



UNODC

United Nations Office on Drugs and Crime



Global Report on Cocaine 2023

Local dynamics,
global challenges



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Countries and areas are referred to by the names that were in official use at the time the relevant data were collected.

Since there is some scientific and legal ambiguity about the distinctions between “drug use”, “drug misuse” and “drug abuse”, the neutral term “drug use” is used in the report.

All uses of the word “drug” and the term “drug use” in the report refer to substances controlled under the international drug control conventions, and their non-medical use.

The term “seizures” is used in the report to refer to quantities of drugs seized, unless otherwise specified.

References to dollars (\$) are to United States dollars, unless otherwise stated.

References to tons are to metric tons, unless otherwise stated.

Acronyms

AGC	<i>Autodefensas Gaitanistas de Colombia</i>
CDS	<i>Cártel de Sinaloa</i>
CJNC	<i>Cártel de Jalisco Nueva Generación</i>
CoE	Centre of Excellence for Illicit Drug Supply Reduction (Brazil)
CRIMJUST	Criminal Network Disruption Global Programme (UNODC)
DEA	Drug Enforcement Administration (United States)
DEVIDA	<i>Comisión Nacional para el Desarrollo y Vida sin Drogas (Peru)</i>
DMP	UNODC Drugs Monitoring Platform
OGC	Organized Criminal Groups
FARC	<i>Fuerzas Armadas Revolucionarias de Colombia (Revolutionary Armed Forces of Colombia)</i>
EMCDDA	European Monitoring Centre for Drugs and Drug Addiction
ELN	<i>Ejército de Liberación Nacional (National Liberation Army)</i>
EPL	<i>Ejército Popular de Liberación (Popular Liberation Army)</i>
EU	European Union
Europol	European Union Agency for Law Enforcement Cooperation
FIP	<i>Fundación Ideas para la Paz</i>
Ha	hectare(s)
Kg	kilogram(s)
MAOC-N	Maritime Analysis Operations Centre (Narcotics)
OECD	Organisation for Economic Co-operation and Development
OMG	Outlaw Motorcycle Gangs
ONDCP	Office of the National Drug Control Policy, United States
PBC	<i>pasta básica de cocaína (coca paste)</i>
PCC	<i>Primeiro Comando da Capital</i>
SACENDU	South African Community Epidemiology Network on Drug Use
SAMHSA	Substance Abuse and Mental Health Services Administration
SIMCI	<i>Sistema Integrado de Monitoreo de Cultivos Ilícitos</i>
UNODC	United Nations Office on Drugs and Crime
UNTOC	United Nations Convention against Transnational Organized Crime
WCO	World Customs Organization

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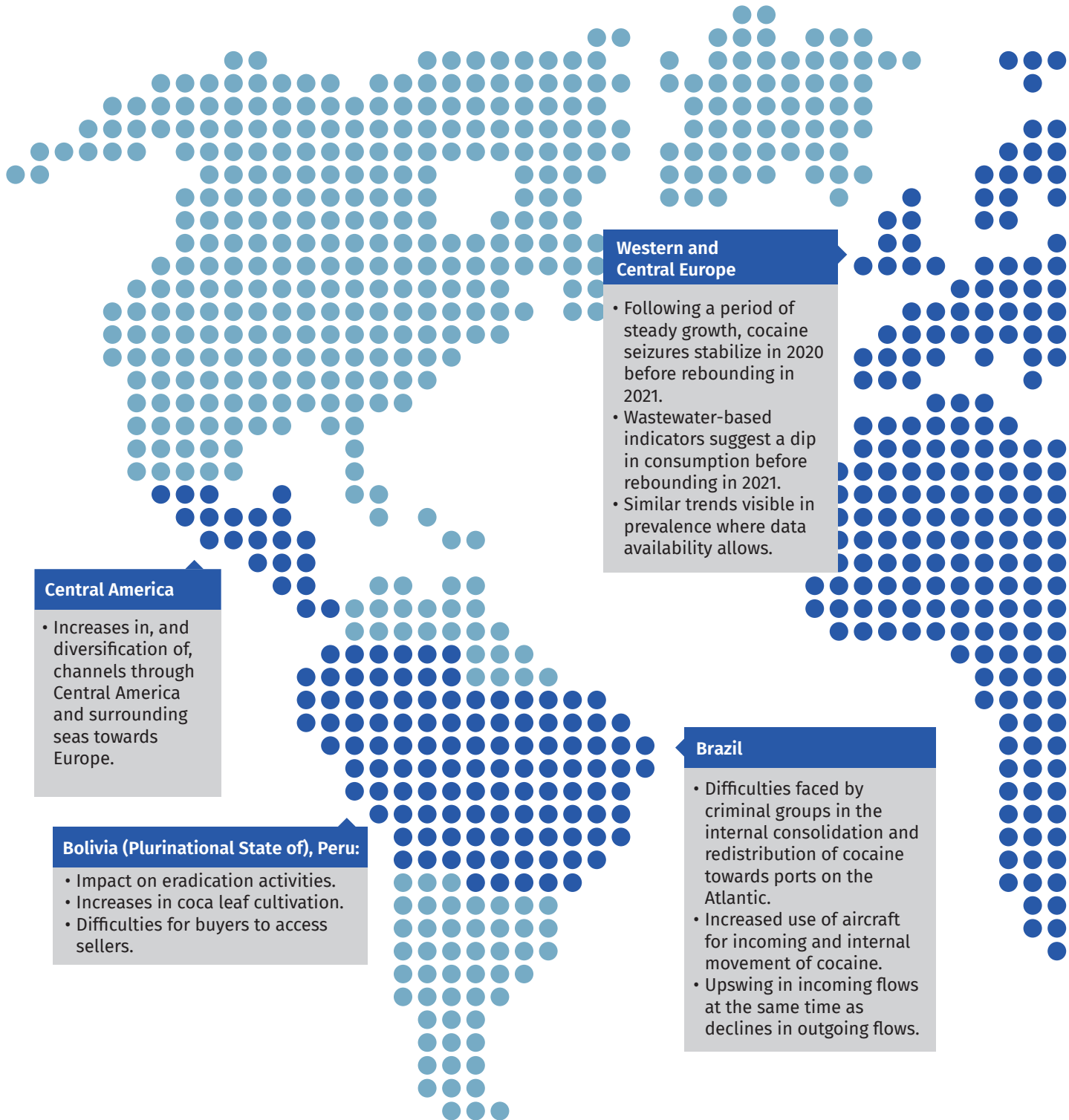
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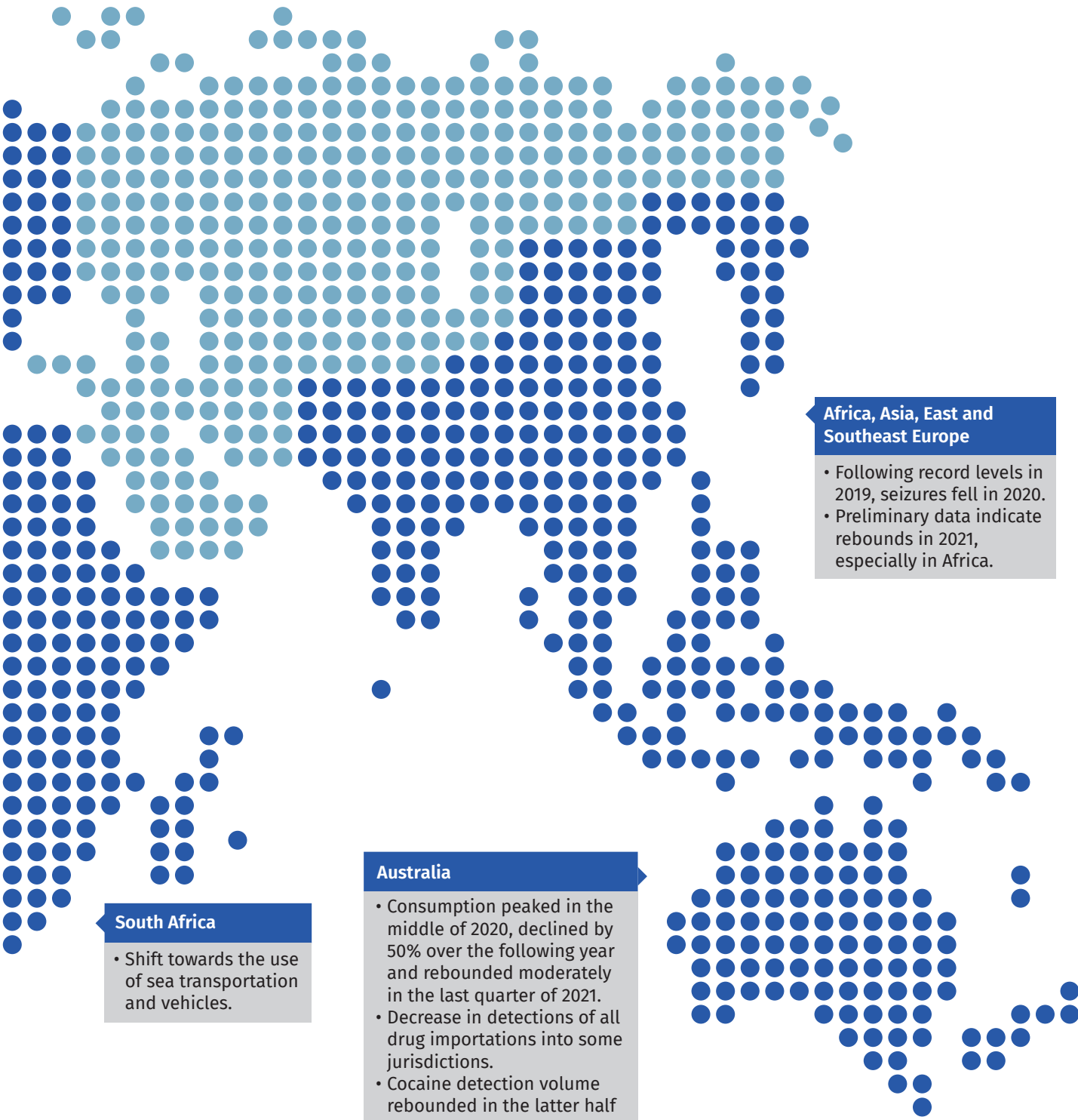


**Special
points of
interest**

Cocaine market expands

The impact of COVID on cocaine markets worldwide





South Africa

- Shift towards the use of sea transportation and vehicles.

Australia

- Consumption peaked in the middle of 2020, declined by 50% over the following year and rebounded moderately in the last quarter of 2021.
- Decrease in detections of all drug importations into some jurisdictions.
- Cocaine detection volume rebounded in the latter half of 2020.

Africa, Asia, East and Southeast Europe

- Following record levels in 2019, seizures fell in 2020.
- Preliminary data indicate rebounds in 2021, especially in Africa.

Cocaine market reasserts itself after COVID-19 bump

The COVID-19 pandemic had a disruptive effect on drug markets. With international travel severely curtailed, producers struggled to get their product to market. Night clubs and bars were shut as officials ramped up their attempts to control the virus, causing demand to slump for drugs like cocaine that are often associated with those settings.

However, the most recent data suggests this slump has had little impact on longer-term trends. The global supply of cocaine is at record levels. Almost 2,000 tons was produced in 2020, continuing a dramatic uptick in manufacture that began in 2014, when the total was less than half of today's levels.

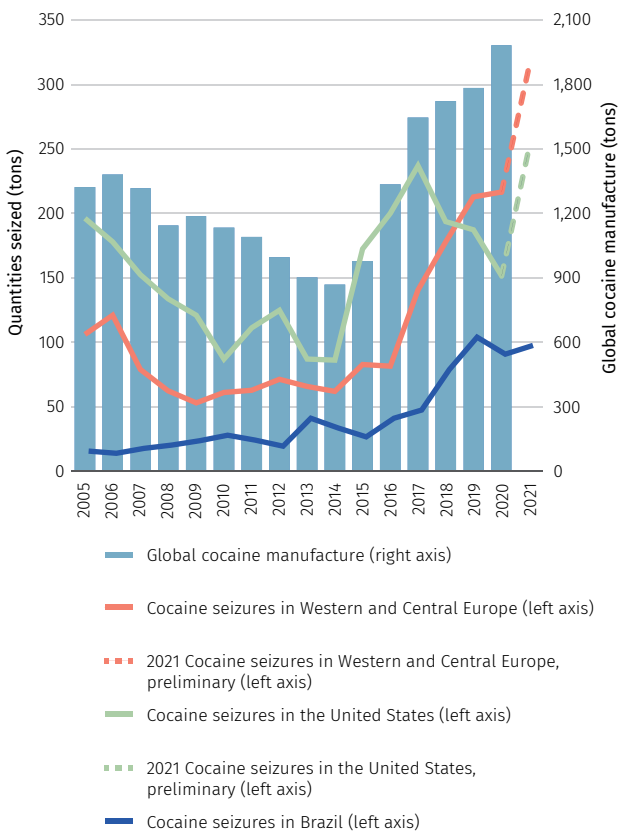
The surge is partly a result of an expansion in coca bush cultivation, which doubled between 2013 and 2017, hit a peak in 2018, and rose sharply again in 2021. But it is also

due to improvements in the process of conversion from coca bush to cocaine hydrochloride.

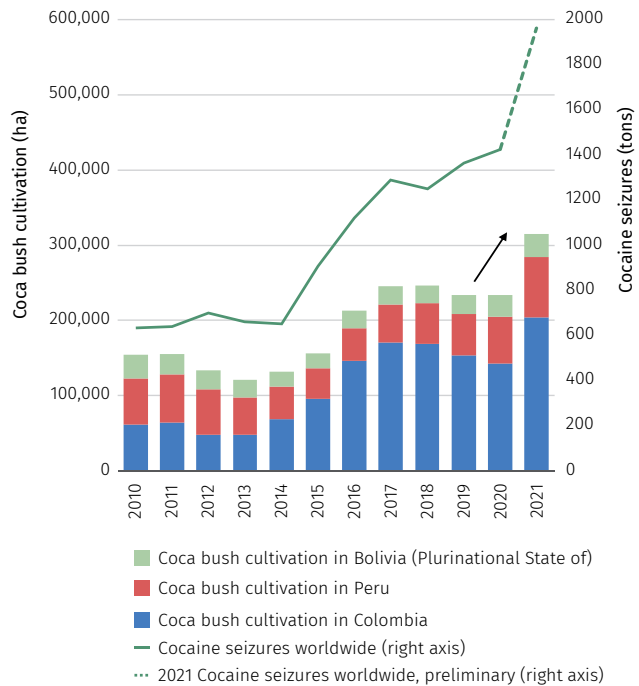
In parallel, there has been a continuing growth in demand, with most regions showing steadily rising numbers of users over the past decade. Although these increases can be partly explained by population growth, there is also a rising prevalence of cocaine use.

Interceptions by law enforcement have also been on the rise, at a higher speed than production, meaning that interdiction has contained the growth of the global amount of cocaine available for consumption.

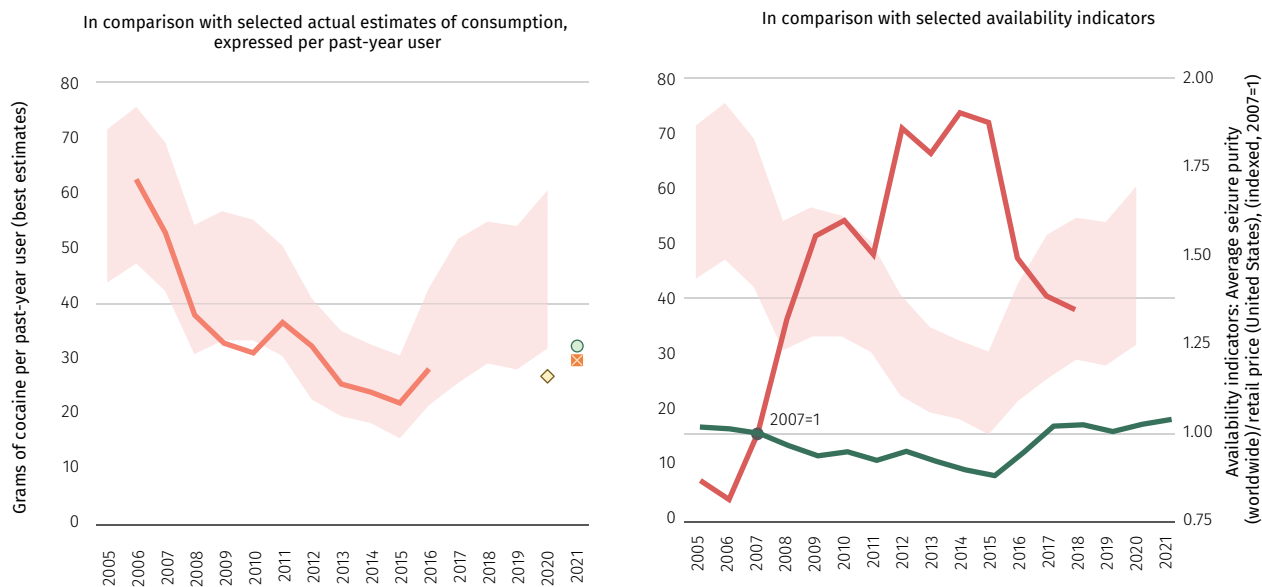
Quantities of cocaine seized in selected markets, in comparison with global cocaine manufacture, 2005–2021



Coca bush cultivation, by country, and cocaine seizures worldwide, 2010–2021



Estimated supply of cocaine available for consumption (net of seizures) per past-year cocaine user worldwide, 2005–2020



- Estimated quantity of cocaine available for consumption per past-year user (global, range)
- Estimated cocaine consumption (RAND) per past-year user, United States (best estimate)
- ◇ Estimated cocaine consumption (EMCDDA, 2022) per past-year user, European Union
- Estimated cocaine consumption per past-year user, Western and Central Europe, based on modelling of wastewater data (UNODC)
- ⊠ Estimated cocaine consumption per past-year user, Western and Central Europe, based on simple average of wastewater measurements in 142 cities
- Estimated average purity of seizures worldwide (indexed, 2007=1, right axis)
- Purity-adjusted retail price, United States (indexed, 2007=1, right axis)

The presence of foreign criminal groups could incentivize producers in Colombia

The cocaine trade in Colombia was once controlled by just a few major players. As a result of a fragmentation of the criminal landscape following the demobilization of the *Fuerzas Armadas Revolucionarias de Colombia (FARC)* in 2016, it now involves criminal groups of all sizes, structures and objectives. But, signs of consolidation of some of these groups have recently emerged.

These developments have led to an increasing presence of foreign actors in Colombia. Mexican and Balkan

criminal groups have moved closer to the centre of production to gain access to supplies and wholesale quantities of cocaine.

These foreign groups are not aiming to take control of territory. Instead, they are trying to make supply lines more efficient. Their presence is helping to incentivize coca bush cultivation and finance all stages of the supply chain.

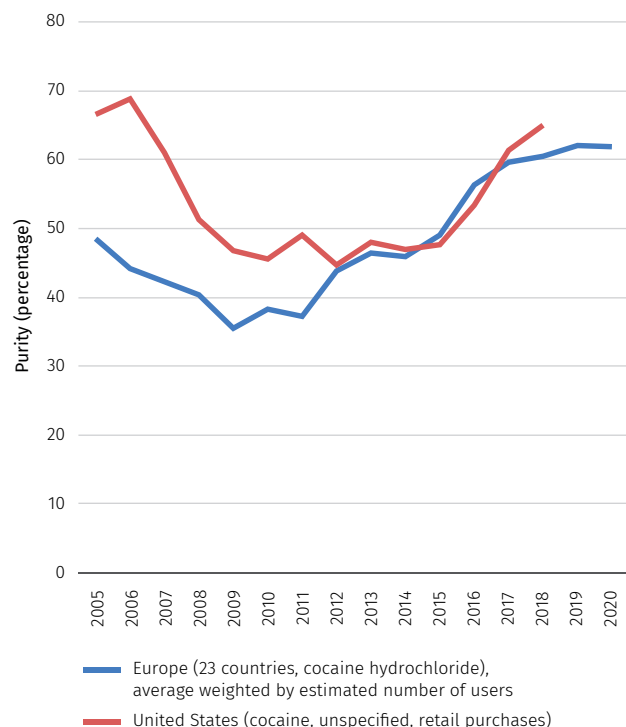
Concentration of established markets raises potential for large expansion

In established cocaine markets, the proportion of the general population using the drug is high. But these markets only cover around one-fifth of the global population.

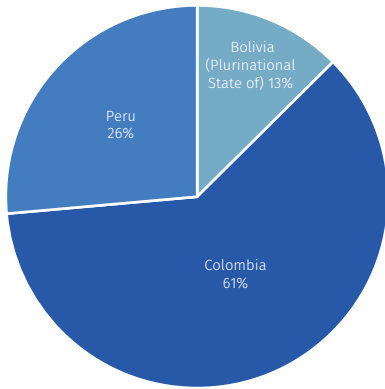
If the prevalence in other regions increases to match established markets, the number of users globally would increase tremendously because of the large underlying population.

This type of market convergence has already been happening in the case of Western and Central Europe, where purity levels and prices have harmonised with the United States, although prevalence of cocaine use in Western and Central Europe has not yet reached the level in the United States.

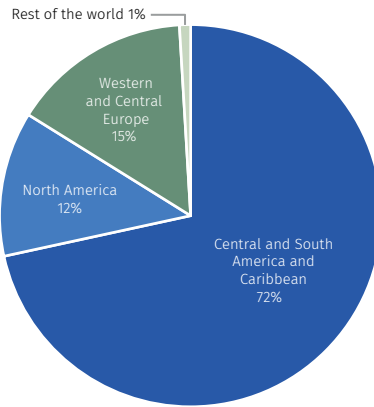
Retail purity of cocaine in Europe and the United States, 2005–2020



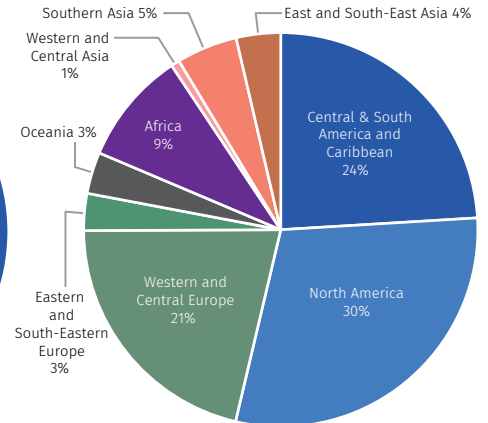
Cultivation of coca bush, 2020



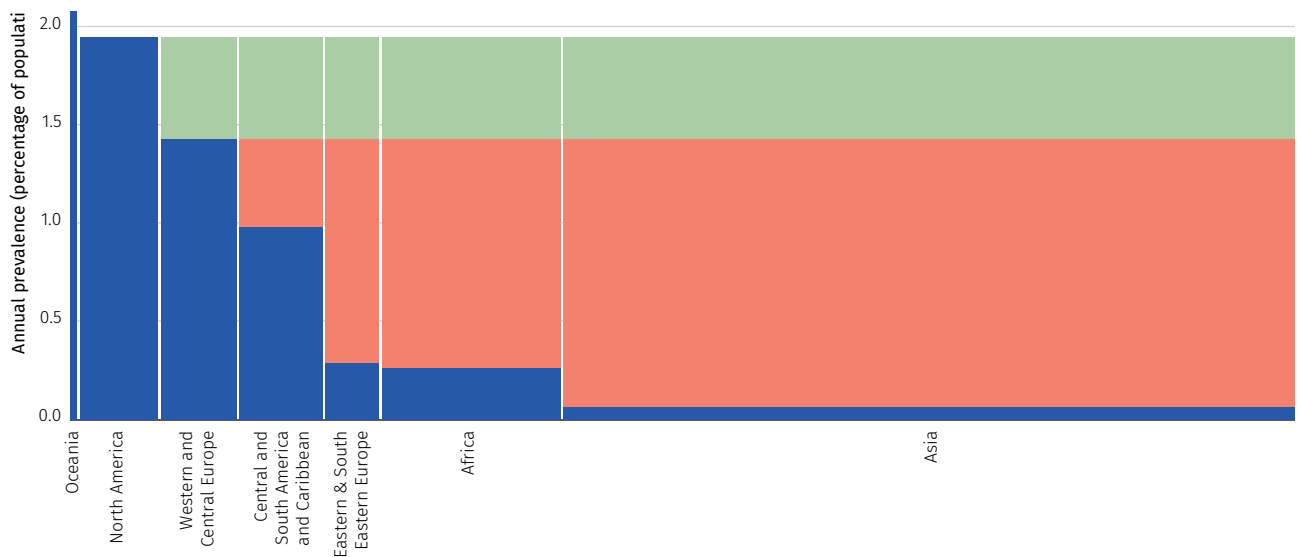
Cocaine seizures, 2020



Cocaine past-year users, 2020



Potential additional cocaine users if the prevalence rate in Western and Central Europe or in North America extends to other regions in the world



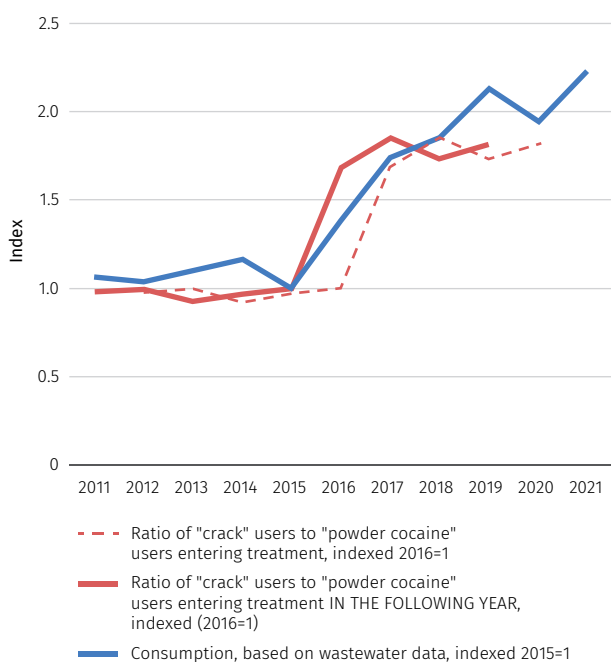
Use of 'crack' on the rise in Europe

The use of "crack" cocaine is on an upward trend in several Western European countries, according to data on people seeking treatment for the first time. While the use of "crack" has been well documented in the United Kingdom, countries in continental Europe also appear to show an increased incidence. Belgium, France and Spain each registered abrupt rises in crack users entering treatment starting in 2017 or 2018. Italy also showed a slow but steady increase.

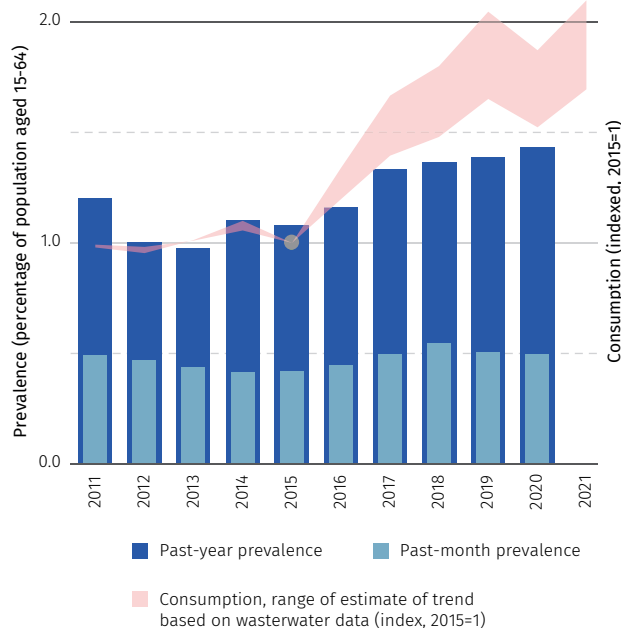
This comes in parallel with an increase in cocaine consumption shown by wastewater data, where rises in overall use appear to come a year before rises in admissions to treatment. The lag could be down to the time it takes users to feel the physical impact of their drug use.

While smoking of cocaine products could be a driver contributing to the increase in consumption, it could also be part of the broader trend of intensifying use patterns in the subregion.

Comparison of trends in cocaine consumption and relative importance of crack users entering treatment in Europe, 2011–2021



Trends in demand-side indicators in Western and Central Europe, 2010–2021



Research reveals how cocaine ‘competes’ with methamphetamine

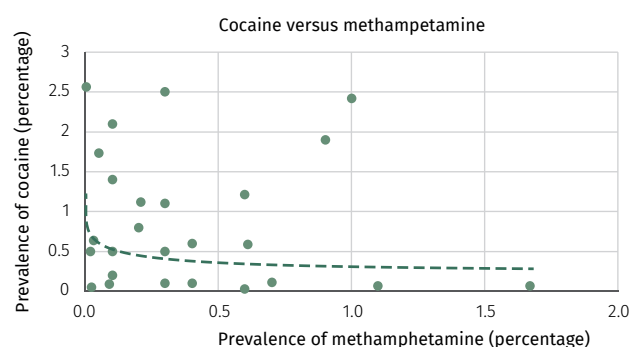
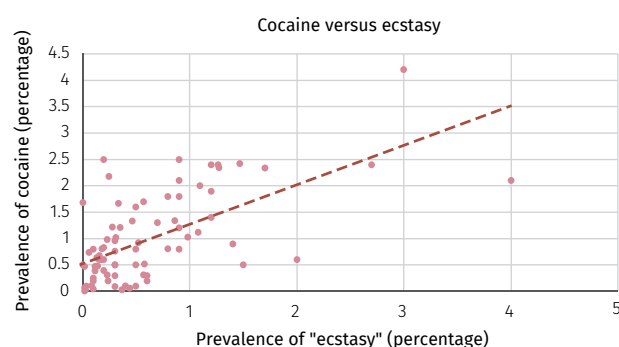
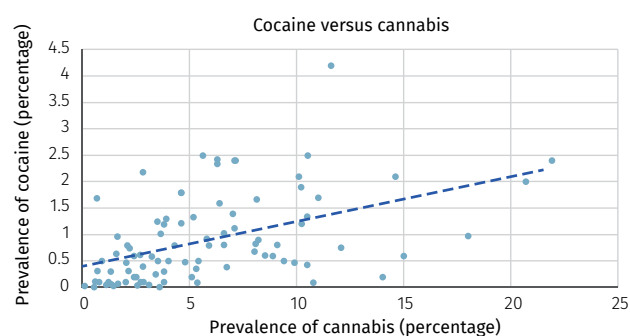
Cocaine users are often involved with other drugs, so high levels of cocaine use often go hand in hand with other drugs such as cannabis and ecstasy. This relationship has been shown across various indicators, including residues found in wastewater and levels of seizures by law enforcement.

However, this relationship may be reversed with methamphetamine. Analysis shows that a big domestic market for cocaine appears to “alternate” with a big market for methamphetamine.

These findings appear to show methamphetamine as a potential “competitor” to cocaine. Though it is possible that these relationships on a global level simply reflect the geography of drug trafficking. Methamphetamine is much more widespread than cocaine in Asia. For Latin America and Europe, the opposite is true.

But data from the United States, where both drugs have a foothold, show how this relationship also plays out within a country. The more frequently a person uses methamphetamine, the less they use cocaine. Cannabis trends, for example, showed the opposite relationship: heavier users of cannabis were more likely to be heavier cocaine users.

Past-year prevalence of use among adult population, cocaine versus other drugs, by country, 2020 or latest year available

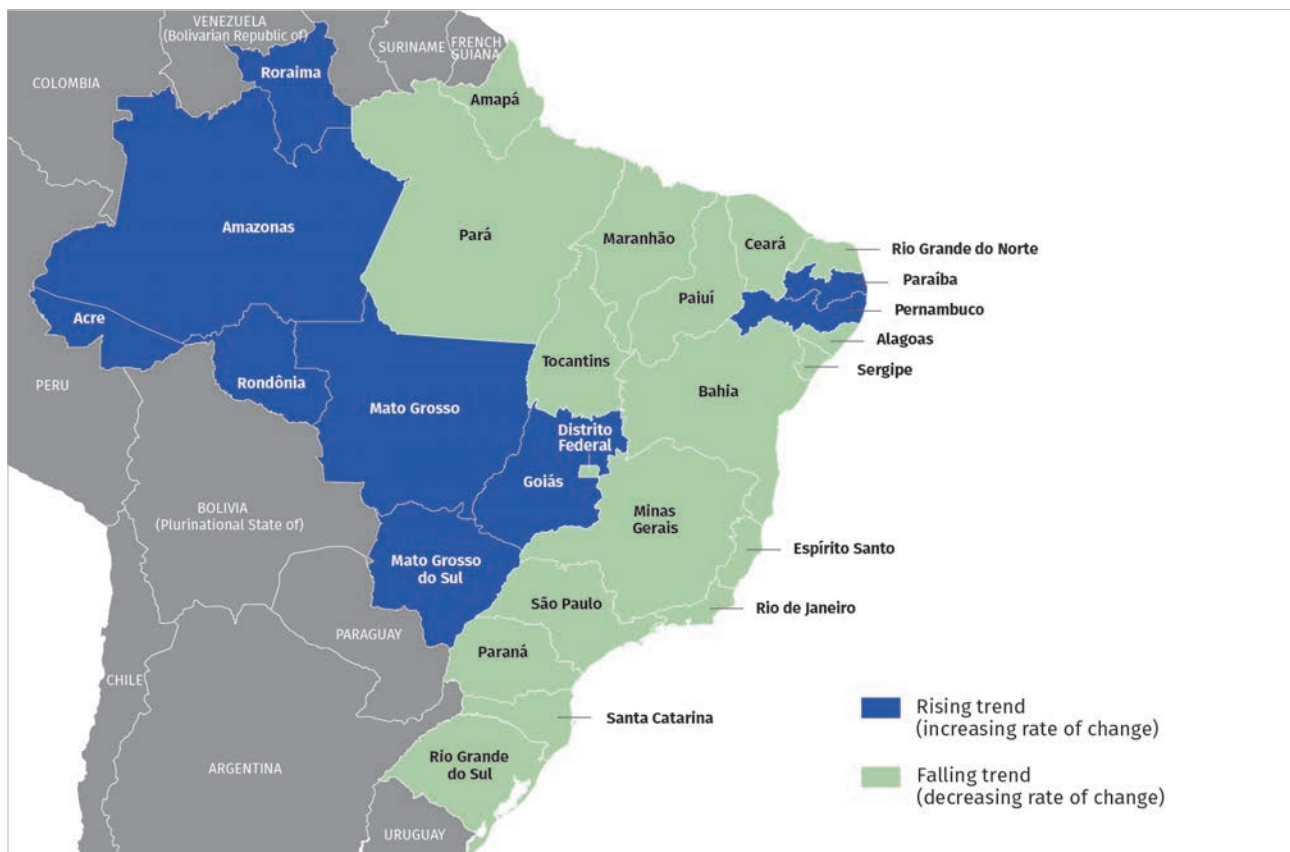


Brazil faced spike in cocaine-related deaths during the pandemic

The pandemic seems to have disrupted the cocaine market in Brazil on both supply and demand sides. Faced with severe logistical hurdles, traffickers increasingly shifted to aircraft to get cocaine into the country, leading to an overall rise in amounts entering Brazil. But criminal gangs seem to have struggled to coordinate transit of the drug within Brazil to ports on the Atlantic. Various indicators show that the level of cocaine leaving the country fell.

At the same time, there was a dramatic spike in the number of deaths attributable to cocaine use. It is possible that the shifting trafficking dynamics resulted in a surge in the availability of cocaine in Brazil, and intensified use patterns.

Changing trends (rates of change) in cocaine seizures in Brazil following the onset of COVID



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COVID restrictions aided the growth in trafficking via international postal services

The use of parcel and courier services increased significantly during COVID-related lockdowns. Restrictions on passenger flights meant traffickers could not rely on couriers to transport drugs on planes.

Some countries in West Africa have noted a significant increase in these services to smuggle small quantities of cocaine to Europe and beyond. In Costa Rica, smaller quantities of cocaine were being mailed to Asia, Africa and Europe concealed in goods such as books, religious images, and vehicle spare parts.

The pandemic may have accelerated the trend, but traffickers had already been increasing their use of international mail services to get cocaine into Europe. Evidence from Spain and Argentina points to a longer-term decline in the use of drug mules on passenger flights. Both countries recorded instances of larger shipments being concealed in unaccompanied luggage.

Air trafficking

General aviation



Increasing importance in recent years of clandestine flights moving cocaine along the southern cone route
Use of airdrops – drugs thrown from airplane while a group on the ground picks them up (used with ultra-light aircraft and aerial drones)

Air passengers



Small quantities of cocaine carried on passenger flights by passengers, crew members, or in unsupervised luggage

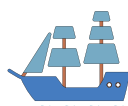
Maritime trafficking

Containers



Camouflage concealment
Rip-on/rip off method
“drop-off”, “three-seals”, “switch”, “trojan horse”
Front companies used to imitate legitimate import-export activity
False paperwork

Sailing vessels



Technological advances in maritime navigation allowed sailing vessels to diversify their departure ports on the Atlantic coast from where they deliver cocaine to Europe or Africa

Fishing vessels



“mother ships” from which smaller vessels traffic drugs
Provide go-fast boats in transit with fuel and supplies
Smaller fishing vessels traffic drugs in smaller quantities

Speed boats (go-fast)



Used for trafficking over shorter stretches
Long-range maritime routes are used for trafficking quantities above 500 kg by go-fast boats or by semi-submersibles

Merchant vessels



Tugboats, general cargo vessels and bulk carriers

(Semi)-submersible and water drones



Artisanal vessels built specifically for trafficking drugs
Uncrewed underwater vehicles following a pre-programmed trajectory

Parasite modality



Method where cocaine is attached to the vessel from the outside, below the waterline

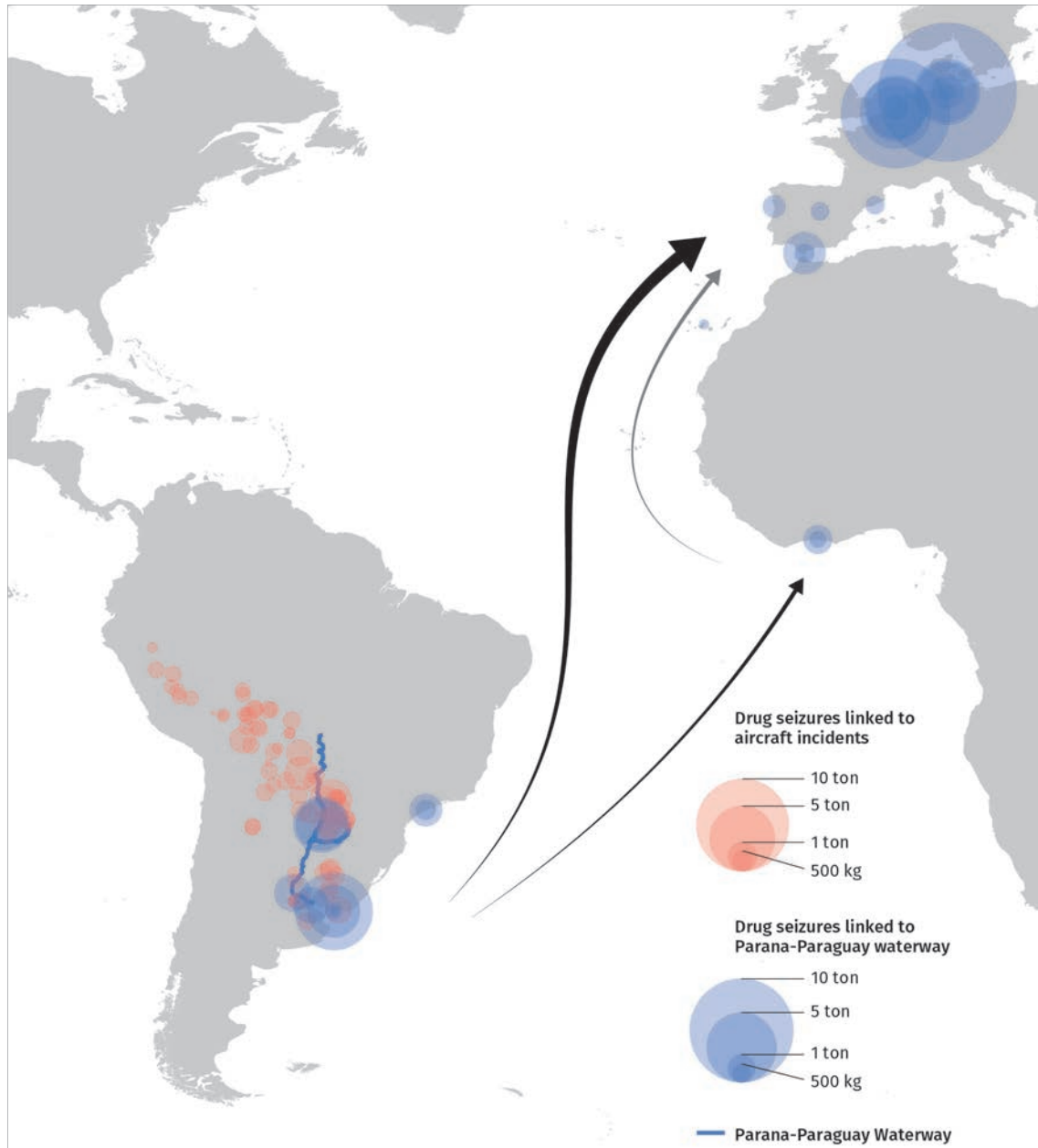
New trafficking hubs emerge

‘Southern Cone’ route becomes major departure point for Europe-bound cocaine

Colombia still dominates trafficking routes from South America, particularly to North America where most cocaine is Colombian. However, trafficking routes to Europe have evolved. The dominant role of Colombia’s ports as a point of departure appears to be declining, with traffickers increasingly transiting their product through Central America and other countries in South America.

Cocaine from landlocked Bolivia (Plurinational State of) and Peru is increasingly transported via the so-called Southern Cone route through Paraguay and the Paraná-Paraguay waterway. Criminal groups, often from Brazil, use planes to cross the border and then boats along the river to the Atlantic.

Seizures linked to the Paraná-Paraguay waterway or the River Plate estuary, and aircraft-related incidents along the Southern Cone Route, 2017– September 2022

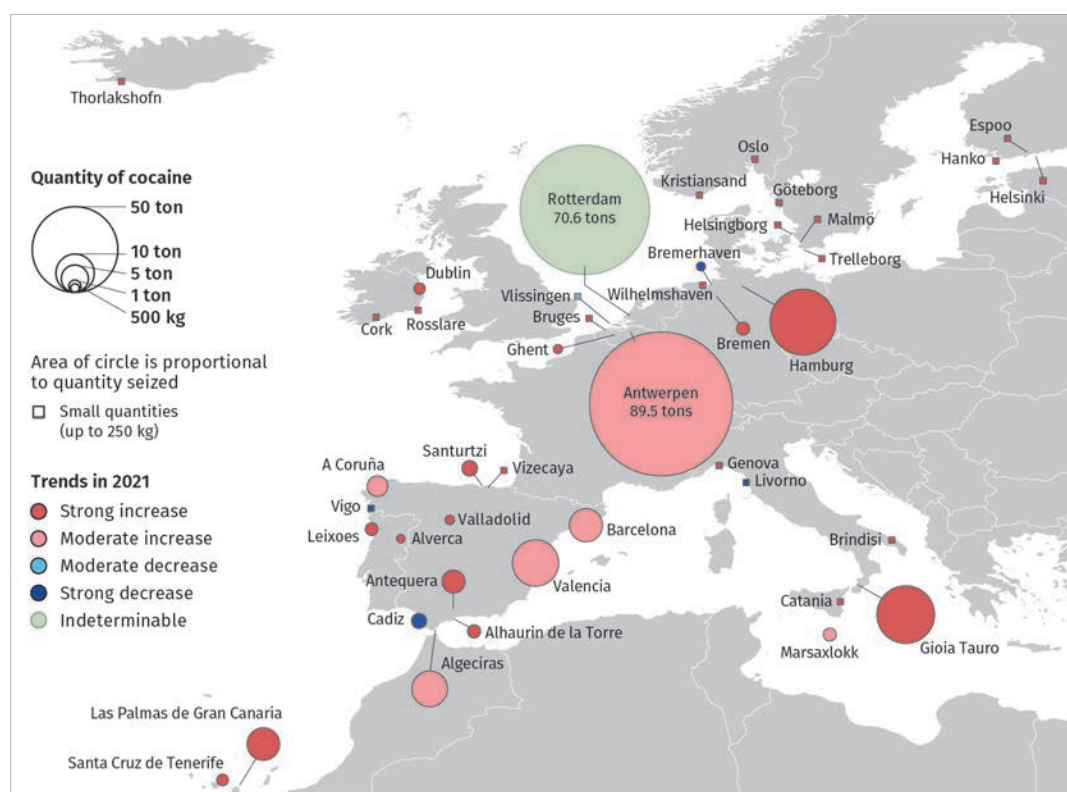


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The points of arrival in Europe have also changed, with Belgium and the Netherlands now eclipsing the Iberian peninsula as the main hub. These two developments appear to be linked, with seizures connected to the Southern Cone route prominent in North Sea European ports.

The growing prominence of Netherlands-linked routes over the past decade, and the more recent rise to prominence of the Southern Cone route, may have been instrumental in increasing the availability of cocaine in Europe.

Cocaine seized at seaports by customs authorities in Western and Central Europe, quantities seized in 2021 and trend in comparison with 2020



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Africa's role in global supply chain on the rise

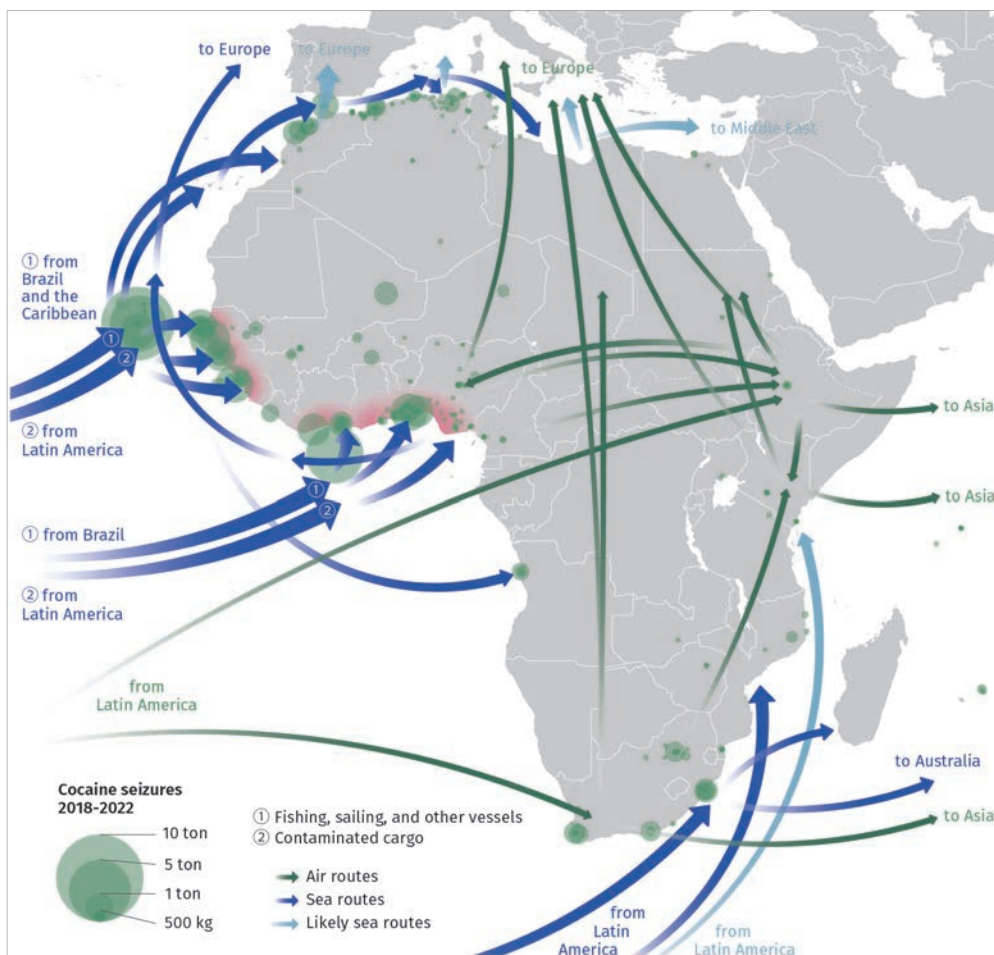
Seizure data suggest that the role of Africa, especially West and Central Africa, as a transit zone for cocaine on its way to markets in Europe has picked up substantially since 2019. Both the total quantity seized in Africa and the number of large seizures appear to have reached record levels during 2021, according to preliminary data.

Maritime nations in West Africa account for much of the volume of cocaine seized. But other indicators suggest a widening issue on the continent. South Africa, for

example, reported a record amount of cocaine seized, suggesting a large increase in flows into the country and raising the prospect of a rebound in the domestic market.

Brazilian crime groups seem to be increasingly targeting Portuguese-speaking countries like Mozambique, Angola and Cabo Verde. And airports in Kenya and Ethiopia are also believed to have been targeted as “stopovers” en route from Brazil to Europe.

Main cocaine trafficking routes into and out of Africa, and cocaine seizure cases in Africa, 2018–2022



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Conflict in Ukraine likely to affect transit routes and consumption patterns

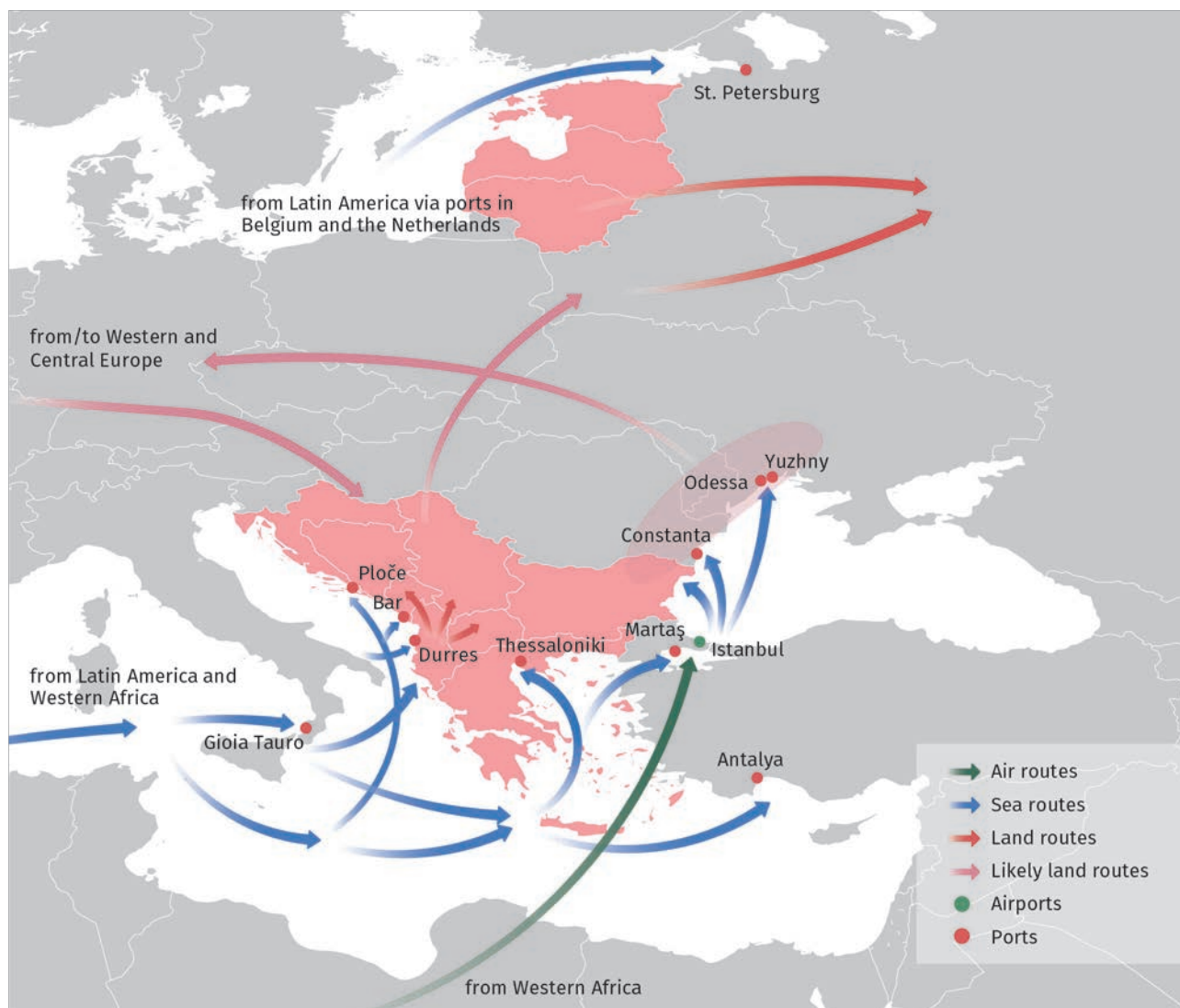
Cocaine is expensive and its use in Eastern Europe is the preserve of groups of high-income consumers, and often associated with recreational venues like night clubs. In Ukraine, the market had been expanding. But the armed conflict that began in February 2022 is likely to have drastically disrupted those lifestyle patterns and reduced opportunities for cocaine use.

In the Russian Federation, the domestic market for cocaine had also been expanding. It is not yet clear how

the economic fallout from the current armed conflict with Ukraine and sanctions might disrupt consumption habits.

Some supply lines are also likely to be affected. There is evidence that foreign criminal groups have used Ukraine's ports as a way of avoiding law enforcement controls in Western Europe. It is likely that those groups will shift such activities to other Black Sea ports in Romania or Bulgaria.

Cocaine trafficking routes affecting Eastern and South-Eastern Europe



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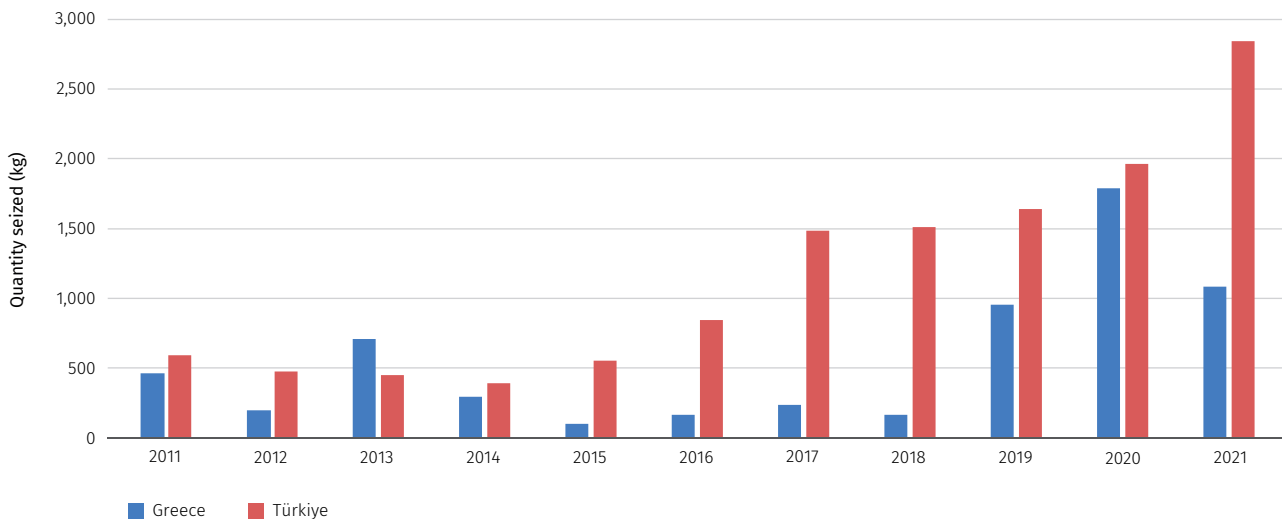
South-Eastern Europe consolidates position as transit region

Türkiye's role as a transit country for cocaine has been growing in recent years. Since 2014, the amount of the drug seized in the country has increased sevenfold to a record 2.8 tons in 2021. Some of the cocaine reaching Türkiye arrives after transiting through Western Africa, and some also comes directly from Latin America.

From Türkiye, the outbound cocaine flows westwards through the Black Sea and the Balkans, a route traditionally associated with trafficking of opiates and smuggling of cigarettes.

Neighbouring Greece has also been receiving rising quantities of cocaine in recent years, much of it destined for the same Balkan route and the markets of Western Europe. Seizure data showed Greece intercepting almost 2 tons in 2020 before falling back slightly in 2022. Brazil and Ecuador are often the countries of departure for seized cocaine shipments.

Cocaine seizures in Greece and Türkiye, 2011-2021



Control of trafficking routes fragments

Loose networks of criminal groups take charge of smuggling

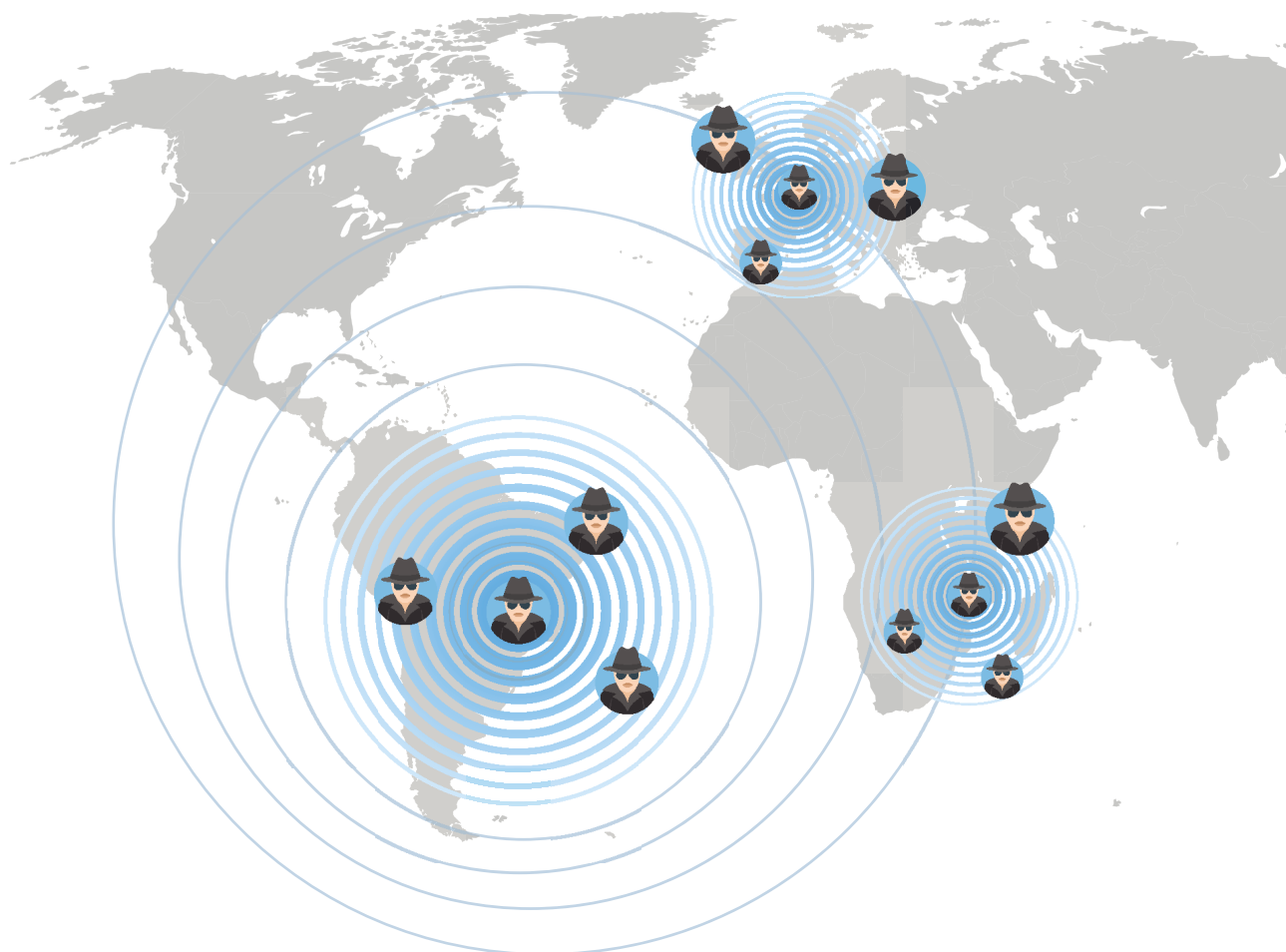
Small to medium-sized criminal groups are playing an increasingly key role in global cocaine trafficking. They function like networks rather than well-delineated organizations. These groups manage only parts of the supply chain and form partnerships with other organizations. This fragmentation has been seen across regions, and the actors involved have become increasingly specialized.

Mexican crime groups remain powerful actors at the global level. The *Cártel de Sinaloa* and the *Cártel Jalisco Nueva Generación (CJNG)*, for example, largely control the trafficking corridors from Mexico to the United States. But they then rely on local criminal groups and street gangs to distribute cocaine. Most Mexican crime groups are offshoots of former larger organizations. They constantly shift their alliances and fight for control of territory.

The Brazilian crime group *Primeiro Comando da Capital (PCC)* has expanded its presence in other South American countries and beyond in Africa and Europe, and controls several stages of the cocaine supply chain. But the criminal landscape in Brazil is increasingly fragmented and many smaller criminal groups now also operate in the cocaine trade, often specializing in logistics.

In Europe, cocaine smuggling appears to be controlled by European criminal groups, some facilitating the receipt of the drug and others specializing in its distribution. Crime groups from the Balkan region have become major players in large-scale cocaine trafficking into Europe.

Expansion of the criminal group *Primeiro Comando da Capital* from Brazil to other countries in South America, and beyond to Africa and Europe



Crime groups increasingly farm out work to 'service providers'

The move to decentralized networks of criminal groups has given rise to a system of "service providers" who manage parts of the supply chain without ever owning the drug. They often collect the cocaine from the port, provide local transportation, and protect the shipments.

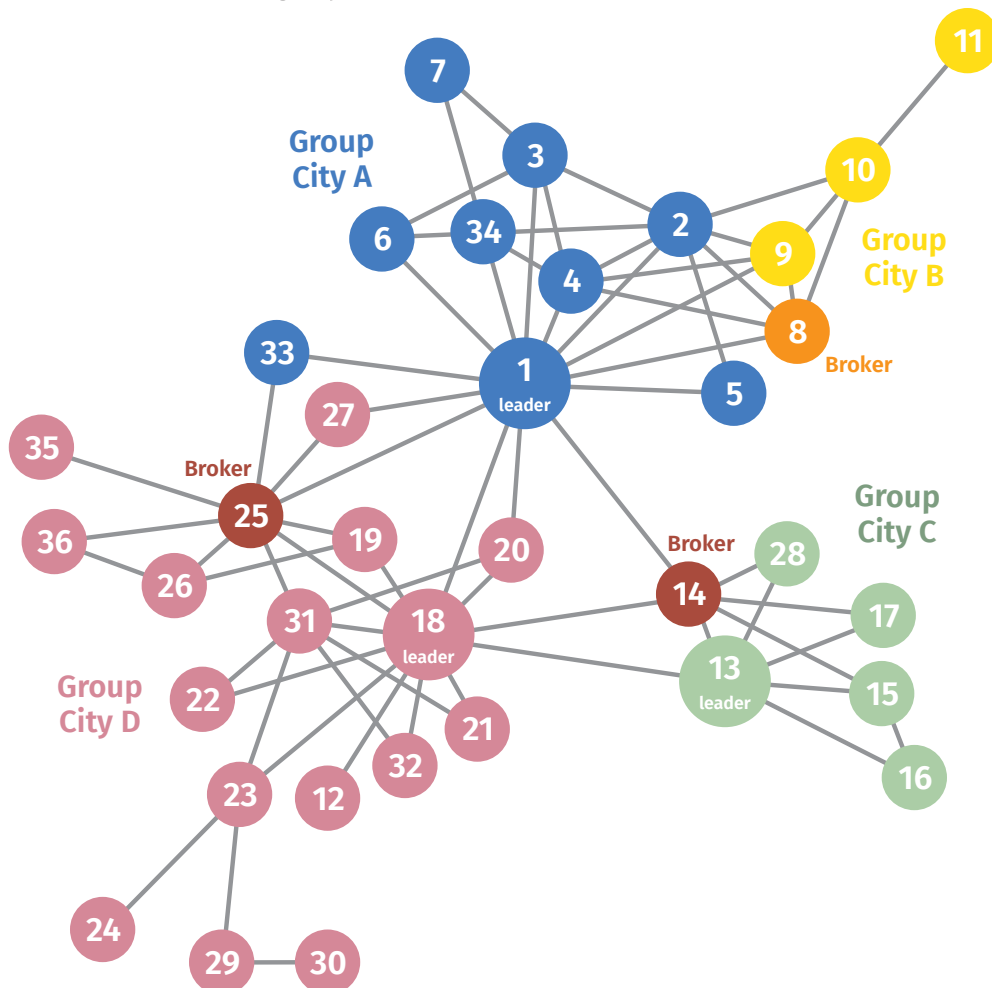
These service providers will generally guarantee delivery of the cocaine in return for a fee based on the quantities trafficked. Some groups receive payment for their services in kind, which drives cocaine availability on the domestic market of the transit countries.

These groups range from motorcycle gangs in Belgium to well-connected organized crime groups in Guatemala. Experts believe the practice is widespread throughout South and Central America, the Caribbean, and Africa.

Some service providers are so successful that they have been able to gain political protection and set up as independent traffickers.

Local service providers may work for several clients and organize deliveries to buyers in various locations. Lieutenants of foreign crime groups often travel to transit countries to establish operations with local service providers. For example, traffickers from the Balkans and members of Italian crime groups have set up in Ecuador to establish supply lines to European markets.

Example of a network of criminal groups



Nigerian groups dominate African traffic routes

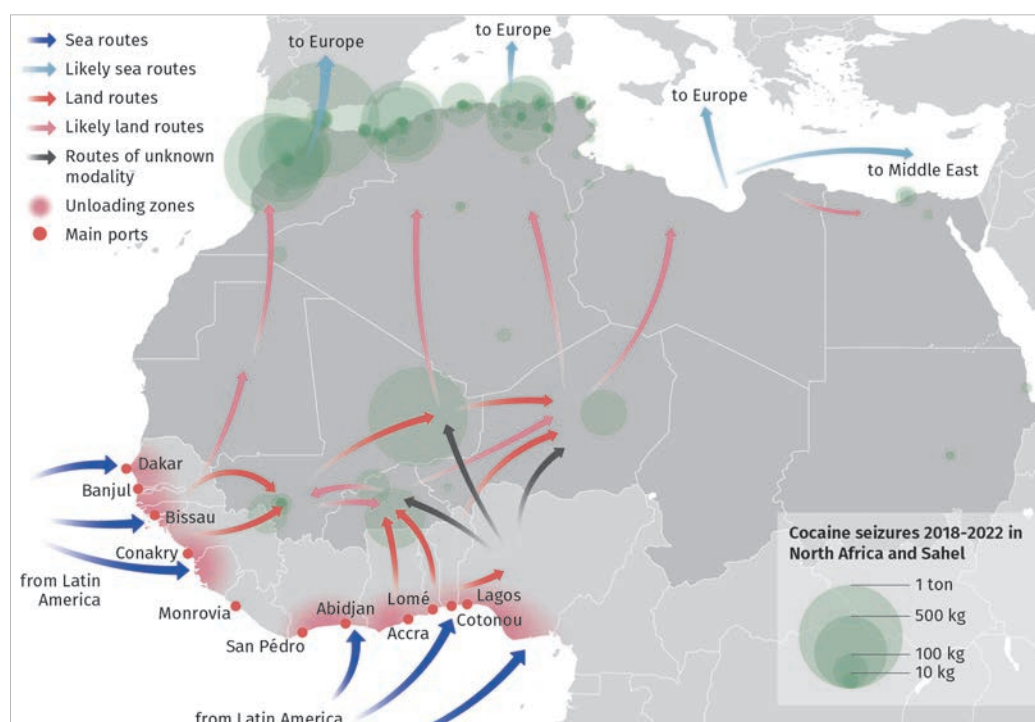
Criminal networks from Nigeria appear to play an especially significant role in smuggling activities across West and North Africa. They are also active globally, supported by a segment of the Nigerian diaspora and a large network of drug couriers.

Nigerian groups are known for trafficking of small quantities by means of mules on passenger flights. Data from Brazil show that in each year since 2018 the most

common foreign nationality of drug mules arrested at Brazilian airports has been Nigerian.

Nigerian trafficking groups are understood to be tribe-based cells of four or five members, where each member of the cell has a small number of people working for them without knowing the members of the core group. They are thought to collaborate with larger groups outside of the country.

Cocaine trafficking routes across West and North Africa, and significant cocaine seizures in the Sahel and North Africa 2018-2022



The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations. Final boundary between the Republic of Sudan and the Republic of South Sudan has not yet been determined.

Cocaine trafficking gets entangled with other criminality

As routes and methods of trafficking converge, the same actors may become involved in different trafficking activities. For example, criminal networks in the north-western Spanish province of Galicia make drug boats for hashish traffickers that may also be used by other groups smuggling migrants. Galician trafficking groups are also active in redistributing heroin by land to the rest of Spain and Portugal. Some Galician cocaine smuggling groups appear to have transitioned from cocaine to heroin distribution, lured by the promise of greater rewards and less risk.

Trafficking of cocaine also occurs along the same routes as smuggling of legal goods. The Brazilian criminal group *Primeiro Comando da Capital* apparently uses the same logistics to transport cigarettes and drugs, facilitated by their control over smuggling corridors on the borders with Bolivia (Plurinational State of) and Paraguay.

And in South and Central America, trafficking of cocaine is carried out by backpackers across porous land borders. Migratory and contraband flows often intersect with drug-trafficking on these routes, exposing people who use them to increased levels of criminality.

Technology boosts trafficking

Smuggling by sea buoyed by technological advances

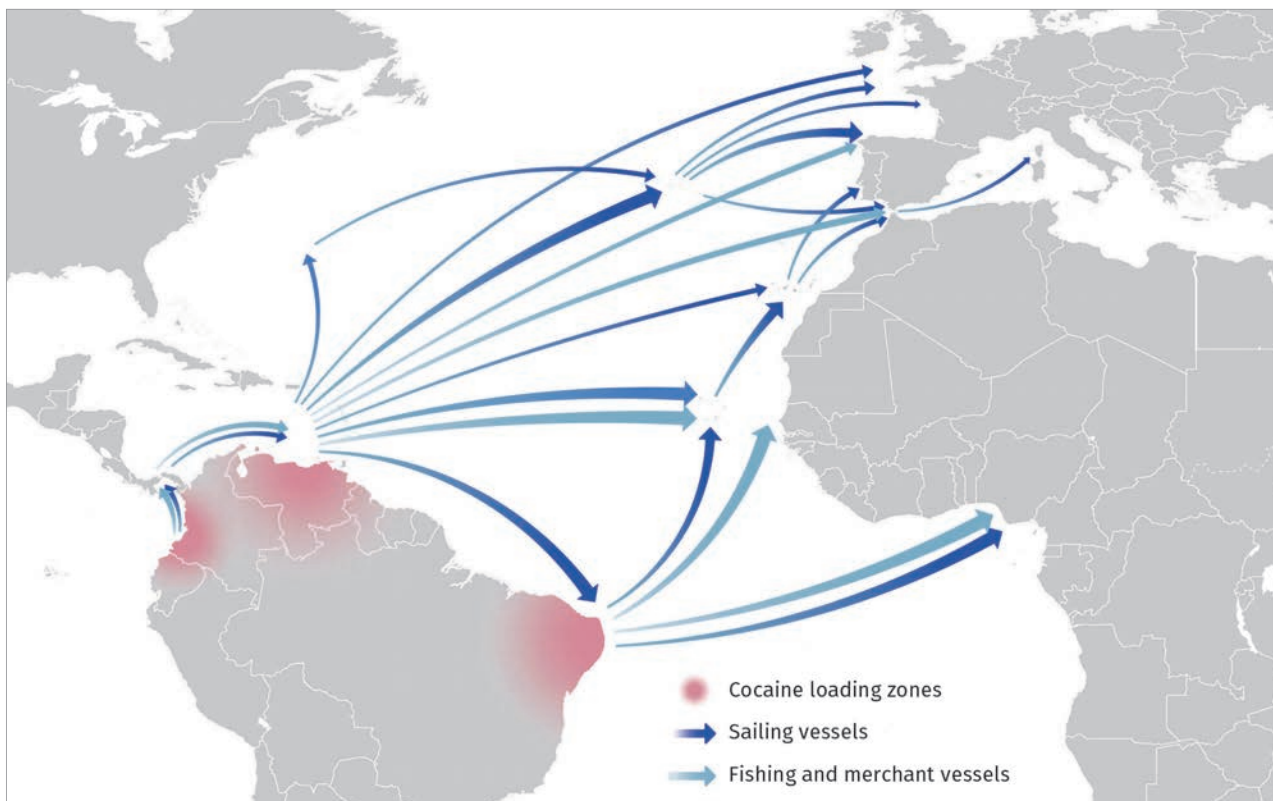
Trafficking groups have access to a growing variety of vessels – from yachts and speedboats to ferries and fishing boats – to help get their product to market. Sophisticated navigation technology is enabling traffickers to construct ever more efficient maritime routes.

To avoid law enforcement at seaports, traffickers frequently offload cocaine from the mother ship before reaching land. Ship-to-ship transfers occur at

rendez-vous points using small and medium-sized vessels like speedboats and fishing boats. This method is widely used around West and North Africa, in Central America and the Caribbean, and in the Pacific islands.

Container ships are also known to have dropped off cocaine to be picked up by speedboats. This is a known tactic for vessels bound for the Netherlands and Belgium.

Transatlantic trafficking routes involving sailing, merchant and fishing vessels, 2022



The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations. Final boundary between the Republic of Sudan and the Republic of South Sudan has not yet been determined.

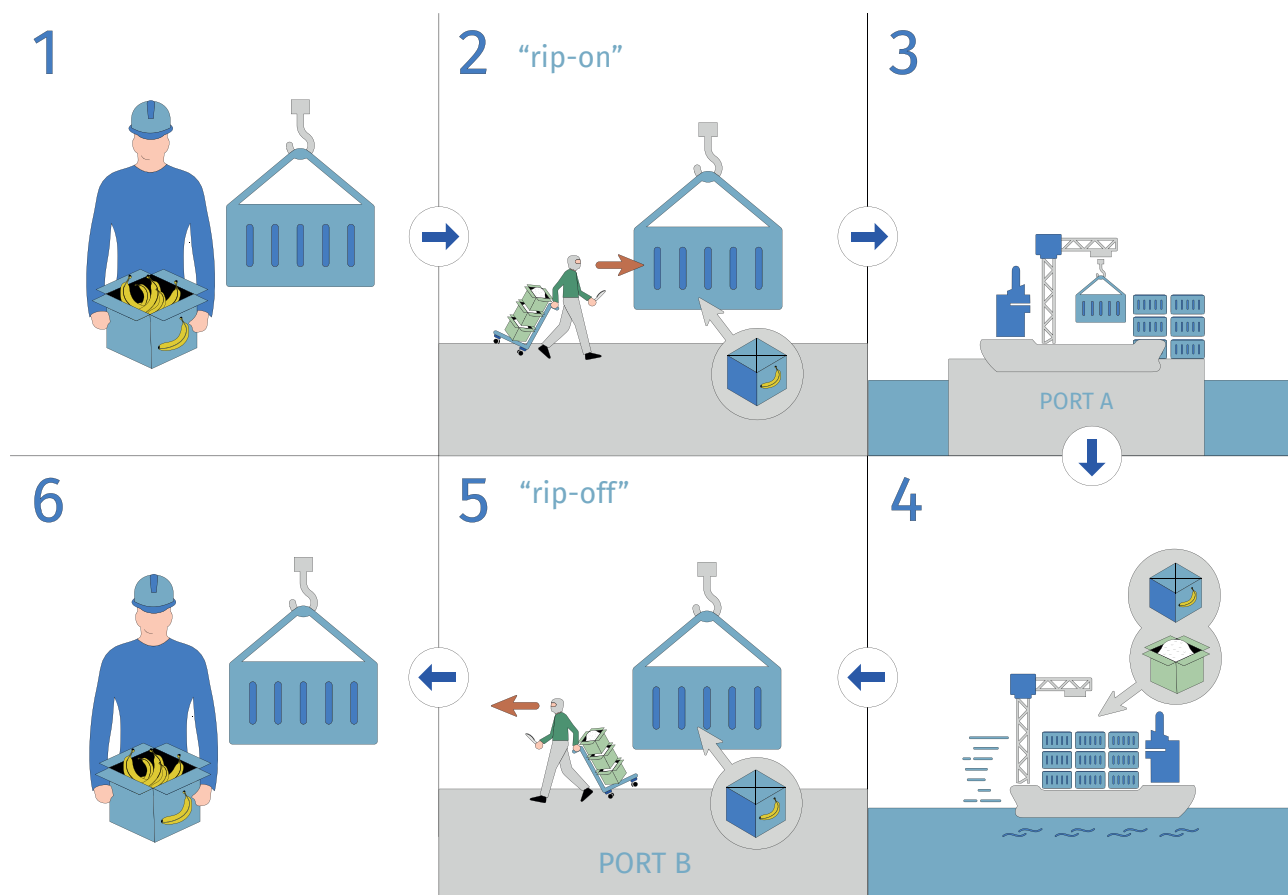
Smugglers expand use of shipping containers

Cocaine traffickers have long taken advantage of shipping containers to transport their cargo. But this method of transportation is growing in importance and the logistics are becoming more complex and sophisticated.

Cocaine trafficked in container ships can be introduced at various stages – away from the port, in transit to the port, in the port itself, or even at sea. Traffickers often use creative methods of camouflage. Drugs have been found stuffed into fruit, passed off as sugar or flour, mixed with soya, and even concealed in the structure of a container.

While traffickers are known to organize their own shipments, typically using front companies, the most popular method in recent years is to “piggy-back” on a legitimate shipment without the shipper’s knowledge. Moving large quantities of cocaine in this way requires a network of collaborators – port workers, transport companies, drivers, or customs officials.

Container shipping of cocaine



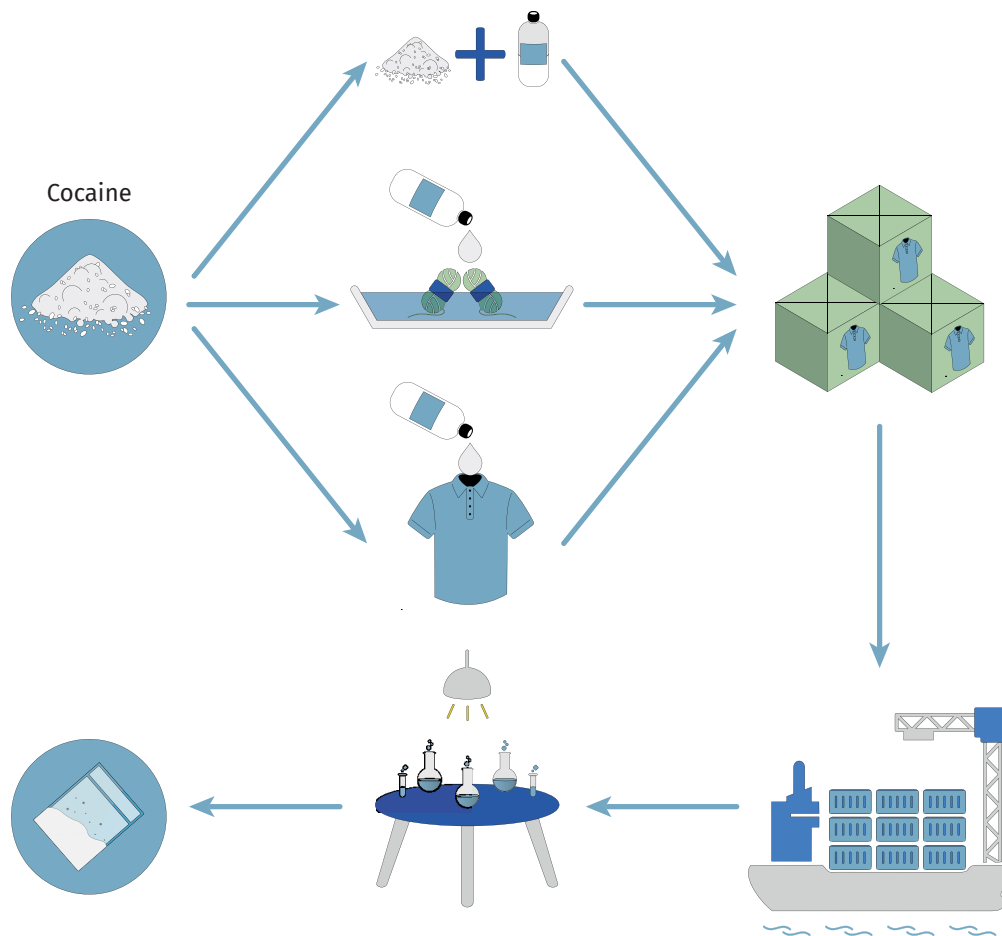
Chemical camouflaging on the rise in Europe

Some of the most sophisticated techniques to conceal cocaine involve impregnation into a carrier material – from textiles to animal skins. Trafficking of cocaine hydrochloride impregnated in clothing was detected several decades ago. But evidence suggests traffickers are getting increasingly sophisticated. Cocaine has been detected recently in beeswax, plastics, herbs, charcoal and various liquids. In Europe in particular, these methods are making the drug hard to detect.

However, this method requires a complex process of chemical extraction to separate the cocaine from other

substances. Large extraction laboratories have been uncovered in Europe in recent years, suggesting this process is becoming more widespread. According to Dutch police, these clandestine laboratories are set up as exact copies of Colombian cocaine production sites. Dutch crime groups organize the chemicals and equipment, using highly skilled local facilitators to build the laboratories using technical drawings from South America. They hire Colombian chemical experts to carry out the extraction process.

Example of cocaine camouflaging



An aerial photograph of a boat moving through clear, turquoise water. The boat is positioned at the top center of the frame, moving downwards. It leaves a long, narrow, white wake that extends towards the bottom of the image. The water's surface is textured with small ripples. There are some dark, thin objects floating in the water, possibly seaweed or branches.

Chapter 1

The big picture

The big picture

Recent trends

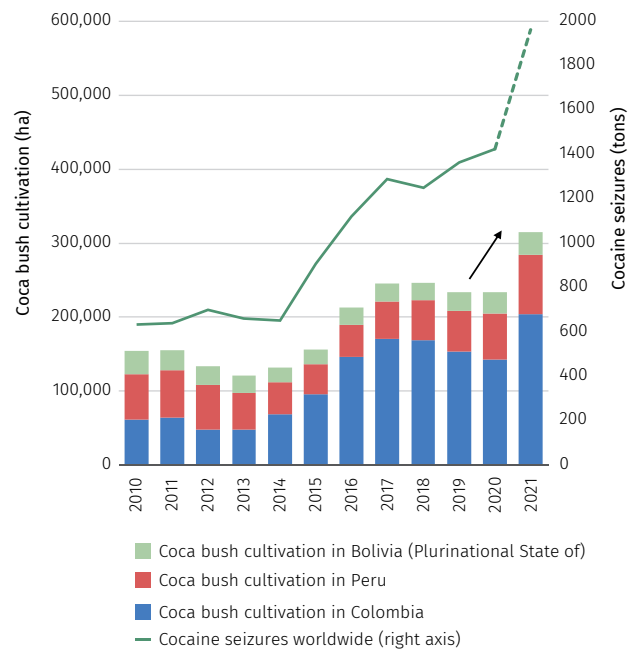
The global supply of cocaine is at record levels. Cultivation doubled between 2013 and 2017, peaked in 2018 and rose sharply again in 2021. The process from coca bush cultivation to cocaine hydrochloride has also become more efficient, contributing even further to the global supply of cocaine.

In parallel, law enforcement agencies are seizing greater amounts of cocaine. Preliminary figures for 2021 suggest a very sharp rise in seizures. In recent years, seizures showed an underlying upward trend across most regions, punctuated by a “bump” brought about by COVID.

North America and Western and Central Europe remain the largest destination markets for cocaine, but data suggest that the new markets are the fastest growing.

The COVID pandemic had short-term ramifications for the cocaine market across the world. In the origin countries of Bolivia (Plurinational State of) and Peru, cultivation rose and eradication efforts were curtailed during the pandemic. Yet traffickers struggled to get their product to market, creating an overabundance of coca leaf that pushed down prices.

Global cultivation of coca bush and global cocaine seizures, 2010-2021



Sources: UNODC calculations based on UNODC data and data from the respective Governments, and coca bush cultivation surveys carried out in Bolivia (Plurinational State of), Colombia and Peru in 2020 and previous years; UNODC, responses to the annual report questionnaire.

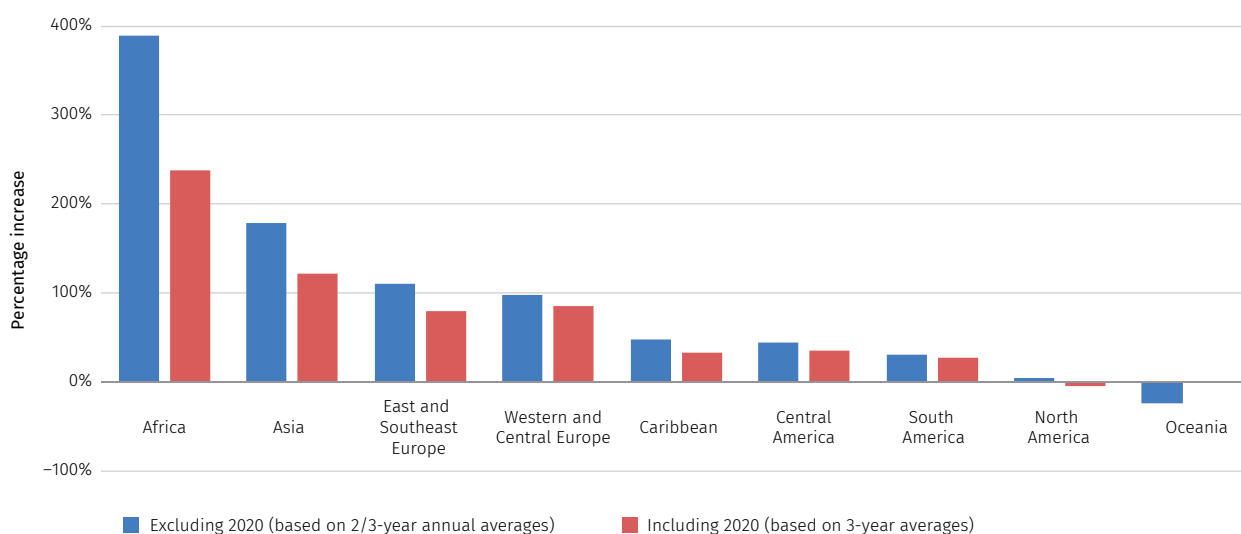
During the pandemic in Brazil, traffickers increased their use of aircrafts to get cocaine into the country. This led to an overall rise in the amount of cocaine coming into Brazil just as outgoing flows began to fall. The pandemic also had a possible impact on domestic consumption.

In Western and Central Europe, the pandemic appears to have had a temporary restraining effect on the ongoing expansion of the cocaine market. Following a period of steady growth, cocaine seizures stabilized in 2020 before rebounding in 2021. Wastewater-based indicators also suggest a dip in consumption that recovered in 2021.

Wastewater measurements from Australia suggest consumption declined by approximately one half in the year from late 2020, before rebounding moderately in the last quarter of 2021. This was probably linked to the lockdowns and curfews that reduced opportunities to use drugs in social settings. These measures may have also made it more onerous for criminal groups to coordinate their activities.

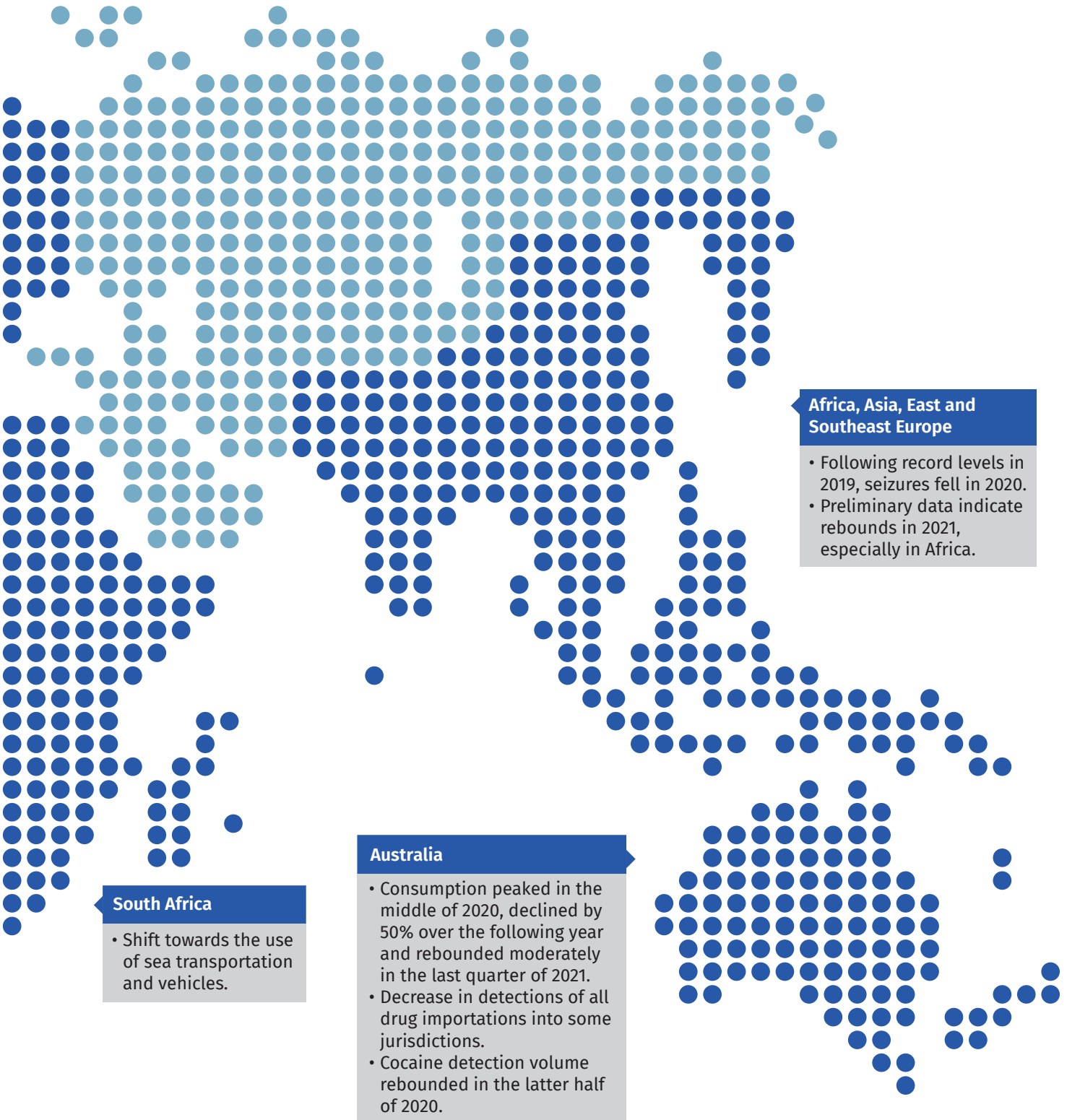
Outside of the principal markets, the pandemic affected trafficking activities in Africa, Asia, and East and Southeast Europe. Seizures fell during 2020 in those regions, before rebounding in 2021. In South Africa, the authorities reported traffickers were increasingly using maritime routes since the pandemic.

Increase in cocaine seizures, by (sub)region, 2019–21 versus 2016–18



Source: UNODC, responses to the annual report questionnaire.





South Africa

- Shift towards the use of sea transportation and vehicles.

Australia

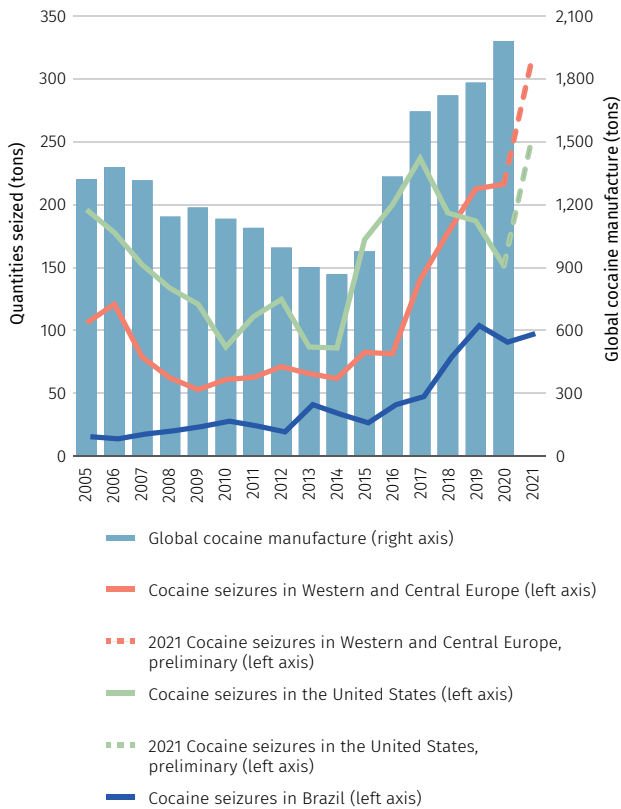
- Consumption peaked in the middle of 2020, declined by 50% over the following year and rebounded moderately in the last quarter of 2021.
- Decrease in detections of all drug importations into some jurisdictions.
- Cocaine detection volume rebounded in the latter half of 2020.

Africa, Asia, East and Southeast Europe

- Following record levels in 2019, seizures fell in 2020.
- Preliminary data indicate rebounds in 2021, especially in Africa.

Cocaine supply hit a major turning point in 2014–15. Almost a decade of gradual decline in cultivation eventually bottomed out in 2014. From 2015 onwards, cultivation has been on the rise. And transit routes have multiplied. Seizures have increased across South America, Central America, Western and Central Europe, and to some extent Oceania and North America.

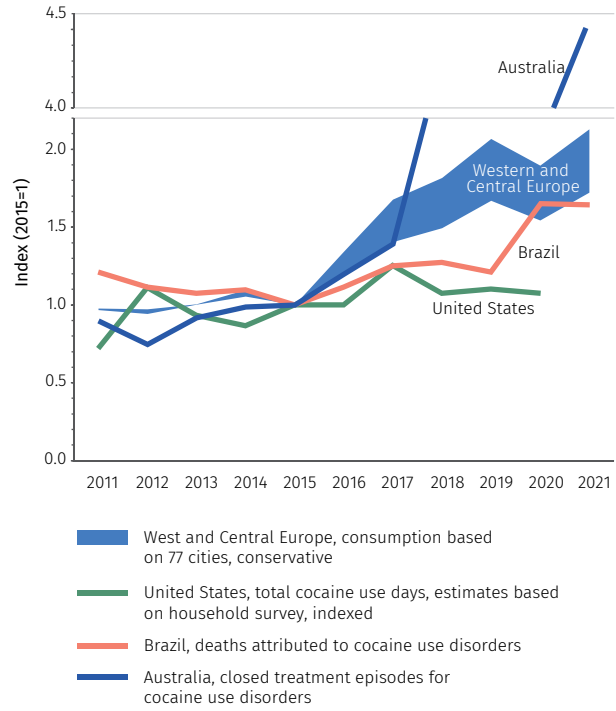
Quantities of cocaine seized in selected markets, in comparison with global cocaine manufacture, 2005–2021



Note: Data for 2021 are preliminary.
Sources: UNODC, responses to the annual report questionnaire; UNODC *World Drug Report 2022*.

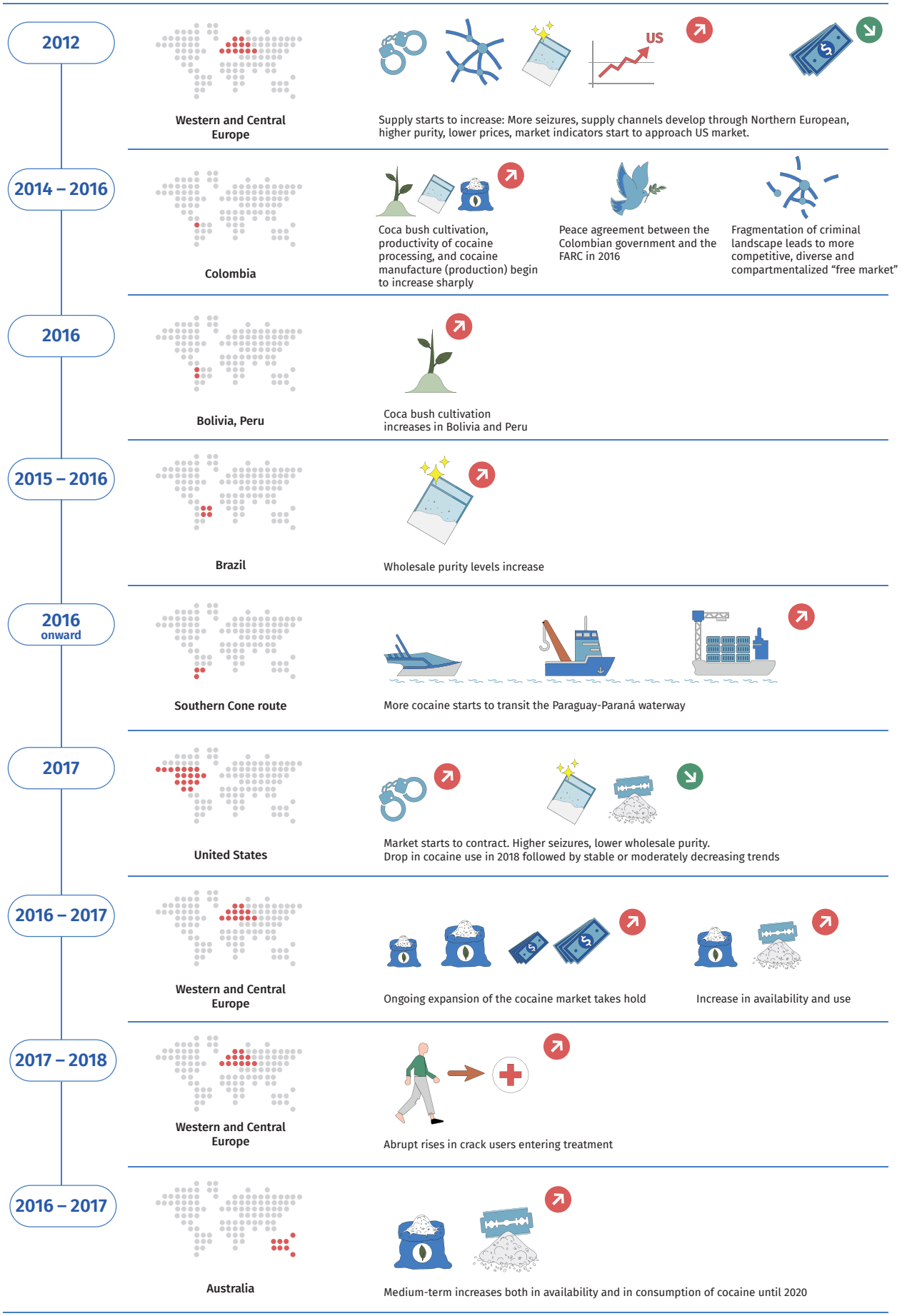
The market in North America peaked in 2017 and has flattened since then even as other regions continued to see expansion. In Western and Central Europe, for example, the market accelerated around this time. This is clear in all main market indicators including seizures purity, consumption (as measured in wastewater) and use (as measured in prevalence rates). Demand-side indicators from Australia also indicate an expansion around this time, although the timing of this shift is less distinct.

Selected indicators of cocaine demand in major established consumer markets, 2010–2021 (relative to 2015 levels)



Sources
Western and Central Europe: UNODC calculation based on SCORE dataset (wastewater).
United States: SAMHSA, National Survey on Drug Use and Health (NSDUH) 2020.
Brazil: Ministry of Health, DATASUS portal.
Australia: The Australian Institute of Health and Welfare, *Alcohol and other drug treatment services in Australia annual report*, Supplementary tables – Drugs (episodes)

Timeline of key developments in the global cocaine market



The balance of supply and demand

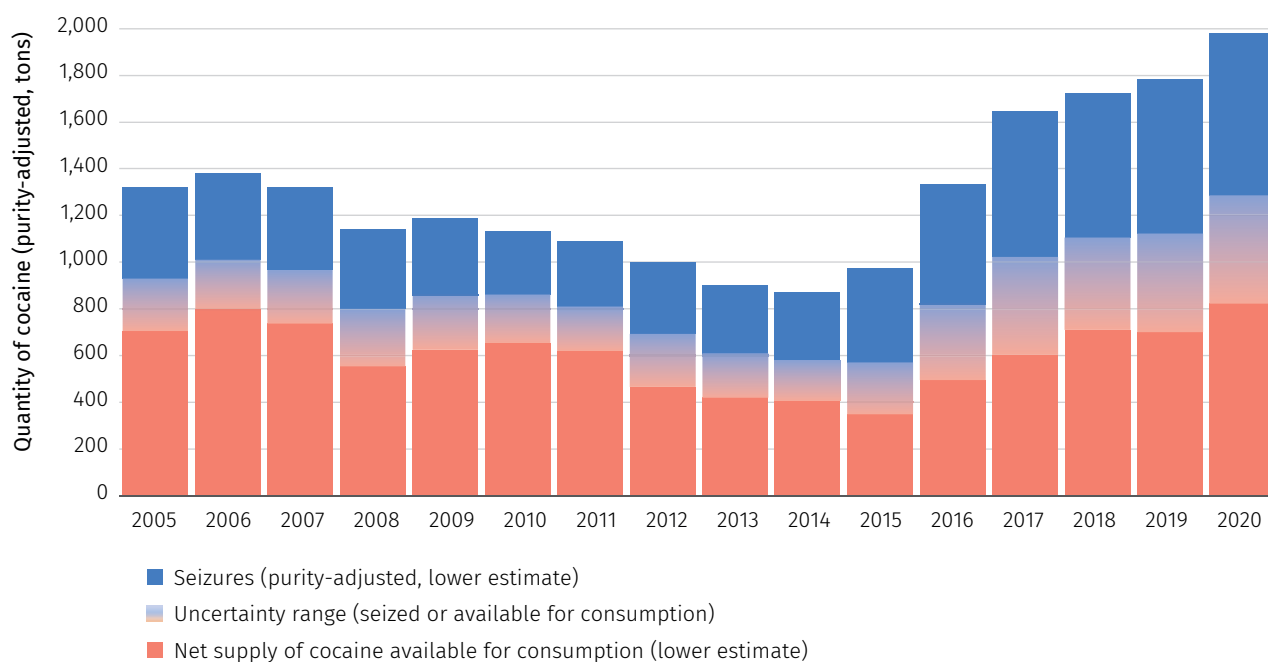
Supply of cocaine is at a record high, seizures are rising globally, and various indicators show increasing use in several regions. All this information points to an overall expanding market, but with a different rate of increase across the various elements of the market.

In 2020, the potential manufacture of cocaine was 44 per cent higher than the previous peak level of 2006. But seizures rose by 94 per cent over the same period. While these indicators are not directly comparable in terms of cocaine purity (manufacture is estimated at 100 per cent pure and seizure aggregates reflect varying degrees of purity), evidence of an overall purity increase during the period would indicate that interdiction has risen even more compared to manufacture, suggesting that the global law enforcement response may not have only coped with the increased supply, but may have also contained it.

On the demand side, the estimated number of users worldwide has grown steadily over the past 15 years, driven in part by rising population levels but also by a gradual long-term increase in prevalence, while markets including Western and Central Europe, and Australia, have shown a tendency for use patterns to shift towards more intensive consumption.

These indicators suggest that following the increase in global manufacture, more cocaine has been globally available for consumption, but this increased availability has not been proportional to the increase observed in cocaine manufacture due to increased efforts in interdiction of the drug.

Cocaine manufacture, breakdown into seizures and net supply available for consumption, 2005–2020



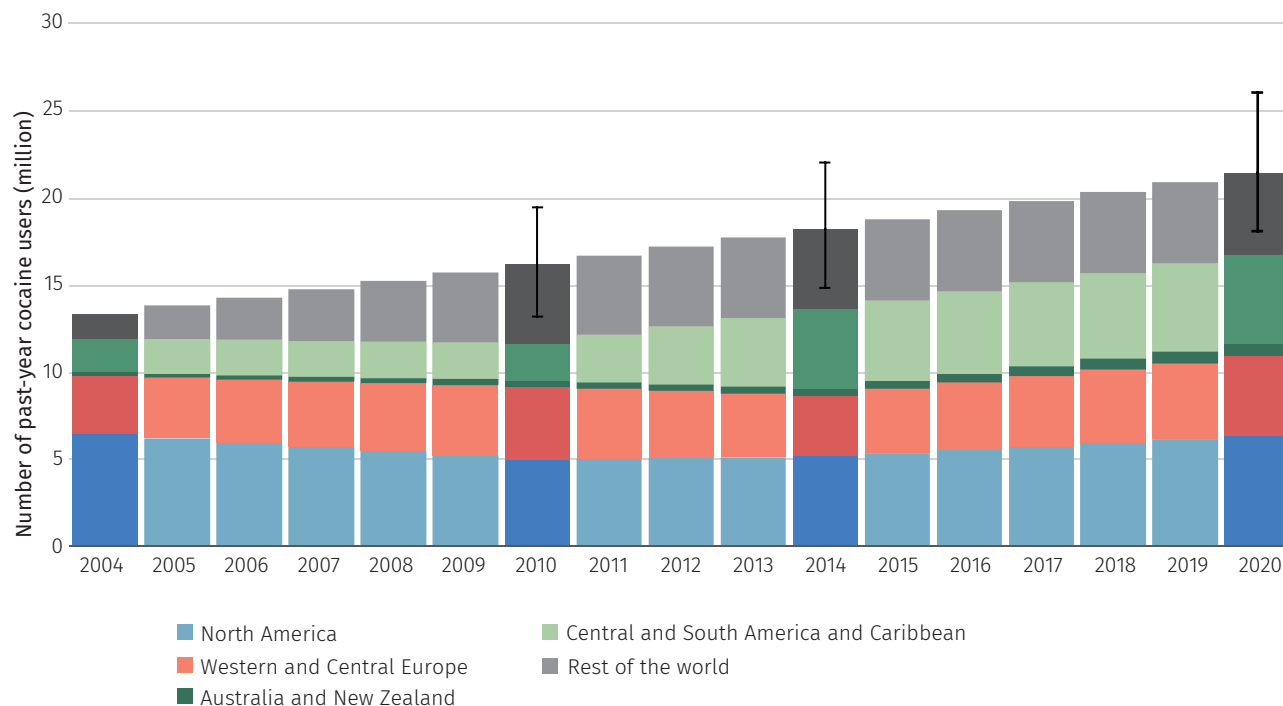
Notes: The uncertainty range is obtained by considering two extreme scenarios on the purity of seizures, namely that seizures were made entirely at wholesale level (with corresponding purities) or entirely at retail level (with corresponding purities). The best estimate was obtained by assuming (conservatively) that 80 per cent of seizures are made at wholesale level. One UNODC estimate for the case of Italy, based on 2009 study, assessed that 93 per cent of cocaine seizures made over the period 2000–2007 in Italy were at the level of 1kg or above.¹ In source countries and the neighbouring countries in South and Central America, which account for the majority of seizures, this percentage is likely to be higher than in destination markets. The same holds for other transit countries outside of these regions.

Sources:

Seizures and purities: UNODC, responses to the annual report questionnaire; Brazilian Federal Police.
 Manufacture: UNODC *World Drug Report 2022*.

¹ UNODC, 'Drug Money: The Illicit Proceeds of Opiates Trafficked on the Balkan Route' (Vienna: UNODC, 2015).

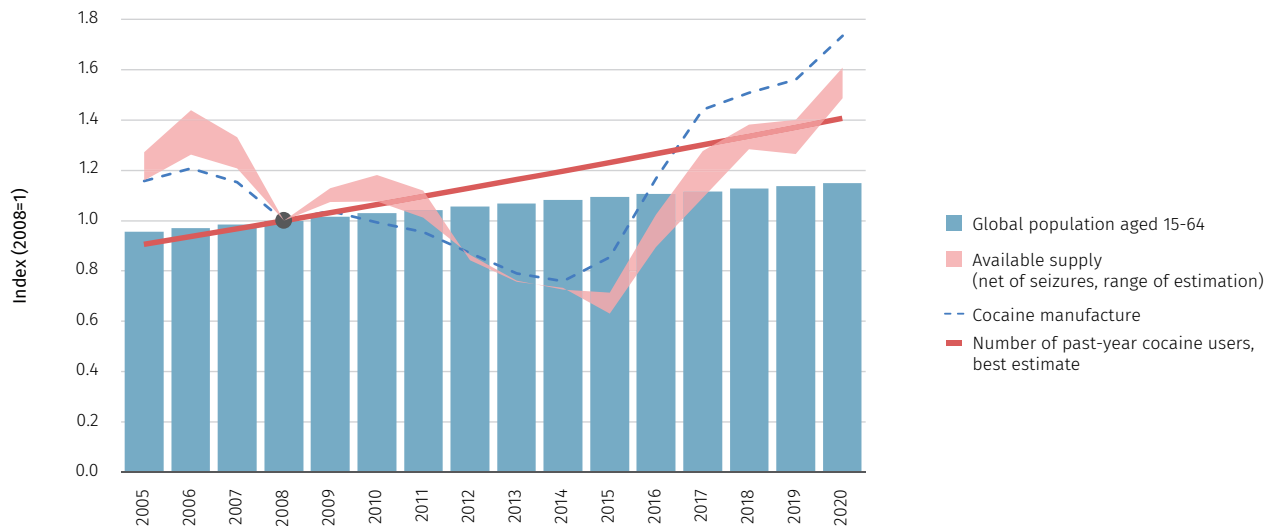
Number of past year cocaine users worldwide (best estimates), by region, 2004–2020



Note: Data for 2004, 2010, 2014 and 2020 are previously published UNODC best estimates. These years are chosen to maximize comparability over time and to minimize spurious year-on-year volatility linked to changes in availability of data. Data for intermediate years are interpolated at regional (and hence global) level and thus differ slightly from previously published UNODC estimates for these years.

Sources: UNODC *World Drug Report* 2006, 2012, 2016, 2022.

Comparison of trends in global cocaine supply and demand indicators, 2005–2020



Note: Number of users based on previously published UNODC best estimates for 2004, 2010, 2014 and 2020. These years are chosen to maximize comparability over time and to minimize spurious year-on-year volatility linked to changes in availability of data. Data for intermediate years are interpolated at regional (and hence global) level and thus differ slightly from previously published UNODC estimates for these years.

Sources:

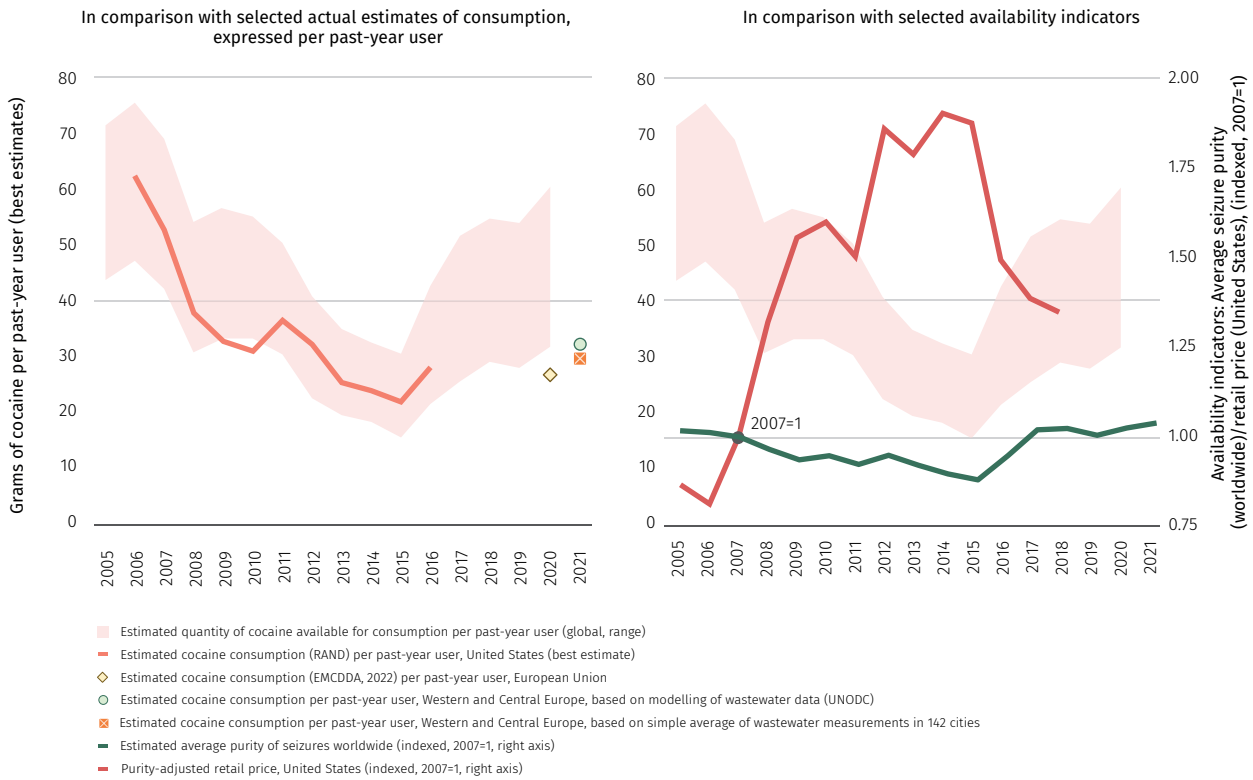
Population: United Nations Population Division.

Manufacture: UNODC *World Drug Report* 2022.

Past-year users: UNODC *World Drug Report* 2006, 2012, 2016, 2022 and estimates based on these values.

Available supply: Estimations based on seizures and purity data from UNODC responses to the annual report questionnaire, official communication and official national sources, and data indicated above.

Estimated supply of cocaine available for consumption (net of seizures) per past-year cocaine user worldwide, 2005–2021



Notes: Although estimates of consumption quantities are expressed per past-year user in the above, the quantities consumed vary widely among past-year users. Moreover, the numbers of past-year users are obtained independently of the consumption estimates and are mainly based on household surveys, which likely do not capture marginalized users (a minority in the case of cocaine). However, this applies consistently across the different estimates. In view of this, these values are best understood as benchmark ratios rather than typical quantities consumed by users.

Sources: Estimations based on cocaine manufacture (from WDR 2022), seizures, purity and price data (from UNODC responses to the annual report questionnaire, official communication and official national sources) and number of past-year users (from UNODC *World Drug Report 2022* and previous editions); *US National Survey on Drug Use and Health 2020*, Detailed Tables (SAMHSA); *What America’s Users Spend on Illegal Drugs, 2006–2016* (RAND, 2019); EMCDDA, *EU Drug Markets: In-depth analysis*.

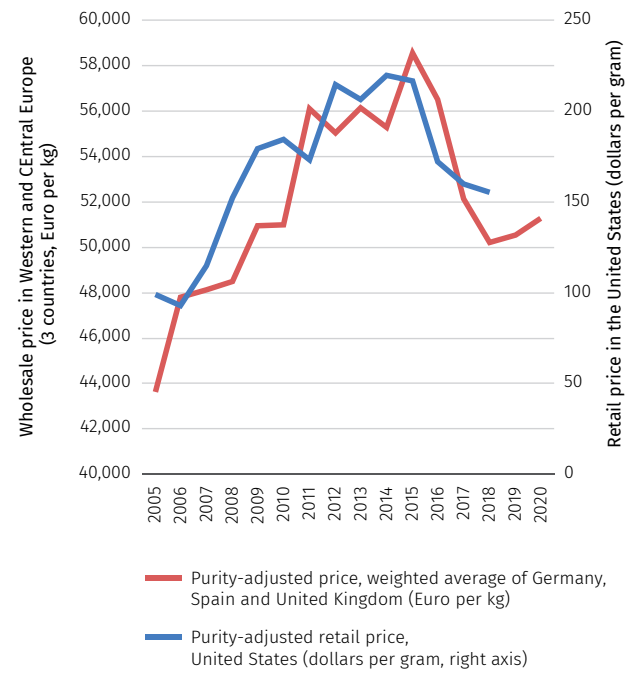
Globalization, convergence and emerging markets

Europe and North America are the largest markets for cocaine, and indicators show that the two regions are increasingly portraying parallel behaviour. While the signs of such developing behaviour can be traced back a long time, it has become progressively more visible, especially at retail level.

An analysis of upstream dynamics in the supply chain to Europe (wholesale level) suggests that the responsiveness to global supply was already visible in the 2000s.

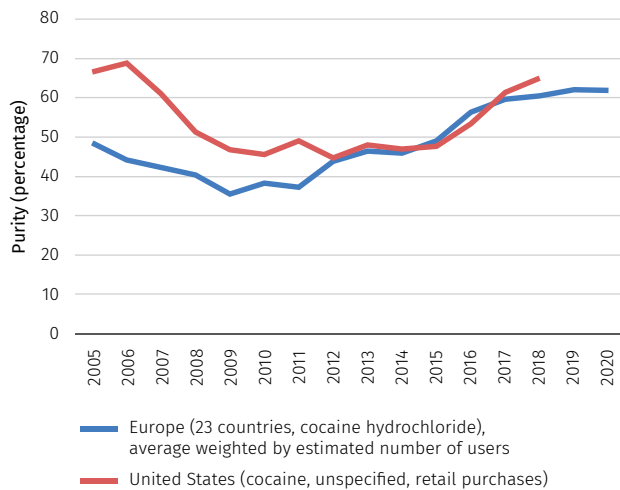
Purity levels for cocaine available at the retail level converged in these two major destination markets around 2012 and have remained in sync since then. This probably reflects an increasingly efficient supply chain facilitated by European actors establishing direct links with suppliers in South America.

Selected indicators of cocaine availability based on price data, United States and West and Central Europe, 2005–2020



Sources: UNODC, responses to the annual report questionnaire; ONDCP.

Retail purity of cocaine in Europe and the United States, 2003–2020



Note: For 2019 and 2020, comparable data for the United States were not available.
Sources: EMCDDA, ONDCP.

Law enforcement efforts along the route to North America may have contributed to reshaping the path of least resistance towards the European market. In 2012, the purity-adjusted price rose in the United States but fell in Europe. This possibly indicates that traffickers may have diverted cocaine from North America towards Europe.

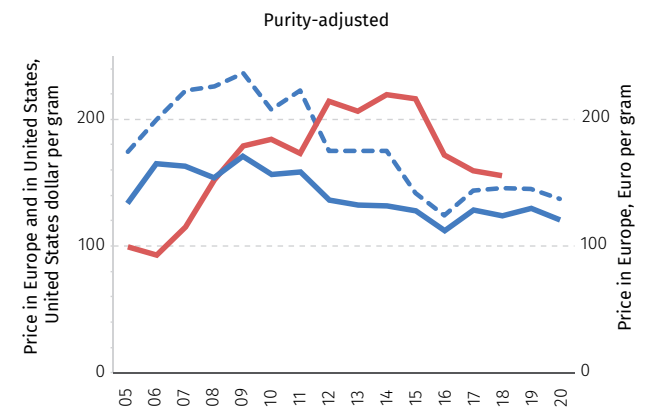
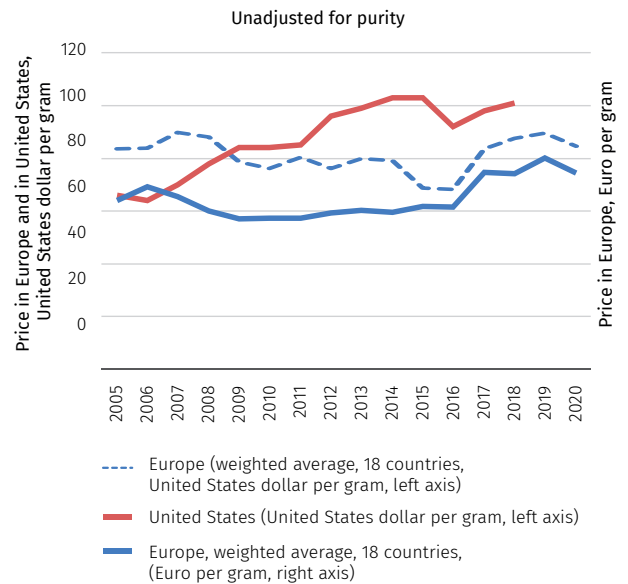
The transition appears to have had a lasting impact. The purity-adjusted price remained relatively stable in both markets until the impact of the expanding supply from South America was felt in 2016.

It is also plausible that 2012–2015 was an “incubation period” for Europe’s domestic market. The increased availability was initially not matched by demand. The price remained low, increasing the accessibility of cocaine to European consumers and eventually ushering in a supply-driven expansion of consumption.

This increase may explain the different behaviour of retail prices in the United States and Europe since 2015. While the purity-adjusted price in the United States fell, in Europe there was a generally stable trend. Rising demand in Europe may have compensated for the increasing supply and maintained an equilibrium in the market with stable prices.

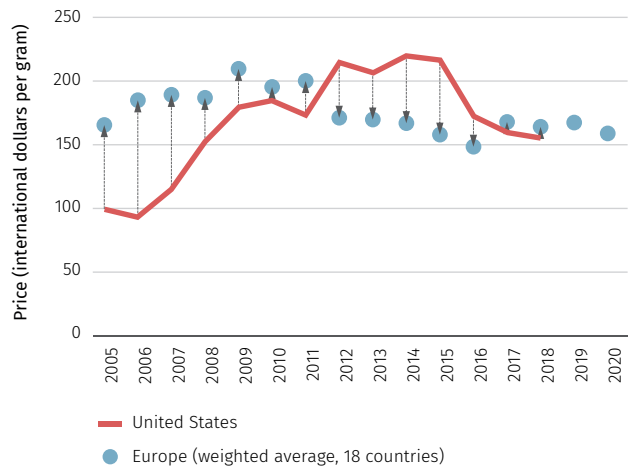
As a result, purity-adjusted retail prices also appear to have converged between the United States and Europe, albeit much later than purities, especially when expressed relative to the cost of living.

Retail cocaine prices in Europe and the United States, 2005–2020



Note: For 2019 and 2020, comparable data for the United States were not available.
Sources: UNODC, responses to the annual report questionnaire; EMCDDA; ONDCP.

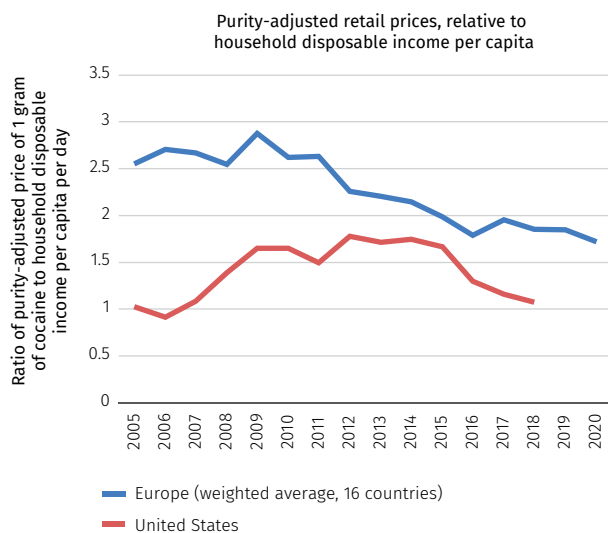
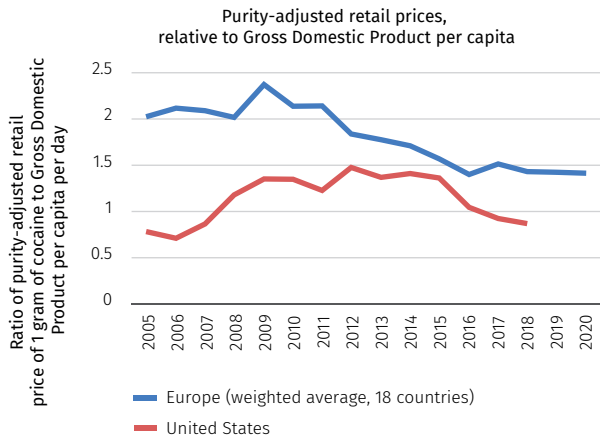
Purity-adjusted cocaine retail prices in Europe, adjusted for cost of living differences across countries, in comparison with United States, 2005–2020 (purchasing power parities, international dollar)



Notes: Purchasing power parity adjustments were made on the basis of OECD purchasing power parity conversion factors for individual consumption. **Note:** For 2019 and 2020, comparable data for the United States were not available.
Sources: UNODC, responses to the annual response questionnaire; EMCDDA; ONDCP; OECD.

Despite this, cocaine is still distinctly more affordable in the United States than in Europe. Also, the annual prevalence in the United States (2.4 per cent of the general population aged 15–64) is still higher than in Europe (1.43 per cent in Western and Central Europe and 0.96 per cent in Europe overall).

Measures of affordability of cocaine in Europe and the United States, 2005-2020



Notes: Note: For 2019 and 2020, comparable data for the United States were not available. Household expenditure includes expenditure by Non-profit Institutes Serving Households (NPISH). Based on World Development Indicator "Households and NPISHs final consumption expenditure." Household disposable income includes income (net of tax) available to households such as wages and salaries, income from self-employment, pensions and other social benefits, as well as social transfers in kind, such as health or education provided for free. Based on OECD indicator "Gross adjusted household disposable income".

Sources: UNODC, responses to the annual report questionnaire; EMCDDA; ONDCP; World Bank; OECD.

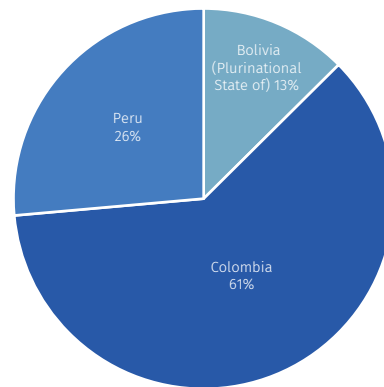
Cocaine in relation to other drugs

Both demand and supply of cocaine are geographically concentrated. The Americas, Western and Central Europe, and Oceania are "established markets" where use levels far surpass other regions. As of 2020, these established markets accounted for more than three quarters of cocaine users, but only a fifth of the global adult population.

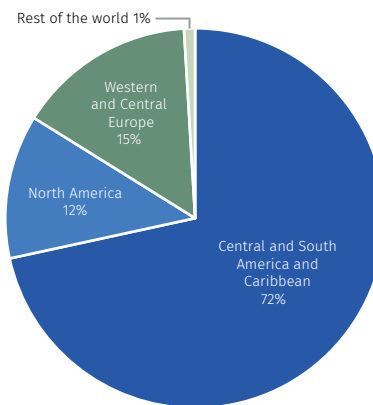
Moreover, almost all (99 per cent) seizures were made in these regions, particularly around the source countries of Bolivia (Plurinational State of), Colombia and Peru.

Geographical breakdowns of cocaine market based on selected supply and demand indicators, 2020

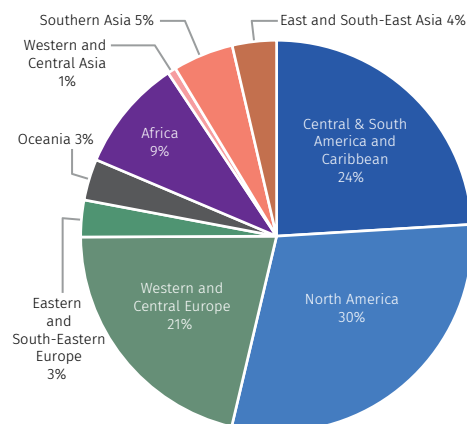
Cultivation of coca bush, 2020



Cocaine seizures, 2020

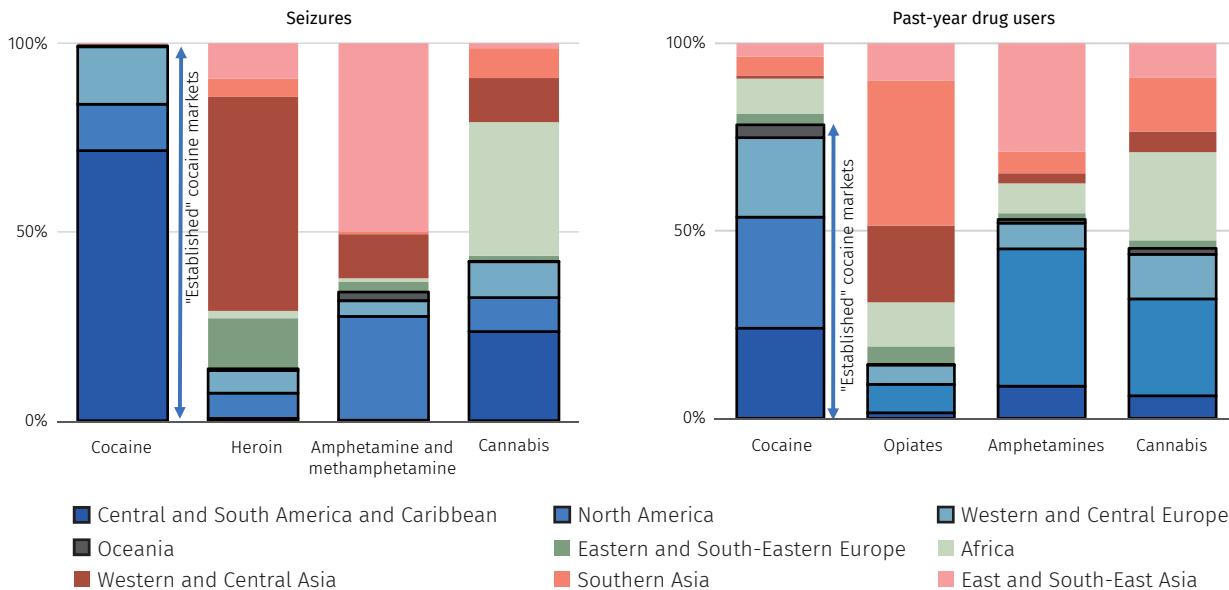


Cocaine past-year users, 2020



Source: UNODC, responses to the annual report questionnaire.

Geographical breakdowns of drug markets based on main supply and demand indicators, by drug class, 2020



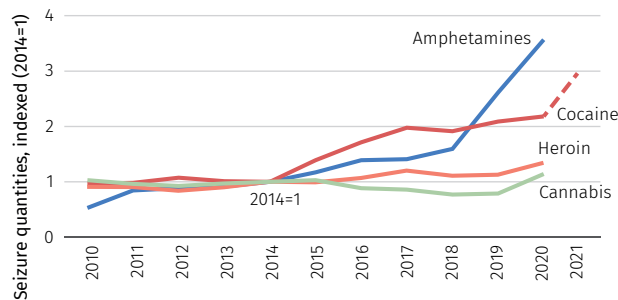
Notes: Figures for cannabis are based on cannabis herb and cannabis resin. The number of users of “amphetamines” includes amphetamine, methamphetamine, and the misuse of prescription stimulants.
Source: UNODC, responses to the annual report questionnaire.

This concentration brings a potential for further expansion. The geographically localized nature of supply means cocaine needs to travel large distances and cross national borders to reach its markets and law enforcement can target supply channels both at their source and destination.

Comparing across different types of drugs globally, cocaine trafficking (seizures) is in recent years among the fastest growing, along with amphetamine-type stimulants.

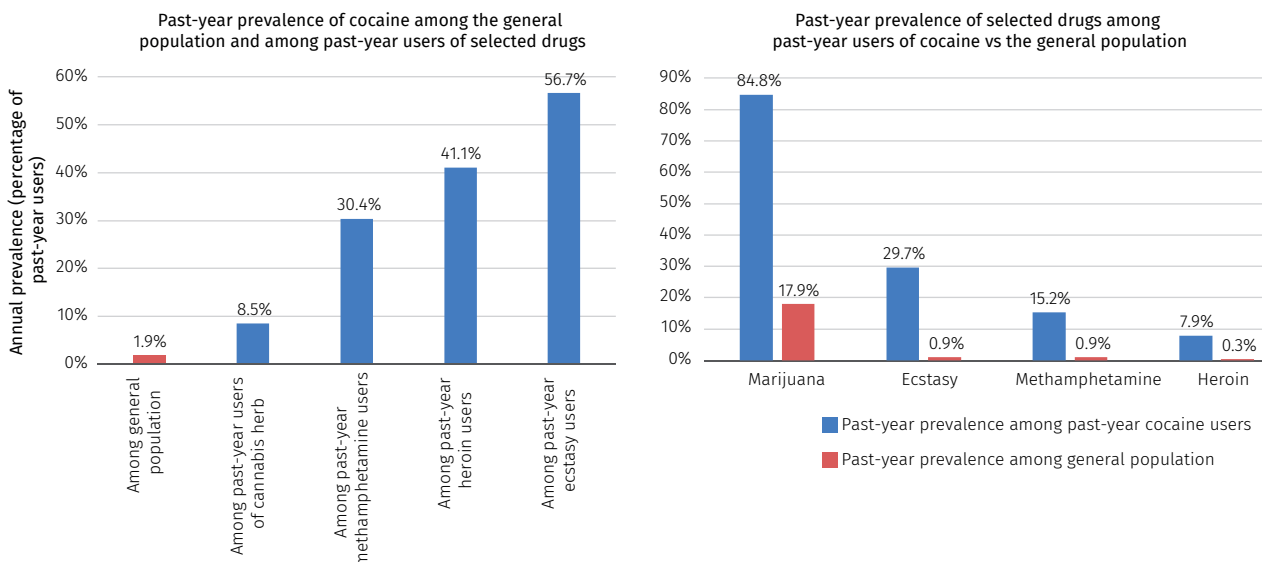
Generally, drugs can serve as gateways for each other; in other words, an individual who has used a given drug at least once is more likely to use another drug. For

Quantities of drugs seized globally, relative to 2014, by drug type, 2010 – 2021



Note: Data for 2021 are preliminary.
Source: UNODC, responses to the annual report questionnaire.

Overlap of past-year users of cocaine and of other drugs, United States, 2020

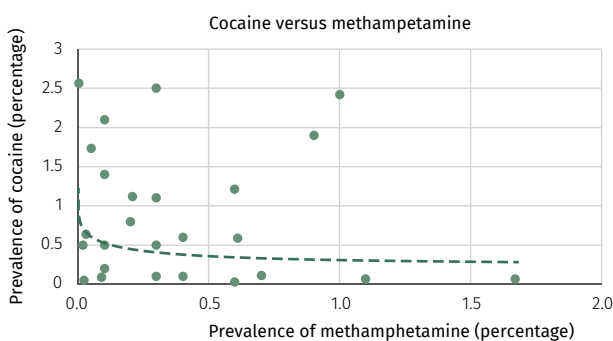
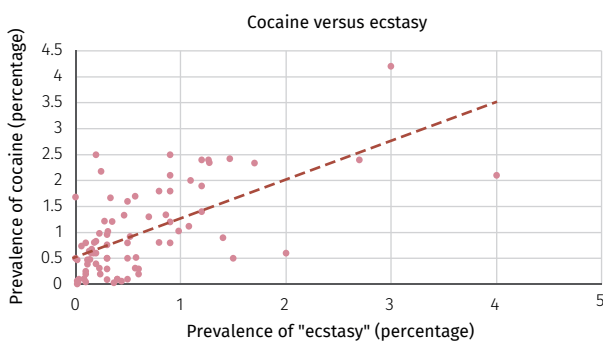
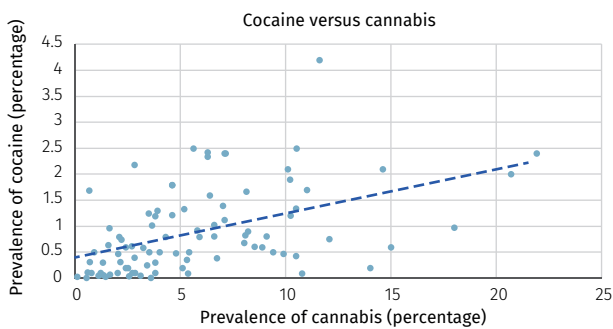


Note: All estimates based on individuals aged 12 years or older.
Source: UNODC calculations based on *National Survey on Drug Use and Health (NSDUH) 2020*, SAMHSA, United States.

example, data from the United States for 2020 illustrate how cocaine use was strongly associated with the use of ecstasy, heroin, cannabis herb and methamphetamine, as the prevalence of cocaine use was significantly higher among users of these drugs versus the general population; conversely, the prevalence of use of these drugs was higher among cocaine users than in the general population.

Both complementary and competitive relationships are possible between drugs. At the macro level, looking at aggregated national indicators, cocaine exhibits complementary relationships with some other “recreational” drugs – such as cannabis and ecstasy – while methamphetamine emerges as a potential “competitor” to cocaine. A large domestic market for cocaine appears to “alternate” with a large market for methamphetamine – although there are exceptions. In the case of opiates, there is not much evidence of either a competitive or a complementary relationship with cocaine.

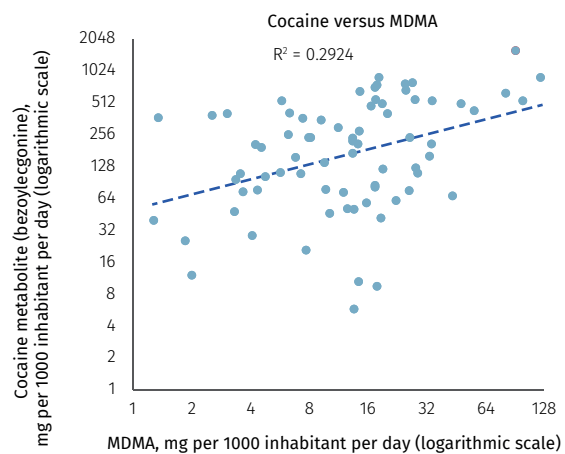
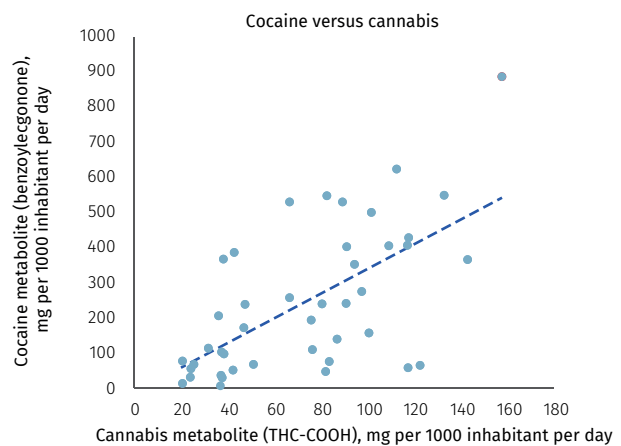
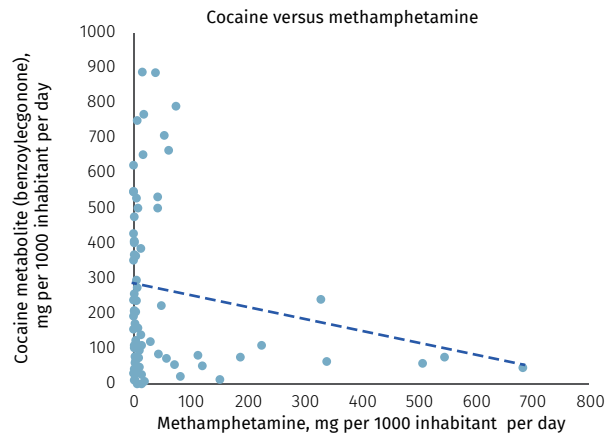
Past-year prevalence of use among adult population, cocaine versus other drugs, by country, 2020 or latest year available



Source: UNODC, *World Drug Report 2022*.

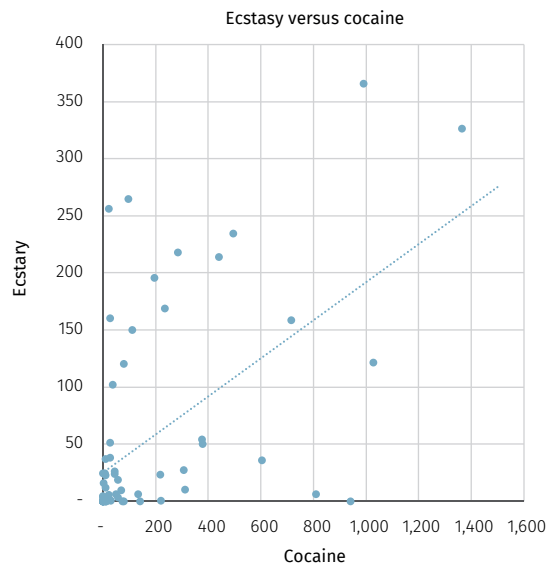
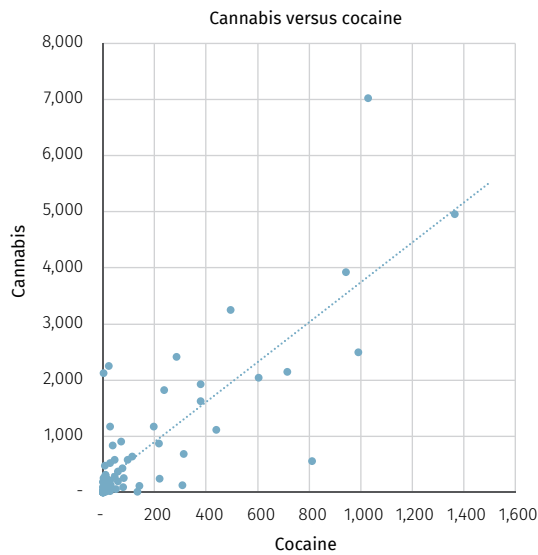
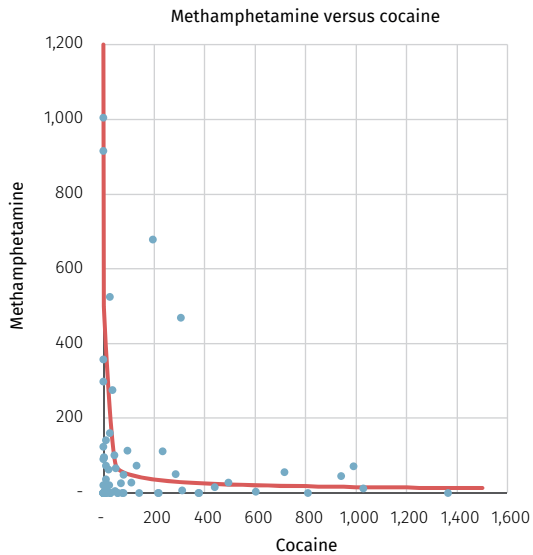
Data from the United States show this relationship from a different angle. Drug users developing *intensive* use patterns of one drug are *less* likely to develop intensive use patterns of the other. Consumption of increasing quantities of one drug comes at the expense of the other. Among methamphetamine users, frequency of use of cocaine appears to decrease as frequency of use of methamphetamine increases.

Drug residues in European cities, cocaine versus other drugs, 2021 (per day, per 1000 inhabitants)



Note: Points refer to cities.
Source: SCORE dataset.

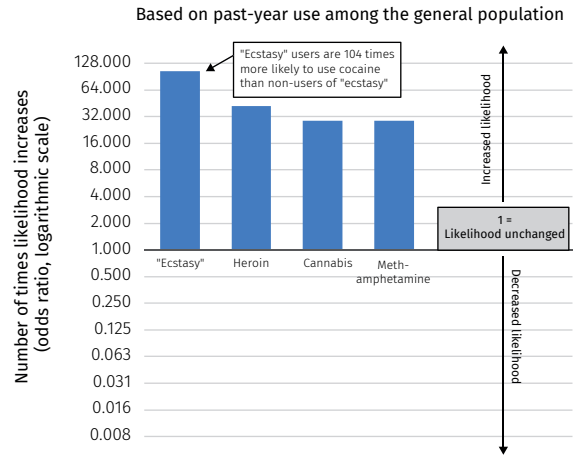
Number of seizure cases per capita, cocaine versus other drugs, by country, 2019



Source: UNODC, responses to the annual report questionnaire.

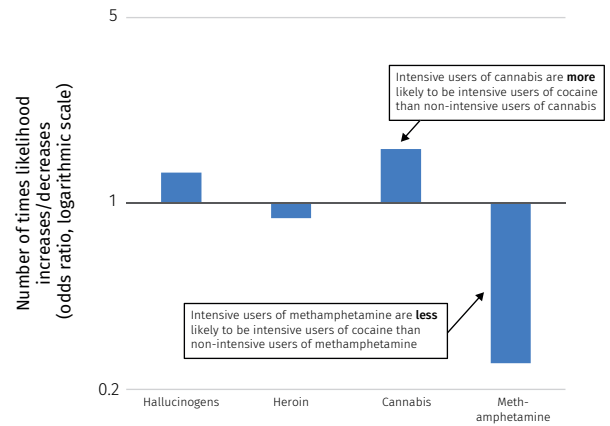
The relationship between cocaine and methamphetamine in the United States apparently goes back two decades. A 2009 study² observed that methamphetamine treatment admissions in 2003 in the United States were heavily concentrated in the west while cocaine treatment admissions were heavily concentrated in the east.

Increase/decrease in likelihood of cocaine use associated with use of other drugs, United States, 2020



■ Increase in likelihood of past-year cocaine use among past-year users of second drug, versus people who did not use second drug in past year

Based on intensive use, within the universe of past-year users of cocaine and second drug



■ Increased likelihood of intensive cocaine use among intensive users of second drug, versus other individuals in this universe

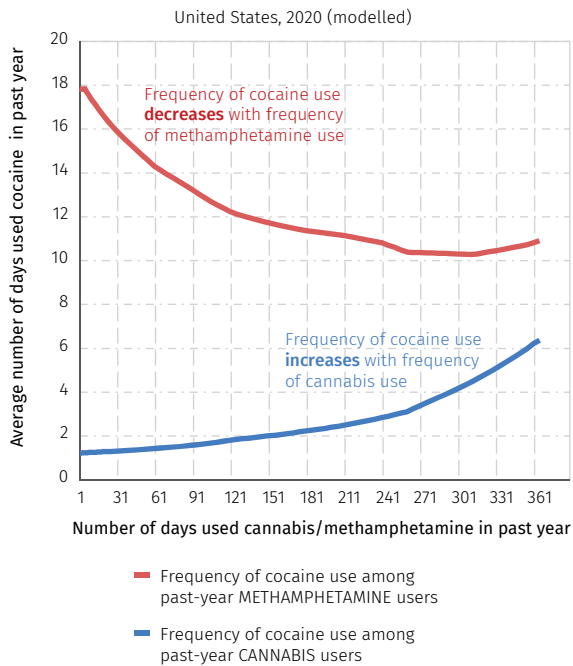
Notes:

- 1) For the purposes of this chart, "intensive" use of a drug refers to use on 50 days or more within the past year.
- 2) All estimates based on individuals aged 12 years or older
- 3) The values shown above are calculated as odds ratios, which are unchanged if the roles of the two drugs are inverted. Hence, these values also indicate, symmetrically, increases/decreases in the likelihood of use of the *second* drug (e.g. cannabis, methamphetamine) among the corresponding category of cocaine users (versus the remaining individuals in the universe).

Source: UNODC estimations based on *National Survey on Drug Use and Health (NSDUH)* 2020, SAMHSA, United States.

2 Ralph Weisheit and William White, *Methamphetamine: Its History, Pharmacology and Treatment*, Hazelden Publishing, 2009.

Frequency of cocaine use among users of other drugs (cannabis/methamphetamine), in relation to frequency of use of second drug, United States, 2020 (modelled)



Source: UNODC modelling of data from the *National Survey on Drug Use and Health (NSDUH) 2020*, SAMHSA, United States.

Another potential manifestation of the dynamics of competitiveness between methamphetamine and cocaine may be observed in the case of Australia, a country that exhibits notable levels of use (annual prevalence) of both cocaine and methamphetamine. While annual prevalence of cocaine use in Australia is the highest worldwide by far, wastewater measurements suggest that in April 2021 Australia ranked below most European countries (14 out of 24 European countries with available data) in terms of cocaine consumption per capita; considering the high prevalence in Australia, the consumption per past-year user is likely significantly more modest. On the other hand, Australia was ranked in first place among 27 countries with available data in terms of methamphetamine consumption, based on wastewater analysis.³

Dynamics in the United States and Australia are two examples of the competitiveness between cocaine and methamphetamine suggested by global indicators. Other dynamics may be seen in other countries where the two markets of cocaine and methamphetamine may increase together.⁴

The spectrum of cocaine products

Cocaine appears on the market in several forms and can be consumed by insufflation (“snorting”), smoking and injection. Cocaine hydrochloride is typically insufflated, while other forms including “crack” are amenable to smoking.

It appears that smoking of cocaine results in more intensive use patterns. One study among users in treatment⁵ in Chicago, United States, indicated that crack users consumed 9.1 grams of cocaine per week, considerably more than snorters (5.3 grams) and injectors (5.6 grams). UNODC estimates based on data from another study examining marginalized drug users⁶ in London, United Kingdom, suggest that weekly crack consumption was 4.7 times higher than cocaine salt. However, among socially integrated users the ratio was 0.28 (hence consumption of cocaine salt was higher). But marginalized drug users consumed more than socially integrated users in general (both for cocaine salt and crack).

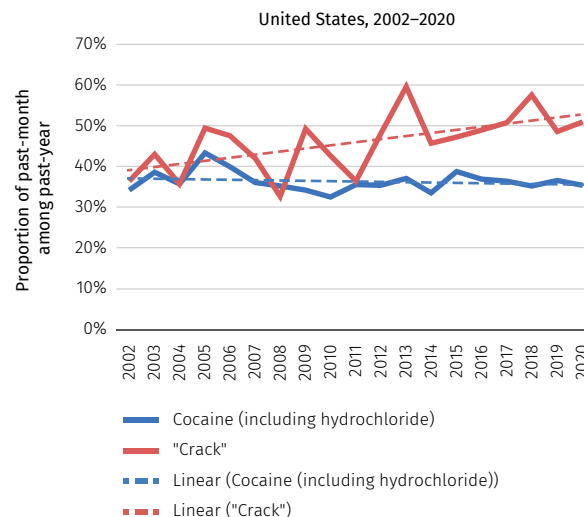
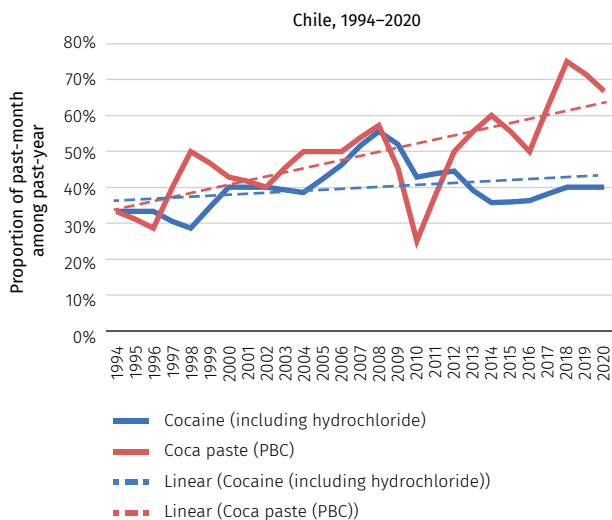
Evidence from Chile and the United States bears out a similar pattern of intensifying use among smokers.⁷

The driver behind this difference in intensity of use is probably because smoking yields more intense and quicker “highs” than insufflation.⁸ It seems that, even when the number of cocaine smokers declines, the population of those who persist gradually tends towards including a majority of intensive users. This can be seen in the case of Chile and the United States; in both cases the prevalence of smoking of the corresponding cocaine products actually declined.

3 Australian Criminal Intelligence Commission, University of Queensland, and University of South Australia, ‘National Wastewater Drug Monitoring Program: Report 16’, National Wastewater Drug Monitoring Program (Australian Criminal Intelligence Commission, 2022).
 4 UNODC, ‘World Drug Report 2020’ (Vienna: UNODC, 2022).

5 S. Schnoll et al., ‘Characteristics of Cocaine Abusers Presenting for Treatment’, in *Cocaine Use in America: Epidemiologic and Clinical Perspectives* (National Institute of Drug Abuse, 1985), 171–81, 173, 175–178.
 6 Irmgard Eisenbach-Stangl, Jacek Moskalewicz, and Betsy Thom, ‘Two Worlds of Drug Consumption in Late Modern Societies’, Policy Brief (Vienna: European Centre for Social Welfare Policy and Research, January 2010).
 7 See also Chapter Established markets, in this report.
 8 Brian D. Kiluk et al., ‘Smokers versus Snorters: Do Treatment Outcomes Differ According to Route of Cocaine Administration?’, *Experimental and Clinical Psychopharmacology* 21, no. 6 (2013): 490–98.

Trends in the share of past-month users among past-year users, comparisons of smokable forms of cocaine



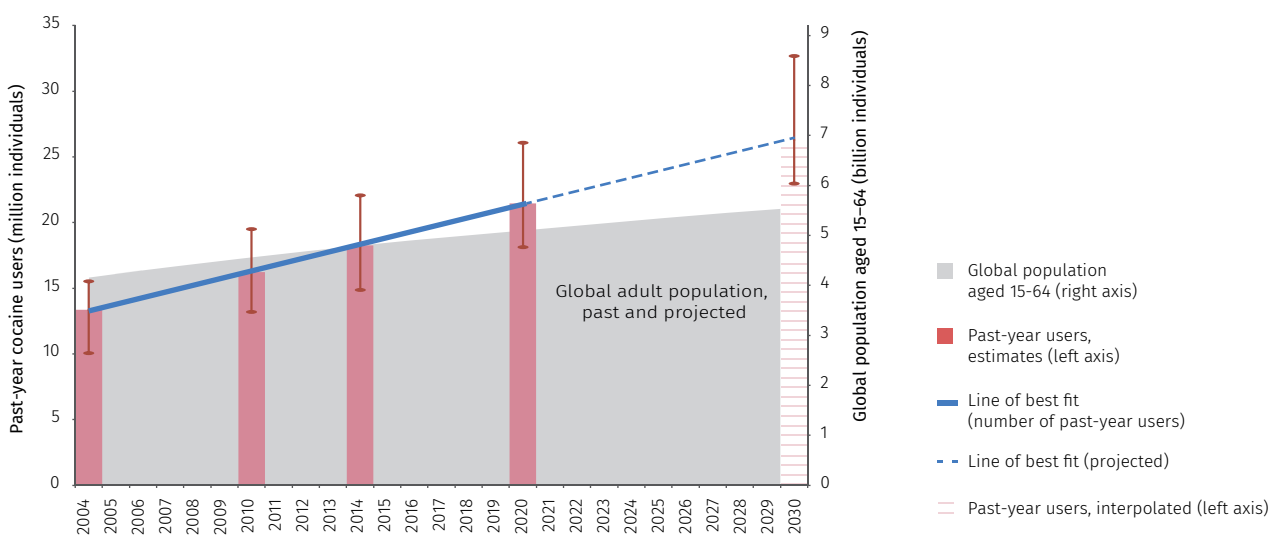
Sources: Observatorio Nacional de Drogas, *Décimo Cuarto Estudio Nacional de Drogas en Población General*, 2020; *National Survey on Drug Use and Health (NSDUH)* 2020, SAMHSA, Detailed Tables.

Outlook

Cocaine use is on the rise at the global level. The number of people who use cocaine has been increasing at a faster rate than population growth. The main markets for cocaine worldwide are North America, Western and Central Europe, followed by South and Central America and the Caribbean.

The current increase in cocaine supply at source in Latin America coupled with the expansion of trafficking of the drug eastward may potentially lead to an expansion of the still limited markets in Africa and Asia. From an estimated 21.5 million users of cocaine in 2020, that number would increase to 55 million, should the prevalence in Asia, Africa and the rest of Europe increase

Comparison of growth in number of cocaine users and global adult population, 2004-2020 and simple projections up till 2030

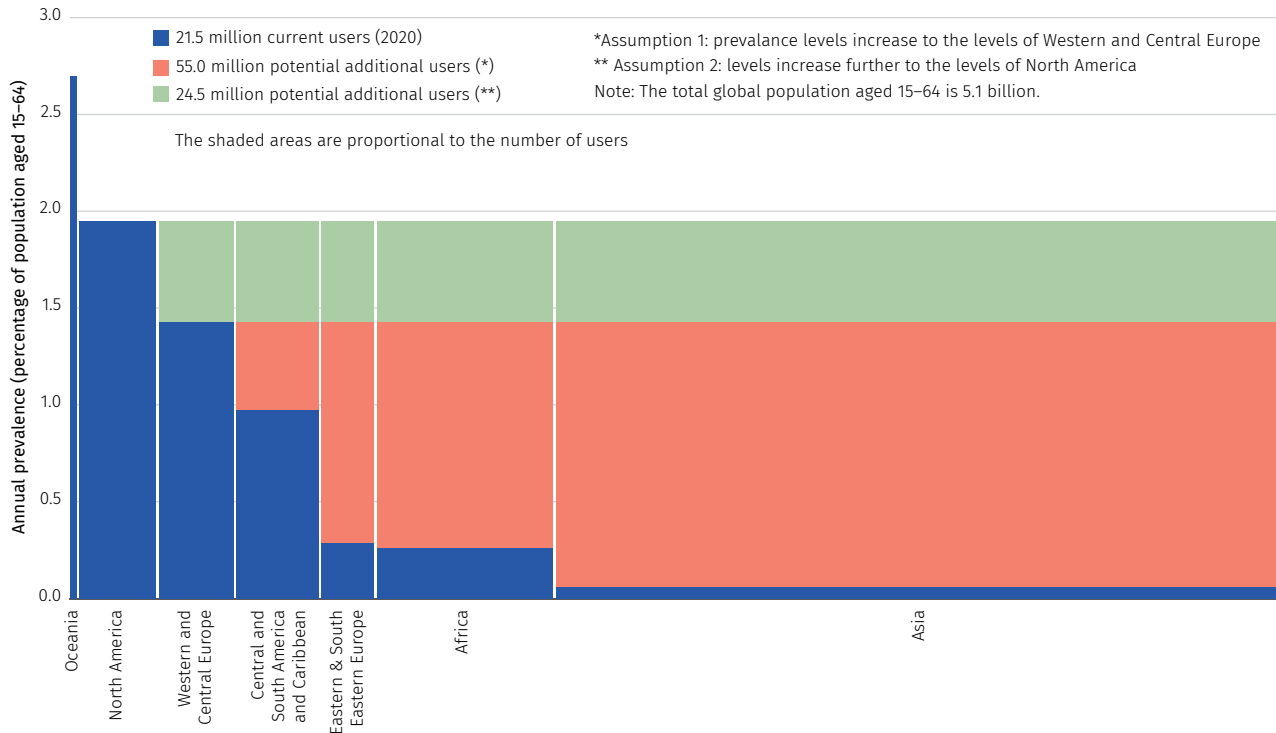


Sources: UNODC World Drug Reports; United Nations Population Division.

to the level of Western and Central Europe; and by an additional 24.5 million should it increase in those (sub) regions to the level of North America. Asia, where cocaine use is comparatively very low, has the largest potential for an increase in the number of cocaine users, largely due to its population size; in a scenario whereby the

prevalence jumps by 1.32 percentage points to align with that of Western and Central Europe, the number of users would increase to over 40 million in Asia from the current 2 million.

Potential additional cocaine users if the prevalence rate in Western and Central Europe or in North America extends to other regions in the world



Source: UNODC estimates based on UNODC World Drug Report 2022.

An aerial photograph of a desert landscape. A central, narrow canal or irrigation channel runs vertically through the middle of the frame. The ground on either side is dry, sandy, and cracked, with some sparse, low-lying green shrubs scattered across the terrain. The overall color palette is dominated by warm, earthy tones of brown and tan.

Chapter 2

Established markets

Established markets

The Americas

Supply of cocaine originating from Bolivia (Plurinational State of), Colombia and Peru

The world's supply of cocaine originates virtually entirely in South America, specifically in the three countries of Bolivia (Plurinational State of), Colombia and Peru. Colombia continues to account for the largest share of the area under coca bush cultivation (between 60 and 70 per cent each year between 2015–2020) and potential manufacture of cocaine (between one half and two thirds each year during the same period).

Levels of coca bush cultivation in Colombia, which increased strongly during the period of negotiation between the Government of Colombia and FARC-EP, plateaued in the aftermath of the signing of the peace agreement (in November 2016) and subsequently declined.^{9–10} Despite this, the potential manufacture of cocaine hydrochloride continued to increase, driven (up to 2020) by a process of concentration of coca cultivation in areas where enhanced agricultural practices and processing methods resulted in improvements in the overall productivity of coca bush cultivation: more coca leaf per unit area under cultivation; coca leaves containing higher concentrations of cocaine;¹¹ and greater efficiencies in extracting the said cocaine and converting it into an export-ready product (in the form of cocaine hydrochloride). These improvements may have been incentivized by a more competitive, diverse and compartmentalized “free market” in which farmers and traffickers operated, increasingly characterized by numerous small actors rather than the monolithic ones which previously “regulated” the market.^{12–13} This environment appears also to have facilitated the penetration of non-Colombian actors, such as the active presence of Mexican organized crime groups¹⁴ and other, new, direct links with emerging European actors.¹⁵

In 2021, cultivation in Colombia increased sharply by 43 per cent, and potential manufacture of cocaine also increased significantly by 14 per cent, reaching record levels in both cases, and driving the corresponding global totals to the highest levels ever registered. In contrast with the preceding years, the overall productivity per unit area declined as coca cultivation expanded to new fields with younger crops producing their first harvests.¹⁶

Coca bush cultivation in Bolivia (Plurinational State of) and Peru followed largely similar long-term trends over the 2005–2020 period, in particular a generally increasing trend (with individual year-on-year exceptions) observed since 2015. In 2020, the onset of the global COVID pandemic likely contributed indirectly to increases in the productive area under coca leaf cultivation (net of eradication) in both countries, mainly as eradication activities were negatively impacted.^{17–18–19–20} Furthermore, the pandemic temporarily obstructed the efficiency of the early stages of the supply chain (creating difficulties for buyers to access sellers) thus leading to a temporary over-abundance of coca leaf²¹ and price declines of coca leaf (documented in both Peru and, for coca leaf sold in authorized markets, the Plurinational State of Bolivia) as well as (in the case of Peru), coca paste (PBC) and cocaine hydrochloride.²² In Peru, prices rebounded around November 2020 but subsequently declined again; as of October 2022, prices of coca leaf and cocaine hydrochloride remained well below the level of January 2020.²³ In the Plurinational State of Bolivia, prices of coca leaf sold in authorized markets fell abruptly in June 2020 and recovered somewhat in the following months, while remaining generally lower²⁴ than 2019 levels during the

9 UNODC Colombia, SIMCI, and Gobierno de Colombia, 'Colombia: Monitoreo de Territorios Afectados por Cultivos Ilícitos 2020' (UNODC-SIMCI, 2021).

10 UNODC, 'World Drug Report 2022' (Vienna: UNODC, 2022).

11 UNODC Colombia, SIMCI, and Gobierno de Colombia, 'Colombia: Monitoreo de Territorios Afectados por Cultivos Ilícitos 2020'.

12 UNODC and Europol, 'The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All?', 1, Cocaine Insights 1 (Vienna: UNODC, September 2021).

13 UNODC Colombia, SIMCI, and Gobierno de Colombia, 'Colombia: Monitoreo de Territorios Afectados por Cultivos Ilícitos 2021' (UNODC-SIMCI, Forthcoming).

14 UNODC Colombia, SIMCI, and Gobierno de Colombia, 'Colombia: Monitoreo de Territorios Afectados por Cultivos Ilícitos 2020'.

15 UNODC and Europol, 'Cocaine Insights 1'.

16 UNODC Colombia, SIMCI, and Gobierno de Colombia, 'Colombia: Monitoreo de Territorios Afectados por Cultivos Ilícitos 2021'.

17 UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022).

18 Policía Nacional del Perú, 'Anuario Estadístico Policial 2019' (Lima, Peru, June 2019)."

19 UNODC, 'Peru, Responses to the Annual Report Questionnaire 2020', n.d.

20 UNODC, Estado Plurinacional de Bolivia: Monitoreo de Cultivos de Coca 2020 (La Paz: United Nations publication, 2021)..

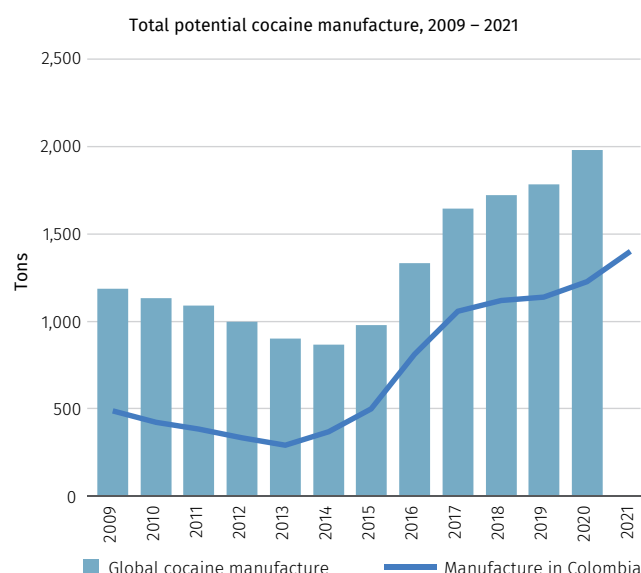
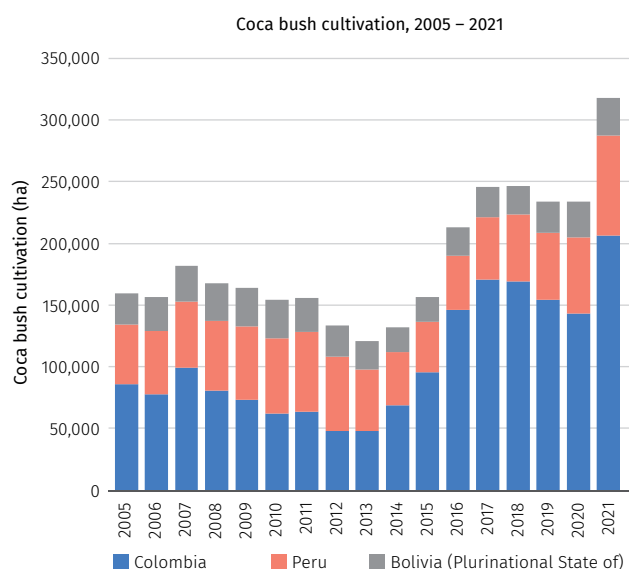
21 UNODC and CoE Brazil, 'Cocaine Insights 4'.

22 Comisión Nacional para el Desarrollo y Vida sin Drogas DEVIDA, 'Price Monitoring Reports', n.d.

23 DEVIDA (Peru) Monitoreo de precios de hoja de coca y derivados cocaínicos en zonas estratégicas de intervención. Reporte No 31, October 2022

24 Every month from June 2020 to December 2021, coca leaf prices, calculated as a weighted average of prices in the authorized markets of La Paz and Cochabamba and expressed in Bolivian currency, were lower than the corresponding month in 2019, with the exception of December 2020 (75 Bolivianos per kg, versus 70 Bolivianos per kg in December 2019).

Coca bush and cocaine production indicators in Bolivia (Plurinational State of), Colombia and Peru



Note: Estimate of coca bush cultivation in Bolivia (Plurinational State of) in 2021 has not been confirmed by the Government of Bolivia.
Sources: UNODC calculations based on UNODC data and data from the respective Governments, and coca bush cultivation surveys carried out in Bolivia (Plurinational State of), Colombia and Peru in 2020 and previous years.

rest of 2020 and 2021.^{25 26 27}

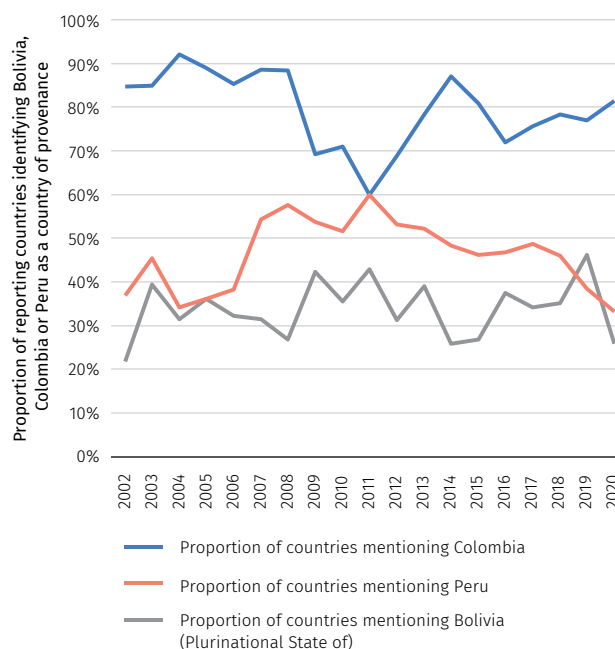
Reporting from Member States on the country of provenance (including mentions of countries of departure and transit prior to seizure, aside from countries of production or origin) of cocaine seized by their authorities, generally confirms the relative importance, at global level, of Colombia, Peru and Bolivia (Plurinational State of), in that order, as source countries for cocaine.²⁸

Given the concentration of the source of the world's supply of cocaine in three contiguous countries in South America – a feature which sets the cocaine market apart from other drug markets, such as those for heroin, cannabis or synthetic drugs – it is perhaps to be expected that the majority of global cocaine seizures are also concentrated in and around South America. From 2008 onwards, more than one half of global seizures of cocaine have taken place in this subregion. In 2020, the subregions of Central and South America and the Caribbean collectively accounted for 72 per cent of total global seizures of cocaine,²⁹ and approximately one quarter of past-year cocaine users.

Aside from supplying the domestic markets of Bolivia (Plurinational State of), Colombia and Peru and those of neighbouring countries, cocaine is trafficked from these three countries in various directions, often across

long distances, to reach consumers worldwide. Cocaine exits Colombia along various routes: via its Pacific coast,

Frequency of cocaine-producing countries mentioned by reporting countries as provenance for cocaine-type drugs (as proportion of reporting countries), 2002–2020



Note: Reporting on provenance in the Annual Report Questionnaire was revised in 2010 and again in 2020. Based on reported countries of "origin" (up till 2009), production (2010-2019), departure (2010 onwards) and transit (all years) of drugs seized by reporting countries. In order to maintain comparability over time, the frequency is expressed as a percentage of countries providing information in response to these questions.
Sources: UNODC, responses to the annual report questionnaire, 2002-2020.

25 UNODC, Estado Plurinacional de Bolivia: Monitoreo de Cultivos de Coca 2019 (La Paz: United Nations publication, 2020).
 26 UNODC, Estado Plurinacional de Bolivia: Monitoreo de Cultivos de Coca 2020.
 27 UNODC, Estado Plurinacional de Bolivia: Monitoreo de Cultivos de Coca 2021 (La Paz: United Nations publication, 2022).
 28 UNODC, 'Responses to the Annual Report Questionnaire from Member States 2002–2020', n.d.
 29 UNODC, 'Responses to the Annual Report Questionnaire', n.d.

heading northwards towards Central and North America;³⁰ via Ecuador, from where it exits via a variety of modalities to different destinations, including Europe as well as a northward route towards Central and North America;³¹ via Peru;³² via the Atlantic coast on the eastern flank of Colombia, especially through Venezuela (Bolivarian Republic of),^{33 34} and to some extent through Guyana and Suriname;^{35 36} via Brazil³⁷ and on its waterways leading to the Atlantic Coast;³⁸ and across the land border with Panama.^{39 40} Outgoing cocaine consignments detected at ports in Colombia continue to be predominantly in the form of cocaine hydrochloride; in 2021, Colombian National Police seized 67 tons of cocaine hydrochloride in ports, but only 109 kg of cocaine base out of a total of 62 tons of cocaine base seized by Colombian National Police in 2021 were seized in ports.⁴¹ Operations of the Colombian National Police in 2019–20 yielded seizures of 526 kg of cocaine base along the route towards Ecuador.⁴²

From Peru, cocaine may exit through the following channels: via its extensive coastline with the Pacific Ocean; into Ecuador; via its eastern borders with Bolivia (Plurinational State of) and Brazil, including through clandestine flights; and via its border with Chile.⁴³ This may include significant quantities of cocaine in base form, which so far have been documented mainly across the land borders shared with neighbouring countries; in particular a share of cocaine trafficked from Peru into Bolivia (Plurinational State of), is believed to be in the form of coca paste (PBC).^{44 45} Multiple experts indicate that trafficking into Brazil in base form also occurs across the land borders with Peru and the Plurinational State of Bolivia in order to feed the domestic market for

smokable cocaine consumer products (in base form),^{46 47} which are likely derived directly from coca paste (PBC) or cocaine base in the case of Brazil.⁴⁸ Some indications of the presence of laboratories in Brazil producing cocaine hydrochloride suggest however that the intended destination of cocaine in base form goes beyond the domestic Brazilian market for smoked cocaine, but the extent of this phenomenon is unknown^{49 50}, and significant numbers of laboratories processing cocaine hydrochloride for the domestic market likely also exist in Brazil.⁵¹

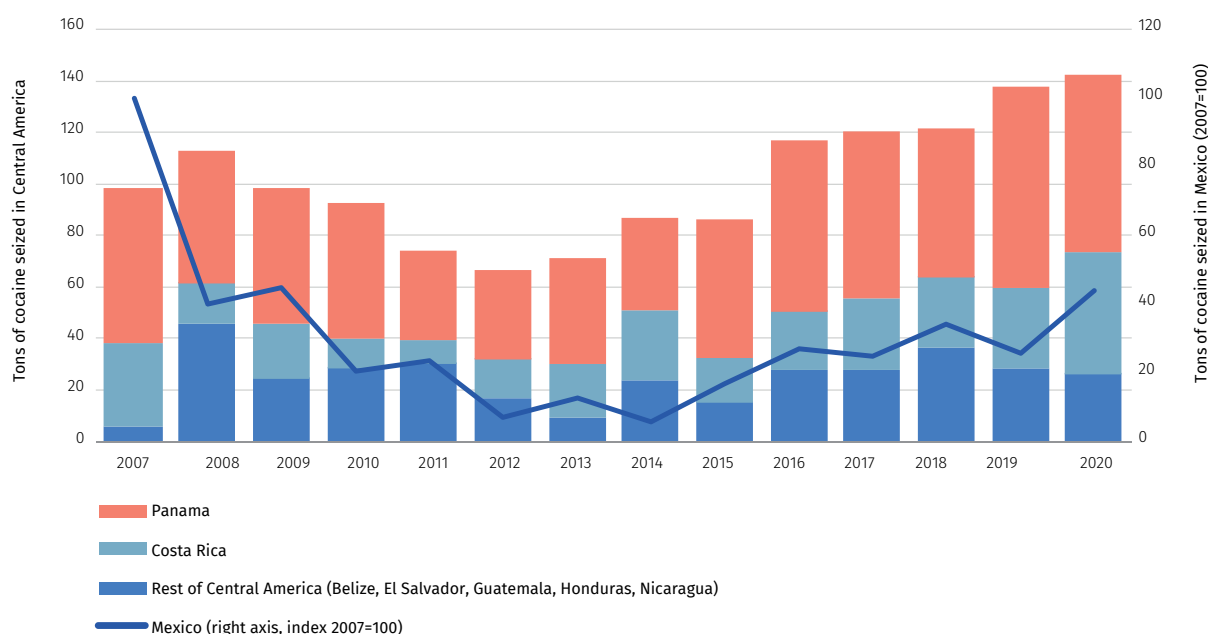
Bolivia (Plurinational State of), a landlocked country sharing borders with 5 countries, functions to some extent as a transit country in addition to a country of origin for cocaine. Aside from cocaine coming into Bolivia (Plurinational State of) across the border with Peru, cocaine trafficking from Bolivia (Plurinational State of) occurs eastwards and southwards, into Brazil,^{52 53 54} Paraguay,^{55 56 57} Argentina^{58 59 60 61} and Chile.^{62 63 64} On the other hand, aside from Brazil, the available evidence does not indicate significant quantities of cocaine reaching South American transit countries north of the Plurinational State of Bolivia (such as Ecuador, Guyana, Suriname or Bolivarian Republic of Venezuela) from Bolivia (Plurinational State of).⁶⁵

There appear to be marked differences across the destination markets of Europe and North America in terms of the relative importance of the three countries of origin; in particular the share traceable to Bolivia (Plurinational State of) and Peru tends to be higher in Europe than in North America (despite Colombia being an important

30 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets' (Colombia, 11 November 2021).
 31 Ibid.
 32 Policía Nacional de Colombia, 'Rutas y Destinos Del Tráfico de Sustancias Ilícitas, 2021' (Centro Internacional de Estudios Estratégicos contra el Narcotráfico, May 2022).
 33 Drug Enforcement Administration, '2020 National Drug Threat Assessment' (Washington D.C.: United States Department of Justice, March 2021).
 34 Policía Nacional de Colombia, 'Rutas y Destinos Del Tráfico de Sustancias Ilícitas, 2021'.
 35 Interview #24, interview by UNODC, 2022.
 36 Jeremy McDermott et al., 'The Cocaine Pipeline to Europe' (Global Initiative Against Transnational Organized Crime, 2021).
 37 Policía Nacional de Colombia, 'Rutas y Destinos Del Tráfico de Sustancias Ilícitas, 2021'.
 38 Interview #15, interview by UNODC, 2022.
 39 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.
 40 Policía Nacional de Colombia, 'Rutas y Destinos Del Tráfico de Sustancias Ilícitas, 2021'.
 41 Centro Internacional de Estudios Estratégicos contra el Narcotráfico, 'Informe Ejecutivo – Incautaciones Base y Clorhidrato de Cocaína 2018–2021' (Bogotá, April 2022).
 42 Policía Nacional de Colombia, 'Rutas y Destinos Del Tráfico de Sustancias Ilícitas, 2021'.
 43 Policía Nacional del Perú, 'Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú' (Peru Ministry of Interior, 2020).
 44 Ibid.
 45 Mauricio Quiroz Teran, 'Resabios de Sendero y dos carteles de Brasil controlan la narcoruta Perú – Bolivia', El Deber, 19 July 2021.

46 Interview #15.
 47 Brazil Federal Police, 'PeQui Project (Identification Project for the Chemical Profile of Drugs)', n.d.
 48 UNODC, 'Cocaine: A Spectrum of Products', Cocaine Insights 2 (Vienna: UNODC, October 2021).
 49 'UNODC Technical Meeting on "Coca/Cocaine Production Sites"' (online web-based, 17 June 2021).
 50 In its response to the Annual Report Questionnaire for 2017, Brazil reported 3 cocaine hydrochloride laboratories seized during this year.
 51 Brazil Federal Police, 'PeQui Project (Identification Project for the Chemical Profile of Drugs)'.
 52 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2019', n.d.
 53 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2020', n.d.
 54 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2021', n.d.
 55 UNODC, 'Paraguay, Responses to the Annual Report Questionnaire 2019', n.d.
 56 Paraguay, 'Responses to the CRIMJUST "Illicit Flows" Questionnaire', 2022.
 57 Interview #34, interview by UNODC, 2022.
 58 UNODC, 'Argentina, Responses to the Annual Report Questionnaire 2016', n.d.
 59 Interview #19, interview by UNODC, 2022.
 60 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.
 61 Argentina, 'Responses to the CRIMJUST "Illicit Flows" Questionnaire', 2022.
 62 UNODC, 'Chile, Responses to the Annual Report Questionnaire 2019', n.d.
 63 UNODC, 'Chile, Responses to the Annual Report Questionnaire 2020', n.d.
 64 UNODC, 'Chile, Responses to the Annual Report Questionnaire 2021', n.d.
 65 In January 2020, Mexican authorities seized 780 kg of cocaine were seized from a plane which had landed in Chetumal, close to the southern border (UNODC Drugs Monitoring Platform). According to an Argentinian prosecutor cited in media coverage, the jet had likely left empty from Salta, Argentina and was loaded with cocaine in Peru or the Plurinational State of Bolivia. 'Piloto boliviano capturado en México con una tonelada de droga en 2019 tuvo un percance aéreo en Cuatro Cañadas', El Deber, 30 January 2020, sec. PAÍS.

Cocaine seizures in Central America and in Mexico, 2008–2020



Note: It should be borne in mind that significant quantities of cocaine transiting Panama and Costa Rica are destined for consumer markets outside North America, such as Europe, and thus do not necessarily transit Mexico.

Sources: UNODC, responses to the annual report questionnaire.

country of origin also in Europe), while the North American market appears to be supplied predominantly from Colombia. Based on forensic profiling conducted by the Cocaine Signature Programme of the Drug Enforcement Administration (United States) during the second half of 2021, of the 436 samples taken from 99 seizures in the United States of at least 1kg each made during January–June 2021, 98 per cent were assessed to have originated from Colombia. On the other hand, out of 113 samples submitted to the Drug Enforcement Administration by 6 European countries for which the origin could be determined⁶⁶ and analysed during the same period, 67 per cent were traced to Colombia, 27 per cent to Peru, and 5 per cent to Bolivia (Plurinational State of).⁶⁷

Trafficking from South America to North America

North America, with its large consumer base,⁶⁸ continues to be one of the main destinations for cocaine trafficked from South America. Mexico is an important transit country functioning as a gateway for cocaine reaching the United States,⁶⁹ which accounts for the majority of cocaine users in North America,⁷⁰ as well as Canada (primarily via the United States, but also directly from Mexico⁷¹). Cocaine reaches Mexico from South America via different routes: via maritime shipments, especially

using go-fast boats; via clandestine flights; and also, via land.

Maritime trafficking appears to be the dominant modality along the western (Pacific) coast of the Central American landmass,⁷² with several identified maritime routes ending directly on the western coast of Mexico, including states like Chiapas, Oaxaca, Guerrero, Michoacán, Jalisco and Sinaloa,^{73 74} while others make landfall further south, in Central American countries with a coast on the Pacific, such as (from north to south) Guatemala,^{75 76} El Salvador,^{77 78 79} Nicaragua,^{80 81} Costa Rica^{82 83} and Panama,⁸⁴ before continuing the journey north. Traffickers rely extensively on go-fast boats for trafficking along this route,⁸⁵ but other vessels, including semi-submersibles⁸⁶ and fishing

66 In another 39 cases the origin could not be determined.

67 Drug Enforcement Administration. January 2022 CSP Report, DEA PRB 2022–07, 2022.

68 See subsequent section on North America

69 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

70 UNODC, 'World Drug Report 2022'.

71 UNODC, 'Canada, Responses to the Annual Report Questionnaire 2020', n.d.

72 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

73 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

74 Manrique Gandaria, 'Envían droga a México por cinco rutas marítimas', El Sol de México, 26 February 2021.

75 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'. r

76 Alex Papadovassilakis, 'The Jalisco Cartel's Quiet Expansion in Guatemala', InSight Crime, 18 May 2022.

77 Interview #16, interview by UNODC, 2022.

78 Interview #32, interview by UNODC, 2022.

79 Interview #33, interview by UNODC, 2022.

80 Interview #32.

81 Interview #33.

82 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'. Presentation by Costa Rica

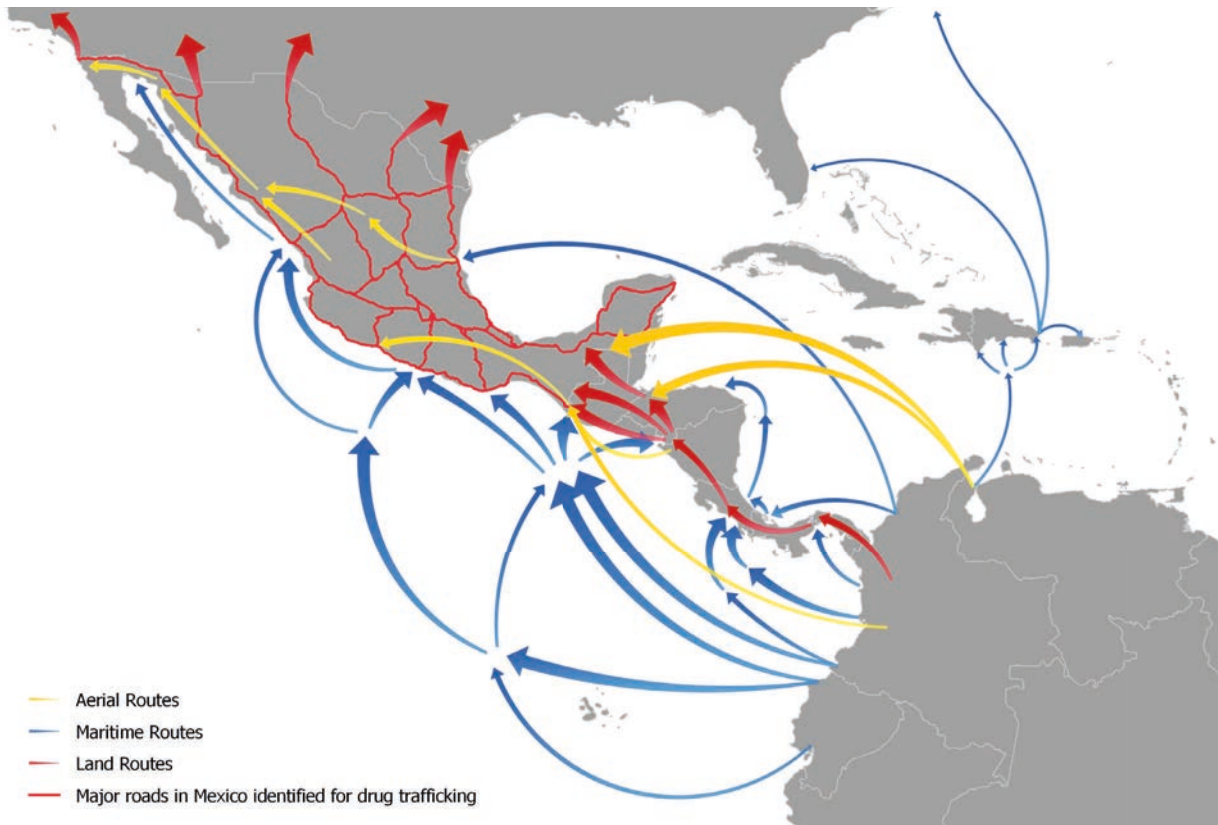
83 Interview #29, interview by UNODC, 2022.

84 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

85 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

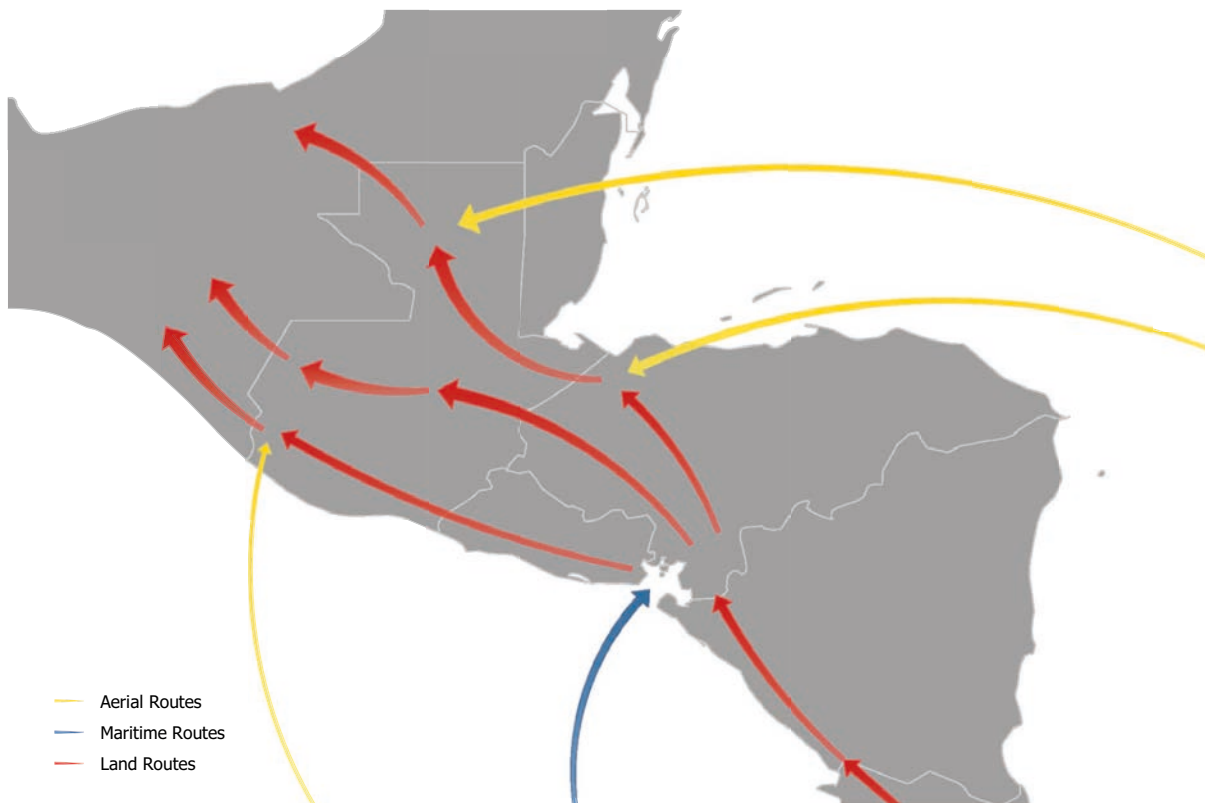
86 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

Cocaine trafficking routes from South America to North America, 2021



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations.
 Sources: UNODC CRIMJUST Annual Meeting of Strategic Analysts, Girardot, Colombia, November 2021; US Drug Enforcement Administration. 2020 National Drug Threat Assessment; Washington D.C.: National Drug Intelligence Center, 2021; El Heraldo, "Las seis rutas que usa el narcotráfico en su paso por Honduras", 21 February 2022.

Transition of cocaine trafficking towards Mexico from seaborne and airborne modalities to land routes, in El Salvador, Guatemala and Honduras



Sources: UNODC CRIMJUST Annual Meeting of Strategic Analysts, Girardot, Colombia, November 2021; UNODC interviews #16, #32 and #33; Héctor Silva Ávalos et al., "GameChangers 2020: The Resurgence of the Central American Cocaine Highway", Insight Crime, 28 December 2020; Julie López, "Por qué una aeronave con cocaína aterriza en Guatemala cada diez días desde 2019", Prensa Libre, 26 April 2021.

boats,^{87 88 89} are also used. The US Drug Enforcement Administration estimated this route to account for 74 per cent of cocaine flowing north out of South America.⁹⁰ Ecuador is a major departure country for cocaine leaving the South American landmass along this route.⁹¹ Once the vessels reach or approach the Pacific coast of Central America, cocaine may also be transferred to other maritime vessels to continue northward along the coast.⁹²

Although some clandestine flights have been observed along the Pacific coast of Central America, including some affecting the Mexican airspace close to the border with Guatemala,⁹⁷ and some departing from Ecuador to various destinations,⁹⁸ this mode of conveyance appears to be more pronounced along the eastern (Caribbean) coast, where flights are extensively used alongside maritime shipments to facilitate the northward flow of cocaine from South America towards Mexico.⁹⁹ Venezuela (Bolivarian Republic of) is a major point of departure for such flights.^{100 101 102} While some of these flights appear to reach Mexico directly (close to its southern borders, for example in the state of Quintana Roo),¹⁰³ others land on the Guatemalan side of the Mexico-Guatemala border,¹⁰⁴ or else in Honduras^{105 106} or Belize.¹⁰⁷

Cocaine is also trafficked through Central America towards Mexico via land routes, sometimes crossing several land borders sequentially from south to north.¹⁰⁸ Small quantities are trafficked already across the Colombia-Panama border,¹¹² but trafficking by land often comes after earlier segments of the itinerary involving

maritime or air modalities; specific instances of this transition to land routes have been documented for example in trafficking from El Salvador into Guatemala (after reaching El Salvador via maritime routes through the Gulf of Fonseca),^{113 114 115} from Honduras into Guatemala (after reaching Honduras by air^{116 117}), and from Guatemala into Mexico (after reaching Guatemala by air¹¹⁸).

Once cocaine enters Mexico, it is trafficked internally towards the United States, predominantly by land, and also by means of internal clandestine flights.¹¹⁹ In contrast with the important role of containerized shipping on maritime routes used for trafficking to Europe, cocaine trafficking from Mexico into the United States has been mainly documented across the shared land border using non-containerized mode of conveyance (even if sometimes commingled with legitimate goods), often concealed in vehicles, and sometimes using underground tunnels and drones.¹²⁰ However, the use of maritime vessels for trafficking into the United States, including through official points of entry, has also been observed.¹²¹

Aside from cocaine transiting through Mexico, a minority of cocaine reaches the territory of the United States via the eastern Caribbean route, whereby the drug moves northwards from Venezuela (Bolivarian Republic of) towards the Caribbean islands via a combination of go-fast vessels and fishing boats, and reaches the United States via Puerto Rico and Florida, bypassing the landmass of Central America and Mexico entirely; the Dominican Republic functions as an important transit country on this route.^{122 123 124} Furthermore, maritime containers are used to traffic cocaine from the Dominican Republic to ports in Florida, Georgia, Philadelphia, and New York.¹²⁵

87 Ibid.

88 Interview #32.

89 Interview #33.

90 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

91 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

92 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

93 Interview #29.

94 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

95 Interview #32.

96 Interview #33.

97 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

98 Ibid.

99 Ibid.

100 Interview #24.

101 Interview #16.

102 Alessandro Ford, 'Game Changers 2020: The Resurgence of the Central American Cocaine Highway', InSight Crime, 28 December 2020.

103 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

104 Interview #24.

105 Ibid.

106 Interview #16.

107 Ibid.

108 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

109 Interview #32.

110 Interview #33.

111 Ford, 'Game Changers 2020: The Resurgence of the Central American Cocaine Highway'.

112 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

113 Interview #32.

114 Interview #33.

115 Interview #16.

116 Ibid.

117 Ford, 'Game Changers 2020: The Resurgence of the Central American Cocaine Highway'.

118 Ibid.

119 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

120 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

121 Ibid.

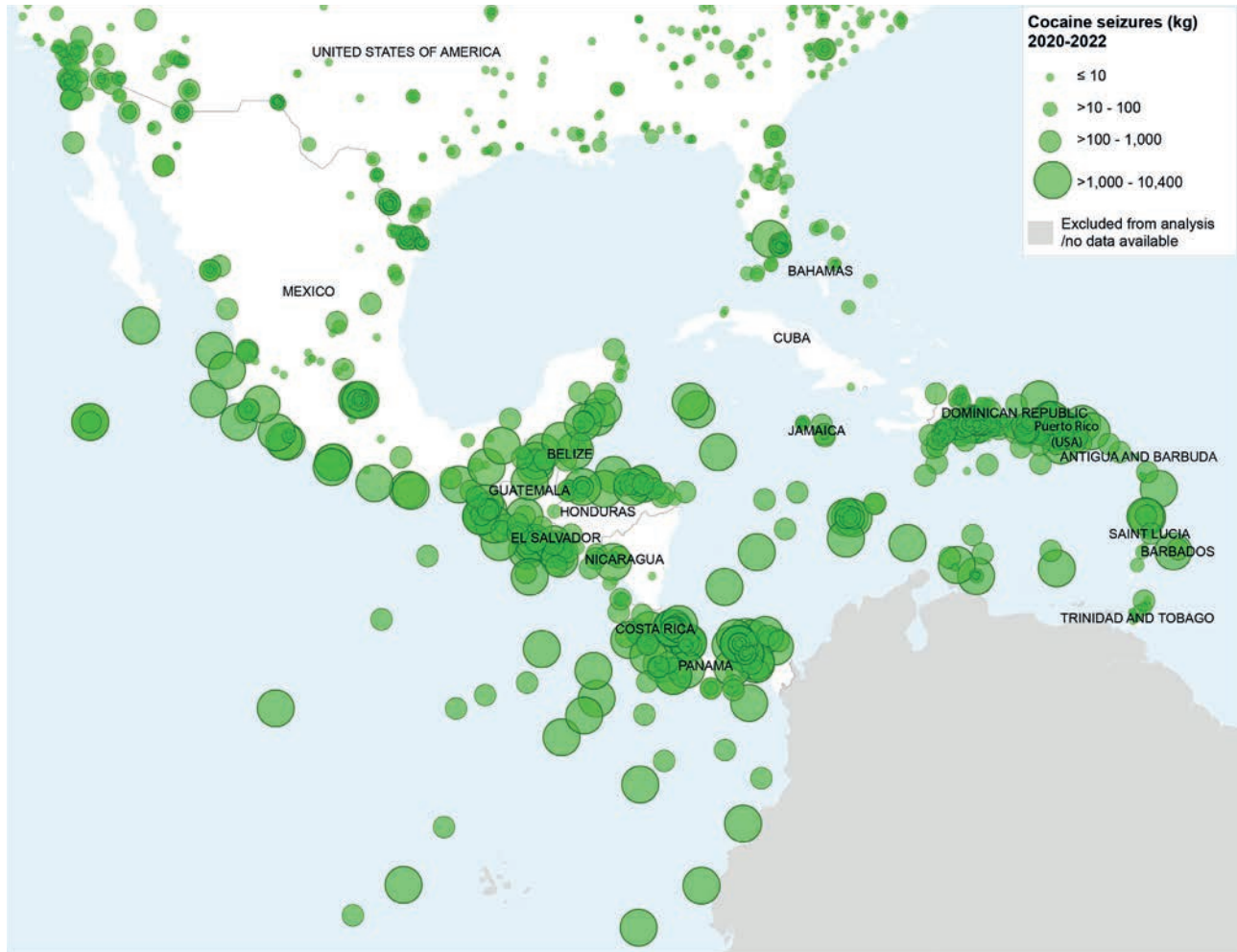
122 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

123 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

124 Interview #24.

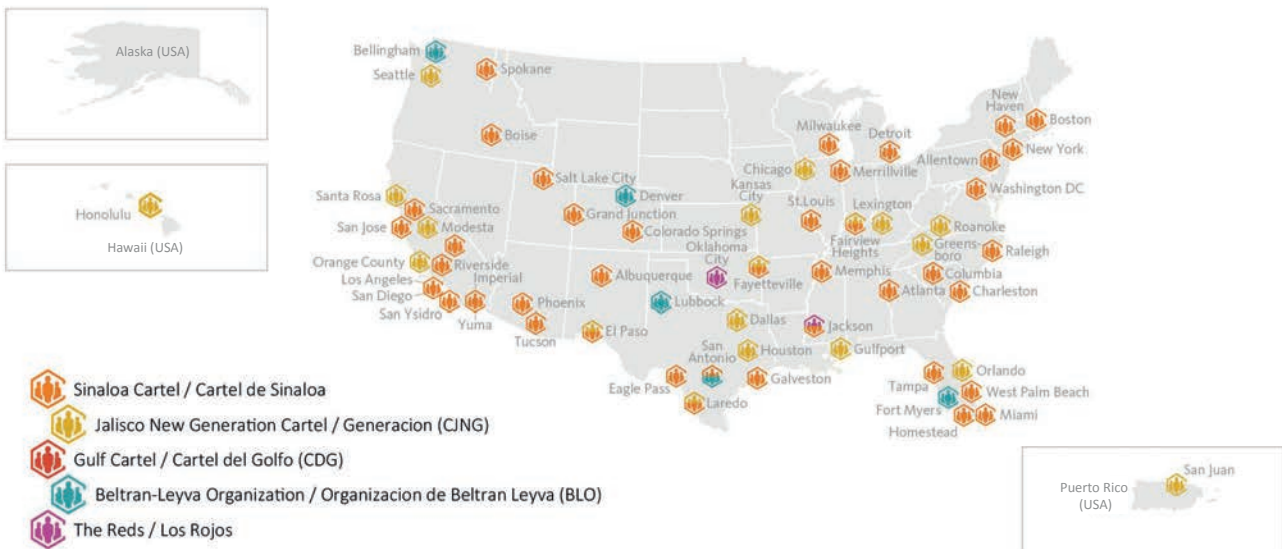
125 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

Individual cocaine seizure cases recorded in UNODC Drugs Monitoring Platform in and around Central America and the Caribbean, 2020–June 2022



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Source: UNODC, Drugs Monitoring Platform.

Dominant Mexican transnational organized crime groups active in the United States, 2019



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Note: Different groups may be present in the same city; only the ones with the strongest presence are shown. Source: Adapted from: US Drug Enforcement Administration, National Drug Threat Assessment 2020, March 2021.

Cocaine trafficking from the Pacific coast of South America, 2019-2021



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Sources: UNODC, CRIMJUST Meeting of Strategic Analysts on Cocaine Trafficking and Markets, Girardot, Colombia, November 2021; UNODC Drugs Monitoring Platform; Policía Nacional del Perú, *Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú*, 2020; World Customs Organization Regional Intelligence Liaison Office - Western Europe; Ministerio Público de Chile, Fiscalía, "Observatorio del Narcotráfico, Informe 2021", September 2021.

According to United States authorities, Mexican organized crime groups, especially the *Cártel de Sinaloa* and the *Cártel de Jalisco Nueva Generación*, are foremost in orchestrating the trafficking of cocaine into the United States, and they are also active within the United States, controlling the wholesale distribution within the country. Dominican groups manage the incoming flows through the eastern Caribbean route and are especially involved in the distribution of cocaine in the north-east of the United States, including having a role at the mid-level (procuring from suppliers within the United States).¹²⁶

Trafficking within and from South America to other markets

Aside from northwards trafficking towards the North American market, a number of other intra-regional and inter-regional trafficking routes originating in South

America, notably maritime routes, are important in supplying cocaine markets worldwide.

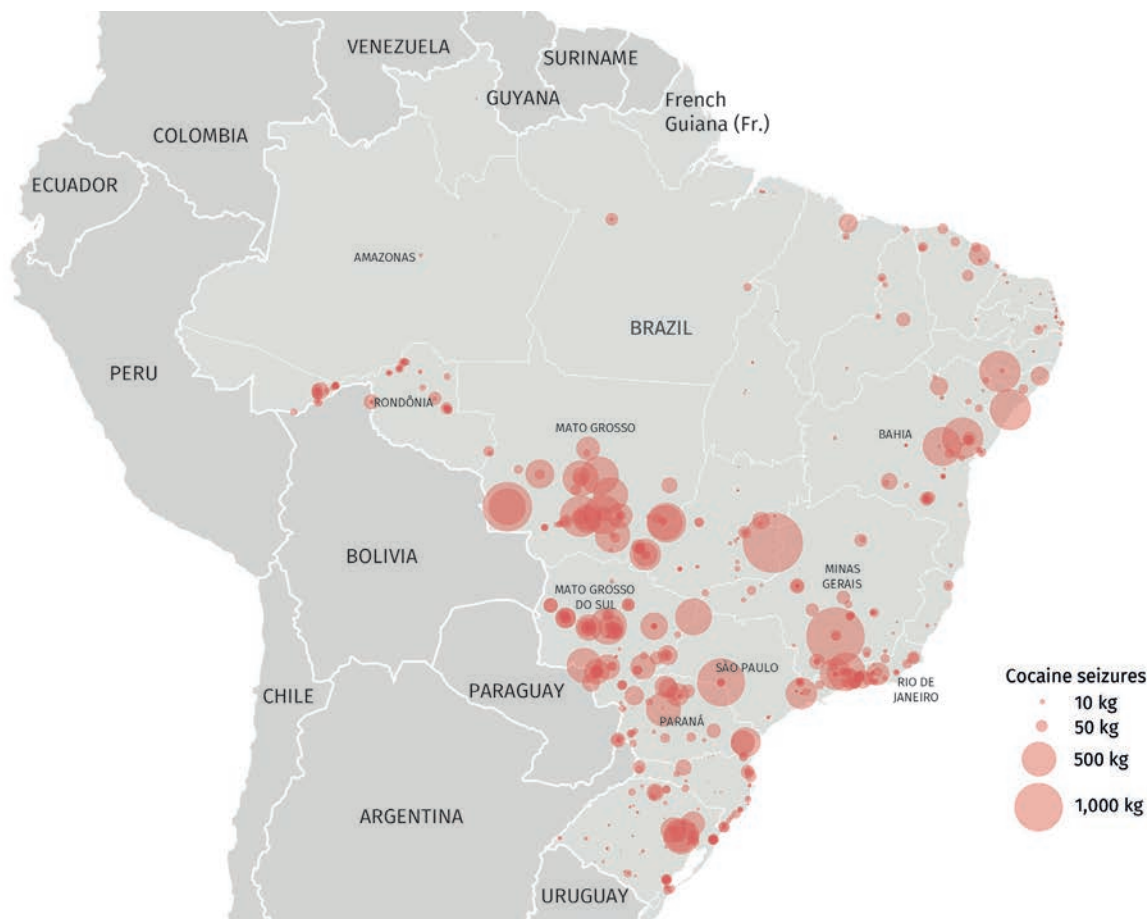
Firstly, the Pacific coast is a springboard for shipments of cocaine to outlying destinations. In 2021 alone, Colombian authorities made at least four seizures of 1 ton or more at the Pacific port of Buenaventura, from containers destined for Guatemala, Netherlands, Mexico, and Spain.¹²⁷ Peruvian authorities estimated that, as of 2019, maritime routes accounted for 45 per cent of the outgoing flows of cocaine-type drugs from Peru; these routes exploit in particular the legal trade from ports such as Callao and Paita.¹²⁸ Ecuador, bordering both Colombia and Peru, has in recent years gained in importance as a departure point for cocaine shipments, especially those destined towards Europe; based on reporting by customs

126 Ibid.

127 UNODC, 'Drugs Monitoring Platform', n.d.

128 Policía Nacional del Perú, 'Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú'.

Cocaine seizures on highways by Brazilian Road Police, 2020



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Source: Polícia Rodoviária Federal, Brazil; Centre of Excellence for Illicit Drug Supply Reduction, Brazil.

authorities to the World Customs Organization, the proportion of cocaine reported to the Regional Intelligence Office for Western Europe with Ecuador identified as a departure point rose from 14 per cent in 2018 to 29 per cent in 2020 and 28 per cent in 2021.^{129 130}

Based on seizures made by Ecuadorean authorities, the proportion of cocaine destined for Europe increased from 9 per cent in 2019 to 33 per cent in 2021, increasing to more than 50 percent when only counting cases where the destination was known.¹³¹ In 2021 most of the largest seizures in Ecuador were made at the port city of Guayaquil.¹³² In January 2021, Gambian authorities seized nearly 3 tons of cocaine from a container, likely owned by a Gambian resident, which had been shipped from Guayaquil.¹³³ These routes are in addition to the more established trafficking from Ecuador towards North America, mainly on undeclared sea voyages using go-fast boats, underwater craft and fishing vessels (sometimes in combination with tug-boats).¹³⁴ Chile is also used as a transit country for cocaine

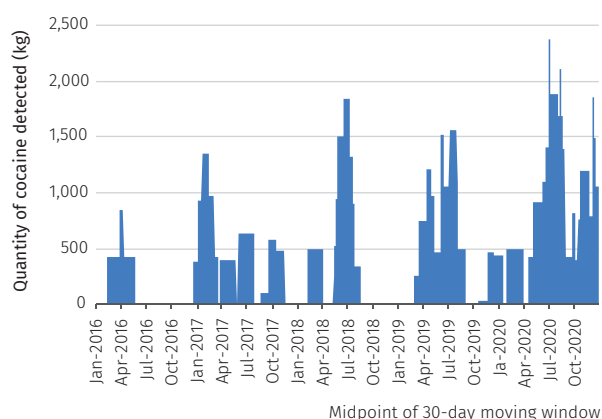
trafficked from Colombia and Peru¹³⁵ to Europe and the United States, in particular via ships departing the port of San Antonio;¹³⁶ this includes a strategy in which containerized goods are nominally imported and re-exported so that the country of departure appears as Chile.^{137 138}

Secondly, large quantities of cocaine are trafficked across land borders into Brazil from each of Bolivia (Plurinational State of), Colombia and Peru.^{139 140} The entry channels include trafficking by air (small planes), land (couriers, cars, trucks and buses) and rivers (small boats, especially in the Amazon area).¹⁴¹ Aside from trafficking directly from the source countries, cocaine also enters Brazil from Paraguay. Paraguayan authorities assessed that, in 2019, 38 per cent of cocaine salts seized on their territory was destined for Brazil.¹⁴²

129 WCO RILO (Regional Intelligence Liaison Office) Western Europe.
 130 Shipments with an unknown point of departure are not considered.
 131 'CRIMJUST Annual Meeting - Latin American and Caribbean' (Colombia, 3 February 2022).
 132 UNODC, 'Drugs Monitoring Platform', n.d.
 133 Ibid.
 134 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

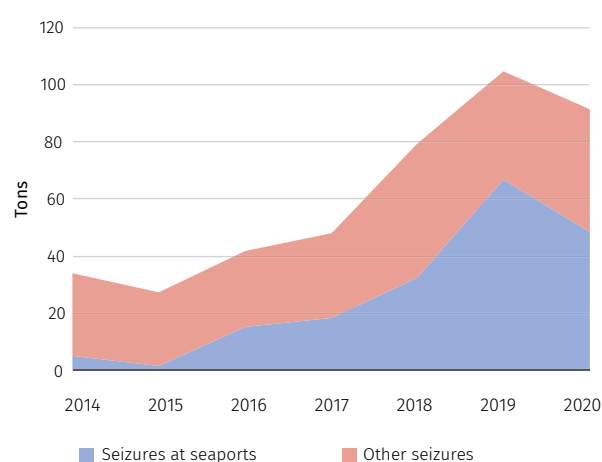
135 Interview #2, interview by UNODC, 2022.
 136 Fiscalía de Chile, 'Informe 2021 Observatorio del Narcotráfico en Chile' (Fiscalía de Chile, 2021).
 137 Interview #2.
 138 UNODC, 'Chile, Responses to the Annual Report Questionnaire 2021'.
 139 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2019'.
 140 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2020'.
 141 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2019'.
 142 UNODC, 'Paraguay, Responses to the Annual Report Questionnaire 2019'.

Quantity of cocaine detected in aircraft-related trafficking incidents in Brazil, 2016–2020 (30-day moving window)



Source: Monitoring of media reports by UNODC; reproduced from UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022).

Cocaine seized in Brazil by Federal Police, breakdown into seaport seizures and others



Source: Polícia Federal, Brazil; reproduced from UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022).

The Brazilian states of Mato Grosso (bordering the Plurinational State of Bolivia) and Mato Grosso do Sul (bordering the Plurinational State of Bolivia and Paraguay) are important points of entry for cocaine trafficking.¹⁴³ Clandestine flights trafficking cocaine into Brazil on small planes are often detected in this region, and this modality appears to have increased recently, likely as a reaction by traffickers to obstacles in using other channels impacted by restrictions related to COVID-19.¹⁴⁴ However, cocaine also enters Brazil through the northern states of Amazonas (bordering Colombia and Venezuela (Bolivarian Republic of) as well as Peru) and Roraima (bordering Bolivarian Republic of Venezuela, in addition to Guyana).^{145 146} The northern parts of Brazil are difficult to police, with large expanses of tropical jungle, while transportation along the rivers is inexpensive;^{147 148} seizures in this region are potentially under-represented in comparison with the extent of trafficking. According to Colombian law enforcement, 7.7 tons of cocaine *en route* to Brazil were seized over 2020–2021. The region of Guaviare (Colombia) appears to be key in the supply channel across the Colombia-Brazil border. Moreover, the area around the triple intersection of the borders of Brazil, Colombia and Peru is also affected by various other types of criminal activity, including trafficking in persons, wildlife crime and illegal mining.¹⁴⁹

According to the Brazilian Federal Police, over the period 2014 to August 2021, 65 per cent of incoming clandestine flights (carrying drugs) detected in Brazil originated in the Plurinational State of Bolivia, followed by Paraguay

(17 per cent), Peru (8 per cent), Colombia (6 per cent) and Venezuela (Bolivarian Republic of) (4 per cent).¹⁵⁰

Some of the cocaine reaching Brazil serves to supply its substantial domestic market; however large quantities are further trafficked towards destination markets^{151 152} such as Europe, notably in containerized shipments via the numerous seaports along Brazil's Atlantic coast.¹⁵³ Large quantities of cocaine are seized both at Brazilian seaports and at seaports in destination countries, having departed from Brazil,¹⁵⁴ especially in Europe. Indeed, seizures at seaports have defined the overall trend in aggregate seizures in Brazil over the period 2014–2020 and exceeded half of the total seizures in Brazil in 2019 and 2020.¹⁵⁵ Based on reporting by customs authorities of countries in Western and Central Europe to the World Customs Organization, in 2021 Brazil was the second most prominent (by weight, after Ecuador) country of departure¹⁵⁶ among cocaine seizures reported to the Regional Intelligence Office for Western Europe.¹⁵⁷ Recently, a diversification of the Brazilian ports used has been observed, with the total share seized in the ports of Santos (São Paulo) and Paranaguá (Paraná) decreasing while other ports, such as Salvador (Bahia), Ilhéus (Bahia) and Joinville (Santa Catarina) registered increases.^{158 159} Diversification is also visible in terms of the destination of cocaine trafficked from Brazilian ports; the number of known destination countries identified from seizures

143 UNODC and CoE Brazil, 'Cocaine Insights 4'.

144 Ibid.

145 Interview #15.

146 Interview #36, interview by UNODC, 2022.

147 Interview #15.

148 Interview #36.

149 Policía Nacional de Colombia, 'Rutas y Destinos Del Tráfico de Sustancias Ilícitas, 2021'.

150 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

151 Interview #15.

152 Interview #36.

153 UNODC and CoE Brazil, 'Cocaine Insights 4'.

154 Ibid.

155 Based on data from Brazilian Federal Police.

156 The point of departure represents the location from which the shipment containing the seized drug was dispatched, based on the details of (declared) itineraries available to Customs Officers.

157 WCO RILO (Regional Intelligence Liaison Office) Western Europe.

158 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2021'.

159 UNODC and CoE Brazil, 'Cocaine Insights 4'.

in Brazilian ports grew from 7 in 2018 to 20 in 2019 and 21 in 2020. The main destinations in 2019 and 2020 were Belgium and Netherlands, followed by Spain.^{160 161}

In Brazil, the organized crime group *Primeiro Comando da Capital* (PCC) reportedly dominates most of the international cocaine trafficking routes through Brazil to Europe and Africa¹⁶², and appears to be the primary interlocutor for European groups sourcing cocaine supplies from Brazil,¹⁶³ notably the Italian OCG *'Ndrangheta'*.¹⁶⁴ The foremost traditional rival of the PCC, the *Comando Vermelho*, reportedly also has international drug trafficking links to source countries.¹⁶⁵ Another important group which has emerged recently is the *Familia do Norte*, especially active close to the triple border of Brazil, Peru and Colombia. These three major groups are in competition for the dominance of the drug trade in the area around the triple intersection of the Amazonian borders of Brazil, Colombia and Peru.^{166 167 168}

A channel which has recently gained in importance is the “southern cone” route which goes from Peru and Bolivia (Plurinational State of) towards the River Plate estuary on the Atlantic coast of Argentina or Uruguay, frequently through Paraguay, and typically relies on the Paraguay-Paraná Waterway, often used in combination with clandestine flights.¹⁶⁹

Bolivia (Plurinational State of) and Peru share a land border, and some cocaine trafficking¹⁷⁰ occurs from Peru into Bolivia (Plurinational State of),¹⁷¹ including via clandestine flights.¹⁷² Peruvian authorities linked clandestine airstrips in the regions of Ayacucho, Huánuco, Junín, Madre de Dios, Pasco, San Martín and Ucayali to trafficking by air to the Plurinational State of Bolivia (and onward to Paraguay, Argentina and Brazil). While flights from Peru into Brazil were an emerging trend as of 2020 – leaving mainly from the region of Loreto – clandestine airstrips in Peru were concentrated in the contiguous regions of Huánuco (45 per cent), Pasco (45 per cent) and Ucayali (8 per cent).¹⁷³ The Peruvian authorities further estimated that, as of 2019, clandestine flights to Bolivia (Plurinational

State of) and Brazil accounted for 37 per cent of the outgoing flows of cocaine-type drugs from Peru.¹⁷⁴ Moreover, they assessed that increased seizures of coca paste (PBC) in several regions¹⁷⁵ were possibly linked to trafficking eastwards for further processing in Bolivia (Plurinational State of), Paraguay, Brazil or Europe.¹⁷⁶ Bolivian authorities seized 50 clandestine laboratories manufacturing cocaine hydrochloride (“crystallization” laboratories) in 2019,¹⁷⁷ 36 in 2020¹⁷⁸ and 26 in 2021.¹⁷⁹

Paraguay is an important transit country which receives cocaine predominantly across the shared border with Bolivia (Plurinational State of),^{180 181 182} and whose role has recently been highlighted by detections of large quantities of cocaine trafficked across the Atlantic. For example, in February 2021, 16.2 tons of cocaine were seized in Hamburg (Germany), having been shipped from Villeta port in Paraguay (on the Paraguay River, close to Asunción).¹⁸³ The main points of entry into Paraguay are the north (Chaco Paraguayo) and northeast (departments of Concepción, Amambay and San Pedro) of the country, and clandestine flights are an important modality used.¹⁸⁴ To a lesser extent, cocaine enters Paraguay through the land border with Bolivia (Plurinational State of) – both at official checkpoints and by means of irregular passage.¹⁸⁵ In 2019, Paraguayan authorities seized 302 kg of incoming cocaine trafficked by air and 458 kg by land.^{186 187}

From the landlocked countries of Bolivia (Plurinational State of) and Paraguay, cocaine trafficking towards the Atlantic Ocean proceeds along two major routes:¹⁸⁸ eastward through Brazil; or southward towards the River Plate ports of Argentina and Uruguay (along the “southern cone” route), via a combination of waterborne and airborne con-

160 Data from Polícia Federal, Brazil.

161 UNODC and CoE Brazil, ‘Cocaine Insights 4’.

162 UNODC, ‘Brazil, Responses to the Annual Report Questionnaire 2019’.

163 Interview #36.

164 UNODC and Europol, ‘Cocaine Insights 1’.

165 UNODC, ‘Brazil, Responses to the Annual Report Questionnaire 2019’.

166 Ibid.

167 Interview #15.

168 Interview #36.

169 This route does not include trafficking through Chile.

170 Throughout this report, the term “cocaine” refers to any of the forms of cocaine, including cocaine salts (such as cocaine hydrochloride) as well as products containing cocaine in its base form, such as coca paste (PBC), refined cocaine base, “crack” cocaine.

171 UNODC, ‘Plurinational State of Bolivia, Responses to the Annual Report Questionnaire 2018, 2019, 2020’, n.d.

172 Policía Nacional del Perú, ‘Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú’.

173 Ibid.

174 Ibid.

175 Ayacucho, Cusco, Loreto, Junín, Pasco, San Martín and Ucayali.

176 Policía Nacional del Perú, ‘Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú’.

177 UNODC, ‘Plurinational State of Bolivia, Responses to the Annual Report Questionnaire 2019’, n.d..

178 Fuerza Especial de Lucha Contra El Narcotráfico, ‘Resultados Obtenidos en la Lucha Contra El Narcotráfico’, felcn.gob.bo, 2020. “Recycling” laboratories are not included.

179 Fuerza Especial de Lucha Contra El Narcotráfico, ‘Resultados Obtenidos en la Lucha Contra El Narcotráfico’, felcn.gob.bo, 2021. “Recycling” laboratories are not included.

180 UNODC, ‘Paraguay, Responses to the Annual Report Questionnaire 2019’..

181 Paraguay, ‘Responses to the CRIMJUST “Illicit Flows” Questionnaire’, 2022.

182 Interview #34.

183 UNODC, ‘Drugs Monitoring Platform’, n.d.

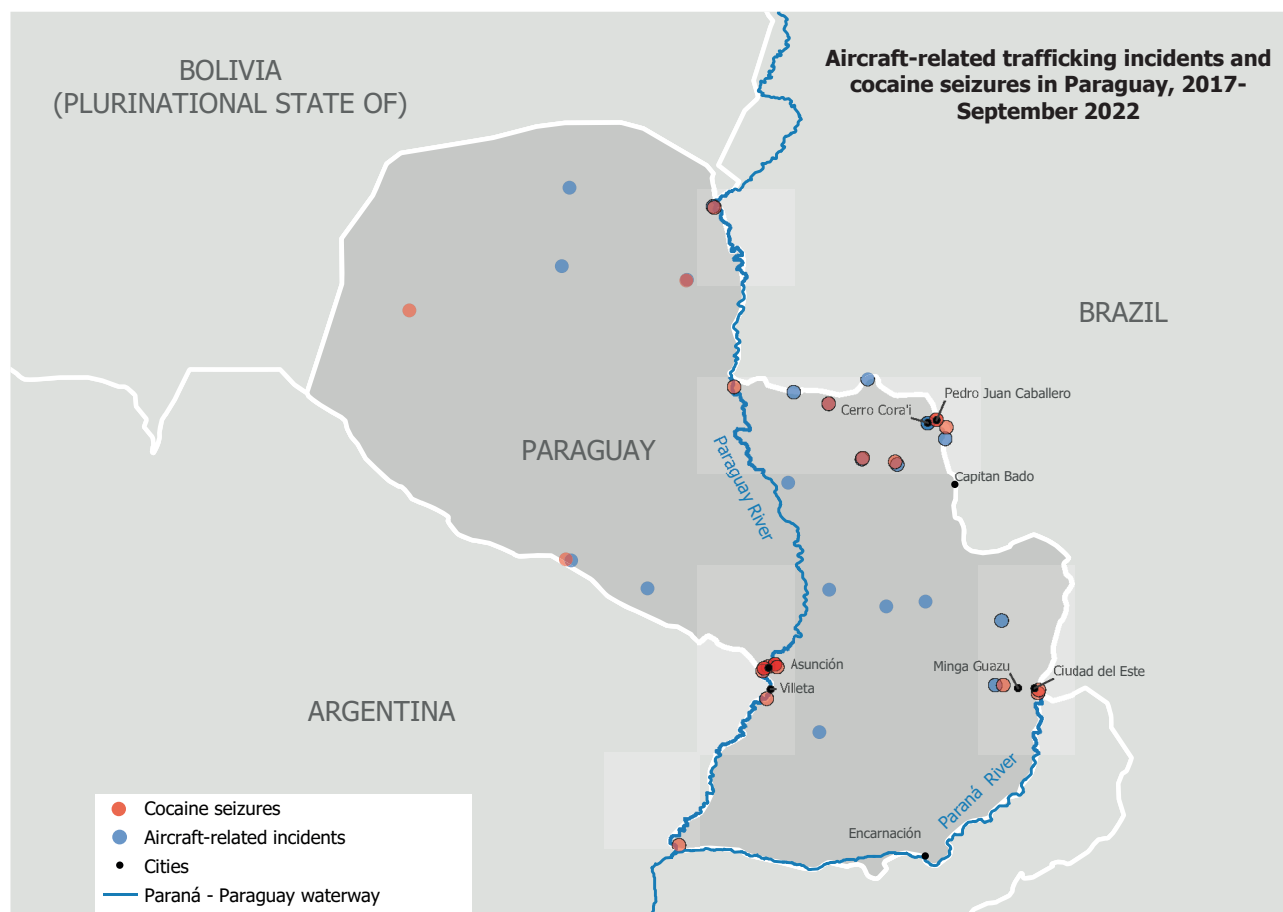
184 Interview #34.

185 Ibid.

186 UNODC, ‘Paraguay, Responses to the Annual Report Questionnaire 2019’.

187 The corresponding information for 2020 was not available.

188 In addition, trafficking from Bolivia (Plurinational State of) into Chile also occurs. In its response to the UNODC Annual Report Questionnaire for 2020, Chile identified Bolivia (Plurinational State of) in third place (after Colombia and Peru) as a country of departure for cocaine hydrochloride reaching its territory, and in first place for the reporting category “coca paste/refined cocaine base”. However, the latter likely represents coca paste (PBC) likely intended for the domestic market; as of 2020, the lifetime prevalence of use of coca paste (PBC) among the general population was estimated at 2.6 per cent, and past-year prevalence at 0.3 per cent.



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations.
Note: Some aircraft-related incidents involve a seizure of cocaine.
Source: UNODC Drug Monitoring Platform.

veyances. The Paraguay-Paraná Waterway is a key channel enabling the latter route.

The Paraguay-Paraná Waterway (*Hidrovia Paraguay-Paraná – HPP*) consists mainly of two fluvial branches which merge into one, namely: a section of the Paraná River – from Foz de Iguazú (at the triple border of Argentina, Brazil and Paraguay) downstream to the confluence with the Paraguay River (near Corrientes) and all the way to the estuary at the Atlantic Ocean; and most of the Paraguay River – from Puerto Cáceres (Brazil) downstream.¹⁸⁹ In addition, the Tamengo canal, an 11km long stretch of water along the border between Bolivia (Plurinational State of) and Brazil flowing into the Paraguay River, is also considered to be part of the Paraguay-Paraná Waterway.¹⁹⁰ The different branches of the *HPP* amount to around 4,100km of navigable waterway of crucial importance for the movement of goods, connecting more than 200 ports and docks of 5 countries (Argentina, Brazil, Paraguay, Plurinational State of Bolivia and Uruguay) to the River Plate estuary (close to Buenos

Aires, Argentina and Montevideo, Uruguay), and hence to the Atlantic.¹⁹¹

This channel for legal trade has increasingly been exploited to traffic cocaine towards destination markets outside South America. Argentina receives significant shares of incoming cocaine across the borders with Bolivia^{192 193 194 195} or Paraguay^{196 197 198} via different modalities. The main entry point for cocaine has in the past been its northwestern border (provinces of Salta and Jujuy) a hotspot for contraband.¹⁹⁹ The border with Paraguay in the northeast was predominantly used for trafficking of cannabis originating in Paraguay into Argentina.²⁰⁰ In recent years, however, the cannabis trafficking routes have been increasingly used to traffic cocaine.

189 Comité Intergubernamental de la Hidrovia Paraguay-Paraná, 'Informe de la Secretaría Ejecutiva del CIH' (Comité Intergubernamental de la Hidrovia Paraguay-Paraná, 2018).

190 Ibid.

191 Honorable Cámara de Diputados de la Nación Argentina, 'Proyecto de Resolución, Expediente 5386-D-2019', hcdn.gov.ar, 4 December 2019.

192 UNODC, 'Argentina, Responses to the Annual Report Questionnaire 2016'.
 193 Interview #19.

194 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

195 Argentina, 'Responses to the CRIMJUST "Illicit Flows" Questionnaire', 2022.
 196 Interview #19.

197 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

198 Argentina, 'Responses to the CRIMJUST "Illicit Flows" Questionnaire', 2022.

199 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

200 Ibid.

Traditional and emerging inland cocaine trafficking routes towards the southern Atlantic



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Sources: UNODC, annual report questionnaire; UNODC Drugs Monitoring Platform; Official National Publications; UNODC CRIMJUST Meeting of Strategic Analysts on Cocaine Trafficking and Markets, Girardot, Colombia, November 2021; and UNODC and CoE Brazil, *Brazil in the regional and transatlantic cocaine supply chain: The impact of COVID-19*, Cocaine Insights 4, UNODC, Vienna, July 2022

²⁰¹ ²⁰² The same criminal groups that had been providing logistics for cannabis now use their infrastructure for cocaine as well.²⁰³

Some of these incoming flows into Argentina likely feed into the domestic market. The available anecdotal evidence on maritime consignments seized in destination countries suggests that the waterborne segment of itineraries having transited the HPP often begins further upstream, in Paraguay. Over the period February 2020–July 2022, at least 10 instances were documented of large

quantities of cocaine (500 kg or more) seized in maritime ports in Belgium, Côte d'Ivoire, Germany, Netherlands, Portugal and Spain which appear to have departed from Paraguay and reached the Atlantic Ocean via the Paraguay-Paraná waterway.²⁰⁴

The Paraguayan cities and ports along the Paraguay River, such as Asunción and nearby Villeta, are key points of transit and trans-shipment. In October 2020, 2.9 tons of cocaine were seized in Villeta Port from a containerized shipment which was meant to travel downstream along the Paraguay River and on to the Atlantic Ocean, Europe

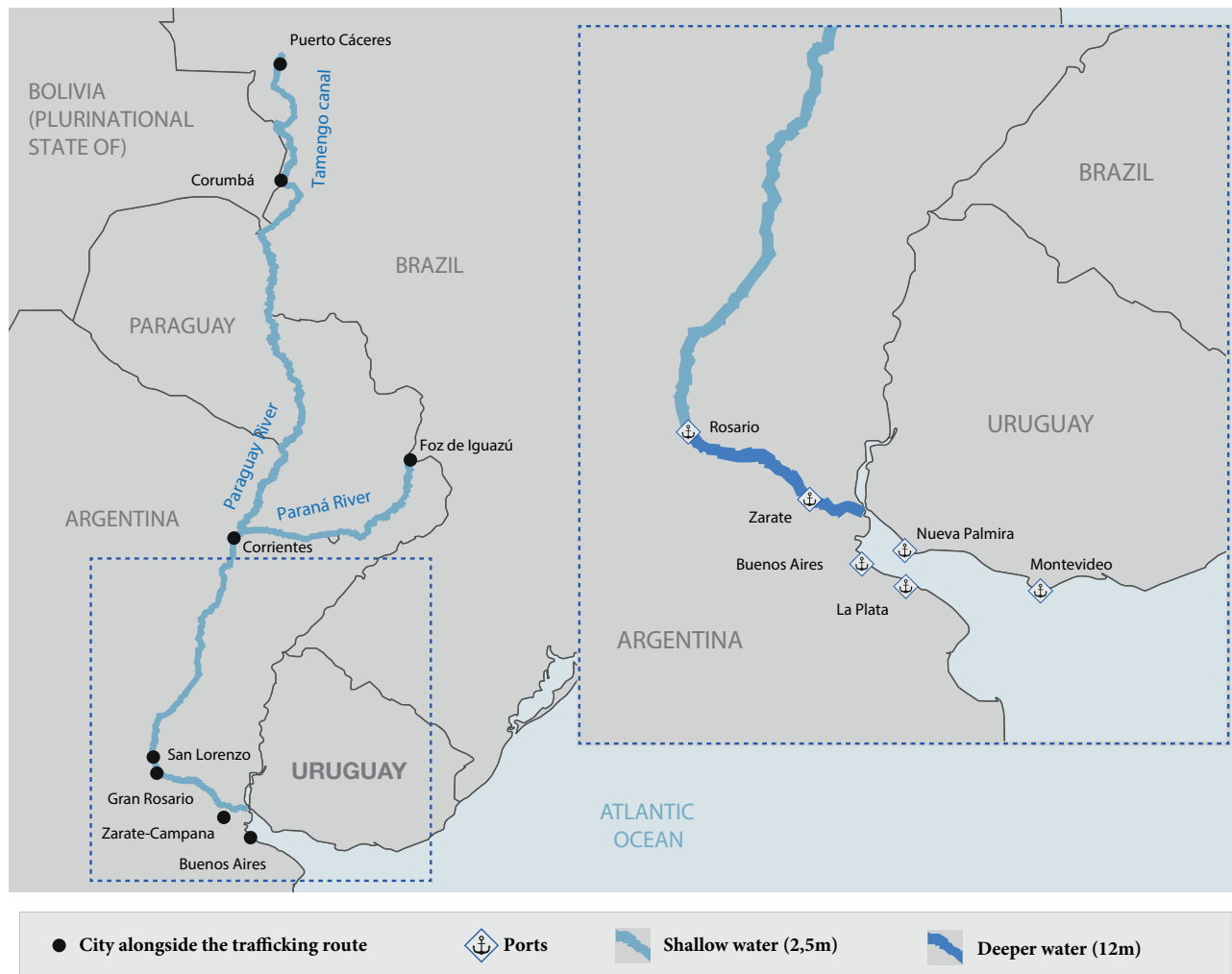
²⁰¹ Ibid.

²⁰² Interview #19.

²⁰³ Ibid.

²⁰⁴ UNODC, 'Drugs Monitoring Platform', n.d.

The Paraná-Paraguay waterway



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Sources: Comité Intergubernamental de la Hidrovía Paraguay-Paraná. Informe de la Secretaría Ejecutiva del CIH, 2018; Argentina, Ministerio de Economía- Agricultura, Ganadería y Pesca, *Hidrovía Paraná-Paraguay*.

and subsequently Israel, including a stop in Belgium.²⁰⁵ Several of the seizures (mentioned above) made in Europe after having transited through Paraguay, displayed links to Asunción or the nearby Villeta port. This included a seizure of 11 tons of cocaine in Antwerp (Belgium) in April 2021 and a seizure of 16.2 tons of cocaine in Hamburg (Germany).²⁰⁶

While the waterborne segment of the trafficking itinerary often begins in Paraguay, logistics necessitate that shipments are trans-shipped between vessels further downstream, in Argentina or Uruguay. Not all vessels can navigate all parts of the HPP; big ocean-going vessels cannot navigate all the way upstream because the waterway becomes too shallow. Up river the waterway may be no more than 2.5 metres deep²⁰⁷ (depending on the rain season in the Amazon basin and the status of the gates in

the hydroelectric dams); hence the cargo in these places must be shipped on barges (typically joined together on barge “trains”) propelled by tugboats. One barge train can consist of up to 36 units and may carry up to 54,000 tons, thus simplifying concealment and making detection through the HPP transit route difficult.²⁰⁸ The waterway widens downriver and deepens to over 12 metres by the time it reaches the River Plate estuary.²⁰⁹

Cargo destined to be shipped on ocean vessels must be trans-shipped at some point on the HPP (or the River Plate estuary where the HPP meets the Atlantic). Large ocean-going vessels, such as those with Panamax hulls, can only sail up the Paraná River up to Rosario and nearby San Lorenzo, where the depth is still no less

205 Ibid.

206 Ibid. Ultima Hora, ‘Fiscalía allana firmas en investigación de envíos de droga a Bélgica’, Ultima Hora, 13 April 2021.

207 Ministerio de Economía Argentina, ‘Hidrovía Paraná-Paraguay’ (Ministerio de Economía Argentina, n.d.).

208 Ibid.

209 Comité Intergubernamental de la Hidrovía Paraguay-Paraná, ‘Informe de la Secretaría Ejecutiva del CIH’.

than 10 metres.^{210 211 212} Thus, San Lorenzo and the ports downstream from it, such as Rosario, Zarate-Campana, Buenos Aires, Nueva Palmira and Montevideo, are the places where transshipment of cargo – and any cocaine consignments concealed therein – must occur. One such instance came to light in the seizure mentioned above of 16.2 tons of cocaine seized in Hamburg (Germany), which, having been shipped from Paraguay, was trans-shipped at Buenos Aires (Argentina).²¹³

Aside from consignments reaching the ocean through the final stretches of the Paraná River in Argentina, the “southern cone” route may include shipments which are loaded on to ocean-going vessels directly at the ports at the mouth of this river, such as Montevideo (Uruguay). For example, in December 2019, 4.4 tons of cocaine were seized in the port of Montevideo from containers destined for Lome (Togo). The cocaine had been transported from a ranch in the department of Soriano, where an additional 1.5 tons were also seized.²¹⁴ Cocaine shipments are sometimes consolidated within Uruguay before being shipped out of its port.²¹⁵

During the period September 2018–December 2019, media sources documented at least five instances (including the one above) of large quantities of cocaine (all in excess of 400 kg) seized in maritime ports in Germany and Uruguay, from containerized shipments departing or transiting from Uruguay, with destinations in Africa or Europe.²¹⁶

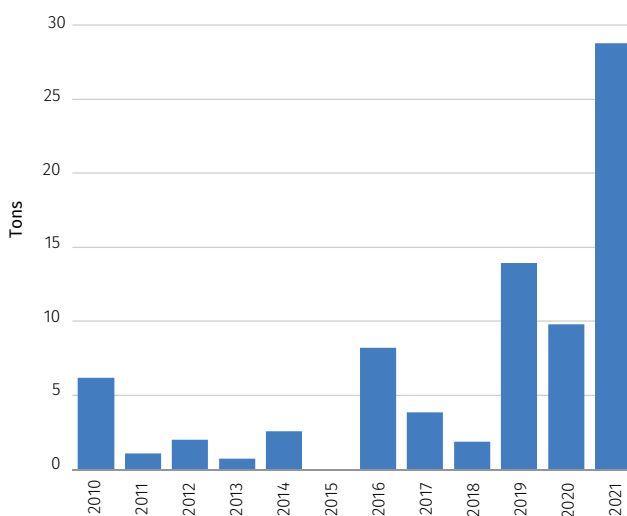
Clandestine flights are reportedly the foremost modality for inbound trafficking into Uruguay; Uruguayan authorities assessed that slightly more than three quarters of cocaine hydrochloride seized during 2020 had been trafficked by air.²¹⁷ Clandestine flights into Uruguay deliver cocaine both by landing on airstrips or by air-dropping the consignment, without landing, to be picked up by accomplices;²¹⁸ as of 2020, the points of entry for such flights included the northern departments of Artigas, Salto and Paysandú.²¹⁹

In summary, the “southern cone” route includes a crucial waterborne segment which begins at some point on the Paraguay-Paraná waterway or the estuary of the river Paraná at the latest (before continuing to the Atlantic).

However, before the waterborne segment, clandestine flights across diverse land borders are used to facilitate the movement towards the Atlantic.

The extent of trafficking along this route is difficult to quantify based on official national data, which is typically available at the aggregate level (and thus does not provide a clear association with a specific trafficking channel). However, seizures recorded in the Drugs Monitoring Platform which can be linked to the HPP or the River Plate estuary yielded 42 instances occurring over the period January 2010–April 2021, and a temporal analysis of these instances indicates a distinctly increasing trend.

Quantities of cocaine seized in individual cocaine seizures linked to the Paraguay-Paraná waterway or the River Plate estuary, by incident and country of seizure, 2010–2021



Note: A seizure was considered to be linked to the HPP or the River Plate estuary if its itinerary (actual or planned) included a stretch or a port on the HPP or the River Plate estuary.

Sources: UNODC Drugs Monitoring Platform.

Clandestine flights are harder to associate conclusively, on a case-by-case basis, to the “southern cone” route, because the link typically depends on the intended (future) itinerary, which is (in contrast with containerized shipments) not declared and not always known to law enforcement. However, 125 aircraft-related incidents occurring over the period 2011–September 2022 could be documented along the southern cone route. In most cases, the incidents involved cocaine products such as cocaine hydrochloride or coca paste (PBC); however, 9 incidents involved cannabis, while the nature of the drug was unclear in 16 other incidents.

Once more, increases can be noted both in terms of the number of incidents and the quantity of cocaine seized over the period 2011 to 2020.

210 Supermaritime Group, ‘Supermaritime San Lorenzo’, supermaritime.com, n.d.

211 Comité Intergubernamental de la Hidrovía Paraguay-Paraná, ‘Informe de la Secretaría Ejecutiva del CIH’.

212 Ministerio de Economía Argentina, ‘Hidrovía Paraná-Paraguay’.

213 UNODC, ‘Drugs Monitoring Platform’, n.d.

214 Ibid.

215 Ministry of Interior (Uruguay), ‘Responses to the CRIMJUST Questionnaire’, 9 November 2020.

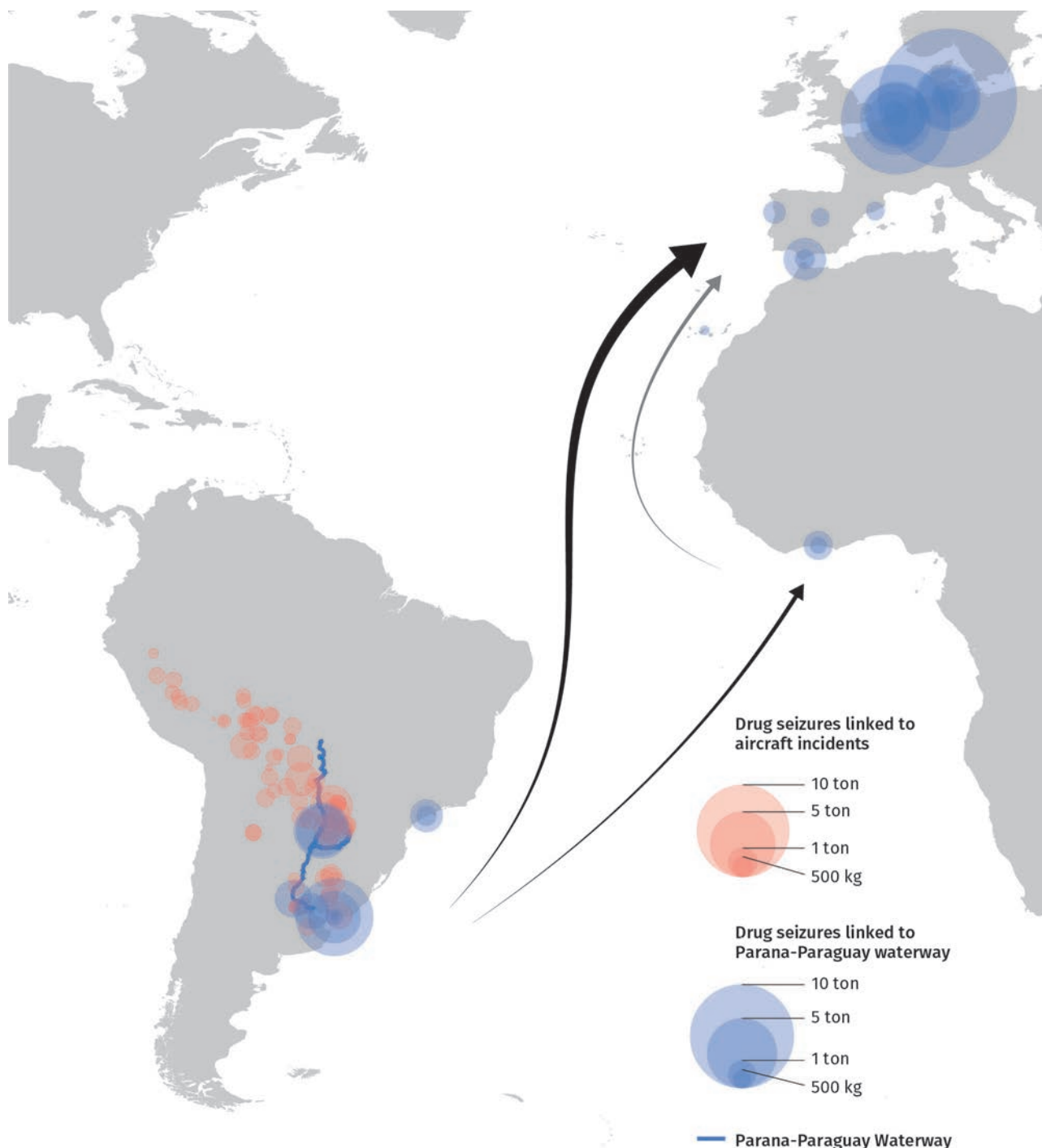
216 UNODC, ‘Drugs Monitoring Platform’, n.d.

217 UNODC, response to the Annual Report Questionnaire for 2020 from Uruguay.

218 Ministry of Interior (Uruguay), ‘Responses to the CRIMJUST Questionnaire’, 9 November 2020.

219 Poder Judicial (Uruguay), ‘Responses to the CRIMJUST Questionnaire’, 7 November 2020.

Seizures linked to the Paraná-Paraguay waterway or the River Plate estuary, and aircraft-related incidents along the Southern Cone Route, 2017–September 2022



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations.
Notes: A seizure was considered to be linked to the Paraná-Paraguay waterway or the River Plate estuary if its itinerary (actual or planned) included a stretch or a port on the HPP or the River Plate estuary. Aircraft-related incidents linked to drug trafficking include episodes where the circumstances suggested that, at the moment of detection, drugs had just been, were about to be, or were being transported on an aeroplane. Not all of the aircraft-related incidents represent physical apprehensions of the relevant aircraft by law enforcement. See Methodological Annex for details.
Sources: UNODC Drugs Monitoring Platform. .

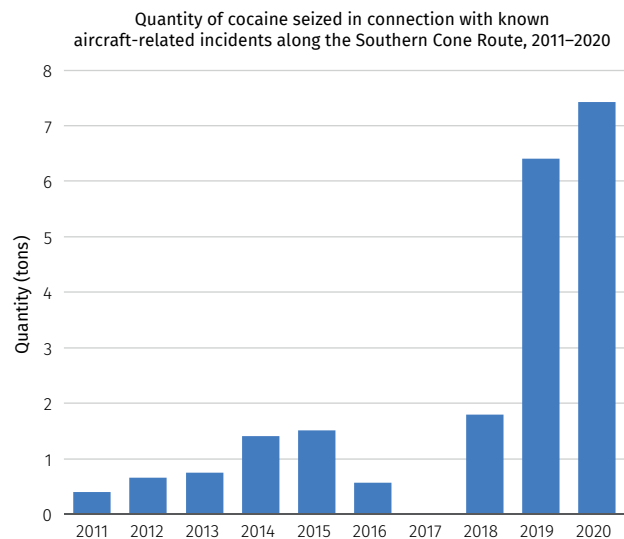
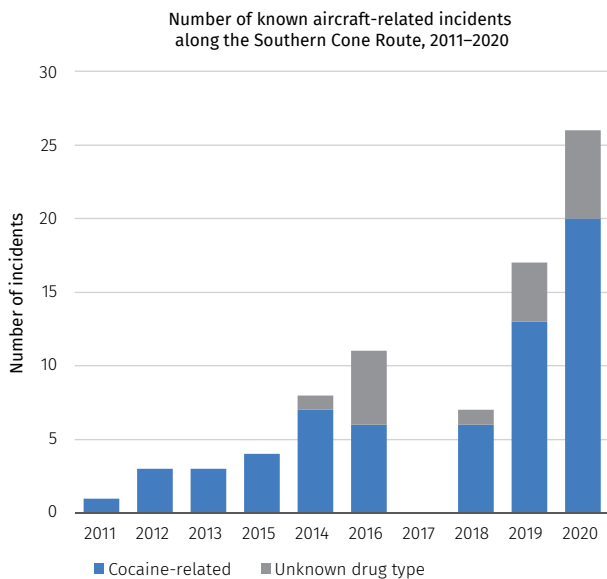
Domestic markets in Central and South America and the Caribbean

The consumption of cocaine via smoking is particularly pronounced in South America and some countries in Central America and the Caribbean; indeed a variety of forms of cocaine known by terms such as *pitillo* (Plurinational State of Bolivia), *merla* (Brazil), *mono* (Chile), *basuco* (Colombia and Bolivarian Republic of Venezuela), *paco*

(Argentina and Uruguay), *baserolo* (Ecuador), *pay* (Peru), *chespi* (Paraguay), as well as more generic names such as “crack” and *pasta base*, are widely smoked by consumers in these countries.²²⁰

220 UNODC, ‘Cocaine Insights 2’.

Known aircraft-related incidents along the Southern Cone route , 2011- 2020



Note: Based on incidents detected in Argentina, Bolivia, Paraguay and Peru. Aircraft-related incidents linked to drug trafficking include episodes where the circumstances suggested that, at the moment of detection, drugs had just been, were about to be, or were being transported on an aeroplane. Incidents involving cannabis are not considered. Not all of the aircraft-related incidents necessarily represent physical apprehensions of the relevant aircraft by law enforcement. **Sources:** UNODC Drugs Monitoring Platform.

While the exact composition and nature of such products is hard to determine conclusively and comprehensively across these countries, an important characteristic is that they are smoked, and their presence and relative importance in the domestic market is a hallmark of cocaine consumption in this region.

The country with the largest domestic market in this region is Brazil. As of 2012, past-year prevalence of cocaine insufflation was estimated at 1.7 per cent among the general population aged 14 or over, and 0.8 per cent in the case of smoking.²²¹

A separate study²²² based on the network scale-up method considered the concept of “regular use” – defined as having used the substance of concern on 25 days or more in the previous six months²²³ – and estimated the number of regular users of “crack” or other similar smokeable forms of cocaine (thus excluding cocaine salts) in 2012 in the Brazilian state capitals alone at approximately 370,000, or 0.81 per cent of the entire general population (of all ages). Among these, 50,000 users were below the age of 18. A parallel exercise, based on time location sampling,²²⁴ on the profile of regular

users indicates that the population of adult regular users concentrates towards the younger age categories, a pattern that is even more pronounced outside the state capitals. In addition, the proportion of males among these users in Brazil was estimated in the range of 76–81 per cent.

Combining the results of these studies, UNODC estimates suggested that the prevalence for regular use in the Brazilian state capitals reached almost 1.7 per cent of the general population aged 23 to 29. It is important to note that this does not include snorting of cocaine powder.

While the available data do not allow a reliable analysis of the evolution of the trend in the prevalence of use since 2012, several indicators suggest that the availability of cocaine in Brazil has increased in recent years, and this may have also translated into an expansion of the domestic market and increased levels of use. Supply-side indicators, such as seizures²²⁵ and purity levels indicate a turning point in the period 2015–16. This occurred in parallel with the trend in the levels of coca bush cultivation in Bolivia (Plurinational State of) and – which together account for significant flows of cocaine into Brazil,^{226 227} as borne out, for example, by the fact that, over the period 2014 to August 2021, 90 per cent of incoming clandestine flights (carrying drugs) detected in Brazil

221 Renata Rigacci Abdalla et al., ‘Prevalence of Cocaine Use in Brazil: Data from the II Brazilian National Alcohol and Drugs Survey (BNADS)’, *Addictive Behaviors* 39, no. 1 (1 January 2014): 297–301.

222 Secretaria Nacional de Políticas sobre Drogas (SENAD), Ministério da Saúde Brasil, and Ministério da Justiça Brasil, ‘Estimativa do número de usuários de crack e/ou similares nas Capitais do País’ (Secretaria Nacional de Políticas sobre Drogas (SENAD), 2013).

223 This likely captures a significantly smaller set of users than annual prevalence.

224 Secretaria Nacional de Políticas sobre Drogas (SENAD), Ministério da Saúde Brasil, and Ministério da Justiça Brasil, ‘Perfil dos usuários de crack e/ou similares’ (Secretaria Nacional de Políticas sobre Drogas (SENAD), 2013).

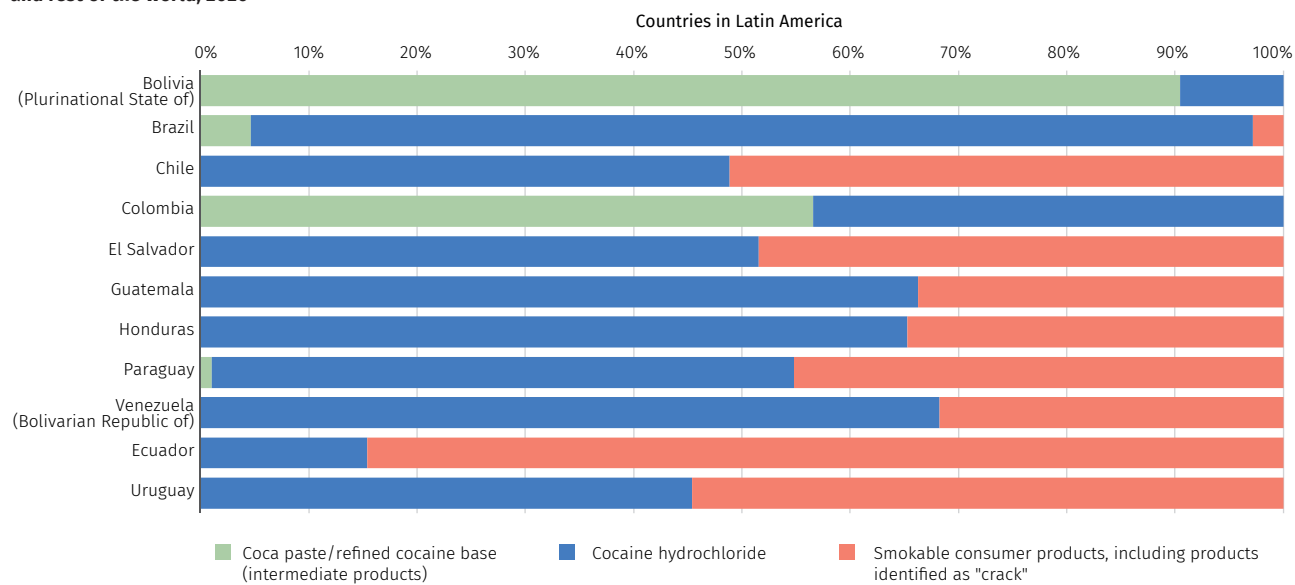
225 See section “Trafficking within and from South America to other markets” in this chapter.

226 UNODC, ‘Brazil, Responses to the Annual Report Questionnaire 2019’.

227 UNODC, ‘Brazil, Responses to the Annual Report Questionnaire 2020’.

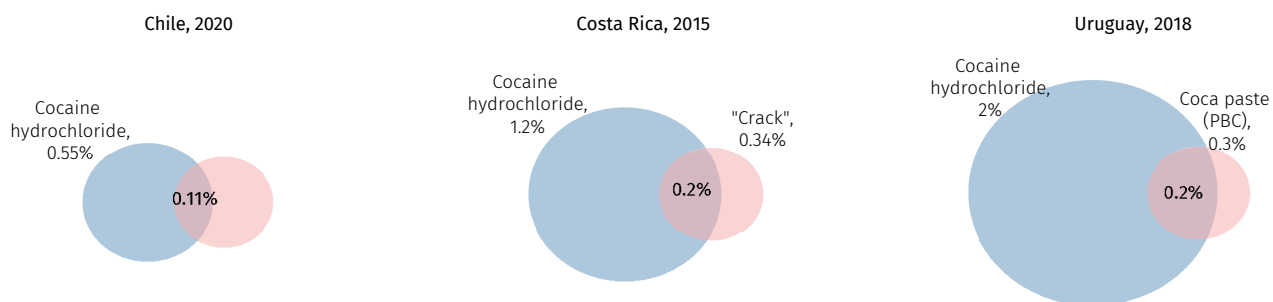
228 UNODC, ‘Brazil, Responses to the Annual Report Questionnaire 2021’.

Distribution of reported number of seizures of cocaine products, by broad category of products, comparison between Latin America and rest of the world, 2020



Note: Reliable distinctions between different cocaine products depend on forensic analysis, which is not always carried out systematically, in addition to recording and reporting practices, which do not always contemplate the entire spectrum of cocaine products.
Source: UNODC, responses to the annual report questionnaire, responses for 2020.

Prevalence of use of cocaine hydrochloride in relation to smokable cocaine products, selected countries in Latin America (latest available data)

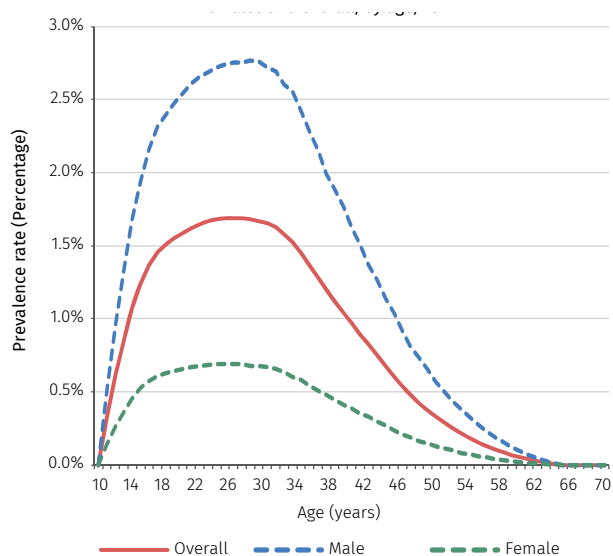


Source: UNODC, responses to the annual report questionnaire.

originated in one of the Plurinational State of Bolivia, Paraguay or Peru.^{229 230}

Demand-side indicators in Brazil are also indicative of a long-term expansion of the domestic cocaine market and raise the possibility of potential recent increases in levels of cocaine consumption.²³¹ Mortality data in particular also show a turning point in 2016; one possibility is that the increase in availability may have spilled over into more intensive use patterns (of people already using cocaine) or more widespread cocaine use (individuals initiating use). It should be borne in mind however that

Estimated prevalence of regular* use of “crack” and similar drugs in Brazilian state capitals, among males, females and overall, by age, 2012



*“Regular” use is defined to be use on 25 days in the previous six months.
Note: The above estimations assume that the breakdown of regular adult users of crack and similar drugs in the Brazilian state capitals into age groups, established via Time Location Sampling (*Perfil dos usuários de crack e/ou similares*, SENAD, Brazil, 2013), is consistent with the number of adult regular users in the Brazilian state capitals established separately via the Network Scale-up Method (*Estimativa do número dos usuários de crack e/ou similares nas Capitais do País*, SENAD, Brazil, 2013). The estimations approximate the male-female breakdown within individual age categories by a constant ratio, independent of the age category.
Sources: UNODC estimates based on drug use data from Secretaria Nacional de Políticas sobre Drogas (SENAD), Brazil and census data for 2010 for the Brazilian state capitals from Instituto Brasileiro de Geografia e Estatística (IBGE), Brazil, adjusted using 2010 and 2012 population data from the United Nations Population Division.

229 However, other modalities – such as fluvial routes used in the north – are also important, and the available data do not allow an accurate determination of the overall shares of cocaine entering Brazil from each Bolivia (Plurinational State of), Colombia and Peru. Seizures in the regions of Brazil bordering Colombia (state of Amazonas) are limited in comparison with states of Brazil further south on its western borders, such as Mato Grosso, Mato Grosso do Sul and Paraná, reinforcing the evidence that an important component comes from Bolivia (Plurinational State of) and Peru (collectively). However, this geographic breakdown may not necessarily reflect incoming flows in a proportional fashion. Since wholesale purity levels are in turn a reflection of seizures, it is possible that the overall picture emerging from these supply-side indicators is somewhat skewed towards the segment of the market supplied from these two source countries. Nevertheless, it is clear that Bolivia (Plurinational State of) and Peru together account for a significant proportion of cocaine entering Brazil.

230 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’.

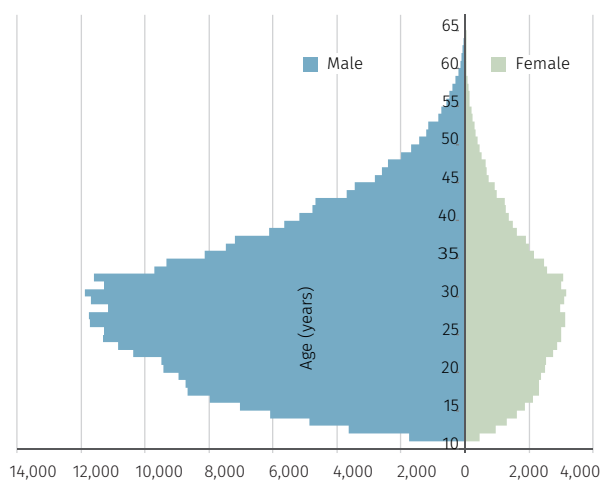
231 Measured in overall quantities consumed, rather than number of users.

cocaine users (including users of “crack” cocaine) may also use other drugs.

Aside from coca leaf cultivation in Peru and Bolivia (Plurinational State of), the link between mortality data and incoming flows is notable (in statistical terms) when comparing the trend in mortality to seizures data, especially when specifically considering seizures in states of Brazil bordering Bolivia (Plurinational State of) and Peru.

The fact that the trend in mortality mirrors that of the supply-side indicators mentioned above, especially the extent of coca leaf cultivation in the Plurinational State of Bolivia and Peru,²³² also point to the possibility that the supply channel from Peru and the Plurinational State of Bolivia (as opposed to Colombia) may be particularly important in supplying the Brazilian domestic market (while the incoming flows from Colombia would contribute to a lesser extent, being routed predominantly towards Europe). This also ties in with the internal trafficking routes affecting Brazil, as described by Brazilian Federal police,²³³ which suggest a certain convergence of the routes from Peru, the Plurinational State of Bolivia and Paraguay towards the state of São Paulo, where

Estimated number of regular cocaine users in Brazilian state capitals, by age and gender (population pyramid), 2012

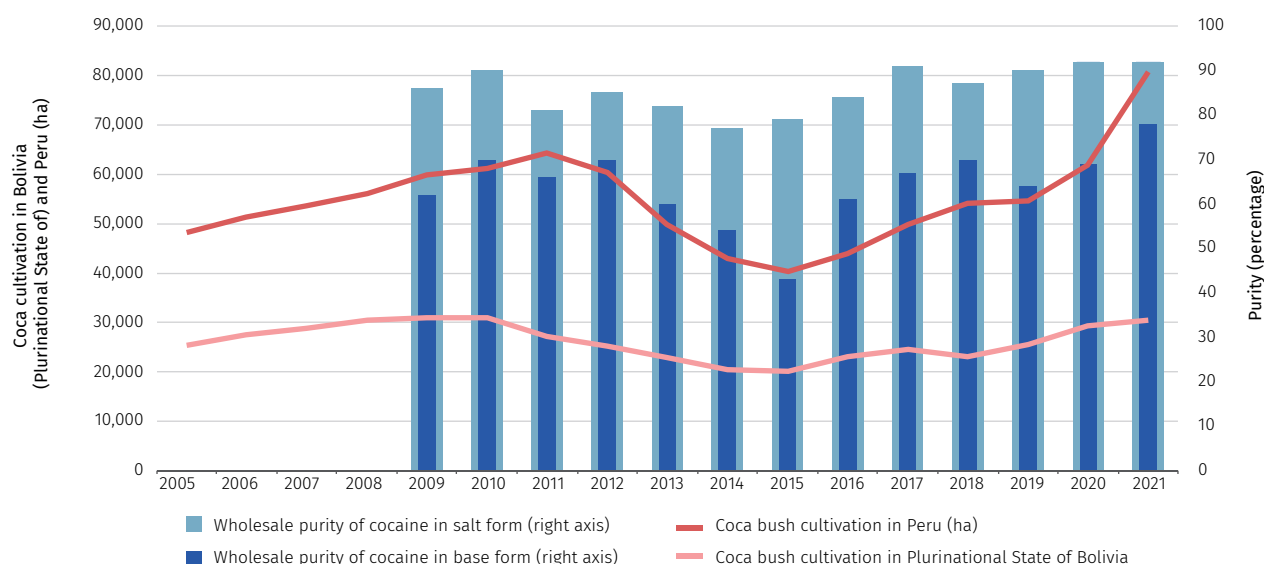


Note: “Regular” is defined to be 25 times in the previous six months. The above estimations assume that the breakdown of regular adult users of crack and similar drugs in the Brazilian state capitals into age groups, established via Time Location Sampling (*Perfil dos usuários de crack e/ou similares*, SENAD, Brazil, 2013), is consistent with the number of adult regular users in the Brazilian state capitals established separately via the Network Scale-up Method (*Estimativa do número dos usuários de crack e/ou similares nas Capitais do País*, SENAD, Brazil, 2013). The estimations approximate the male-female breakdown within individual age categories by a constant ratio, independent of the age category.
Sources: UNODC estimates based on drug use data from Secretaria Nacional de Políticas sobre Drogas (SENAD), Brazil and census data for 2010 for the Brazilian state capitals from Instituto Brasileiro de Geografia e Estatística (IBGE), Brazil, adjusted using 2010 and 2012 population data from the United Nations Population Division.

232 Coca leaf cultivation in Colombia followed a rather distinct trend from Bolivia (Plurinational State of) and Peru. In Colombia, both coca leaf cultivation and estimated potential production of cocaine hydrochloride bottomed out in 2013.

233 ‘CRIMJUST Annual Meeting – Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes’ (CRIMJUST Annual Meeting – Africa, Ghana, 23 November 2021).

Coca bush cultivation in Bolivia (Plurinational State of) and Peru, in comparison with purity levels in Brazil, 2005–2021



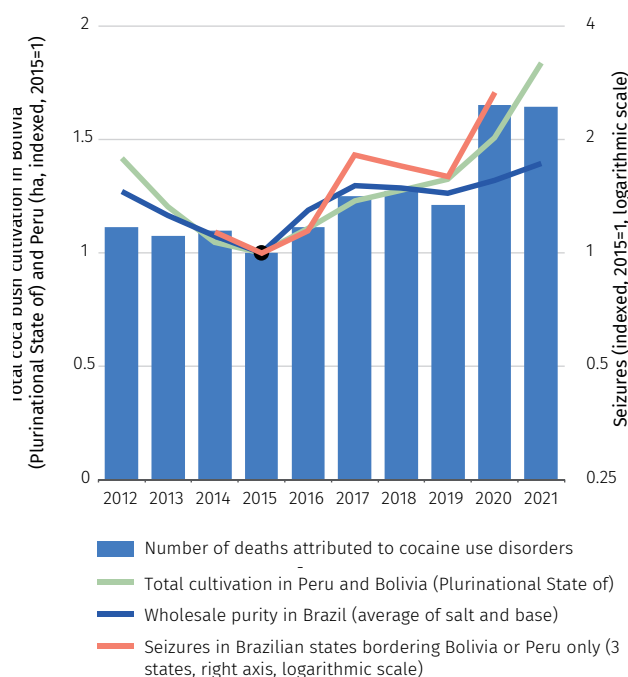
Note: The figure for coca bush cultivation in 2021 in the Plurinational State of Bolivia has not been agreed by the Government of Bolivia.

Sources: Purity: Centre of Excellence for Illicit Drug Supply Reduction and UNODC SIMCI, "Dinâmicas do mercado de drogas ilícitas no Brasil, Análise Comparativa dos preços de maconha, cocaína e outras drogas em quatro estados," 2022; Cultivation: Coca bush cultivation surveys carried out in Bolivia (Plurinational State of) and Peru in 2020 and previous years.

cocaine may be consolidated and distributed onwards towards the ports as well as to the areas of consumption, and also depict some routes from the state of Amazonas (bordering Colombia) directly towards the northern Atlantic coast of Brazil.²³⁴

In 2020, coinciding with the onset of COVID-19, the number of deaths attributed to cocaine use disorders spiked abruptly, rising by 36 per cent over the level in 2019 – the largest year-on-year change (in relative terms²³⁵) since 2010. Based on preliminary data, the increased levels were sustained into 2021.²³⁶

Trend in number of deaths attributed to cocaine use disorders in comparison with selected indicators of cocaine supply in Brazil, 2012–2021



²³⁴ In addition, the hypothesis that the domestic market in Brazil is disproportionately (in relation to quantities flowing into Brazil) supplied via the flows from Peru and the Plurinational State of Bolivia is indirectly corroborated by the following observations: (1) the population in Brazil is overall more concentrated in the south rather than the north (2) the waterways of the Amazonas are particularly remote and provide a relatively "safe" route directly to the Atlantic coast (3) cocaine in base form is particularly well suited to cater for the demand for smokable cocaine products, especially "crack", in Brazil, and the limited evidence of trafficking of coca paste (PBC) and similar products points in particular to the route Peru-Bolivia-Brazil (5) forensic analysis, while not comprehensive, indicates that Colombia continues to be the predominant country of origin for cocaine seizures in Europe, despite the fact that it receives significant quantities through Brazil.

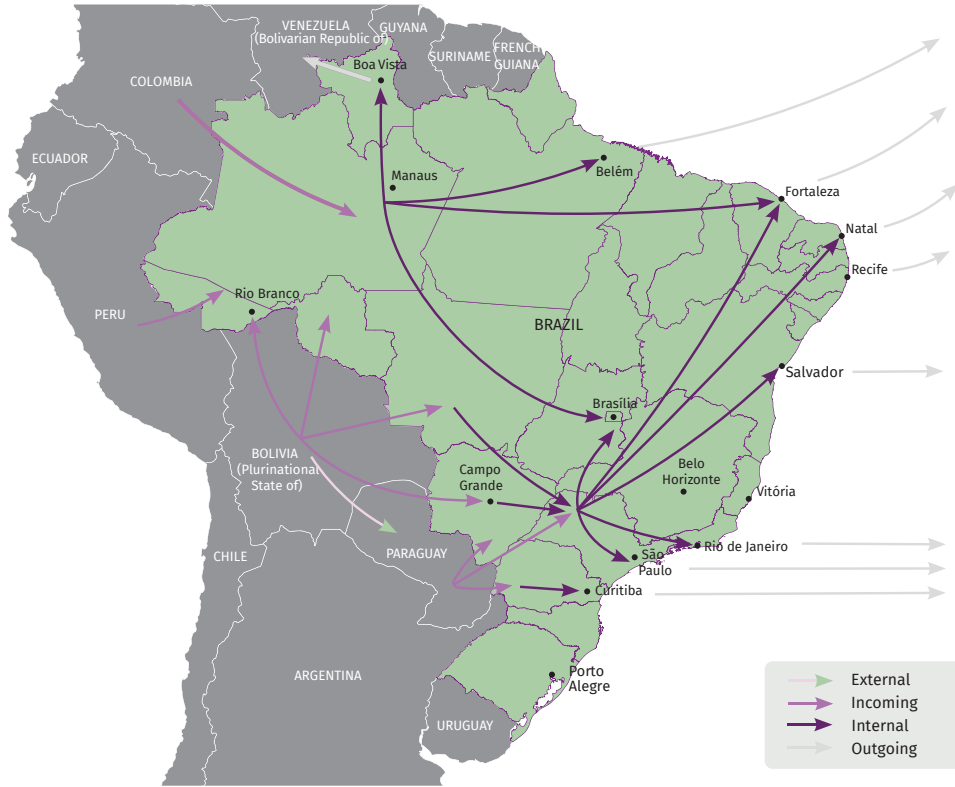
²³⁵ And the biggest on record (since 1996) in absolute terms.

²³⁶ Ministério da Saúde Brasil, 'Ministério da Saúde Datasus', saude.gov.br, n.d.

Note: Data on deaths attributed to cocaine use disorders based on deaths registered under ICD-10 code F14 (Mental and behavioural disorders due to the use of cocaine). Identification procedures for this categorization vary and may include self-reported data, analysis of blood and other body fluids, characteristic physical and psychological symptoms, clinical signs and behaviour, and other evidence such as a drug being in the patient's possession or reports from informed third parties. Therefore, these data need to be interpreted with caution.

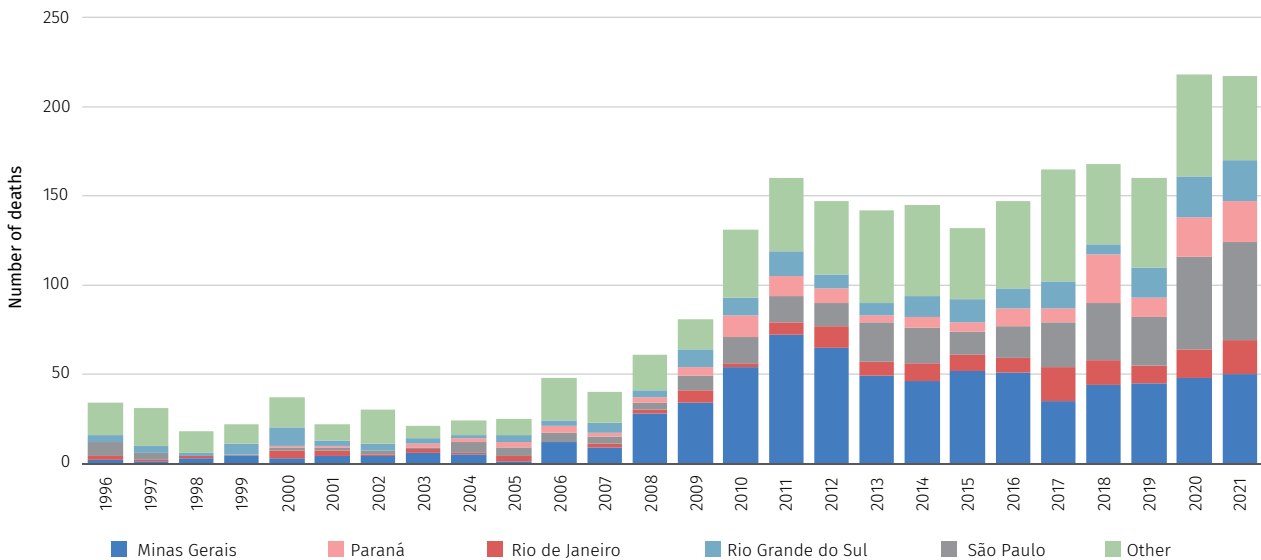
Sources: Purity: Centre of Excellence for Illicit Drug Supply Reduction and UNODC SIMCI; "Dinâmicas do mercado de drogas ilícitas no Brasil, Análise Comparativa dos preços de maconha, cocaína e outras drogas em quatro estados," 2022; Cultivation: Coca bush cultivation surveys carried out in Bolivia (Plurinational State of) and Peru in 2020 and previous years; Seizure data: Brazilian Federal Police; Deaths: Brazil Ministry of Health, DATASUS data portal.

Main cocaine trafficking routes affecting Brazil



Note: This map, reproduced from a visualization by the Brazilian Federal Police, captures the main routes from the international perspective as well as the most important internal routes. A more detailed map can be found in: Centre of Excellence for Illicit Drug Supply Reduction, *COVID-19 and drug trafficking in Brazil: the adaptation of organized crime and the actions of polices during the pandemic*, December 2021. Available at: <https://www.cdebrasil.org.br/boletins/>
Source: Brazilian Federal Police; reproduced from UNODC and CoE Brazil, "Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19", Cocaine Insights 4 (Vienna: UNODC, July 2022).

Deaths attributed to cocaine use disorders in Brazil, by federal unit, 1996-2021



Note: Based on deaths registered under ICD-10 code F14 (Mental and behavioural disorders due to the use of cocaine). Identification procedures for this categorization vary and may include self-reported data, analysis of blood and other body fluids, characteristic physical and psychological symptoms, clinical signs and behaviour, and other evidence such as a drug being in the patient's possession or reports from informed third parties. Therefore, these data need to be interpreted with caution.

Source: Brazil Ministry of Health, DATASUS data portal.

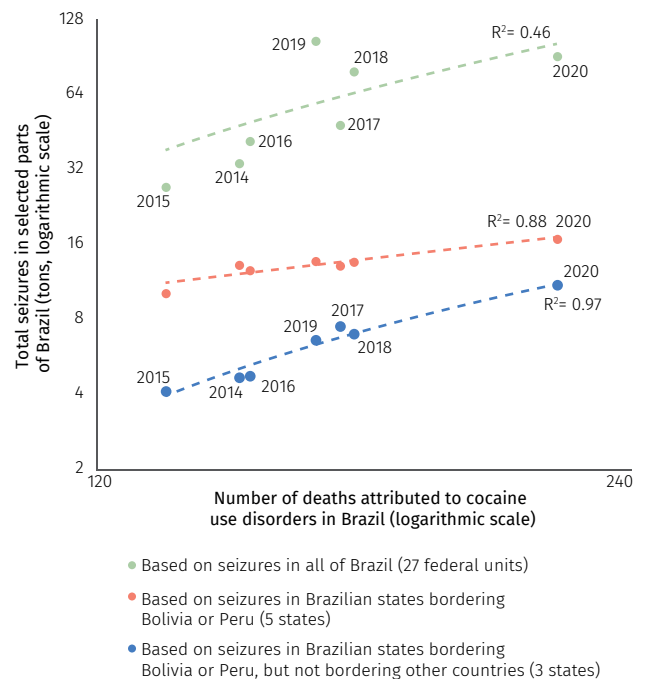
Changing trends (rates of change) in cocaine seizures in Brazil following the onset of COVID



Note: The above map is based on 3 consecutive 6-month periods: April-September 2019 (Period A), October 2019- March 2020 (Period B), and April-September 2020 (period C, immediately following the onset of COVID-19), and the quantities a, b, c seized during periods A, B, C respectively. The rate of change is considered to be increasing (rising trend) if the ratio c/b is larger than b/a, decreasing (falling trend) if c/b is smaller than b/a.
Source: Polícia Rodoviária Federal, Brazil; reproduced from UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022).

At the same time (in 2020), the onset of COVID-19 brought about significant, even if temporary, shifts in trafficking patterns into and through Brazil. While a number of developments in source countries and in the west of Brazil – such as fluctuations in supply, shifts in modalities and restrictions in the flows of goods and people – increased the flows of cocaine into Brazil, difficulties in internal consolidation of cocaine and its redistribution towards the Atlantic coast appear to have temporarily reduced the flows trafficked out this country.^{237 238} It cannot be excluded that this may have resulted in a surge in the availability of cocaine within Brazil, and thus intensified use patterns, with the repercussion ultimately visible in the number of deaths which were clearly attributable to cocaine use.²³⁹ However, the available data do not allow to establish this conclusively.

Cocaine seizures in selected part of Brazil versus deaths due to cocaine use disorders in Brazil, 2014–2020



Note: Data on deaths attributed to cocaine use disorders based on deaths registered under ICD-10 code F14 (Mental and behavioural disorders due to the use of cocaine). Identification procedures for this categorization vary and may include self-reported data, analysis of blood and other body fluids, characteristic physical and psychological symptoms, clinical signs and behaviour, and other evidence such as a drug being in the patient's possession or reports from informed third parties. Therefore, these data need to be interpreted with caution. Sources: Seizure data: Brazilian Federal Police; Deaths: Brazil Ministry of Health, DATASUS data portal.

237 UNODC and CoE Brazil, 'Cocaine Insights 4'.
 238 See also discussion on the impact on trafficking to Europe via Brazil in the section "Western and Central Europe."
 239 Another sign of changes in internal dynamics was the increased use of internal flights within Brazil to distribute cocaine to storage locations and consumption centres. Source: Brazilian Federal Police, presentation at "International Seminar on Illicit Drug Supply Reduction" (December 7, 2021). See also UNODC and CoE Brazil, 'Cocaine Insights 4'.

The North American consumer market

North America has for many years represented a primary cocaine consumer market worldwide; in 2020, it accounted for about 30 per cent of past-year cocaine users worldwide, and 1.95 per cent of the population aged 15–64 was estimated to have used cocaine at least once (second only to Oceania among all other regions or subregions for which such estimates were available).²⁴⁰

Various indicators suggest that the market in the United States peaked in 2017 and has contracted slightly since then. Seizures and wholesale purity levels point to a slight decline in incoming flows and in availability, while most demand-side indicators also suggest a drop in 2018 followed by stable or moderately decreasing trends. Recent declines are evident from data on people taking up cocaine use for the first time in their lives, which also show that the average age at which this happens has increased gradually. Overdose deaths involving cocaine, which need to be interpreted with caution due to the concomitant occurrence of other substances, also exhibit a recent declining trend when overdoses also involving synthetic opioids (other than methadone) are excluded.

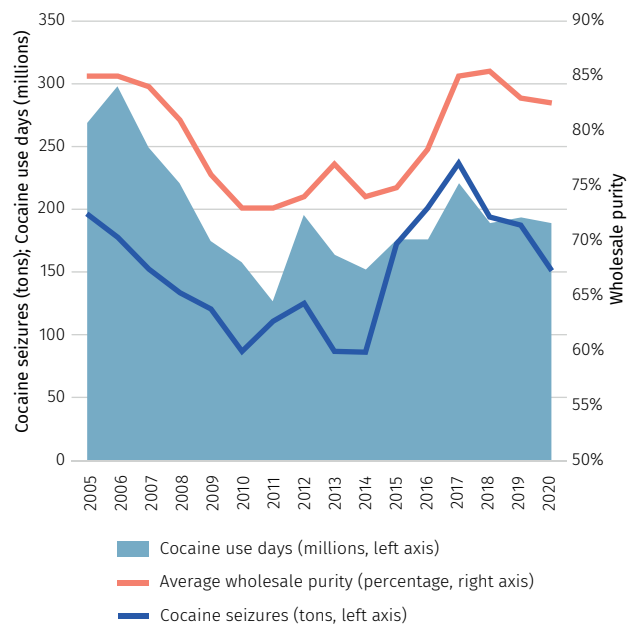
On the other hand, the best available proxy metric for trends in the quantity of cocaine consumed, namely the estimated number of cocaine use-days (based on household surveys), has remained quite stable over 2018 – 2020 (following the drop in 2018). Overall, the demand-side indicators, and to some extent the supply-side indicators, suggest that the recent slight contraction is minor in the broader, long-term picture, and the market appears to stand at levels which are above the trough of 2010 – 11, but still below the peak levels of 2005 – 06.

There also appears to have been a certain long-term divergence between users of “crack” and users of (insufflated) cocaine hydrochloride (“powder cocaine”). While “crack” users have become fewer in number, the population of “crack” users appears to have gradually gravitated to slightly more intensive use patterns. Although the available data do not allow an analogous comparison based specifically on users of cocaine hydrochloride, an opposite (declining) trend in frequency of use is already visible in the overall data for cocaine use in general (including cocaine hydrochloride as well as “crack”), implying that the underlying trend for cocaine hydrochloride is also declining, and even more pronounced.

Approximately half a million past-year users of cocaine reside in Canada. In its response to the Annual Report Questionnaire for 2021, Canada reported that the United States, Mexico and Jamaica (in that order) were the most frequently occurring transit countries observed from seized cocaine shipments.²⁴¹ However, based on developments in 2020, Canadian authorities had observed a continued rise in cocaine seizures with a European nexus, as Mexican OCGs continued to invest in working relationships with Dutch and Spanish counterparts.²⁴²

The COVID-19 pandemic significantly impacted the overall drug threat in Canada in 2020. Canadian authorities also reported that, in 2020, the COVID-19 pandemic significantly impacted the overall drug market in Canada, influencing the social stress factors of drug use, affecting access to health services, and contributing to increased adulteration and toxicity in the supply of drugs,²⁴³ as well as the emergence of new synthetic opioids. In order to compensate for obstacles arising from border and travel restrictions, traffickers increased their use of commercial transport – such as commercial trucks, maritime containers, and cargo planes – as well as postal or courier services and online services, including both the surface and dark web.²⁴⁴

Selected indicators of cocaine supply and consumption in the United States, 2005–2020



Note: The number of cocaine use days is obtained by multiplying the number of cocaine past-year users aged 12 or older (as published by SAMHSA) by the average number of days these users used cocaine (as published by SAHMSA).
Sources: Cocaine use days: UNODC estimate based on *US National Survey on Drug Use and Health 2020*, Detailed Tables (SAMHSA); Purity data: ONDCP (2005–2018); and Cocaine Signature Programme (2019, 2020); Seizure data: UNODC responses to the annual report questionnaire and UNODC Drugs Monitoring Platform.

240 UNODC, ‘World Drug Report 2022, Statistical Annex’ (Vienna: UNODC, 2022).

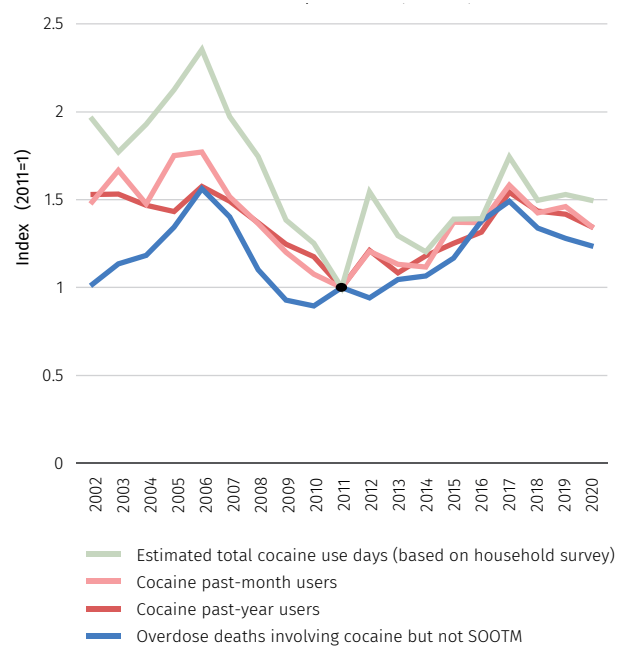
241 UNODC, ‘Canada, Responses to the Annual Report Questionnaire 2021’, n.d.

242 UNODC, ‘Canada, Responses to the Annual Report Questionnaire 2020’.

243 Ibid.

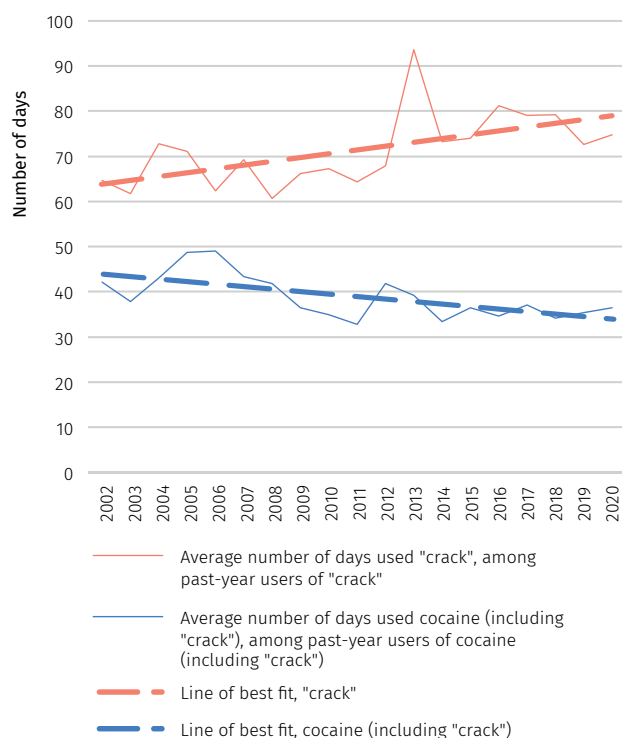
244 Ibid.

Selected indicators of cocaine use, consumption and harm, United States, 2002–2020 (indexed)



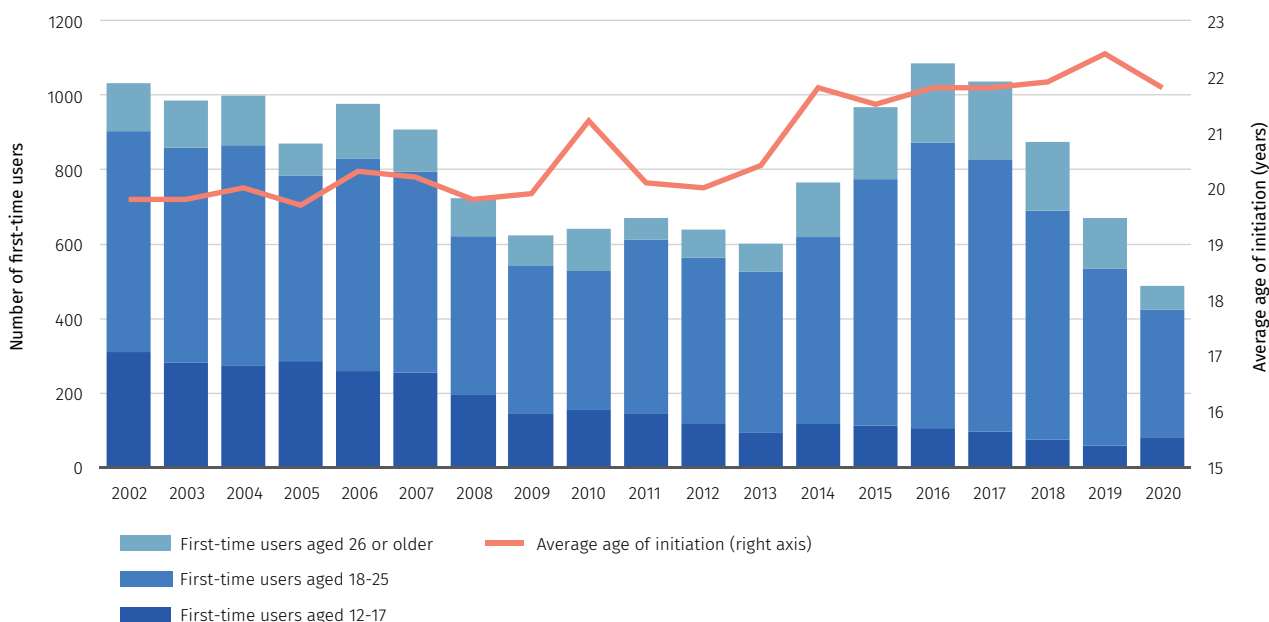
Note: SOOTM stands for synthetic opioids other than methadone.
Sources: US National Survey on Drug Use and Health 2020, Detailed Tables; US Centers for Disease Control and Prevention, Wide-ranging Online Data for Epidemiologic Research (WONDER).

Long-term trends in the annual frequency of use among past-year cocaine users, comparison between "crack" and cocaine overall, United States, 2002–2020



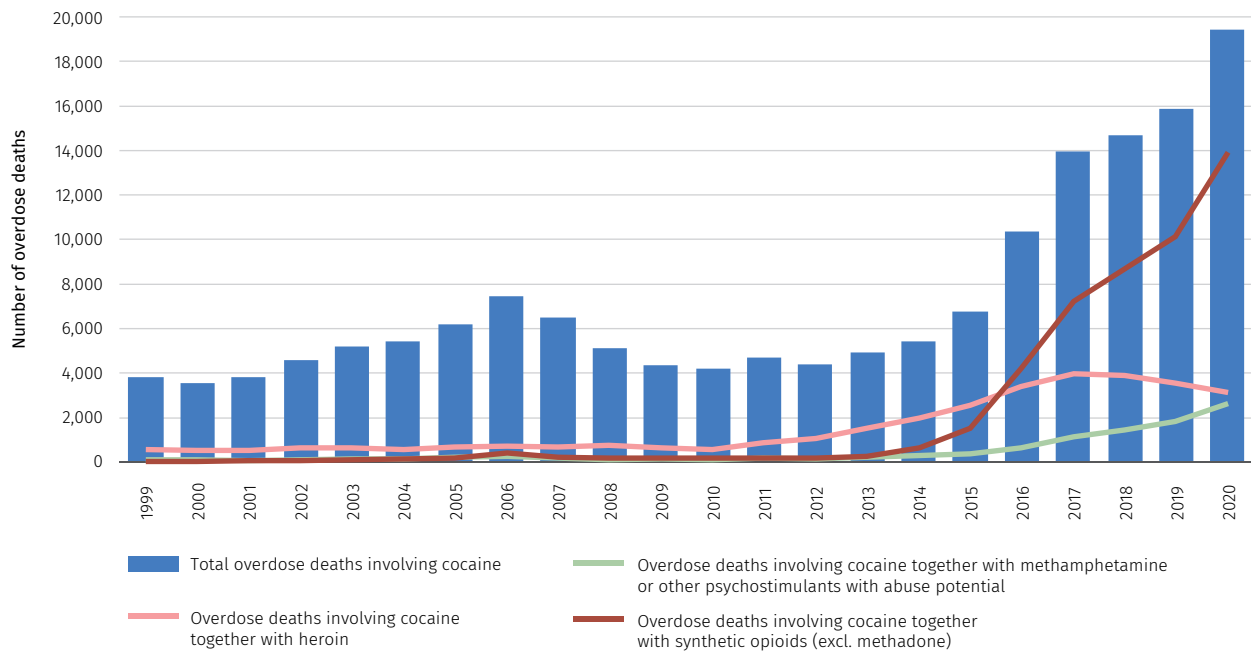
Source: US National Survey on Drug Use and Health 2020, Detailed Tables.

First-time users of cocaine, by age category, United States, 2002–2020



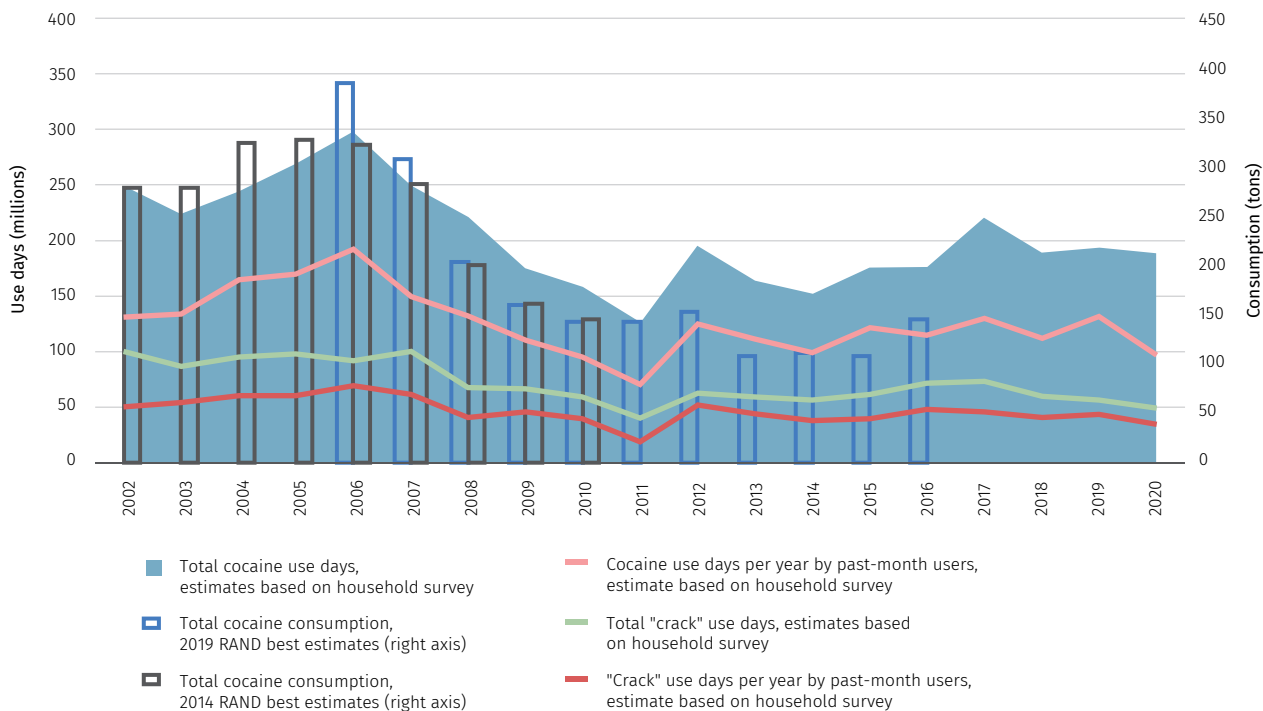
Sources: US National Survey on Drug Use and Health 2020, Detailed Tables.

Overdose deaths involving cocaine, and co-occurrence of other selected substances, United States, 1999–2020



Sources: US Centers for Disease Control and Prevention, Wide-ranging Online Data for Epidemiologic Research (WONDER).

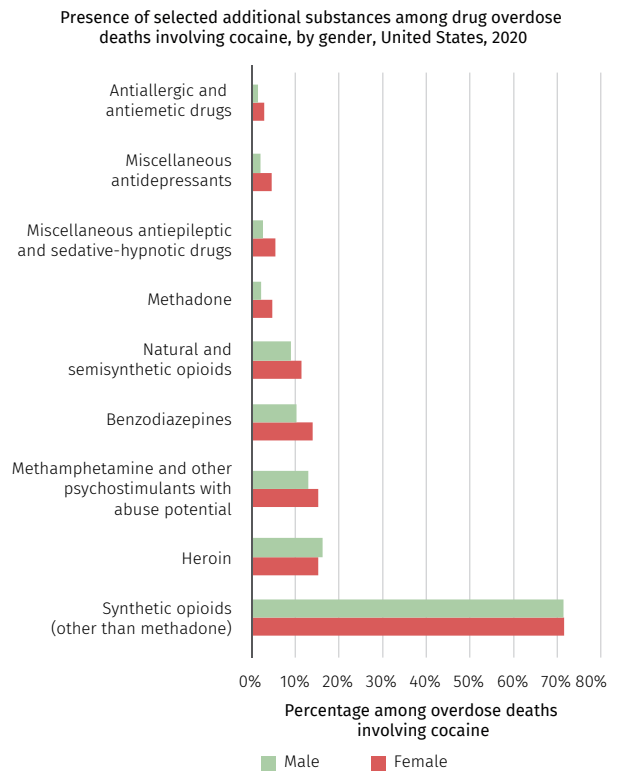
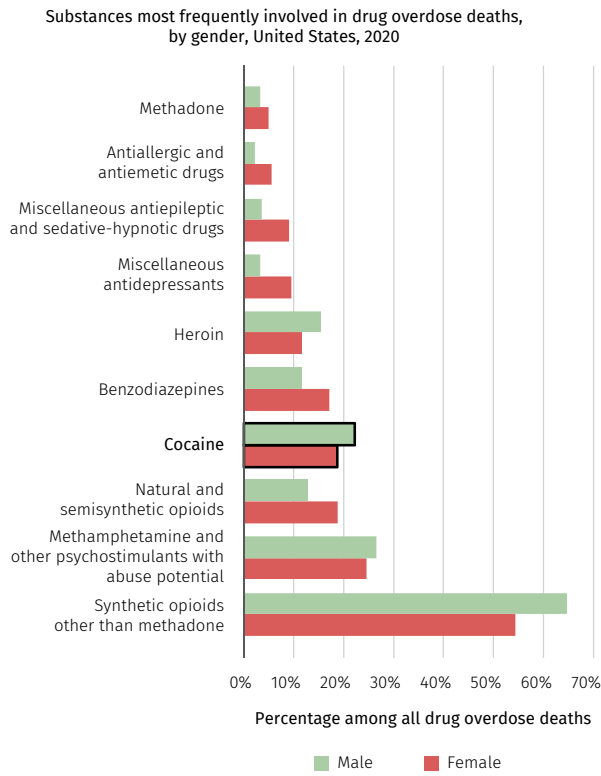
Estimates and proxy measures of cocaine consumption in the United States, 2002–2020



Note: "Crack" is included within "cocaine." The number of cocaine (respectively "crack") use days is obtained by multiplying the number of (past-year or past-month) cocaine (respectively "crack") users aged 12 or older (as published by SAMHSA) by the average number of days (as published by SAMHSA) that these users used cocaine (respectively "crack").

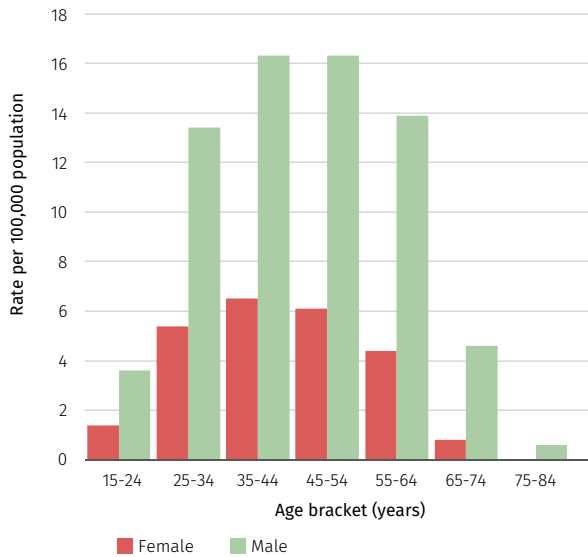
Sources: US National Survey on Drug Use and Health 2020, Detailed Tables (SAMHSA); *What America's Users Spend on Illegal Drugs, 2006–2016* (RAND, 2019); *What America's Users Spend on Illegal Drugs, 2000–2010* (RAND, 2014).

Cocaine overdoses in the United States



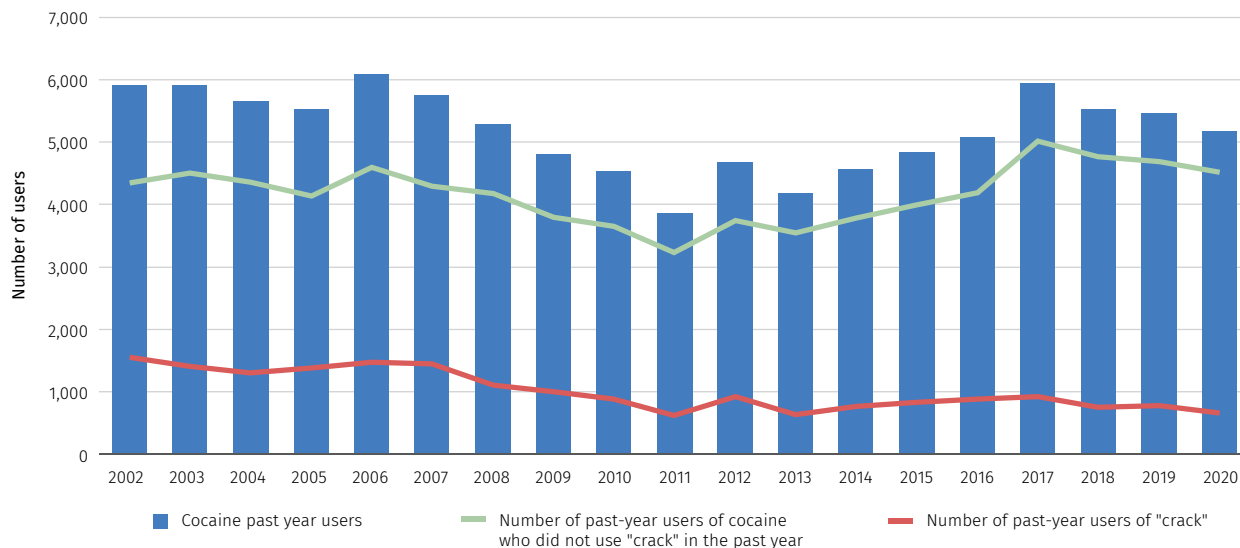
Source: US Centers for Disease Control and Prevention, Wide-ranging Online Data for Epidemiologic Research (WONDER).

Rate of overdose deaths involving cocaine, by age category and gender, United States, 2020



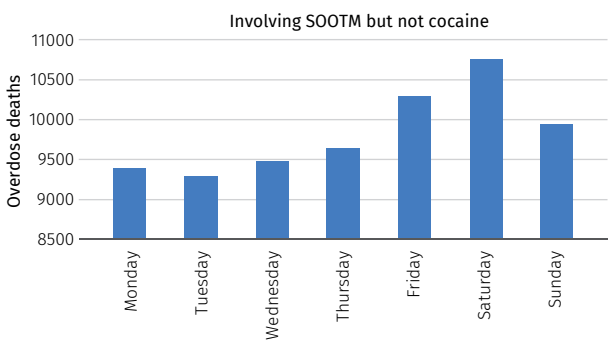
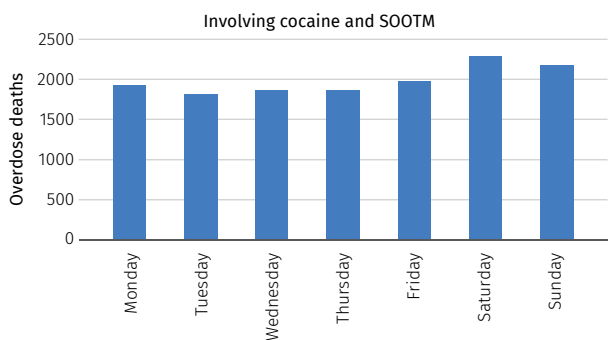
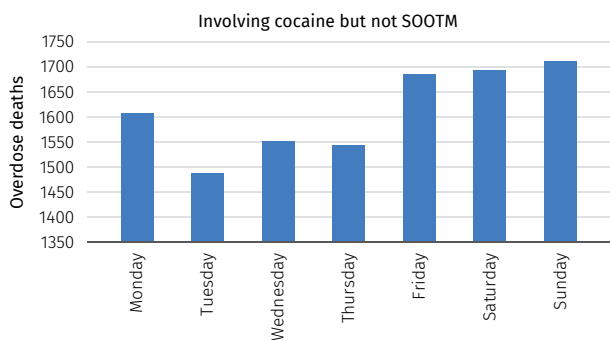
Source: US Centers for Disease Control and Prevention, Wide-ranging Online Data for Epidemiologic Research (WONDER).

Number of cocaine users in the United States, breakdown into "crack" users and others, 2002–2020



Source: US National Survey on Drug Use and Health 2020, Detailed Tables.

Overdose deaths involving selected drug combinations, by day of the week, United States, 2019–2020



Source: US Centers for Disease Control and Prevention, Wide-ranging Online Data for Epidemiologic Research (WONDER).

Western and Central Europe

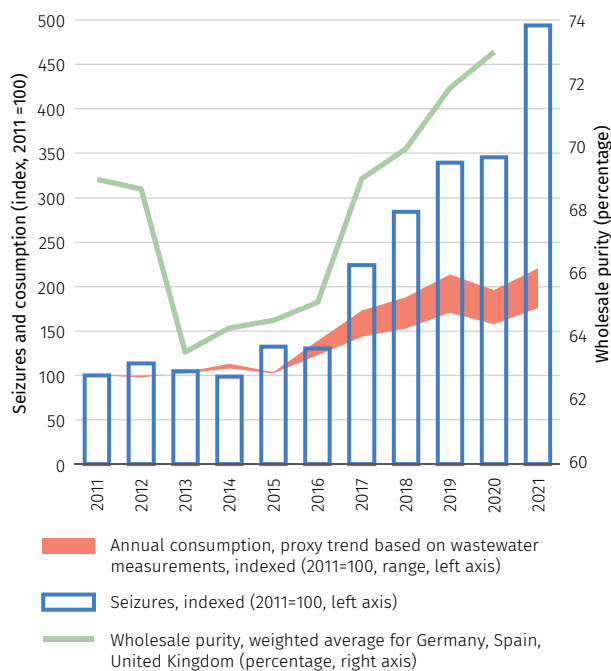
Western and Central Europe has emerged, alongside other regions, as a primary consumer market for cocaine. Seizures of cocaine in Western and Central Europe exceeded those in North America for the first time in 2019, and as of 2020 they accounted for slightly more than one half of all seizures outside of South and Central America and the Caribbean. In terms of the number of users, Western and Central Europe is estimated to account for some 21 per cent of the estimated number of global users as of 2020.²⁴⁵

Several indicators suggest that 2016–17 was a pivotal period which saw the ongoing expansion of the cocaine market in Western and Central Europe take hold. Supply-side indicators such as aggregate seizures, and to some extent wholesale purity, point to an abrupt increase in availability starting in 2017, while retail-level indicators, such as wastewater-based trends reflecting consumption, and retail purity, in addition to seizure data in specific countries such as Belgium, suggest that dynamics began to shift already as of 2016 or even earlier. Indeed, the supply channels which enabled this expansion appear to have developed around 2012, which saw the beginning of a process of greater integration of Western and Central Europe within the global cocaine market, through increased diversification of actors, closer ties of smaller European actors with providers in source countries, and the emergence of European ports on the North Sea, notably Antwerp (Belgium), as primary points of entry for cocaine flows into Europe.²⁴⁶

245 UNODC, 'World Drug Report 2022'.

246 UNODC and Europol, 'Cocaine Insights 1'.

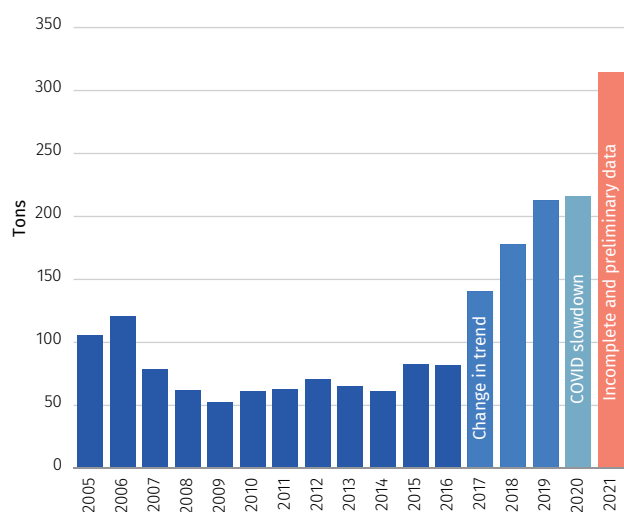
Trends in selected supply and demand indicators, Western and Central Europe, 2011–2021



Note: Seizure data for 2021 are incomplete and preliminary.
Sources: Wastewater: SCORE dataset; Seizures: UNODC, responses to the annual report questionnaire; supplemented (for 2021) by data from WCO; UNODC, Drugs Monitoring Platform; Purity: UNODC, responses to the annual report questionnaire.

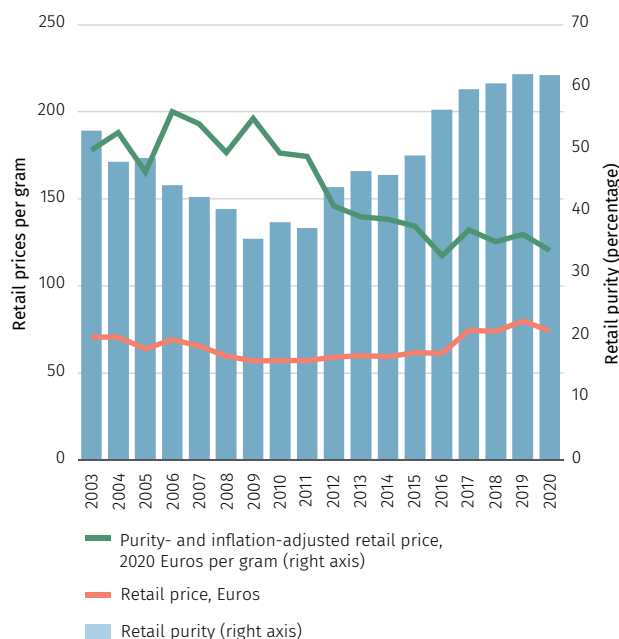
Seizure data, in particular, point to quite abrupt changes (increases) in recent years in several countries in Western and Central Europe, including countries which are key points of entry for cocaine reaching Europe or have relatively large domestic markets (e.g., Belgium, Italy, Netherlands, Spain) as well as some where cocaine

Cocaine seizure quantities in Western and Central Europe, 2005–2021



Note: Seizure data for 2021 are incomplete and preliminary.
Sources: UNODC, responses to the annual report questionnaire; supplemented (for 2021) by data from UNODC Drugs Monitoring Platform.

Cocaine retail prices and purities in Western and Central Europe, 2003–2020



Sources: EMCDDA; UNODC, responses to the annual report questionnaire.

trafficking and use had hitherto only been observed on a small scale (e.g., Greece, Malta, Poland).²⁴⁷

It appears that COVID-19 had a temporary restraining effect on the growth of the market in Western and Central Europe, without stopping the ongoing longer-term expansion, which continued and may have somewhat masked the transitory effects of the pandemic. Following a period of steady growth, total cocaine seizures in this subregion were stable in 2020 but rebounded in 2021. Wastewater-based indicators suggest a dip in consumption immediately following the onset of COVID-19 but in 2021 they returned to (and slightly exceeded) 2019 levels. Moreover, similar trends could be observed in past-year prevalence in every country in this subregion where these data are produced on an annual basis.

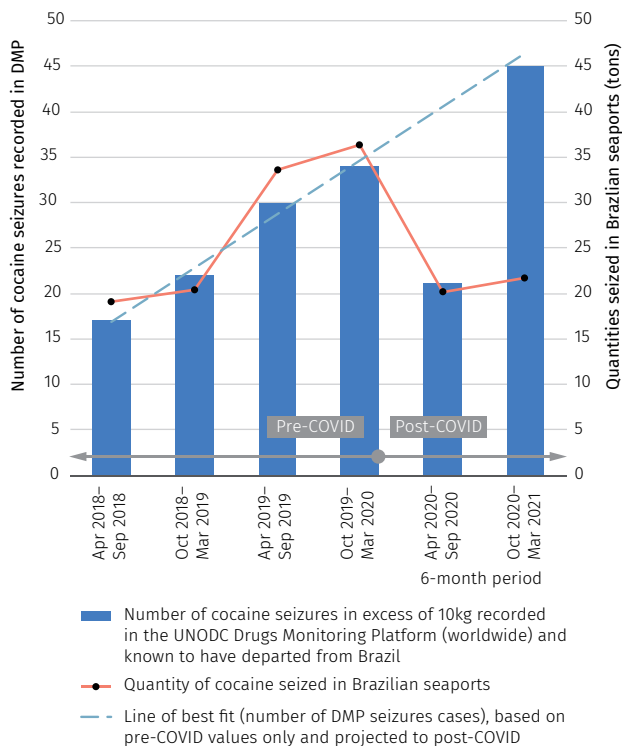
The dynamics behind the effects of COVID-19 on the cocaine market in Western and Central Europe have both supply-side and demand-side dimensions and can be seen at various levels. At the early stages of the supply chain, despite plentiful supplies of coca leaf in areas of cultivation in South America, producers may have faced some temporary difficulties in accessing raw materials (including precursor chemicals as well as coca leaf or coca paste),^{248 249} and mobility restrictions and lockdowns may have presented traffickers with some obstacles in

247 In several other countries with a relatively large domestic market, such as France, Germany and the United Kingdom, the available data up until 2021 indicate a more gradual, or fluctuating, but nevertheless increasing, overall trend.

248 UNODC and CoE Brazil, 'Cocaine Insights 4'.

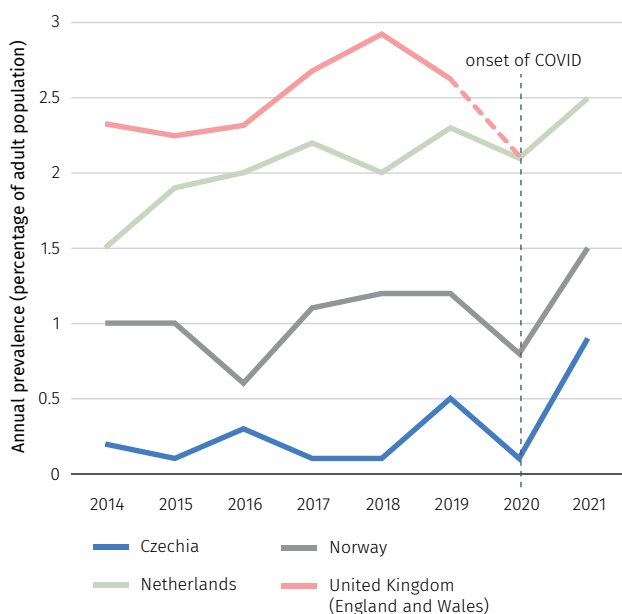
249 UNODC, 'World Drug Report 2021' (Vienna: UNODC, 2021).

Seizure-based metrics of large-scale trafficking of cocaine from Brazil, April 2018–March 2021 (6-month periods)



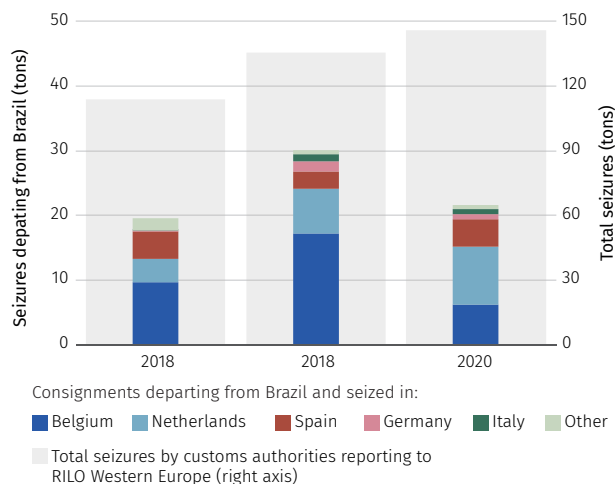
Note: The acronym DMP stands for the UNODC Drugs Monitoring Platform. Seizures recorded in the DMP made in Brazil itself are excluded.
Sources: Federal Police (Brazil), UNODC Drugs Monitoring Platform; reproduced from UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022).

Past-year prevalence of use of cocaine, countries in Western and Central Europe with annual data, 2004–2021



Notes: The age bracket for the reference population is 15–64 for all countries except the United Kingdom (England and Wales). Data for the United Kingdom (England and Wales) refer to 12-month (or shorter) periods starting the year of the axis label and ending in March of the following year. For example, data labelled as "2020" refers to May 2020–March 2021. For this datapoint, the age bracket of the reference population is 18–59; for previous datapoints, the age bracket is 16–59. For this and other methodological reasons, the comparison of the 2020 datapoint with previous years should be made with caution.
Sources: EMCDDA; UNODC, responses to the annual report questionnaire; Crime Survey for England and Wales (year ending March 2020), Drug Misuse Appendix; UK ONS Centre for Crime and Justice, Office for National Statistics, Victimization and its relationship to drug misuse, common mental disorder and well-being in England and Wales tables, year ending March 2021, Appendix Tables.

Cocaine seizures by customs authorities in Western and Central Europe departing from Brazil, by seizing country, in comparison with total seizures by customs (any departure), 2018–2020



Sources: World Customs Organization, Regional Intelligence Liaison Office for Western Europe; reproduced from UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022).

setting up international transactions²⁵⁰ and in maintaining supply and distribution channels, especially along those relying on land transportation – across borders but also domestically.²⁵¹

Some of these disruptions may have had repercussions downstream in the supply chain towards Europe, even as seizures continued at high levels. For example, seizures at seaports in Brazil, a major transit country for cocaine intended for Europe, declined dramatically in 2020, and obstacles encountered by criminals in the internal consolidation of cocaine and its redistribution within Brazil towards the Atlantic coast appear to have temporarily reduced the flows trafficked out this country.²⁵² This pattern is corroborated by data on consignments seized closer to destination (in Europe and beyond), having departed from Brazil. Some very large individual seizures made in European countries also suggest an increased appetite for risk among organized crime groups, possibly a reflection of these disruptions leading to inventory accumulation, or rebounds in supply levels.

At the retail level within the European domestic market, lockdown measures impacted the ability of dealers and consumers (across drug types) to connect, thus increasing the use of contactless transactions and delivery methods relying on online purchases, communication platforms, mail delivery, etc.²⁵³ The United Kingdom, for

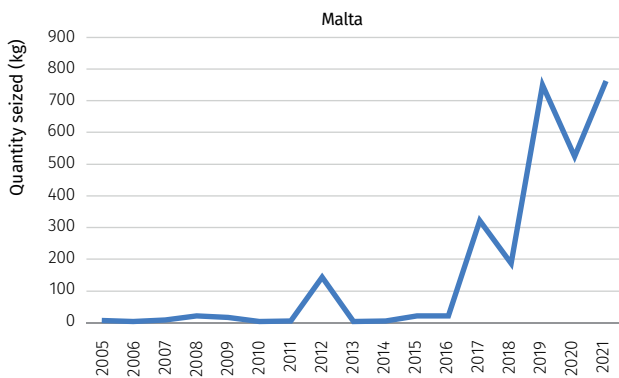
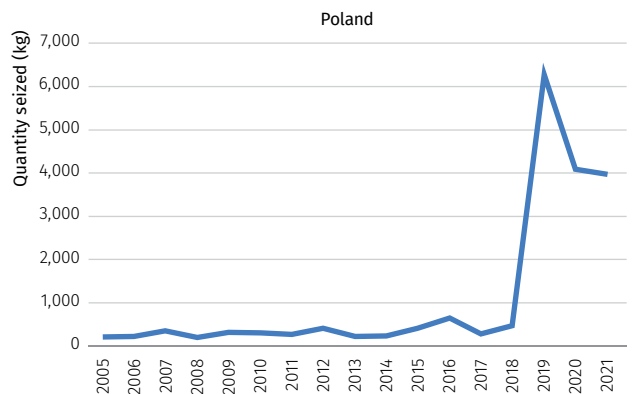
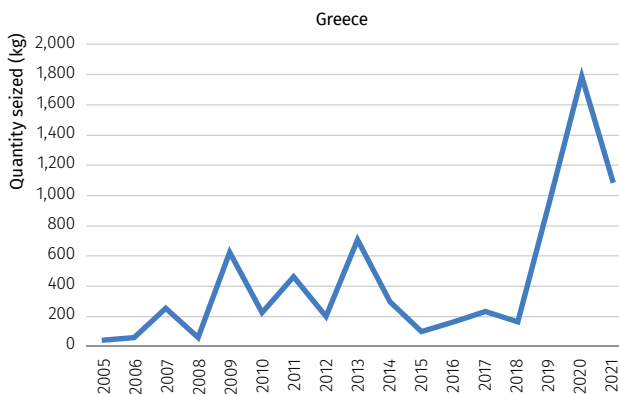
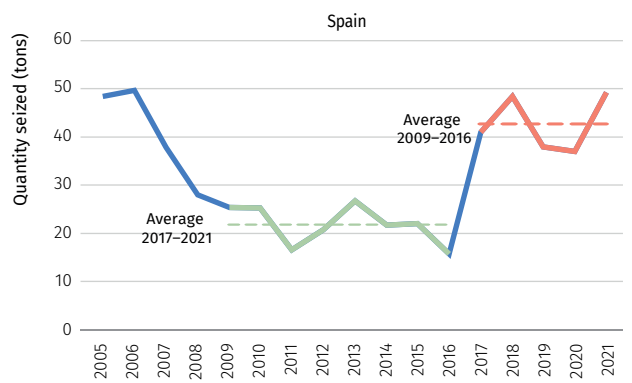
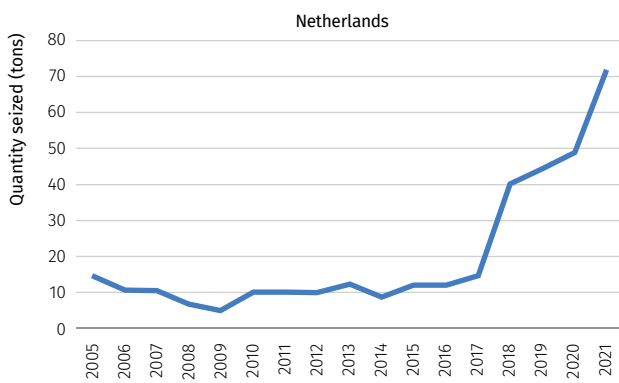
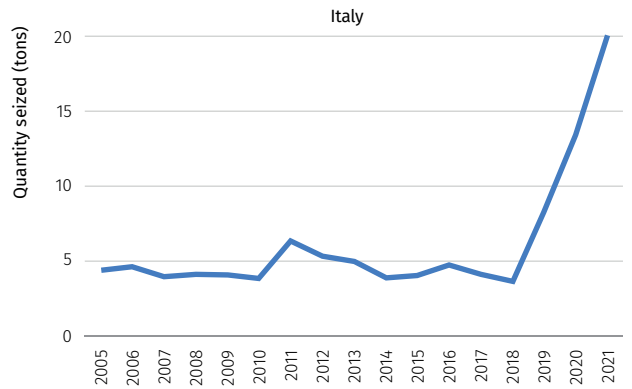
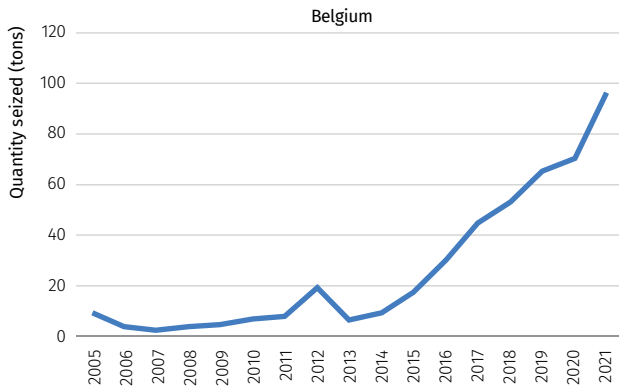
²⁵⁰ United States, Customs and Border Protection, Presentation at Conference of the Parties to the United Nations Convention against Transnational Organized Crime side event, October 2020.

²⁵¹ UNODC and CoE Brazil, 'Cocaine Insights 4'.

²⁵² Ibid.

²⁵³ EMCDDA, 'Impact of COVID-19 on Drug Markets, Use, Harms and Drug Services in the Community and Prisons' (Lisbon: EMCDDA, April 2021).

Notable increases in levels of cocaine seizure quantities in countries in Western and Central Europe



Note: Seizure data for 2021 are incomplete and preliminary.
Sources: UNODC, responses to the annual report questionnaire.

example, reported a significant increase in seizures of cocaine in the fast parcel and postal modes.²⁵⁴

On the demand side, it should be borne in mind that cocaine, alongside other drugs, is frequently used in social settings; thus, the occasion and motivation to use the drug may have declined accordingly during the COVID lockdowns. A web-based survey among people who use drugs across 22 countries in Western and Central Europe indicates that MDMA, cocaine powder and amphetamine – all associated with use in recreational settings – exhibited respectively the strongest, second and third strongest decreases (in that order, among 9 categories of drugs) in use since the start of the COVID-19 pandemic.²⁵⁵

Trafficking into Western and Central Europe

Containerized trade continues to be used by OCGs, who exploit the possibility to conceal large quantities within legitimate goods or within the structure of the container, to traffic ever larger amounts of cocaine to European seaports,²⁵⁶ notably Antwerp (Belgium), Rotterdam (Netherlands), Hamburg (Germany), Gioia Tauro (Italy), Valencia, Algeciras, Barcelona and Las Palmas de Gran Canaria (Spain).²⁵⁷ Based on data reported to the World Customs Organization by customs authorities of 13 countries²⁵⁸ in Western and Central Europe with access to the sea, during 2020 cocaine seizures at the seaports of these countries amounted to 141 tons,²⁵⁹ representing 97 per cent of total seizures reported by the customs authorities of these countries, and 73 per cent of total aggregate seizures in the same countries (including domestic seizures by law enforcement agencies other than customs authorities, and reported via the UNODC ARQ).

Although the points of departure for these shipments remain largely concentrated in Latin America, they have shifted away from Colombia, with other countries in South America (notably Ecuador and Paraguay, which has access to the Atlantic Ocean via the Paraná-Paraguay waterway) and in Central America (notably Panama and Costa Rica) gaining in importance. Brazil, Guyana and Suriname also accounted for significant quantities in 2020–21, as well as Chile and Peru on the Pacific coast.²⁶⁰

An emerging role for Central America in trafficking towards Europe is also suggested by increasing quantities seized from consignments departing from Guatemala, El Salvador and Nicaragua; these quantities,²⁶¹ while still relatively small, suggest that cocaine is increasingly being diverted eastwards towards Europe from the established northward route toward North America.²⁶² These shifts may be linked to the ramifications of the COVID-19 pandemic; one hypothesis that has been put forward by one interviewee from a Central American country was that, in the aftermath of COVID-19, difficulties in crossing (multiple) land borders on the northward route rendered maritime trafficking channels towards Europe more attractive versus the land route towards North America.²⁶³ Authorities from the United Kingdom also assessed that border closings with Colombia and mobility restrictions may have spurred traffickers in Panama to make heavier use of Caribbean (rather than Pacific) waters, and further highlighted increases in cocaine trafficked from Central American countries, such as Costa Rica and Panama, towards Europe.²⁶⁴

Similar to Central America, significant quantities seized in Europe departing from the Dominican Republic (more than 5 tons in 2020²⁶⁵) point to the role of this country as a point of bifurcation of the route from Colombia and Venezuela (Bolivarian Republic of) towards the eastern United States to its north and towards Europe to its east.²⁶⁶ Dutch authorities report that in recent years criminal ties between the Netherlands and the Dominican Republic have strengthened.²⁶⁸

Aside from shipments departing from countries in Central and South America and the Caribbean, quantities of cocaine seized in Europe and identified as having departed from the United States, Canada, Mozambique, Côte d'Ivoire, Turkey and Spain suggest that trans-shipment of cocaine may have occurred in these countries to lower the risk profile of the containers. Significant quantities were also seized from shipments from more far-flung or unusual points of departure in countries with limited evidence of cocaine trafficking, such as China, Singapore, India, and Israel; however it should be borne in mind that the point of contamination of a shipment may not always be the point of departure of the itinerary, as containers may potentially be contaminated during

254 UNODC, 'United Kingdom, Responses to the Annual Report Questionnaire 2020', n.d.

255 EMCDDA, 'European Web Survey on Drugs 2021: Top Level Findings, 21 EU Countries and Switzerland' (European Monitoring Centre for Drugs and Drug Addiction, 2021).

256 UNODC and Europol, 'Cocaine Insights 1'.

257 Based on seizure data from WCO RILO (Regional Intelligence Liaison Office) Western Europe for 2021 and other, open sources.

258 Belgium, Denmark, Finland, Germany, Iceland, Ireland, Italy, Malta, Netherlands, Norway, Portugal, Spain and Sweden

259 Data from WCO RILO (Regional Intelligence Liaison Office) for Western Europe

260 Data from WCO RILO (Regional Intelligence Liaison Office) for Western Europe

261 Data from WCO RILO (Regional Intelligence Liaison Office) for Western Europe

262 See section on North America

263 Interview #29.

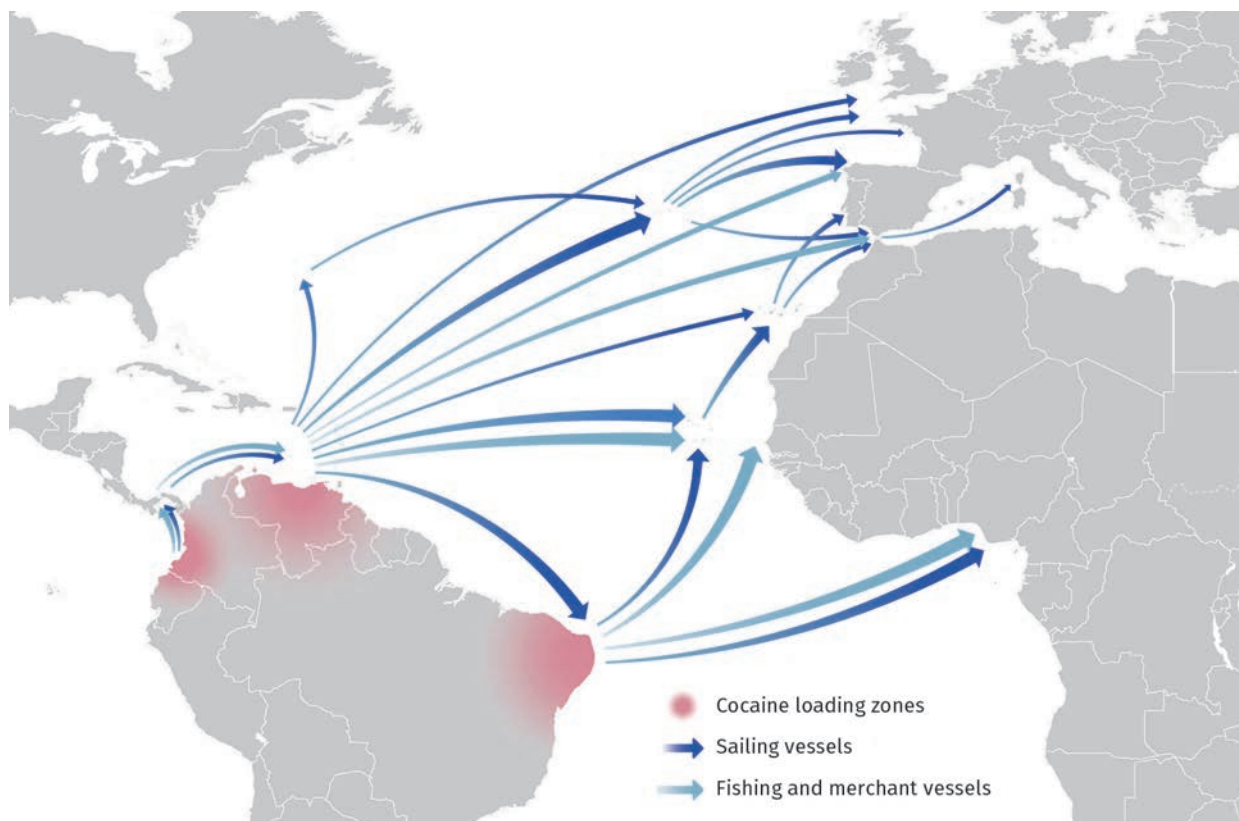
264 UNODC, 'United Kingdom, Responses to the Annual Report Questionnaire 2020'.

265 Data from WCO RILO (Regional Intelligence Liaison Office) for Western Europe

266 Drug Enforcement Administration, '2020 National Drug Threat Assessment'.

267 US Department of the Treasury, 'Treasury Designates Dominican Republic-Based Peralta Drug Trafficking Organization Under the Kingpin Act', Treasury.gov, 20 August 2019.

268 M. van Laar et al., 'Nationale Drug Monitor Jaarbericht 2020' (Utrecht: Trimbus Instituut, 2021).



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Final boundary between the Republic of Sudan and the Republic of South Sudan has not been yet determined. Source: MAOC-N

transportation, at intermediate points of the itinerary, or even, in the case of failed trafficking attempts involving cocaine embedded within the container structure but never retrieved, in a *prior* itinerary. For this minority of cases, the country of departure may also reflect, in a probabilistic sense, the high volume of legitimate trade which goes through specific ports, and which may be contaminated in a random fashion.²⁶⁹

Aside from containerized trade, which relies on well-defined shipping routes through seaports with appropriate infrastructure, significant quantities of cocaine are trafficked towards Western and Central Europe on a variety of vessels (including pleasure craft, fishing vessels and merchant vessels), starting from the Caribbean Sea and the east coast of South America, across the Atlantic and towards Africa and Europe. There are two major areas of departure for this type of transatlantic journey: in the south, along the coast of Brazil; further north, in the Caribbean Sea and along the coasts of Colombia, Venezuela (Bolivarian Republic of) or Suriname.²⁷⁰

Vessels departing from Brazil typically take two routes:

either towards Cabo Verde and the western coast of Africa; or further south towards the more distant Gulf of Guinea. On the other hand, vessels which pick up a cocaine consignment north of Brazil may in some cases navigate directly towards continental Europe; in other cases, including some of the instances of sailing vessels, the vessel may make a stop at the Azores, or take more circuitous paths either to the north via Bermuda (before the Azores), or the east via the Canary Islands or even Cabo Verde (before the Canary Islands). It appears that the coast of Brazil has recently increased in importance as a point of departure.²⁷¹

Cocaine may be trans-shipped between vessels on these routes starting from Brazil, and some vessels which pick up cocaine may be based at the destination rather than at the source region. Some consignments reach land on the coast of West Africa; in this case, in order to continue towards their destination, the drugs may be loaded on a container and shipped to Europe, or they may be trafficked by land through North Africa. However, often the maritime segment of the itinerary across the Atlantic Ocean leads directly to Europe, typically to the coasts of Portugal or Spain; occasionally pickups have been observed by fishing boats off the coast of Ireland,²⁷² and

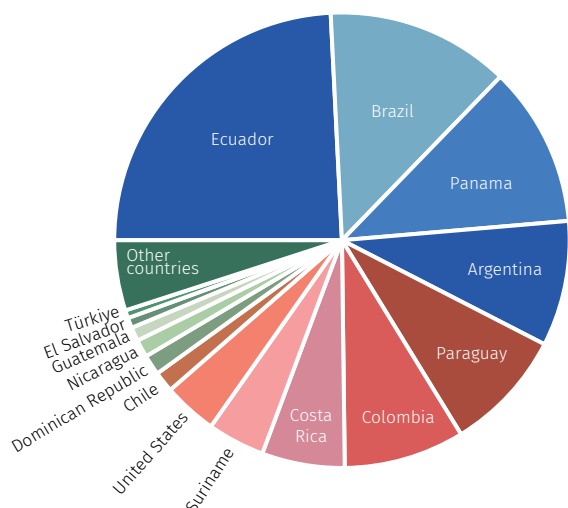
269 For example, according to the World Shipping Council, in 2020 Singapore was the port with the second-highest throughput of containers worldwide. See World Shipping Council, 'The Top 50 Container Ports', worldshipping.org, n.d.

270 Interview #41, interview by UNODC, 2022.

271 Ibid.

272 Ibid.

Breakdown of cocaine seizures by customs authorities in Western and Central Europe, by country of departure of the consignment, 2021



Sources: World Customs Organization, Regional Intelligence Liaison Office for Western Europe.

Note: Based on countries in Western and Central Europe reporting to the Regional Intelligence Liaison Office for Western Europe of the World Customs Organization. Seizures with unknown country of departure are excluded; based on 1797 cocaine seizures with a known country of departure, amounting to 185 tons, out of a total 1902 seizures amounting to 194 tons of cocaine. Value for Argentina is driven by one seizure of 16 tons made in Hamburg, Germany, which had departed from Buenos Aires, having been trans-shipped from a shipment originating in Paraguay.

small vessels may also sail directly to the Netherlands²⁷³ and the United Kingdom.²⁷⁴

Overall, maritime routes (containerized or not) account for the vast majority of cocaine reaching Western and Central Europe. For example, in Portugal, 14 instances of cocaine seized from a maritime conveyance amounted to 8.3 tons in 2020, representing 83 per cent of the total amount of cocaine seized and 3.5 per cent of all cocaine seizure cases in 2020.²⁷⁵

There are two main entry channels into Western and Central Europe: first, via the ports of Belgium, the Netherlands and Germany on the North Sea; second, via the coasts and ports of Portugal and Spain. Other channels, of varying volume, lead into Italy, France, and the United Kingdom, although cocaine reaching these countries appears to be primarily (with some exceptions) intended for the domestic market.

The first of the above channels, with the Netherlands as the main hub, appears to have eclipsed the Iberian Peninsula as the primary conduit for cocaine arriving to Europe.²⁷⁶ Cocaine destined for Dutch criminal orga-

nizations mainly arrives via the ports of Antwerp and Rotterdam and via smaller ports such as Vlissingen and IJmuiden (Amsterdam), in addition to Schiphol airport (Amsterdam).²⁷⁷ There are indications that cocaine importation has shifted from the Dutch port of Rotterdam to the Belgian port of Antwerp in recent years.^{278 279} However the majority of cocaine reaching Antwerp is believed to be channeled into the Netherlands.^{280 281} Some of the criminal groups involved in the extraction of cocaine from the Belgian ports maintain close ties across the border with the Netherlands, sometimes based on family ties.²⁸²

The incoming flow of cocaine through North Sea ports may have been instrumental for traffickers to increase the availability of cocaine in Europe. One study has attributed the significant drop in the wholesale price of cocaine in the Netherlands, beginning around 2012, to the role of Albanian-speaking traffickers in procuring cocaine directly at source in South America and undercutting the prevailing price at the time.²⁸³ Belgian authorities confirm that groups of Albanian ethnicity are among those involved in the extraction of cocaine from the port of Antwerp, and have expanded their role in the procurement of cocaine and the development of contacts in South America.²⁸⁴ Around the same time, retail purity levels in Europe appeared to converge towards the levels seen in the United States;²⁸⁵ moreover, seizures levels spiked in Belgium in 2013.

From the Netherlands, cocaine is further distributed to other European countries,²⁸⁶ and Albanian-speaking groups appear to play an important role in this, in particular in the trafficking towards Italy and Albania.^{287 288} The important destination of the United Kingdom, where Albanian-speaking groups have also been assessed to exert considerable control across the drug market,²⁸⁹ is also supplied to a large extent via “roll-on, roll-off” freight reaching ports in the south-east of the United

273 Interview #14, interview by UNODC, 2022.

274 Maurizio Franco, Youssef Hassan Holgado, and Filippo Poltronieri, ‘How the Albanian Mafia Conquered the Cocaine Market in UK’, IRPI Media, 3 March 2022.

275 Unidade Nacional de Combate ao Tráfico de Estupefacientes Portugal, ‘Combate ao Tráfico de Estupefacientes em Portugal Relatório Anual 2020’ (Polícia Judiciária Portugal, 2021), 12.

276 UNODC and Europol, ‘Cocaine Insights 1’.

277 Interview #14.

278 Robby Roks, Lieselot Bisschop, and Richard Staring, ‘Getting a Foot in the Door: Spaces of Cocaine Trafficking in the Port of Rotterdam’, Trends in Organized Crime 24, no. 2 (1 June 2021): 171–88.

279 Freja De Middel et al., ‘Illegale drugsmarkten in België en Nederland: Communicerende vaten?’ (Gent: Belgian Science Policy Office, 2018).

280 Interview #12, interview by UNODC, 2022.

281 Laar et al., ‘Nationale Drug Monitor Jaarbericht 2020’.

282 UNODC, ‘Belgium, Responses to the Annual Report Questionnaire 2019’, n.d.

283 Tony Saggars, ‘An Assessment of the Extent of Albanian(-Speaking) Organised Crime Groups Involved in Drug Supply in the European Union: Characteristics, Role and the Level of Influence’, Background Paper Commissioned by the EMCDDA for the EU Drug Markets Report 2019 (European Monitoring Centre for Drugs and Drug Addiction, 2019).

284 UNODC, ‘Belgium, Responses to the Annual Report Questionnaire 2019’.

285 UNODC and Europol, ‘Cocaine Insights 1’.

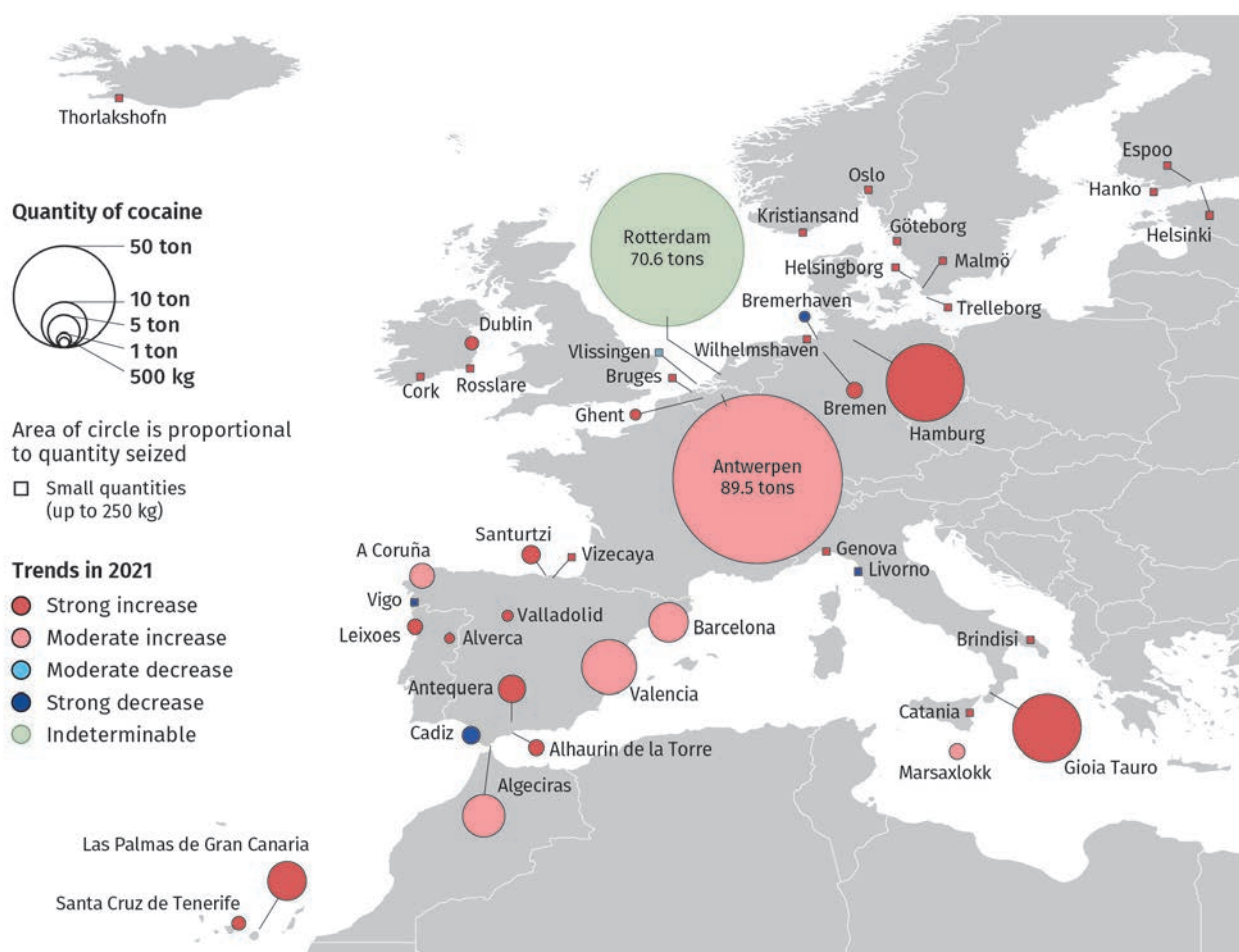
286 Based on ARQ reporting for 2020, 10 European countries identified the Netherlands among the countries of provenance of cocaine reaching their territory.

287 UNODC, ‘Belgium, Responses to the Annual Report Questionnaire 2019’.

288 UNODC, ‘Italy, Responses to the Annual Report Questionnaire 2021’, n.d.

289 Thirteenth Meeting of Heads of National Drug Law Enforcement Agencies, Europe, ‘Country Report: The United Kingdom of Great Britain and Northern Ireland’, Country report (Lisbon, Portugal: UNODC, 2 July 2019).

Cocaine seized at seaports by customs authorities in Western and Central Europe, quantities seized in 2021 and trend in comparison with 2020



Note: Reporting may be incomplete.

Source: WCO Regional Intelligence Liaison Office Western Europe; Office of the Public Prosecutor of Netherlands.

Kingdom²⁹⁰ from nearby European ports²⁹¹ such as those in the Netherlands and Germany.²⁹²

Despite the expansion of the North Sea channels described above, the Iberian peninsula remains a major gateway for cocaine destined for the markets of Western and Central Europe. Portugal's location and extensive coastline on the Atlantic renders it a natural point of arrival for cocaine to be offloaded from maritime vessels. The main points of arrival for this type of (non-containerized) trafficking are in the Algarve region, where cocaine arrives mainly via pleasure boats and yachts – in addition to islands in the Atlantic such as Madeira and the Azores.²⁹³ However, significant quantities are also trafficked into the main ports, concealed among legitimate cargo.²⁹⁴ In 2020, the district of Portugal with the largest

seizures was Setubal (including the port city with the same name, close to Lisbon).²⁹⁵

Some of the trafficking activity occurring in Portugal appears to be managed by groups based in Spain, including in the Spanish autonomous community of Galicia, north of Portugal on the Atlantic coast of Spain.²⁹⁶ Some of the Galicia-bound cocaine is first routed to the north of Portugal, unloaded at night on a beach and trafficked to Galicia, Spain, by road.²⁹⁷ In 2020, 400 kg of cocaine were seized in the northernmost district of Portugal – Viana do Castelo – bordering Galicia, placing this district in fifth place among the 18 which make up the territory of continental Portugal.²⁹⁸

290 UNODC, 'United Kingdom, Responses to the Annual Report Questionnaire 2019', n.d.

291 UNODC, 'United Kingdom, Responses to the Annual Report Questionnaire 2020'.

292 Franco, Holgado, and Poltronieri, 'How the Albanian Mafia Conquered the Cocaine Market in UK'.

293 Miguel Curado, 'Açores e Madeira na rota da cocaína', Cofina Media, 27 November 2019.

294 Interview #5, interview by UNODC, 2022.

295 Unidade Nacional de Combate ao Tráfico de Estupefacientes Portugal, 'Combate ao Tráfico de Estupefacientes em Portugal Relatório Anual 2020'.

296 Interview #5.

297 Ibid.

298 Unidade Nacional de Combate ao Tráfico de Estupefacientes Portugal, 'Combate ao Tráfico de Estupefacientes em Portugal Relatório Anual 2020'.

Criminal groups in Galicia have long maintained ties with Colombian counterparts,²⁹⁹ including some present in Spain itself,³⁰⁰ to operate these cocaine trafficking routes. Galicia-based *narcotransportistas* pick up cocaine from the mother ship at a distance as far as the Azores or Cabo Verde and bring it ashore by small boats, sailing vessels or fishing boats. At the coast, they hand the drug over to the receiving organization (where Colombians are often involved).³⁰¹

Cocaine nowadays reaches Spain through a wide variety of points of entry and modalities. In 2020, each of the provinces of Galicia, Comunitat Valenciana and Andalucía accounted for between 20 and 25 per cent of cocaine seizures made in Spain, followed by the Canary Islands and Catalonia (11 per cent each).³⁰² In Spanish ports, seizures were made from 45 contaminated containers, collectively amounting to 18.5 tons (one half of the overall total for Spain in 2020).³⁰³ Among the various routes, established supply chains which originally served to traffic cannabis resin from Morocco through Spain to the rest of Europe, notably the Netherlands, may have been adapted to also traffic cocaine intended for distributors in the Netherlands.³⁰⁴ It appears that these trafficking routes are managed by networks based in Gibraltar.^{305 306 307}

Once cocaine reaches Spain, a large proportion is distributed across Europe over land by vehicle.³⁰⁸ However, cases of trans-shipment of containers to ports of other European countries, such as Belgium, the Netherlands and Italy, have also been observed, for example at the port of Algeciras near the Strait of Gibraltar.³⁰⁹

Aside from the physical flow of cocaine into its territory, Spain appears to be used as a staging point for criminals facilitating cocaine flows towards the rest of Europe. Wholesale buyers of cocaine in Europe include some acting on behalf of Albanian-speaking, British, Dutch, and Italian groups.³¹⁰ One interviewee indicated that low-level criminals have been observed to operate at the port of Antwerp at the behest of individuals based in Spain.³¹¹ Colombian groups have long had a presence in Spain and sometimes these ties appear to be key in providing

or transferring to traffickers in other European countries specific expertise needed for sophisticated concealment methods.³¹²

In May 2020, for example, an investigation led by Spanish police reported in the media brought to light an international operation, apparently led by a Colombian national with links to Spain, whereby cocaine was impregnated in cardboard boxes before departure from South America and retrieved in Europe at secondary extraction facilities in Bulgaria and the Netherlands. Individuals with specialized chemical skills travelled from Colombia to Spain and subsequently onwards to Bulgaria and the Netherlands specifically to perform the extraction step.^{313 314} Italian law enforcement highlighted a similar case with links to Barcelona (Spain), apparently involving the Italian organized crime group *'Ndrangheta*, in which Bolivian and Colombian nationals were sent from Spain to the Italian port of Gioia Tauro in order to set up a laboratory to refine cocaine.³¹⁵

Other countries in Western and Central Europe whose domestic cocaine market is supplied – to varying degrees – directly via maritime routes (as opposed to being channelled via land from neighbouring countries) include Italy, France and, likely to a lesser extent, the United Kingdom.

In 2020, based on data reported by Italian Customs authorities to the World Customs Organization, the port of Livorno registered the largest quantities of cocaine seizures among Italian ports, but in 2021, seizures in the port of Gioia Tauro (located north of the city of Reggio Calabria) by far exceeded those in any other Italian port, corroborating the continued importance of the role of the *'Ndrangheta*, whose origins and heartland lie in the southern Italian region of Calabria. Cocaine seizures in this port amounted to 14 tons (more than half of total cocaine seizures in Italy during that year), with Brazil, Chile, Colombia, Ecuador, Guatemala, Nicaragua and Peru among the countries of departure.³¹⁶ However, cocaine also reaches Italy from other European countries, including the Netherlands and Spain.³¹⁷ Italian organized crime groups, notably the *'Ndrangheta* but also the *Camorra*, and Albanian-speaking groups, leverage extensive international networks of orchestrate the importation of cocaine into Italy, sometimes working in collaboration.³¹⁸

During 2021 in France, 10.3 tons of cocaine were seized in the port of Le Havre on the shore of the English Chan-

299 UNODC and CoE Brazil, 'Cocaine Insights 4'.

300 Interview #8, interview by UNODC, 2022.

301 Ibid.

302 Centro de Inteligencia contra el Terrorismo y el Crimen Organizado, 'Estadística Anual sobre Drogas 2020' (Madrid: Ministerio del Interior, 2021), 79.

303 Ibid.

304 UNODC and Europol, 'Cocaine Insights 1'.

305 Douwe Den Held, 'Spain: The European Base for Latin American Organized Crime', InSight Crime, 9 February 2021.

306 Departamento de Seguridad Nacional España, 'Informe Anual de Seguridad Nacional 2020' (Departamento de Seguridad Nacional España, 2021), P.71

307 Interview #7, interview by UNODC, 2022.

308 Interview #10, interview by UNODC, 2022.

309 Interview #7.

310 Ibid.

311 Interview #12.

312 UNODC and Europol, 'Cocaine Insights 1'.

313 Sam Jones, 'Smugglers Impregnated Cardboard with Cocaine, Spanish Police Say', The Guardian, 14 May 2020.

314 AFP, 'Spanish Police Say Drug Ring Smuggled Cocaine-Laced Cardboard', France24, 13 May 2020.

315 DCSA, 'Relazione Annuale 2022' (Ministero Dell'Interno, Direzione Centrale per i Servizi Antidroga, 2022).

316 WCO RILO (Regional Intelligence Liaison Office) data

317 UNODC, 'Italy, Responses to the Annual Report Questionnaire 2021'.

318 DCSA, 'Relazione Annuale 2022'.

Quantities of cocaine seized in Portugal and Spain, by province, 2020



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Sources: *Estadística Anual sobre Drogas 2020, Informe 2021*, Ministerio del Interior, Secretaría de Estado de Seguridad Centro de Inteligencia contra el Terrorismo y el Crimen Organizado (Spain); *Policía Judicial, Relatorio Anual 2020* (Portugal).

nel and 1.5 tons in the port of Dunkirk near the Belgian border.³¹⁹ French authorities assessed Suriname as the most frequently detected departure country for cocaine reaching France in 2020, with neighbouring French Guiana also playing an important role.³²⁰

The United Kingdom receives a major portion of incoming cocaine via ferry traffic from European ports, but seizures from containers also occur.³²¹ Yachts and small boats are also used.^{322 323}

Domestic Market

The prevalence of past-year use in Western and Central Europe stood at around 1.4 per cent in 2020 – still below the levels in North America (1.9 per cent). However, this figure has increased significantly from 1.08 percent estimated for 2015; moreover, the best available (proxy) measures of consumption – based on wastewater data – have outpaced this growth, suggesting that users are

not only increasing in number, but on average are also consuming more.

Cocaine in this subregion is understood to be mainly consumed through insufflation of cocaine hydrochloride – typically bought by consumers in powder form. Hence, the shifts in consumption patterns which may explain this development could relate to cocaine hydrochloride consumed with greater frequency, or in larger doses. However, they could potentially also relate to shifts towards different routes of administration such as smoking of cocaine in base form, usually in the form of “crack”.

The available data on prevalence of cocaine use based on household surveys suggests that smoking of cocaine products such as “crack” affects only a minority of cocaine users in Western and Central Europe. For example, the latest available data for Spain (2019)³²⁴ and Germany (2018)³²⁵ suggest that, for every past-year user of “crack”, there were respectively 7 and 11 users of cocaine hydrochloride (including past-year users of both cocaine hydrochloride and “crack”), while similar data from the

319 UNODC, ‘France, Responses to the Annual Report Questionnaire 2021’, n.d.

320 UNODC, ‘France, Responses to the Annual Report Questionnaire 2020’, n.d.

321 UNODC, ‘United Kingdom, Responses to the Annual Report Questionnaire 2020’.

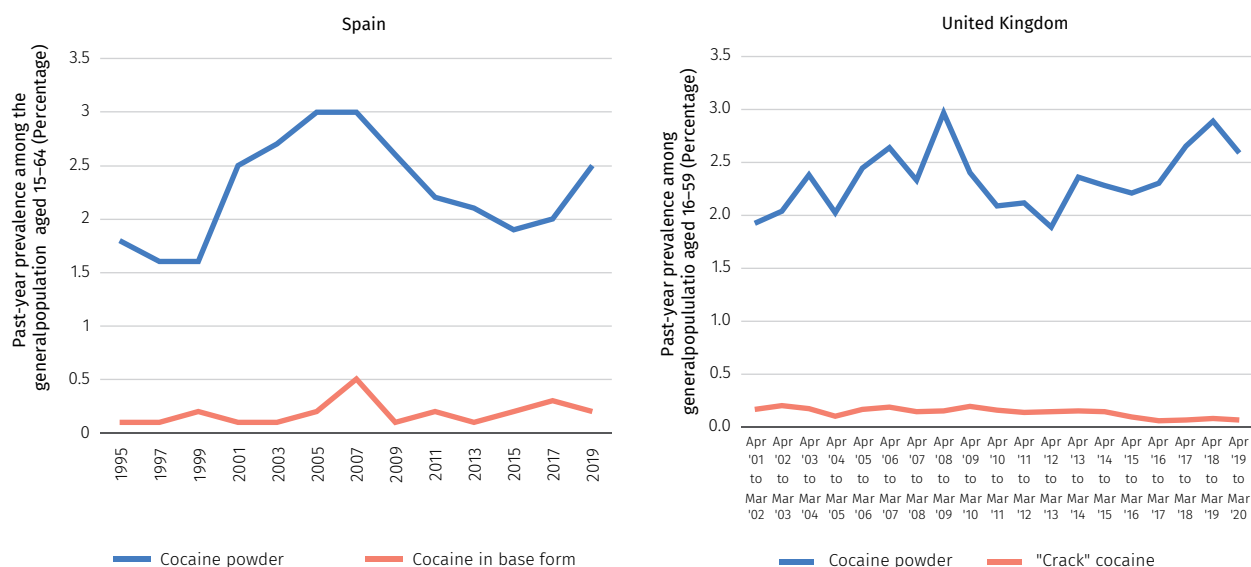
322 National Crime Agency UK, ‘The Threat from Drug Trafficking’, nationalcrimeagency.gov.uk, n.d.

323 UNODC, ‘United Kingdom, Responses to the Annual Report Questionnaire 2019’.

324 UNODC, ‘Spain, Responses to the Annual Report Questionnaire 2019’, n.d.

325 UNODC, ‘Germany, Responses to the Annual Report Questionnaire 2018’, n.d.

Past-year prevalence of use of different cocaine products, Spain and United Kingdom



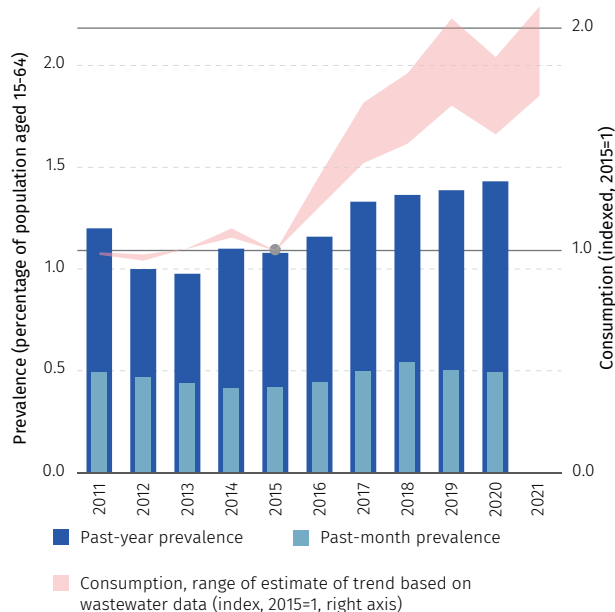
Sources: Informe 2021 Alcohol, tabaco y drogas ilegales en España, Observatorio Español de Las Drogas y Las Adicciones; Crime Survey for England and Wales (year ending March 2020), Drug Misuse Appendix.

United Kingdom (for April 2019–March 2020)³²⁶ suggest an even higher ratio.

However, it should be borne in mind that marginalized individuals may be over-represented among smokers of cocaine products (such as “crack”);³²⁷ thus household surveys may be prone to underestimating the prevalence of use of these products. Moreover, as the conversion from cocaine hydrochloride to base form can be performed relatively easily,³²⁸ some users may perform this conversion themselves and may not identify as “crack” users.

While treatment data confirm the general association of powder cocaine (generally assumed to be in hydrochloride form) with insufflation, and “crack” cocaine with smoking, as the corresponding routes of administration, based on data from EMCDDA, some countries (e.g., Italy,³²⁹ Germany,³³⁰ Portugal³³¹) also recorded significant numbers of individuals in treatment for use of “cocaine powder” via smoking, even as data from each of these countries confirmed in parallel that smoking was the predominant route of administration for users of “crack”.³³² Based on data from 23 countries in Western and Central Europe for which treatment data was available separately for “crack” and for powder cocaine, in 2020 (or the most recent year with available data), 20 per cent of patients entering treatment for cocaine use were recorded as users of “crack” cocaine, while 27 per cent of all cocaine patients

Trends on demand-side indicators in Western and Central Europe, 2010–2021



Note: Estimates of past-year prevalence published in the UNODC World Drug Report reflect the most recent data available at the time; however, estimates are not retroactively revised and data which become available after publication are generally only reflected in the estimate for later years. Hence, while the trend in past-year prevalence is meaningful in the medium or longer term, year-on-year changes are not necessarily captured. Trends in consumption based on unweighted aggregate of data on loads of benzoylecgonine per thousand inhabitant per day from wastewater plants in 77 cities in Western and Central Europe. Data was not available for all cities and all years. The difference between the “conservative” and “presumptive” estimates lies in the way missing data are handled. Both approaches use interpolation when possible. When interpolation is not possible, the conservative approach extrapolates the latest/first available values, while the “presumptive” approach assumes that the year-on-year trend based on cities with available data only reflects the overall trend.

Sources: Past-year prevalence: UNODC World Drug Report, 2013–2022; Past-month prevalence: UNODC estimates based on EMCDDA Statistical Bulletin 2022; Consumption trends: UNODC calculations based on wastewater data provided by the Sewage Analysis CORE group Europe.

326 Office for National Statistics, ‘Crime in England and Wales: Year Ending December 2020’, ons.gov.uk, 13 May 2021.

327 UNODC, ‘World Drug Report 2022’.

328 UNODC, ‘Cocaine Insights 2’.

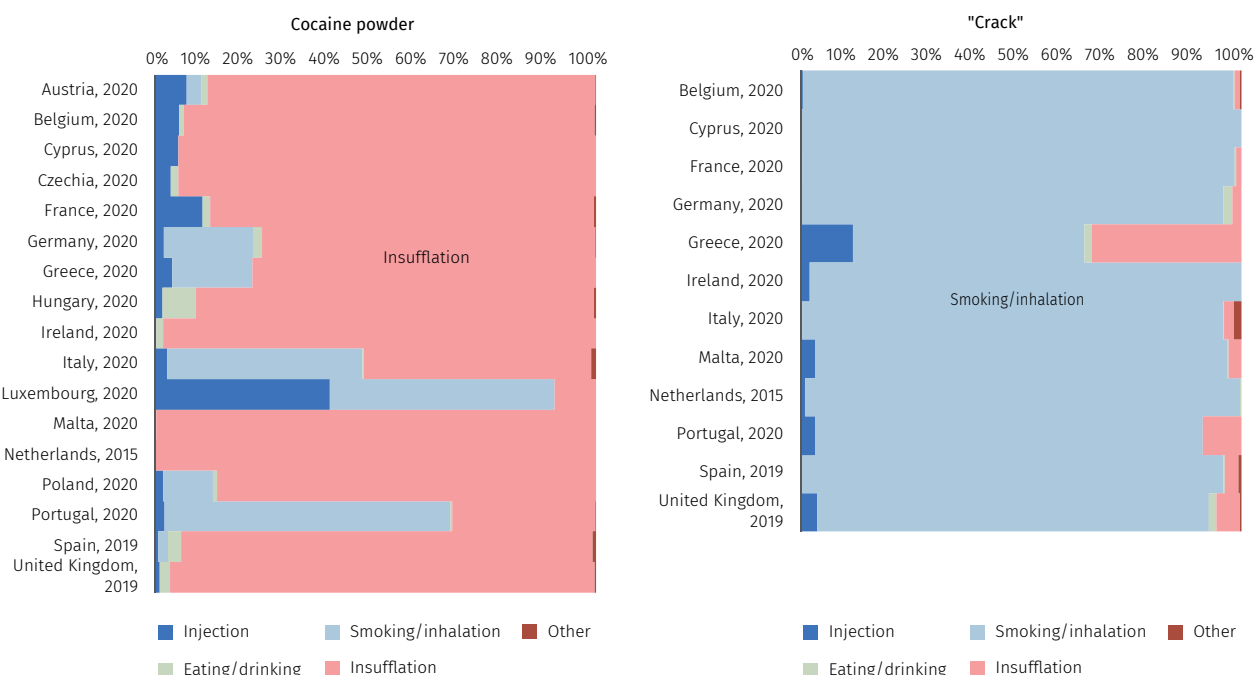
329 4,794 out of 12,152 users of cocaine powder in treatment in 2020.

330 440 out of 3,337 users of cocaine powder in treatment in 2020.

331 308 out of 499 users of cocaine powder in treatment in 2020.

332 EMCDDA, ‘Statistical Bulletin 2022’ (EMCDDA, 2022).

Routes of administration of individuals entering drug treatment for cocaine and “crack” use, countries in Western and Central Europe, latest data available



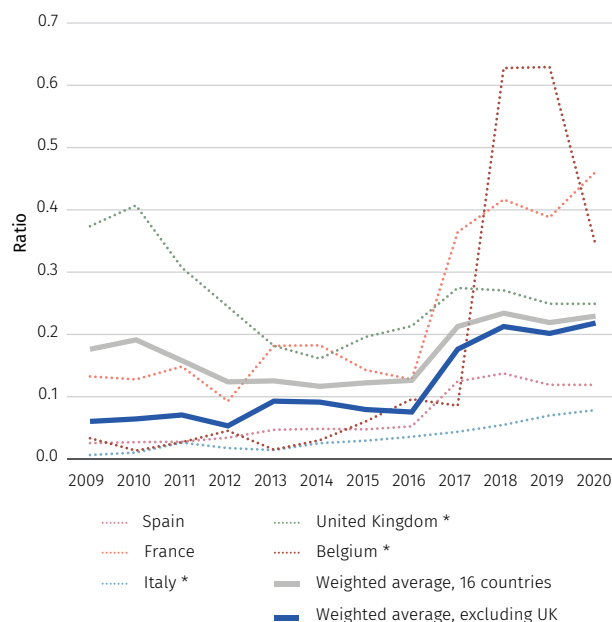
Note: Only countries in Western and Central Europe with at least 40 treatment entrants in the latest available dataset are included. Source: EMCDDA Statistical Bulletin 2022.

registered with a known route of administration used smoking (or inhalation) to consume the drug.³³³

Given that smoking often leads to more intensive patterns of use³³⁴ than insufflation, it is plausible that cocaine smokers are generally over-represented among treatment entrants. On the other hand, such users likely account for larger quantities of cocaine consumed per capita. Thus, the available data only allow indirect assessments of the relative magnitude of the quantities of cocaine consumed via smoking, as opposed to insufflation, in Western and Central Europe; nevertheless, there are indications that the recent trend of smoking cocaine in this subregion has been on the increase.³³⁵

In several countries data on people entering treatment for the first time³³⁶ show sharp increases in the share of such patients registered as “crack” users. While the use of “crack” has been well documented in the United Kingdom, countries in continental Europe also appear to show an increased incidence of “crack”, notably Belgium, France and Spain, each of which registered abrupt increases in crack users entering treatment starting in 2017 or 2018. In Italy a slow but steady increase can also be observed since 2016.

New treatment entrants in Western and Central Europe, ratio of “crack” users to “powder cocaine” users, 2009–2021



Source: EMCDDA Statistical Bulletin 2022

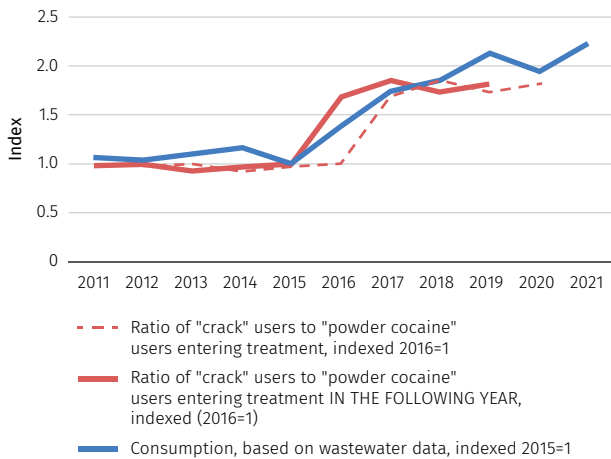
These increases appear to parallel the increase in consumption reflected in wastewater-based trends, albeit with a delay of 1 year, a lag which could be attributable to the time in between changes in patterns of use first occurring and the consequent impacts on the lives and health of users resulting in them seeking treatment. While smoking of cocaine could be a driver contributing

333 Ibid.
 334 See Chapter Introduction: Big Picture in this report.
 335 EMCDDA, 'European Drug Report: Trends and Developments' (Luxembourg: European Monitoring Centre for Drugs and Drug Addiction, 2022).
 336 EMCDDA, 'Statistical Bulletin 2022'.

to some extent to the increase in consumption, it could also be part of the broader trend of intensification of use patterns in this subregion.

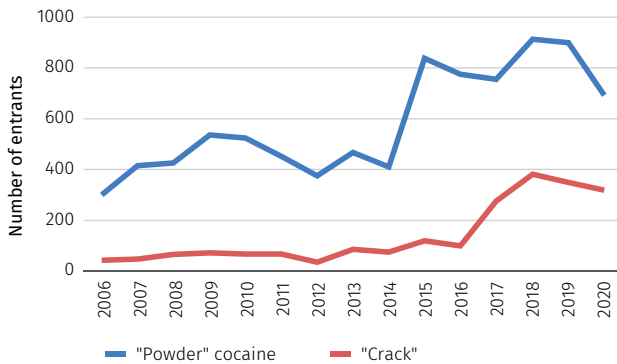
Finally, it should be noted that the evidence, mentioned above, of a temporary decline in the use of cocaine powder following the onset of the COVID-19 pandemic does not extend to “crack” cocaine.³³⁷

Comparison of trends in cocaine consumption and relative importance of “crack” users entering treatment in Europe, 2011–2021



Source: EMCDDA Statistical Bulletin 2022

New entrants in treatment for cocaine use in France, 2006–2020



Source: EMCDDA Statistical Bulletin 2022

Violence linked to the cocaine supply chain in Europe³³⁸

While organized crime is commonly associated with violence, its use is typically deployed in a selective and strategic manner in order to avoid the attention of law enforcement.³³⁹ When conflicts in drug markets arise and the use of violence becomes excessive and overt, it may signal instability due to power shifts among criminal actors and/or following law enforcement intervention.³⁴⁰

Drug-related violence may stem from different mechanisms: it may be economic-compulsive (violence in order to fund a drug habit), psychopharmacological (violence induced by the use of drugs) or systemic. The latter is that associated with the functioning of the drug markets and such contexts in which drug-related violent episodes occur vary; they may include: competition among OCGs or among members of the same criminal group; targeted killings of people involved in a criminal prosecution process; intimidation of facilitators from legal industries, such as port employees; and violence at the retail level, against drug dealers or users alike.³⁴¹ In such contexts, acts or threat of violence typically serve either an instrumental (violence as a tool) or an expressive (violence as communication) goal, or both.³⁴²

The use or threat of violence by criminal networks is a growing concern in Europe. Over the last few years, a spike in serious violent incidents associated with organized crime, particularly in drug markets, has been seen in some countries of the European Union and neighbouring regions.³⁴³ As expanding cocaine (and cannabis) markets in Europe have recently attracted new drug trafficking organizations, drug-related conflicts have resulted in public shootings, bombings, kidnappings and torture.³⁴⁴ In the spring of 2020 for example, the French and Dutch authorities, with the support of Europol and other countries, carried out investigations into organized crime groups using an encrypted communications platform. The

338 Violent behaviours associated with drugs can stem from drug use itself (psychopharmacological violence), from obtaining drugs or money to buy drugs (economic-compulsive violence), and from the structure of the illicit markets (systemic violence). This section focuses on the systemic violence related to cocaine supply and distribution, including turf wars, rip deals and retaliations. See Paul Goldstein, 'The Drugs/Violence Nexus: A Tripartite Conceptual Framework', *Journal of Drug Issues* 15, no. 4 (1985): 493–506.

339 Rocco Sciarone, 'Forms of Capital and Mafia Violence', in *Mafia Violence: Political, Symbolic, and Economic Forms of Violence in Camorra Clans*, ed. Monica Massari and Vittorio Martone (Routledge, 2019), 72–89.

340 Justin Kotzé, Georgios Antonopoulos, and Mohammed Rahman, 'The Processes, Logics and Economies of Violence in Organised Crime', *Trends in Organized Crime* 25 (2022): 1–7.

341 Roks, Bisschop, and Staring, 'Getting a Foot in the Door: Spaces of Cocaine Trafficking in the Port of Rotterdam.'

342 Examples of instrumental violence include obtaining wealth, removing a competitor, ensuring compliance, etc. Expressive violence, such as beheadings, body exposure, and other excessive cruelty, is aimed at sending a signal to the rivals, police or community. See Kotzé, Antonopoulos, and Rahman, 'The Processes, Logics and Economies of Violence in Organised Crime.'

343 EMCDDA and Europol, 'Negative Consequences: Violence' (EMCDDA, May 2022).

344 UNODC and Europol, 'Cocaine Insights 1'. P.26

337 EMCDDA, 'European Web Survey on Drugs 2021: Top Level Findings, 21 EU Countries and Switzerland'.

data collected provided law enforcement agencies with a unique global view of the activities of high-risk organized crime groups, particularly in drug trafficking, but also in the use of violence. Hundreds of serious violent crimes including homicides and threat to life incidents were detected and/or prevented.³⁴⁵

In the United Kingdom, “crack” cocaine is one of the drug types (alongside heroin) most strongly associated with the “county lines” trafficking model,³⁴⁶ which is assessed by authorities in the United Kingdom to be driving violence at the lower end of the supply chain.^{347 348 349} For example, the UK police reported carrying knives and firearms,³⁵⁰ severe beatings and sexual violence, injuring, robbery and assault among players in drug distribution networks (dealers, couriers and users). In addition, in 2016 and 2017, the use of acid or ammonia to perpetrate acid throwing attacks was reported in relation to county lines activity. Causes for violence include competition between county lines operators and local dealers to establish and maintain drug distribution areas, punishment of gang members, enforcement or creation of drug debts which the victim has to pay off, and intimidation of individuals into working for the line.³⁵¹ Much of this criminal activity relies on the exploitation of vulnerable people, including young people.^{352 353}

Similarly, in Ireland, where cocaine use is among the highest in Europe,³⁵⁴ violence and intimidation are perceived to be associated with the dealing of cocaine at the community level.³⁵⁵ As drug users quickly accumulate debts, they are often victimised as a means to force

them repay the debt.³⁵⁶ Research on Dublin’s inner city drug markets points out that drug users from vulnerable communities often acquire cocaine, which is beyond their financial means, without having to pay for it during the transaction. As a result, they accrue debts which may lead to them becoming victims or perpetrators of intimidation and violence.³⁵⁷ A potential new trend identified by a recent study is the growing participation of children as young as 10–14 in intimidation practices, such as throwing stones at houses and damaging cars.³⁵⁸ Although some members of disadvantaged communities, where drug use is concentrated, perceive a greater incidence of drug-related violence and intimidation than before, there is no systematic data to indicate an increase in violence over time.³⁵⁹

According to Ireland police, as of 2018, killings resulting from feuds between the Hutch and Kinahan criminal groups over drug distribution markets became a serious problem in Dublin.³⁶⁰ While the cocaine market is still largely controlled by Irish groups, Albanian organized crime has started establishing its presence in the country, although there is no evidence yet of their encroachment on to the activities of established groups. However, analysts warn that expanding cocaine use across diverse user groups in Ireland and the UK, as well as Ireland’s potential role as a transit country for the UK cocaine market, are likely to further attract OCGs, which may lead to violent clashes in future.³⁶¹

According to some analysts, the competition between criminal groups from the Balkans, including Albanian-speaking groups, has been driving targeted killings in Montenegro, Serbia, and Albania since 2015. These conflicts have spilled over into some EU countries, with isolated assassinations reported in Austria, Germany, Greece, the Netherlands, and Spain. It appears, however, that Balkan criminal groups employ selective violence, rather than using it in indiscriminate way.^{362 363}

The Netherlands, a major cocaine hub in Europe, has seen an increase in violence in recent years as a result of the rivalry between and within multiple drug traffick-

345 Europol, ‘Dismantling of an Encrypted Network Sends Shockwaves through Organised Crime Groups across Europe’, Europol/Eurojust joint press release, 2 July 2020.

346 A “county line” is a term used to describe criminal networks involved in exporting illegal drugs from large cities to suburban, rural and coastal areas within the UK, using dedicated mobile phone lines. “They are likely to exploit children and vulnerable adults to move [and store] the drugs and money and they will often use coercion, intimidation, violence (including sexual violence) and weapons.” See National Crime Agency and National Police Chiefs’ Council, ‘NCLCC County Lines Strategic Assessment 2020/21’ (London: National Crime Agency & National Police Chiefs’ Council, 2021). P44

347 United Kingdom National Crime Agency, ‘County Lines Gang Violence, Exploitation and Drug Supply 2016’, National Briefing Report, November 2016.

348 Dame Carol Black, ‘Review of Drugs – Evidence Relating to Drug Use, Supply and Effects, Including Current Trends and Future Risks’, Evidence Pack (Public Health England and Home Office, February 2020).

349 Ibid.

350 According to a UK National Crime Agency report, as of 2017, the weapons were typically not discharged but used to make threats. See United Kingdom National Crime Agency, ‘County Lines Violence, Exploitation and Drug Supply 2017’, National Briefing Report, November 2017., 10.

351 United Kingdom National Crime Agency, 10–12.

352 United Kingdom National Crime Agency, ‘County Lines Gang Violence, Exploitation and Drug Supply 2016’.

353 Black, ‘Review of Drugs – Evidence Relating to Drug Use, Supply and Effects, Including Current Trends and Future Risks’.

354 Based on the latest available data, Ireland ranks in fourth place among European countries in terms of past-year prevalence (2.4 per cent of the general population). See chapter Established markets, in this report.

355 National Advisory Committee on Drugs, ‘An Overview of Cocaine Use in Ireland: II’ (Dublin: National Advisory Committee on Drugs and National Drugs Strategy Team, 2007).

356 DRIVE, ‘A Data-Driven Intervention Model to Respond Effectively to Drug-Related Intimidation and Violence in Communities in Ireland’, November 2021., 18.

357 Sarahjane McCreery, Matt Bowden, and Marcus Keane, ‘Debts, Threats, Distress and Hope – towards Understanding Drug-Related Intimidation in Dublin’s North East Inner City’ (Dublin: Ana Liffey Drug Project, 2020), 45–46.

358 DRIVE, ‘A Data-Driven Intervention Model to Respond Effectively to Drug-Related Intimidation and Violence in Communities in Ireland’, 19.

359 Ibid., 21–22.

360 Health Research Board, ‘Focal Point Ireland: National Report for 2021 – Drug Markets and Crime’ (Dublin: Irish National Focal Point to the European Monitoring Centre for Drugs and Drug Addiction, 2022), 24.

361 Alexander Chance, ‘Exploring Serious and Organised Crime across Ireland and the UK: Towards a Shared Understanding of a Shared Threat’ (Dublin: The Azure Forum for Contemporary Security Strategy, March 2022), 33–34.

362 EMCDDA and Europol, ‘Negative Consequences: Violence’.

363 Walter Kemp, ‘Making a Killing: What Assassinations Reveal about the Montenegrin Drug War’ (Global Initiative Against Transnational Organized Crime, July 2020).

ing organizations.³⁶⁴ In the ongoing Marengo trial, for example, media report that 16 defendants, members of a prominent drug trafficking network (known as “Mocro Mafia”), are accused of orchestrating six murders of underworld associates and planning another seven.³⁶⁵ The previously mentioned investigations linked to the infiltration by law enforcement of an encrypted communication platform led to the discovery of shipping containers in the Netherlands that had been converted into cells to be used as torture chambers.^{366 367}

Although the number of contract killings among members of organised crime in the Netherlands fell in 2019 to its lowest value (18) since 2007, the nature of such killings has changed, and the victims have included a mistakenly or unintentionally targeted person³⁶⁸ almost every year since 2013.³⁶⁹ Indeed, a comparison of criminal underworld conflicts in the Netherlands during the last two decades suggests that methods of settling scores have become increasingly violent and ruthless. In a study on settling of conflicts during 2000–2016, assassinations were found to be an extreme measure after less violent means had failed,³⁷⁰ while an examination of contract killings from 2014 to 2020 shows a trend towards more excessive and ostentatious use of force.³⁷¹ It seems also that the new developments in contract killings are mainly associated with the cocaine market, which has allegedly seen a proliferation of OCGs settling in the Netherlands and an increase in the associated flows of illicit money.³⁷²

Research by the Ministry of Justice and Security of the Netherlands notes “a sliding scale in the extension of excessive violence,” both internally with punishment of OCG members for “relatively minor mistakes,” and externally with contract killings, in the presence of family, for the purposes of intimidation.³⁷³

Unlike the patterns found in the previous decade, it seems that contemporary contract killings in the Netherlands’ criminal underworld also feature deliberate tar-

geting of people not associated with the criminal world. Criminal justice professionals, such as judges and prosecutors, non-criminal witnesses or the press involved in the prosecution process seem now to also be targeted.³⁷⁴ For example, media report the killing of a lawyer and a prominent journalist in the Netherlands in 2019 and 2021 respectively, allegedly in retaliation for their role in a criminal trial of a high-profile Dutch trafficker.³⁷⁵

The port of Antwerp in Belgium is a key point of entry into the EU for cocaine from South America.³⁷⁶ The cocaine then typically proceeds to neighbouring Netherlands by land, where major criminal groups have settled, and from where the drug is redistributed to other countries.³⁷⁷ According to a Belgian prosecutor interviewed for this study, drug trafficking organisations in Belgium predominantly cooperate rather than compete. For example, the same facilitators may launder money and arrange port logistics for several criminal groups. The prosecutor noted in particular that cocaine-related violence in Belgium has not been as visible as in Rotterdam (in the Netherlands), for instance.³⁷⁸

An assessment of harm to public safety in Belgium posed by cocaine trafficking in the first decade of the century found little evidence of threat or use of violence in any of the stages of the supply chain (importation, wholesale distribution and retail markets).³⁷⁹ However, the contemporary Belgium may not be exempt from cocaine-related violence. Media sources cite shootings, grenade attacks and hostage-taking, especially in the province of Limburg, which borders Antwerp province and the Netherlands and is home to some cocaine traffickers and clandestine laboratories that produce synthetic drugs.³⁸⁰ In January 2022 for example, a known Albanian gangster was shot dead by hitmen in Antwerp in an apparent contract killing.³⁸¹

With European ports receiving record quantities of cocaine shipments, port employees, such as crane operators, stevedores and shipping administrators, are especially vulnerable to pressures from criminal groups. For example, according to media reports, Serbian and Albanian traffickers linked to the Kinahan clan (an Irish OCG involved in large-scale cocaine trafficking) employ criminals, reportedly from North Africa, to intimidate dock workers in large European ports if they refuse to

364 Elian Peltier, ‘Belgian Port City Grapples With a Flood of Cocaine’, *The New York Times*, 4 December 2021.

365 DutchNews.nl, ‘Life Sentence Demanded for Ridouan Taghi and Four Co-Defendants’, *DutchNews.NL*, 28 June 2022.

366 BBC, ‘Six Arrested after “Dutch Torture Chambers” Found’, *BBC News*, 7 July 2020.

367 Europol, ‘Dismantling of an Encrypted Network Sends Shockwaves through Organised Crime Groups across Europe’.

368 A “mistakenly targeted person” refers to a case of a mistaken identity; an “unintentionally targeted person” refers to a bystander or other victim who was not the intended target.

369 B. Van Gestel and R. F. Kouwenberg, ‘Update Liquidaties 2020’ (The Hague: Research and Documentation Centre (WODC), 2020).

370 B. Van Gestel and M. A. Verhoeven, ‘Liquidaties Nieuwe Stijl. Verruwing En Professionalisering Bij Liquidaties in Nederland [Contract Killings in a New Style. The Coarsening and Professionalization in Contract Killings in the Netherlands]’, in *Liquidaties in Nederland*, vol. 43, *Justitiële Verkenningen* (Research and Documentation Centre (WODC), 2017), 9–28.

371 B. Van Gestel and R. F. Kouwenberg, ‘Tweede Verkenkende Studie Liquidaties’ (The Hague: Research and Documentation Centre (WODC), 2020).

372 Ibid.

373 Van Gestel and Kouwenberg, 45–46.

374 Ibid.

375 David Gormezano, ‘Dutch PM under Protection as the “Mocro Mafia” Drug Cartel Sows Fear in the Netherlands’, *France24*, 2 October 2021.

376 UNODC, ‘World Drug Report 2021, Booklet 4’ (Vienna: UNODC, 2021), 26.

377 UNODC and Europol, ‘Cocaine Insights 1’.

378 Interview #12.

379 L. Paoli, V. A. Greenfield, and A. Zoutendijk, ‘The Harms of Cocaine Trafficking: Applying a New Framework for Assessment’, *Journal of Drug Issues* 43, no. 4 (2013): 407–36.

380 AFP, ‘Illicit Drug Trade at Belgian Port Fuels Crime Wave’, *France24*, 6 October 2020.

381 Andy Young, ‘A “Brit” Gangster Executed in Cold Blood on Just Another Day in Antwerp’, *Daily Mail*, 1 February 2022.

collaborate in retrieving cocaine shipments.³⁸² As mentioned also by a prosecutor from Belgium, port employees sometimes do face threats and may feel forced to provide logistics-related information to traffickers.³⁸³

Similarly, cases of intimidation, kidnapping, torture, and murder targeted at port workers to enforce their compliance have been reported in cocaine trafficking hubs in France, specifically in the port cities of Marseille and Le Havre.³⁸⁴ As pointed out by media sources, violent incidents, such as drive-by shootings as a means of score-settling among criminal groups involved in the cocaine retail distribution, have been increasing in Marseille and especially affecting some disadvantaged neighbourhoods.³⁸⁵ Although the number of gang-related killings remained stable in the Marseille area as of 2021, the age of victims has become younger over the last decade, due to gang leaders increasingly recruiting teenagers from vulnerable backgrounds to work as lookouts and drug dealers.³⁸⁶

Aside from port workers, owners and managers of companies involved in transatlantic trade are also approached, as traffickers look for firms with a long-standing commercial record to reduce the probability of customs inspections. Owners or employees of such companies may be under pressure to collaborate with traffickers in importing cocaine. In one case shared by the Belgian prosecutor, an owner of a logistics company specialised in a specific type of container was offered money in exchange for using his containers to import cocaine to Antwerp. When the owner refused, the traffickers made clear that they knew exactly where his parents lived (which was in a village in another country).³⁸⁷ Thus, even when no physical violence is involved, import companies and port employees may occasionally face pressure and intimidation.

According to media sources, the south of Spain also has seen severe public security problems associated with drug trafficking. The Costa del Sol area has long served as a base for a diverse range of high-level traffickers from across Europe.³⁸⁸ There may be over 100 drug trafficking groups in the area, which results in tight competition for wholesale distribution markets and the settling of scores through targeted killings,³⁸⁹ sometimes resorting to hitmen squads.³⁹⁰ The port of Algeciras is one of the

main cocaine trafficking hubs in the country, in addition to major cannabis flows incoming through the Strait of Gibraltar.³⁹¹ As a result of law enforcement measures in 2018 aimed at containing increasing violence in the area of the Strait of Gibraltar, cocaine and cannabis trafficking routes appear to have shifted recently towards other Spanish provinces, mainly to the east of Gibraltar.³⁹²

In the eastern provinces of Spain, in turn, there have been signs of an increase of threats to public security derived from cocaine and cannabis trafficking. A Spanish prosecutor interviewed in the context of this report mentioned as an example the municipality of Torrevieja (Alicante province), of just over 80,000 inhabitants, where there was no court in 2000. Fifteen years later, the Spanish government had to focus its public security resources on the municipality (with the establishment of trial courts and resource endowments for police units) in response to public safety concerns due to the presence of OCGs.³⁹³ Many of the OCGs involved in cannabis and cocaine trafficking in the eastern provinces of Spain are of Eastern European origin.³⁹⁴ According to media coverage, their growing presence has been accompanied by the seizures of rifles and machine guns.³⁹⁵

While the available data on drug-related homicides do not allow for systematic tracing of the dynamics of cocaine-related violence, anecdotal evidence suggests that, in some European countries, competition between criminal groups for cocaine trafficking hubs or consumer markets leads to an increase in violent acts. Moreover, in the Netherlands, violence has taken on an expressive form, rather than being only instrumental. Although the response from law enforcement institutions may succeed in abating the violence, it may result in the displacement of criminal hubs to neighbouring areas, as this has happened in the south and east of Spain. In addition, demand for cocaine in the United Kingdom and Ireland, including the emergence of crack cocaine in certain parts of Ireland,³⁹⁶ may fuel further violent competition among criminal groups.³⁹⁷ Finally, the current political and economic instability in eastern Europe as a result of the conflict in Ukraine may lead to additional strains on cocaine markets in parts of Europe, with some trafficking routes shifting away from the ports on the Black Sea and

382 John Hand, 'Kinahan Gang's Drug Route Exposed as Cartel "Employs African Thugs to Threaten EU Port Workers"', Irish Mirror, 25 April 2022.

383 Interview #12.

384 EMCDDA and Europol, 'Negative Consequences: Violence'.

385 Jeevan Ravindran, 'Drugs, Violence and Racism Are Creating a "Cocktail of Neglect" in Marseille', CNN, 28 December 2021.

386 Hugh Schofield, 'Marseille Drugs: Child Victims of French City's Vicious Gang War', BBC News, 1 September 2021.

387 Interview #12.

388 Patricia Ortega Dolz and Nacho Sánchez, 'El "congreso" del narco en la Costa del Sol', El País, 2 December 2018.

389 Ibid.

390 Patricia Ortega Dolz and Nacho Sánchez, 'Caen "los suecos", la banda más sanguinaria de la Costa del Sol', El País, 30 November 2018.

391 Centro de Inteligencia contra el Terrorismo y el Crimen Organizado, 'Estadística Anual sobre Drogas 2020'.

392 Fiscalía General del Estado, 'Fiscalía Especial Antidroga', in Memoria 2021, 2021, 613–46., 616.

393 Interview #10.

394 Ibid.

395 Patricia Ortega Dolz et al., 'España: Territorio narco', El País, 28 January 2021.

396 Health Research Board, 'Focal Point Ireland: National Report for 2019 – Drug Markets and Crime' (Dublin: Irish National Focal Point to the European Monitoring Centre for Drugs and Drug Addiction, 2021).

397 Chance, 'Exploring Serious and Organised Crime across Ireland and the UK: Towards a Shared Understanding of a Shared Threat', 33–34.

diverting towards the Balkan peninsula.^{398 399} If the supply of cocaine (and other drugs) increases in Eastern and South-Eastern Europe, coupled with increased availability of weapons due to the conflict, fighting among criminal groups is likely to arise.

Australia and New Zealand

Australia constitutes its own distinct, and well established, cocaine market. Concerns about the gaining importance of cocaine use in Australia arose among law enforcement and treatment practitioners in Australia as early as the mid-1980s.⁴⁰⁰ In terms of number of past-year users, as of 2019, Australia had the highest known national prevalence of past-year use of cocaine worldwide (4.2 per cent among people aged 14 years or older), well above countries in other established markets. Data on lifetime prevalence⁴⁰¹ from the same year indicated that more than 1 adult in 10 had used cocaine at least once in their life.

At the same time, retail prices in Australia, as well as neighbouring New Zealand, have remained very high; the geographical location of these countries and the associated effort required to transport goods from South America may go some way towards explaining these high prices. Nevertheless, the high prices may have contributed to keeping the quantity consumed per user to moderate levels. The Australian Crime Intelligence Commission estimated, based on wastewater measurements from the SCORE dataset, that the per capita level of cocaine consumption in Australia in December 2021 was below the levels of 13 among 24 countries in Europe.⁴⁰²

Based on interviews conducted annually with sentinel samples of people who regularly use stimulants such as ecstasy or cocaine, over 2003–2021 the median number of days of use over a six-month period of the interviewees never exceeded 5.⁴⁰³ While these samples were not statistically representative of the entire population of cocaine users, it is suggestive (by way of comparison), that the results of household surveys in the United States indicate that, as of 2020, past-year users of cocaine consumed the drug on average 36.5 days⁴⁰⁴ over the previous

12-month period (hence approximately 18 days over the previous 6-month period).⁴⁰⁵

Aside from the impact of price, a fact which potentially might have a bearing on the relatively low levels of per capita consumption in Australia is the ready availability of methamphetamine, whose use and consumption in Australia is relatively high. The same report⁴⁰⁶ mentioned above by the Australian Crime Intelligence Commission ranked Australia in first place for per capita methamphetamine consumption among countries covered by the SCORE dataset (ahead of Czechia in second place), resulting in an overall first ranking among 28 countries when all stimulants (amphetamine, cocaine, MDMA and methamphetamine) are taken together.

Independent of the underlying dynamics, the above data suggest that the progression from occasional to intensive use of cocaine has been relatively more limited, or slower, in Australia than in other countries. This is also corroborated by the fact that routes of administration other than insufflation are limited. “Crack” cocaine is rarely encountered^{407 408} and smoking of cocaine is infrequent. The most recent record of seizures of “crack” cocaine reported by Australia relate to less than 2 kg seized in 2017 (compared to 4.1 tons of cocaine salts in the same year);⁴⁰⁹ based on interviews conducted in 2021 with a sentinel sample of people who regularly use stimulants such as ecstasy or cocaine, 99 per cent of participants who had consumed cocaine within the past 6 months and responded to the relevant question had snorted cocaine, followed by swallowing as the second most frequent mode of administration.⁴¹⁰ Across the period 2003–2019, 99.6 per cent of those reporting use of cocaine used the powder form and 1 per cent the “crack” form.⁴¹¹

Injection of cocaine also appears to be limited in Australia; based on interviews conducted in 2020 with a sentinel sample⁴¹² of people who regularly⁴¹³ inject drugs, only 1 per cent reported cocaine as their drug of choice in 2020.⁴¹⁴ Seventeen per cent of these interviewees

398 UNODC, ‘Conflict in Ukraine: Key Evidence on Drug Demand and Supply’ (Vienna: UNODC, April 2022).

399 See also Chapter Potentially developing markets, in this report.

400 Julie Hando, Bruce Flaherty, and Scott Rutter, ‘An Australian Profile on the Use of Cocaine’, *Addiction* 92, no. 2 (1 February 1997): 173–82.

401 11.4 per cent among the general population aged 14 or older.

402 Australian Criminal Intelligence Commission, University of Queensland, and University of South Australia, ‘National Wastewater Drug Monitoring Program: Report 16’, National Wastewater Drug Monitoring Program (Australian Criminal Intelligence Commission, 2022).

403 Rachel Sutherland et al., ‘Australian Drug Trends 2021: Key Findings from the National Ecstasy and Related Drugs Reporting System (EDRS) Interviews’ (National Drug and Alcohol Research Centre, 2021).

404 This value has remained relatively stable in recent years, staying within the range 34.7–37.1 since 2015.

405 SAMHSA, ‘2020 National Survey on Drug Use and Health Detailed Tables’ (Substance Abuse and Mental Health Services Administration, 2022): Detailed Tables, Table 7.17B

406 Australian Criminal Intelligence Commission, University of Queensland, and University of South Australia, ‘National Wastewater Drug Monitoring Program: Report 16’.

407 Sutherland, R et al., ‘Australian Drug Trends 2021: Key Findings from the National Illicit Drug Reporting System (IDRS) Interviews’ (NDARC, Sydney, 2021).

408 Sutherland et al., ‘Australian Drug Trends 2021: Key Findings from the National Ecstasy and Related Drugs Reporting System (EDRS) Interviews’.

409 UNODC, ‘Australia, Responses to the Annual Report Questionnaire 2017’, n.d.

410 Sutherland et al., ‘Australian Drug Trends 2021: Key Findings from the National Ecstasy and Related Drugs Reporting System (EDRS) Interviews’.

411 Nicola Man et al., ‘Trends in Cocaine Use, Markets and Harms in Australia, 2003–2019’, *Drug and Alcohol Review* 40, no. 6 (1 September 2021): 946–56.

412 UNSW Sydney, ‘The Illicit Drug Reporting System (IDRS)’, ndarc.med.unsw.edu.au, n.d.

413 At least monthly during the six months preceding the interview.

414 Australian Criminal Intelligence Commission, ‘Illicit Drug Data Report 2019–20’, n.d., accessed 30 January 2023.

reported use of cocaine via any route of administration;⁴¹⁵ among these, snorting and injecting were the most common ways to administer the drug (approximately one half of respondents in each case).⁴¹⁶

Despite the relatively low levels of cocaine consumption per capita, recent trends suggest medium-term increases both in availability and in consumption of cocaine in Australia, with temporary disruptions brought about by the COVID-19 pandemic. Purity data at the subnational level suggest that there has been an overall increasing trend in retail purity across the country over the past decade.⁴¹⁷

Evidence from several sources suggests that a turning point may have occurred in 2016–17. Data reported at the national level indicate that retail purity levels have increased substantially since 2016;⁴¹⁸ at the same time, the median price reported by a sentinel sample of injecting drug users (nationally representative data on price were not systematically available) fell steadily from 400 Australian dollars in 2016 to 300 Australian dollars in 2019 (before rising again in 2021 to 350 Australian dollars).⁴¹⁹ Total quantities seized spiked in 2017, driven in part by a seizure of 1.4 tons in open waters⁴²⁰ but also driven by overall increased seizures in New South Wales.^{421,422}

Based on sentinel sampling of regular users of stimulants such as ecstasy (and cocaine),⁴²³ the percentage of respondents indicating that cocaine was “very easy” to obtain increased from 14 per cent in 2016 (the lowest since 2006) to 33 per cent in 2021,⁴²⁴ growing steadily throughout this period with the exception of a drop of 2 per cent in 2020.

Demand-side indicators suggest that the increased availability of cocaine has resulted in increased levels of use pointing to a distinct upswing in the trend in recent years. Not only did the number of past-year cocaine users increase sharply between 2016 and 2019, but several indicators of more intensive use outpaced this growth, suggesting that use patterns may be intensifying. For example, the number of closed treatment episodes for drug use where cocaine was a principal drug of

concern rose by 163 per cent between 2015–16 and 2018–19, and rose by a further 43 per cent by 2020–21.⁴²⁵ One study which examined several such indicators concluded that treatment episodes and 6-month prevalence of use among a sentinel sample of interviewees who use stimulants underwent an upward change in trend in 2016–17, while in the case of hospitalizations the most likely year when the change occurred was estimated to be in 2010–12 (other indicators were assessed to have increased at a constant rate in the period examined).⁴²⁶

Similar to Western and Central Europe, the onset of COVID-19 likely had a moderate restraining effect on the Australian domestic cocaine market; for example, estimates by Australian authorities based on testing for cocaine metabolites in wastewater plants in state capitals conducted every two months suggest that consumption peaked in the middle of 2020, declined by approximately one half over the course of the following year and rebounded moderately in the last quarter of 2021.⁴²⁷

The mechanisms driving the slowdown in the aftermath of the onset of COVID likely had both supply-side and demand-side aspects. One reason emerging from interviewed regular users of stimulants such as ecstasy and cocaine was a reduction in occasions to use drugs in social settings.⁴²⁸ On the other hand, Australian law enforcement reported COVID-19 also made it more onerous for criminal groups to coordinate criminal activity due to COVID-19 responses such as lockdowns and curfews, and observed some changes brought about by COVID-19 in the methodology of drug trafficking (across drug types), with a decrease in detections of importations into some jurisdictions (especially into Northern Territory); however cocaine detection volume rebounded in the latter half of 2020. In general, organized crime groups proved themselves to be resilient and capable of adapting quickly to identify new and alternate ways of importing illicit drugs and precursors.⁴²⁹

Cocaine consumption is believed to be relatively low in New Zealand.⁴³⁰ Cocaine use is highest in the urban centres of Tāmaki Makaurau (including Auckland Metropolitan Area), as borne out by wastewater measurements, which were consistently far higher on a per capita basis than in other districts in each of the four quarters of 2021.⁴³¹

415 While the sample consisted of interviewees who regularly injected drugs, respondents may report the use of different drugs via different routes of administration.

416 Sutherland, R et al., ‘Australian Drug Trends 2021’.

417 Australian Criminal Intelligence Commission, ‘Illicit Drug Data Report 2019–20’.

418 UNODC, ‘Australia, Responses to the Annual Report Questionnaire’, n.d.

419 Sutherland, R et al., ‘Australian Drug Trends 2021’.

420 UNODC, ‘Drugs Monitoring Platform’, n.d.

421 UNODC, ‘Australia, Responses to the Annual Report Questionnaire 2017’.

422 Australian Criminal Intelligence Commission, ‘Illicit Drug Data Report 2016–17’, n.d., accessed 30 January 2023.

423 Sutherland et al., ‘Australian Drug Trends 2021: Key Findings from the National Ecstasy and Related Drugs Reporting System (EDRS) Interviews’.

424 If the response of “easy” to obtain is counted alongside “very easy”, the corresponding percentages increased from 45 per cent in 2016 and 2017 to 77 per cent in 2021.

425 Australian Institute of Health and Welfare, ‘Alcohol and Other Drug Treatment Services in Australia Annual Report 2022’ (Australian Institute of Health and Welfare, 2022). Supplementary tables - Drugs (episodes)

426 Man et al., ‘Trends in Cocaine Use, Markets and Harms in Australia, 2003–2019’.

427 Australian Criminal Intelligence Commission, ‘Illicit Drug Data Report 2019–20’.

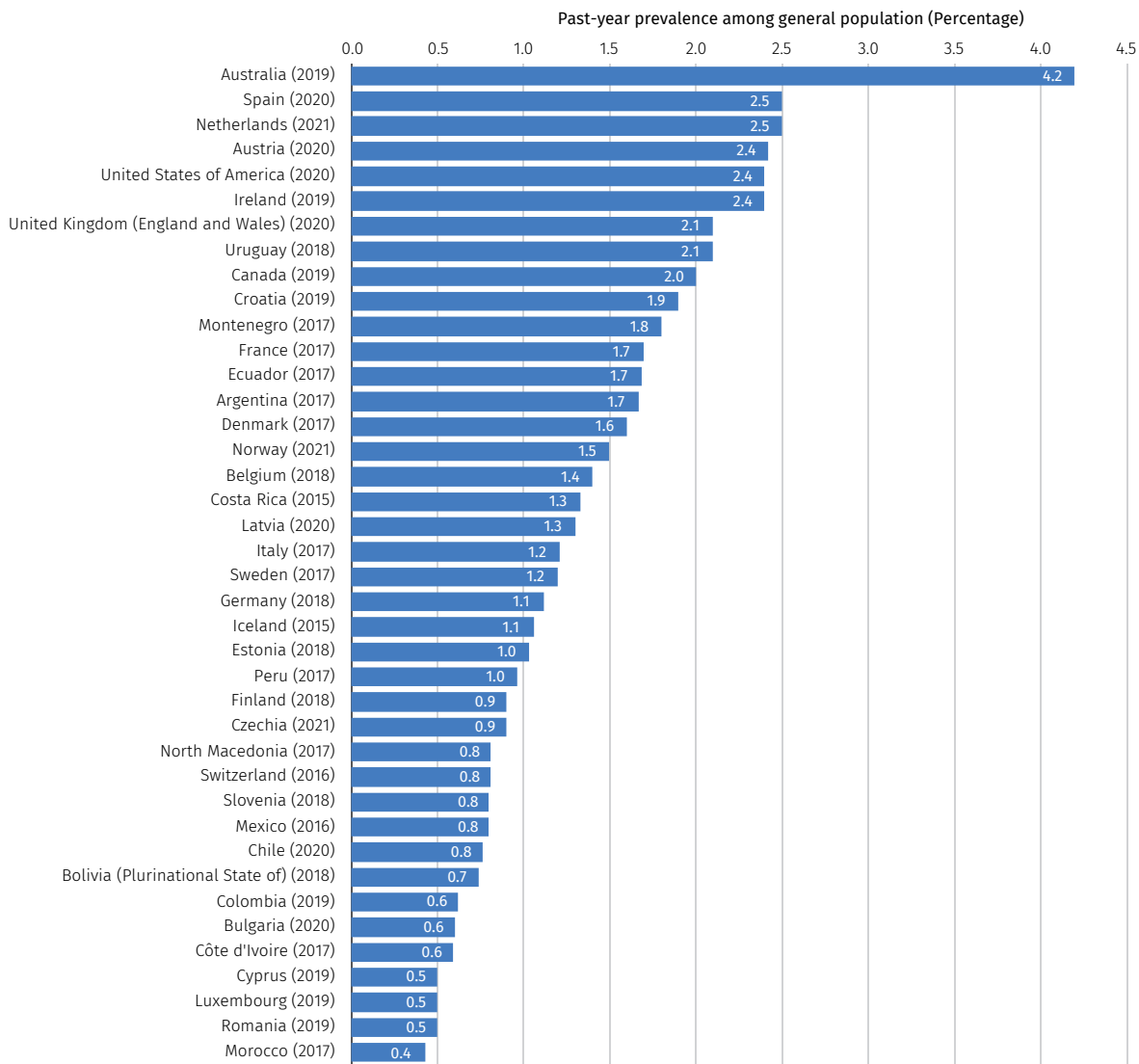
428 Sutherland et al., ‘Australian Drug Trends 2021: Key Findings from the National Ecstasy and Related Drugs Reporting System (EDRS) Interviews’.

429 UNODC, ‘Australia, Responses to the Annual Report Questionnaire 2020’, n.d.

430 UNODC World Drug Report 2022.

431 New Zealand Police, ‘National Wastewater Testing Programme - Quarter 4 2021’ (New Zealand Police, 2022).

Past-year prevalence of cocaine use, countries with values above the global average, most recent data (2015 or later)

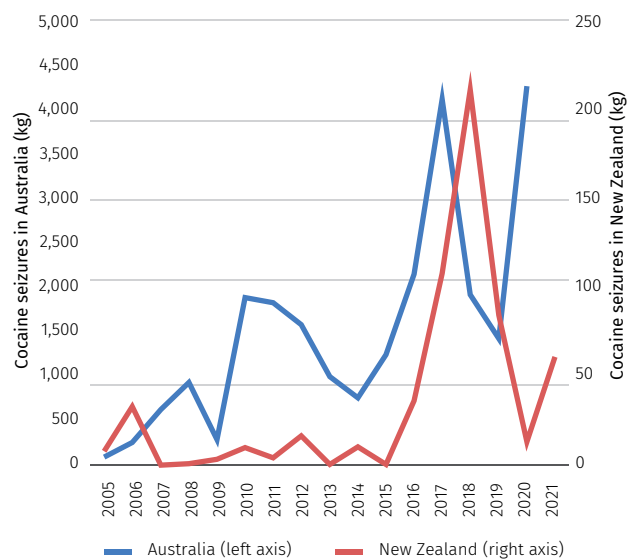


Sources: UNODC World Drug Report 2022; UNODC, responses to the annual report questionnaire; UK ONS Centre for Crime and Justice, Office for National Statistics, *Victimisation and its relationship to drug misuse, common mental disorder and well-being in England and Wales tables*, year ending March 2021, Appendix Tables.

Cocaine seizures in New Zealand, while relatively small, have mirrored the trend in Australia with a time lag of 1 year. While aggregate seizure quantities are susceptible to large fluctuations driven by sporadic individual events, and as such need to be interpreted with caution, an analysis of the *number* of seizure cases – a less volatile indicator – in the two countries also indicates a similarity in trends, with a delay of 1.5 years,⁴³² suggesting that the developments in the market in Australia may percolate to New Zealand with a certain time lag.

According to Australian authorities, forensic profiling of cocaine seized in Australia indicates that the vast majority of cocaine in this subregion originates in Colombia, with Peru a distant second as a country or origin, and with no recent evidence of cocaine originating in Bolivia

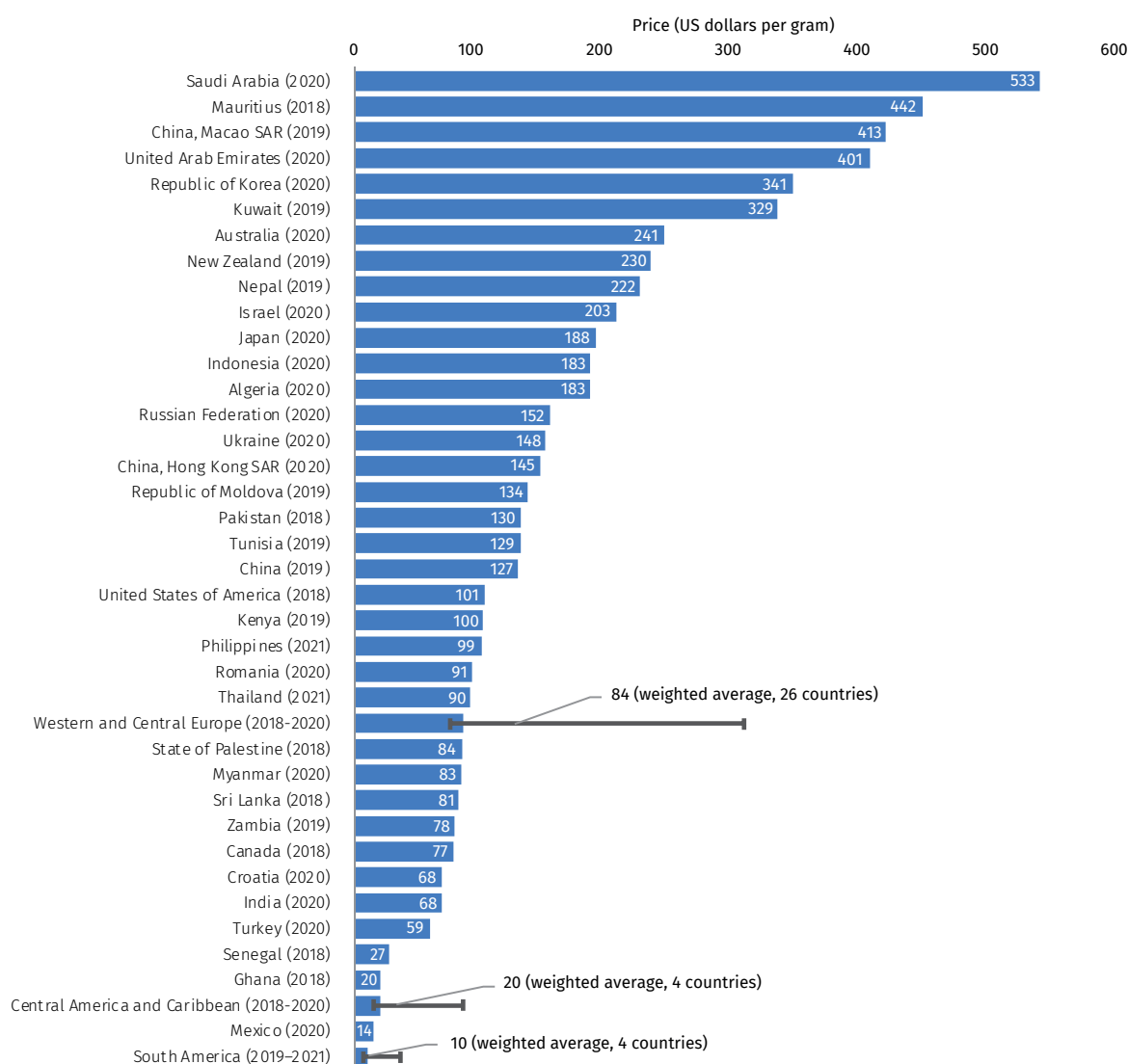
Comparison of trends in cocaine seizures in Australia and New Zealand, 2005–2021



Sources: UNODC Annual Report Questionnaire/Official Communication

432 The number of seizures in New Zealand, over the period 2010–2021, correlates ($R^2=0.81$) with the average number of seizures in Australia in the preceding 2 years.

Cocaine retail prices, by country or subregion, most recent data (2018 or later)



Sources: UNODC, responses to the annual report questionnaire; UNODC DAINAP; EMCDDA *Statistical Bulletin 2022*; UNODC CRIMJUST responses to the Flows Questionnaire; ONDCP; UNODC-SIMCI-Policia Nacional de Colombia-DIRAN.

(Plurinational State of) during the reporting period July 2019-June 2020.⁴³³ Cocaine reaches this subregion via a variety of different routes and modalities.

It is notable that Australia and New Zealand have in the past repeatedly identified countries in North America and in Europe, which are themselves key destination markets, as important countries of provenance for cocaine reaching their territory. For example, over the period July 2019-June 2020, Australian authorities identified the United States, Germany, Austria, the United Kingdom, Belgium, the Netherlands, France and Canada among the key embarkation countries (based on weight seized) for detections at the border. However, Mexico was the primary embarkation country during this period, and Brazil was also identified as key; 42 embarkation countries were identified in total. In their response to the UNODC Annual Response Questionnaire for 2021, New

Zealand authorities indicated the United Kingdom, the United States and France as the three most frequently occurring countries of departure for cocaine trafficked to New Zealand.⁴³⁴ Based on reporting from Australia via the UNODC ARQ, South Africa is another important transit country for cocaine reaching Australia⁴³⁵ - a country with its own domestic market for cocaine but also a natural stopover on the maritime route from South America via the Atlantic and Indian Ocean.

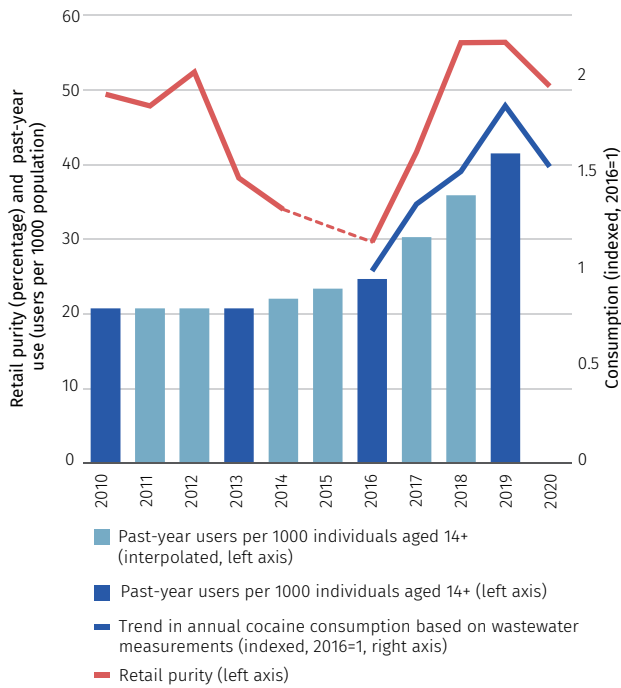
Aside from these routes, anecdotal evidence and media reports point to a significant, possibly under-reported, trafficking route westward from South America, approaching Australia and New Zealand across the Pacific. These routes rely on small vessels and stopovers in Pacific islands such as Fiji, Vanuatu, Tonga and New

433 Australian Criminal Intelligence Commission, 'Illicit Drug Data Report 2019-20'.

434 UNODC, 'New Zealand, Responses to the Annual Report Questionnaire 2021', n.d.A

435 UNODC, 'Australia, Responses to the Annual Report Questionnaire 2018, 2019, 2020', n.d.

Selected supply-side and demand-side indicators of the domestic cocaine market in Australia, 2010–2020



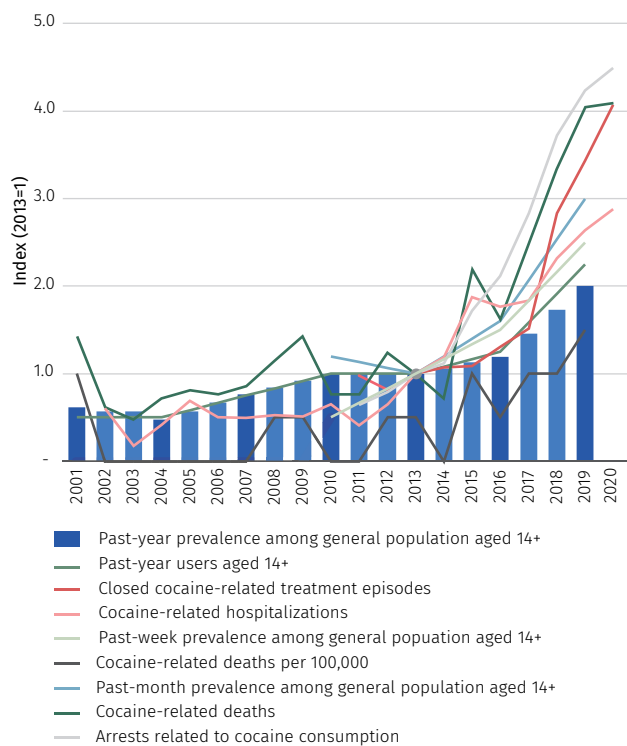
Sources: Prevalence: The Australian Institute of Health and Welfare, *National Drug Strategy Household Survey 2019*, July 2020; Wastewater-based consumption estimates: Australian Crime Intelligence Commission, Report 15 of the National Wastewater Drug Monitoring Program; Purity: UNODC, responses to the annual report questionnaire.

Caledonia, as well as Papua New Guinea.^{436 437} According to a report by the Lowy Institute, over the period December 2016 to November 2017, Pacific-based law enforcement agencies seized approximately 7.6 tons of cocaine from 11 small vessels believed to be bound for Australia.⁴³⁸ This trafficking has allegedly had a “spillover” effect on drug consumption, drug production and trafficking in these islands, including the involvement of local criminal actors.⁴³⁹

Some of the largest detected cocaine consignments intended for Australia have been intercepted in open waters of the Pacific, eastwards of the Australian coast. These included 1.4 tons seized from a yacht in February 2017,⁴⁴⁰ 1.5 tons seized, also from a yacht, close to New Caledonia in July 2017,⁴⁴¹ and 1.8 tons seized in August 2020 after a trawler was intercepted off the coast of Newcastle (New South Wales, Australia), having received cargo from a Chinese fishing boat likely coming from South

436 Kate Lyons, 'The New Drug Highway: Pacific Islands at Centre of Cocaine Trafficking Boom', *The Guardian*, 23 June 2019.
 437 Mark Saunokonoko, 'Mother Ships and Huge Underwater Caches: How South American Cartels Smuggle Cocaine into Australia', *9News*, 7 September 2019.
 438 Jose Sousa-Santos, 'Drug Trafficking in the Pacific Islands: The Impact of Transnational Crime', *Lowy Institute (blog)*, 16 February 2022.
 439 Ibid.
 440 UNODC, 'Drugs Monitoring Platform', 27 July 2017; UNODC, 'Drugs Monitoring Platform', 2 February 2017.
 441 UNODC, 'Drugs Monitoring Platform', 27 July 2017.

Trend in past-year prevalence of cocaine use compared with the other indicators of cocaine demand in Australia, 2001–2020, indexed (1=2013)



Note: Data on hospitalizations, treatment and arrests refer to 12-month periods (financial years) ending in June of the year shown in the axis label; for example, data for these indicators labelled “2020” on the axis refer to the 12-month period July 2019–June 2020. Data on prevalence of use (past-year, past-month, past-week) are based on household surveys conducted every three years (2001, 2004, 2007, 2010, 2013, 2016, 2019); figures for intermediate years were interpolated for illustrative purposes assuming a constant (linear) rate of growth.

Sources: Prevalence: The Australian Institute of Health and Welfare, *National Drug Strategy Household Survey 2019*, July 2020. Treatment: The Australian Institute of Health and Welfare, *Alcohol and other drug treatment services in Australia annual report*, Supplementary tables - Drugs (episodes). Cocaine-related deaths: Australian Institute of Health and Welfare (AIHW) 2022, *Alcohol, tobacco & other drugs in Australia*, Impacts, Supplementary data tables. Retrieved 18 August 2022. Cocaine-related hospitalizations (deaths recorded under the codes F14.0-F14.9, T40.5 in the ICD-10-AM classification system): The Australian Institute of Health and Welfare, *National Hospital Morbidity Database (NHMD)*. Arrests: The Australian Criminal Intelligence Commission, *Illicit Drug Data Report 2019-2020* (October 2021), *Illicit Drug Data Report 2015-2016* (June 2017).

America.⁴⁴² In its response to the Annual Report Questionnaire for 2020, Australia also identified French Polynesia as the second most frequently occurring departure country for seizures of coca leaf.⁴⁴³

Another relatively undocumented phenomenon appears to be the use of clandestine flights to import cocaine into Australia. Media sources suggest that, as of 2019, Mexican organized crime groups were in the lead in orchestrating importations of around 500 kg via flights landing in remote locations and small airports.⁴⁴⁴ In July 2020 law enforcement agencies of Australia and Papua New Guinea foiled an attempt by members of a Melbourne-based

442 UNODC, 'Drugs Monitoring Platform', 15 August 2020.
 443 UNODC, 'Australia, Responses to the Annual Report Questionnaire 2020'.
 444 Duncan McNab, 'Mexican Drug Cartels: How They Infiltrated Australia and Have More Power than Ever', *7News*, 12 April 2019.

criminal syndicate, with alleged links to Italian organized crime groups, to traffic cocaine aboard a Cessna model airplane from a remote runway in Papua New Guinea, close to the capital Port Moresby, into Queensland, Australia.⁴⁴⁵ The cocaine had allegedly reached Papua New Guinea on a yacht and the transfer to the airfield was facilitated by local criminal actors.⁴⁴⁶

While air cargo and sea cargo are the predominant importation streams into Australia, the use of international mail, facilitated by darknet marketplaces,⁴⁴⁷ for small quantities at a time appears to be more important in comparison with other countries, accounting for 96 per cent of cocaine detections at the Australian border (by number; 18 per cent by weight) during July 2019–June 2020.⁴⁴⁸ However, during this period this tendency was visible, to varying degrees, across drug types – most notably those associated with “recreational” use, namely MDMA (98 per cent by number) and cannabis (94 per cent), followed by amphetamine-type stimulants (excluding MDMA; 80 per cent) and heroin (73 per cent).⁴⁴⁹ Moreover, high values for these proportions were also recorded in previous years.⁴⁵⁰ This suggests a significant importation stream in small quantities, likely including users who procure the drugs directly from abroad.

Once in Australia, cocaine (among other drugs) can be transported between different states and territories. For example, cocaine is transported to the Australian Capital Territory (ACT) mainly by road and can be sourced in particular from neighbouring New South Wales and Victoria. Cocaine is mainly sold in venues such as nightclubs in entertainment districts.⁴⁵¹

Implications of cocaine trafficking for borderland communities in South America

Geographic areas may turn into smuggling or trafficking hubs due to a series of enabling factors, such as being in a strategic geographic location, the historical presence of armed actors, proximity to other trafficking hubs, political and economic instability, or opportunities for money laundering. This section reviews some of the consequences of illicit activities for some communities where cocaine trafficking has thrived for an extended period of time and examines implications for local development and citizen security.

In some cases, border communities are located away from major urban centres and are exposed to illicit flows and criminal groups that take advantage of the scarcity of state resources in the area. In other cases, border cities are centres of commercial activity, sometimes facilitated by a Free Zone regime, with constant flows of goods and people. Border control and surveillance are especially difficult in areas characterized by inhospitable geography, such as the desert in the north of Chile with its vast unpopulated areas, or the border between Colombia and Ecuador, with large expanses of mountain ranges and rainforests. Such geographic conditions contribute to border porosity, while facilitating smuggling of goods and unregulated movement of people.^{452–453} However, vulnerabilities may also emerge in urban areas, as for example in the twin cities of Ponta Porã (Brazil, Mato Grosso state) and Pedro Juan Caballero (Paraguay, Amambay department) that are only divided, by a border that residents and traffickers alike cross regularly, effectively constituting a single urban agglomeration.⁴⁵⁴

Border areas are characterized by a convergence of illicit activities

Border regions often represent spaces where trafficking routes converge and where differences in regulations and prices between two or more national economies are exploited by criminal actors.⁴⁵⁵ Different forms of trafficking can share routes and logistics. In Pedro Juan Caballero in Paraguay, for example, there is a history of cigarettes and pesticides smuggling,⁴⁵⁶ as well as timber trafficking,⁴⁵⁷ to Ponta Porã on the Brazilian side of the border. Moreover, the city has been traditionally a hub for cannabis trafficking; the department of Amambay accounted for approximately two thirds of the cannabis plantations eradicated in Paraguay over the period 2009 to October 2019.⁴⁵⁸ In addition, the airport in Pedro Juan Caballero might serve as a base for planes involved in cocaine trafficking across South America.⁴⁵⁹ Overall, the twin cities serve as simultaneous hubs for the traffick-

445 Australian Federal Police, ‘Organised Crime Syndicate Charged and More than 500kg of Cocaine Seized in PNG’, afp.gov.au, 1 August 2020.

446 Sousa-Santos, ‘Drug Trafficking in the Pacific Islands: The Impact of Transnational Crime’.

447 UNODC, ‘Australia, Responses to the Annual Report Questionnaire 2020’.

448 Australian Criminal Intelligence Commission, ‘Illicit Drug Data Report 2019–20’.

449 Ibid.

450 Australian Criminal Intelligence Commission, ‘Illicit Drug Data Report 2018–19’, n.d., accessed 30 January 2023 and previous years.

451 UNODC, ‘Australia, Responses to the Annual Report Questionnaire 2020’.

452 Academia Nacional de Estudios Políticos y Estratégicos (ANEPE), *Desafíos nacionales en un contexto internacional complejo* (Chile: ANEPE, 2013), 121.

453 Katherine Pamela Herrera Aguilar, ‘Desarrollo, Caracterización y Efectos Del Narcotráfico En El Ecuador’, *Revista de Ciencias de Seguridad y Defensa* 3, no. 1 (2018).

454 Lilian Aguilar Teixeira and Luciane Pinho de Almeida, ‘O Tráfico de Pessoas Na Fronteira Brasil, Paraguai e Bolívia’, *Multitemas especial* (2015): 67–88.

455 Fernando Carrión, ‘Economía de frontera: una atracción fatal’, *Fronteras*, March 2011.

456 Agencia AP, ‘Asesinaron a un periodista que investigaba el contrabando’, *La Voz*, 14 February 2020.

457 Mixed sources point out that illegal logging in the department of Amambay may be linked to cannabis trafficking, as criminal actors cut trees to clear the area for illicit crop plantations. Moreover, the tree trunks are sometimes trafficked using the same routes and logistics as the cannabis. See Instituto Forestal Nacional, ‘INFONA detectó desmonte de 80 hectáreas de bosque en Amambay’, infona.gov.py, n.d., accessed 20 November 2022.; ‘Narcos construyen puentes en reserva natural’, *Nacionales* (NPY, 14 November 2019).

458 ‘Plantación de Marihuana, Identificada y Destruída Por Personal de La SENAD, Desagregados Por Departamento y Región’ (Observatorio Paraguayo de Drogas (OPD/SENAD), October 2009).

459 Tristan Clavel, ‘Corruption Undermining Paraguay Efforts to Combat Drug Flights’, *InSight Crime*, 1 June 2017.

ing of a number of commodities: Paraguayan cannabis (mainly to the Brazilian market); Andean cocaine (into Brazil and onward towards Europe); weapons and ammunition (imported from the United States, Europe and Asia for the Brazilian market⁴⁶⁰); and for money laundering. It is worth noting that some of the cocaine trafficked from Pedro Juan Caballero is likely refined locally from coca paste (PBC); several larger-scale sites producing cocaine hydrochloride have been discovered in recent years near the city.^{461 462} Pedro Juan Caballero also is among the main gateways of illegal weapons into Brazil to be used by criminal groups. Brazil-based criminal groups acquire weapons from Paraguayan smugglers in exchange for stolen cars that are later resold in Paraguay.⁴⁶³ There have also been reports of trafficking in persons, with women, children, and adolescents trafficked in both directions for the purposes of sexual exploitation, slavery-like practices and illegal adoptions.⁴⁶⁴

Similarly, borderlands in northern Chile have been traditionally used for smuggling legal commercial goods, mainly from the Chilean ports of Arica and Iquique (the latter being a Free Zone) into Bolivia (Plurinational State of) and Peru.⁴⁶⁵ Research shows that smuggling of legal goods, such as clothing items, electronics and used vehicles is a major income-generating activity for some border communities.⁴⁶⁶ According to media reports, some areas of the Bolivia-Chile border are dominated by drug-trafficking networks, others are dominated by smugglers of legal goods, and some areas are shared between the two.⁴⁶⁷

According to Chilean authorities, the northern regions of Arica y Parinacota, Antofagasta and Tarapacá, that border with Peru and Bolivia, are the main entry points for drugs, including cocaine hydrochloride and coca paste (PBC), from abroad. It is estimated that, 90 per cent of drugs (mostly cocaine products and cannabis) entering Chile from abroad use these regions as their entry

routes.⁴⁶⁸ The northern border of Chile represents a corridor where traffickers move cocaine to the ports of Arica and Antofagasta, while taking advantage of the transit of free legal goods from Bolivia (Plurinational State of) to the ports of Arica and Antofagasta, regulated by the Treaty of Peace and Friendship (1904).⁴⁶⁹ The same border has been used to traffic increasing quantities of ketamine to Chile, a substance that is sometimes used as a cutting agent for cocaine resulting in a mixture known as “CK”.⁴⁷⁰ In a recent multi-drug seizure, for example, reported in the media, a drug courier was detained in the area of Colchane town while transporting a total of 8 kg of drugs including coca paste (PBC), cocaine hydrochloride, and ketamine.⁴⁷¹ This suggests that the same drug trafficking organizations might be catering to different groups of consumers on the Chilean markets.

In addition, as noted by a Chilean senior prosecutor, stolen vehicles or their parts are actively smuggled from Chile to Bolivia (Plurinational State of) across the Chile-Bolivia border (which includes about 110 unpatrolled passages⁴⁷²).⁴⁷³ According to media sources, in the town of Colchane (Chile), stolen vehicles are often disassembled into spare parts to be sold on the other side of the border.⁴⁷⁴ As mixed sources point out, this activity appears to generate occasional collaborations between vehicle smugglers and cocaine traffickers who exchange small quantities of cocaine for stolen vehicles.^{475 476} Reportedly, Chile has also seen a proliferation of criminal groups who buy vehicles with cash of illicit origin and then sell them in Bolivia (Plurinational State of) to launder the proceeds from arms and drug trafficking.⁴⁷⁷

As noted by mixed sources, besides drug trafficking, trafficking in persons and smuggling of migrants from the neighbouring countries and from Venezuela (Bolivarian Republic of), have become an increasing concern in northern Chile, especially in the vicinity of Arica (border with Peru) and Colchane (border with Bolivia).^{478 479} For example, it is not uncommon for migrants from Peru and

460 Camila Nunes Dias and Edgar Díaz, 'Notas Contextuales Acerca de La Creciente Presencia Transnacional Del Grupo Criminal Brasileño Primer Comando de La Capital (PCC)', *Aisthesis* 70 (2021): 331–54.

461 Secretaría Nacional Antidrogas, 'SENAD Gestión 2021' (Secretaría Nacional Antidrogas, Paraguay, 2021), 13.

462 Prensa Latina, 'Desactivan en Paraguay moderno laboratorio para producir cocaína', *Prensa Latina*, 31 March 2022.

463 Mariano César Bartolomé and Vicente Ventura Barreiro, 'Narcotráfico En América Del Sur Más Allá Del Bloque Andino: Los Casos de Argentina y Brasil', *Revista de Relaciones Internacionales, Estrategia y Seguridad* 14, no. 1 (2019): 205–22, 216.

464 Aguilár Teixeira and Pinho de Almeida, 'O Tráfico de Pessoas Na Fronteira Brasil, Paraguai e Bolívia'.

465 José Muñoz and Alejandro Garcés, 'Circulación y contrabando de mercancías chinas en la espacialidad fronteriza Atacama-Lípez (Chile y Bolivia) bajo el influjo de la zona franca de Iquique (ZOFRI)', *Rumbos TS. Un Espacio Crítico Para La Reflexión En Ciencias Sociales* 27 (2022): 99–128.

466 Valeska Troncoso, 'Una aproximación al crimen organizado en la Triple Frontera de Bolivia, Chile y Perú', *Debates Latinoamericanos* 29 (2016): 130–49.

467 Media reports point out that northern areas of the Bolivia-Chile border are dominated by smugglers. Southern parts of the border, in turn, are mostly dominated by drug traffickers. The latter typically recruit Bolivians from the interior of the country to cross the border to Chile with small quantities of cocaine and its derivatives hidden in backpacks. See Ivan Alejandro Paredes, 'Zonas "parceladas" por narcos y contrabandistas', *El Deber*, 13 September 2021.

468 Observatorio Nacional de Drogas, 'Décimo Cuarto Estudio Nacional de Drogas En Población General de Chile, 2020' (Santiago, Chile: SENDA, Ministerio del Interior y Seguridad Pública, 2021), 128.

469 *Ibid.*, 71, 77.

470 *Ibid.*, 192.

471 UNODC, 'Drugs Monitoring Platform', n.d.

472 Forbes Staff, 'Así funciona el contrabando de vehículos robados entre Chile y Bolivia', *Forbes Chile*, 20 August 2022.

473 Interview #2.

474 Forbes Staff, 'Así funciona el contrabando de vehículos robados entre Chile y Bolivia'.

475 *Ibid.*

476 Interview #2.

477 Forbes Staff, 'Así funciona el contrabando de vehículos robados entre Chile y Bolivia'.

478 Laura Ávila, 'How Tren de Aragua Controls the Destiny of Migrants from Venezuela to Chile', *InSight Crime*, 25 July 2022.

479 The mix of illicit activities has especially impacted the Chilean village of Colchane, whose mayor confirmed that the criminal group Tren de Aragua is currently using the area in its vicinity to traffic drugs, persons, and weapons. See Camila Arcos, 'Alcalde de Colchane confirmó que "Tren de Aragua" utiliza fronteras para trata de personas y drogas', 11 July 2022, *BioBioChile* edition, sec. Radiograma.

Bolivia (Plurinational State of) to be transported illegally in hidden compartments of trucks or to cross through unregulated border crossings to access the informal labour market of Arica.⁴⁸⁰ As reported in the media, the situation of vulnerability of these migrants is often exploited by human trafficking networks, resulting in forced labour or sexual exploitation.⁴⁸¹

Ecuador's northern border, situated in proximity to the Colombia's coca cultivating departments of Nariño and Putumayo, is the main entry point into Ecuador for cocaine manufactured in Colombia, which is typically exported in large quantities through Ecuadorean sea-ports, such as Guayaquil, or transported north to Central America by *go-fast* and fishing boats.⁴⁸² By 2019, there were more than 70 non-authorized border passages detected between Ecuador and Colombia, which were primarily used for trafficking cocaine and precursor chemicals.⁴⁸³ The north-western province of Esmeraldas in Ecuador has an extensive shore with ports, including clandestine ones, which appears to attract multiple trafficking flows, such as cocaine coming from Colombia, and fuel (gasoline and liquefied petroleum gas), precursor chemicals, arms and ammunition⁴⁸⁴ going the other way from Ecuador to Colombia. The same borderland is home to illegal mining,⁴⁸⁵ and large migration flows,⁴⁸⁶ providing additional revenue sources for criminal groups.

Recent media reports suggest that some of the gasoline distributed to coastal communities in Esmeraldas, through state subsidies, for the purposes of artisanal fishing is being sold to cocaine traffickers.⁴⁸⁷ This gasoline is either supplied to the vessels that carry cocaine along the coast or smuggled to Colombia's production sites to be used for cocaine processing. According to media sources, there are at least 17 clandestine storage points along the Pacific coast of Esmeraldas, most of which are situated in its northern part, close to the Colombian border.⁴⁸⁸ The manufacture of cocaine hydrochloride on the border in recent years⁴⁸⁹ adds yet another layer of security threats to the borderland communities.

The mix of illicit flows leads to the rise of local criminal groups, fighting over territories and threatening citizen security

Criminal groups that engage in trading tangible illicit commodities, such as drugs, typically depend on territorial control for economic profit.⁴⁹⁰ When a territory is disputed by several armed actors or when law enforcement agencies clash with criminal groups, the competitive dynamics typically lead to increases in violence.⁴⁹¹ As some borders in Latin America have gradually shifted from being locations of contraband to locations of multiple illicit transnational flows over the past decades, they have also become vulnerable to violence perpetrated by different types of criminal actors operating in those border areas.⁴⁹²

In 2010, the Brazilian criminal group PCC began establishing its presence in Pedro Juan Caballero, on the Paraguayan side of the border with Brazil. Its expansion to Paraguay by sending trusted emissaries was aimed at directly controlling cannabis production and cocaine trafficking while cutting out intermediaries.^{493 494} In 2016, smuggling routes in Pedro Juan Caballero were heavily disputed between the PCC and smaller local actors which led to a spike in violence.⁴⁹⁵ After eliminating their main competitor in Paraguay, the PCC took control over the route and became the dominant OCG in the Pedro Juan Caballero border area, with a growing number of Paraguayan associates.^{496 497} Currently, however, the situation seems to have changed again, following several high-profile arrests of PCC associates; according to a Paraguayan law enforcement official, the city's drug market and trafficking routes seem to be disputed among locally-based independent groups, without any apparent PCC leader.⁴⁹⁸

According to ethnographic research, leaders of drug trafficking groups are reportedly interested in keeping common crime (including selling drugs to minors) low. Therefore, the high murder toll is typically a result of targeted killings as means of punishment for "wrongdoings" in the

480 Troncoso, 'Una aproximación al crimen organizado en la Triple Frontera de Bolivia, Chile y Perú'.

481 Felipe Díaz Montero, 'Secuestros con homicidios en Chile: cae brazo del "Tren de Aragua", banda más grande de Venezuela', BioBioChile, 24 March 2022.

482 See Chapter Established markets, in this report.

483 Renato Rivera-Rhon and Carlos Bravo-Grijalva, 'Crimen Organizado y Cadenas de Valor: El Ascenso Estratégico Del Ecuador En La Economía Del Narcotráfico,' Revista Latinoamericana de Estudios de Seguridad 28 (December 2020), 22.

484 Juan Camilo Jaramillo and Mayra Alejandra Bonilla, 'Ecuador Arms Trafficking Ring More Complex Than Previously Thought', InSight Crime, 6 March 2019.

485 Mark Wilson, 'Ecuador: The New Corridor for South American Arms Trafficking', InSight Crime, 4 October 2021.

486 Fernando Carrión Mena and Victor Llugsha Guijarro, 'Cross-Border Urban Complexes: The Urban Morphology of a Global Structure', in Latin America's Global Border System (Routledge, 2022), 250–65.

487 Arturo Torres, 'Narcos Se Llevan La Gasolina Para Pesca Artesanal En Esmeraldas', Primicias, 19 September 2022.

488 Ibid.

489 UNODC, 'Ecuador, Responses to the Annual Report Questionnaire 2019', n.d.

490 Anna Sergi and Luca Storti, 'Shaping Space. A Conceptual Framework on the Connections between Organised Crime Groups and Territories', Trends in Organized Crime 24 (2021): 137–51.

491 Deborah Yashar, *Homicidal Ecologies: Illicit Economies and Complicit States in Latin America* (Cambridge University Press, 2019).

492 Carrión Mena and Llugsha Guijarro, 'Cross-Border Urban Complexes: The Urban Morphology of a Global Structure', 251.

493 Ana Isadora Meneguetti and Marcos Alan Ferreira, 'Transnational Gangs in South America: The Expansion of the Primeiro Comando Da Capital to Paraguay', *Urban Crime. An International Journal* 1, no. 2 (2020): 29–53.

494 InSight Crime and American University's Center for Latin American & Latino Studies, 'The Rise of the PCC: How South America's Most Powerful Prison Gang Is Spreading in Brazil and beyond', CLALS Working Paper Series, December 2020.

495 David Gagne, 'Killing of Mysterious Figure Part of Larger Narco War in Paraguay?', InSight Crime, 16 June 2016.

496 Meneguetti and Ferreira, 'Transnational Gangs in South America: The Expansion of the Primeiro Comando Da Capital to Paraguay', 46.

497 Interview #36.

498 Follow-up consultation to the 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

criminal world (such as not keeping one's word).⁴⁹⁹ Media sources point out that from 5 to 25 persons are assassinated in Pedro Juan Caballero monthly due to score settling between criminal groups.⁵⁰⁰ They also highlight assassination attempts against local politicians,⁵⁰¹ while a prosecutor and a journalist were among the victims of recent targeted killings.^{502 503}

Research also finds that homicides in Pedro Juan Caballero are not generally perceived as significantly affecting citizen security, as killing innocent people, or employing violence and aggressions towards minors, women and the elderly is not generally tolerated, even among illicit actors, and thus seldomly occurs. Drug trafficking in turn is more tolerated by the population, as it is believed to affect only the destination countries rather than the domestic market.⁵⁰⁴ Yet, the outright confrontation between drug trafficking groups does not seem to be tolerated by the residents of Pedro Juan Caballero as it threatens the stability of market relationships and increases insecurity.⁵⁰⁵

In the northern region of Tarapacá in Chile, the expansion of criminal actors from abroad, into Chile, and the ensuing competition for drug distribution and human trafficking markets may, according to media reports, be driving violence.⁵⁰⁶ The region, home to illicit flow hubs on the Plurinational State of Bolivia-Chile border, has seen a drastic increase in homicide rates after 2019, becoming the most violent in the country.⁵⁰⁷ In 2021, according to the Office of the Regional Prosecutor, violent crimes in Tarapacá increased, in comparison with the previous year, by 501 per cent in the case of migrant smuggling, 183 per cent in the case of homicides, 42 per cent in the case of drug trafficking, and 18 per cent in the case of violent robbery.⁵⁰⁸ In the first half of 2022, 32 homicides were reported in the Tarapacá region, at least 13 of which had signs of score settling between criminal groups.⁵⁰⁹ As for non-violent crimes, theft and economic crimes in Tarapacá decreased by 27% and 16% respectively during

2021.⁵¹⁰ While this pattern may seem similar to the one observed in Pedro Juan Caballero, where high levels of violent crimes are combined with low levels of common crime, the reasons behind this decrease in the context of Tarapacá, Chile are unclear and need to be studied further.

In Ecuador, a recent surge in homicides prompted the President in 2022 to declare a state of emergency in the three most violent provinces (including Esmeraldas), all situated along the cocaine route from the Colombian border to the port of Guayaquil.⁵¹¹ Data from official and media sources indicate that Esmeraldas province, the most violent at the national level as of 2022, saw homicides increase sharply from 79 in 2018 to 151 in 2021,⁵¹² and to a partial figure of 322 in 2022 (as of 1 September), placing its homicide rate at 48.8 per 100,000 inhabitants in the first eight months of 2021 (compared to the national average of 15.5 per 100,000 inhabitants over the same period).^{513 514} The government, as cited in the media, attributes this spike to criminal groups (such as *Los Tiguerones*, *Los Choneros*, and *Los Templados*) fighting for control over cocaine trafficking routes and domestic drug retail markets, while they evolve from small criminal gangs to more sophisticated groups.⁵¹⁵ Ecuador's domestic groups, who had long served mainly as logistics operators for foreign traffickers (such as Colombian and Mexican OCGs), have been playing a greater role in international cocaine operations, which might have led to intensified competition among the various criminal groups.⁵¹⁶ In 2019, several villages in the western part of the Colombia-Ecuador border were afflicted by fighting between drug trafficking groups involving Colombians, which drove some residents to flee their homes.⁵¹⁷

Social impacts of cocaine trafficking on border communities vary

Although transit border areas are typically not the primary destination of the trafficked cocaine, the use of cocaine products, both in salt and smokable forms, may increase as a result of greater availability in communities through which trafficking routes pass. It is not uncommon, for example, that local logistics facilitators receive payments in kind, which are subsequently sold

499 Marcelo Moriconi and Carlos Aníbal Peris, 'Merging Legality with Illegality in Paraguay: The Cluster of Order in Pedro Juan Caballero', *Third World Quarterly* 40, no. 12 (2019): 2210–27.

500 Alexandre Peyrille, 'Pedro Juan Caballero, Enésima Capital Mundial de La Droga', *El Faro*, 26 August 2022.

501 Infobae, 'Pedro Juan Caballero, La Peligrosa Ciudad Paraguaya Dominada Por Los Narcos', *Infobae*, 18 May 2022.

502 Chris Dalby, 'Pedro Juan Caballero – The Descent into Madness of a Paraguay Border Town', *InSight Crime*, 20 May 2022.

503 'Embajada de Estados Unidos Condena Atentado Contra Periodista de Pedro Juan Caballero', *La Nación*, 6 September 2022.

504 Moriconi and Peris, 'Merging Legality with Illegality in Paraguay: The Cluster of Order in Pedro Juan Caballero'.

505 *Ibid.*

506 Eduardo Córdova, 'Revelan que Tarapacá es la región con la tasa de asesinatos más alta de Chile', *La Nación*, 29 August 2022.

507 In 2021, the Tarapacá's homicide rate was 6 per 100,000 inhabitants compared to the national rate of 2.3 per 100,000. See *Ibid.*

508 La Fiscalía de Chile, 'Fiscal Regional de Tarapacá: "enfrentar la criminalidad requiere de una política de Estado"', *Fiscaliadechile.cl*, 28 January 2022.

509 Eduardo Córdova, 'Revelan que Tarapacá es la región con la tasa de asesinatos más alta de Chile'.

510 La Fiscalía de Chile, 'Fiscal Regional de Tarapacá: "enfrentar la criminalidad requiere de una política de Estado"'.
511 Secretaría General de Comunicación de la Presidencia, 'El Presidente Guillermo Lasso Declara Estado de Excepción En Guayas y Esmeraldas (Boletín 715)', *comunicacion.gob.ec*, 1 November 2022.

512 Guillermo Lasso Mendoza, 'Estado de Excepción Por Grave Conmoción Interna En Los Cantones Guayaquil, Durán y Samborondón Con Una Vigencia de 30 Días', *Pub. L. No. Decreto No. 527* (2022).

513 El Comercio, 'Muertes violentas crecen en Esmeraldas por disputas entre bandas', *El Comercio*, 16 January 2022.

514 Carolina Mella, 'Ecuador Alcanza La Tasa Más Alta de Muertes Violentas de La Última Década', *Primicias*, 2 September 2022.

515 Redacción Primicias, 'El 66% de Las Muertes Violentas Se Concentra En Tres Provincias En Emergencia', *Primicias*, 4 May 2022.

516 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

517 James Bargent, 'Esmeraldas: An Ecuador Province Gripped by Drug Conflict', *InSight Crime*, 5 November 2019.

by retail dealers within the community.^{518 519 520 521} The limited evidence suggests varying effects of cross-border cocaine trafficking on the consumption of cocaine products. For example, the Ministry of Interior of Ecuador notes that retail distribution of cocaine in San Lorenzo, a coastal city in Esmeraldas, is a result of its location on an international trafficking route.⁵²² However, there is a lack of evidence regarding the consumption level of the drug among the population of Esmeraldas.

In addition, data from Paraguay suggest that the inhalation of solvents is being displaced by the smoking of cocaine products due to their high availability and accessibility.⁵²³ A study of public health services for users of smokable cocaine in the border cities of Pedro Juan Caballero and Ponta Porã points out that the area is characterized by serious underreporting and insufficient cross-border cooperation in providing treatment to drug users.⁵²⁴

In contrast, in the northern regions of Chile, available data for 2020 suggest that the use of cocaine products⁵²⁵ is not higher than in the rest of the country; moreover, the prevalence of cocaine use has been overall decreasing in the past decade in these regions.⁵²⁶ Previous research on the regions of Tarapacá and Antofagasta has found some evidence of a positive correlation between cocaine use and poverty levels, likely driven by the use of cheaper smokable forms of cocaine by sectors of low-income population in urban areas. As poverty rates declined between 2006 and 2014, the use of cocaine products declined as well for the most part of the same period.^{527 528}

Chilean Aymara communities located in sparsely populated areas on the border with Bolivia (Plurinational State of) have been also affected by an increase in trafficking activities. According to ethnographic research, the strengthening of border control measures, further

reinforced under COVID-19 protocols, hampered the cross-border mobility that had been occurring regularly among members of borderland indigenous communities, preventing some of them from accessing legal goods and services on the other side of the border.⁵²⁹ One consequence was that smuggling and cocaine trafficking activities shifted away from the official border crossings, resulting in the proliferation of unauthorized border passages. This, in turn, appears to have led residents of communities like Colchane to engage in illegal border crossing and be exposed to potential violence by criminal groups.⁵³⁰

Remote borderland communities are often characterized by higher poverty levels compared to the rest of the national territories, which may push some residents to become involved in illicit activities. In Chile, the regions of Tarapacá and Arica y Parinacota, for example, are among the poorest in the country,⁵³¹ with the border communities of Colchane and General Lagos being the poorest within these regions as of 2013.⁵³² Evidence from academic research points out that international drug trafficking networks have hired poverty-struck farmers at the Bolivian-Chilean border to traffic cocaine into Chile, paying them USD 500 each time for a 5-day journey on foot, through the desert, with up to 40 kg of cocaine at a time.⁵³³ In recent years, agricultural communities of the Tarapacá region, including Colchane, have suffered from torrential rains on the one hand and scarcity of water on the other, which reduced small farmers' livelihoods.⁵³⁴ These climatic conditions have created further vulnerabilities that may continue to drive farmers to search for additional income sources, including trafficking of drugs.

Similarly, in Ecuador, the deterioration of the environment and the degradation of natural resources also present vulnerabilities for livelihoods at the northern border with Colombia, especially for those who depend economically on the harvest of shell and crabs,⁵³⁵ which may potentially push some residents to enter the illicit economy. According to ethnographic research and open sources, in the province of Esmeraldas, a large number of fishing communities live off the cocaine trafficking economy. Some of the fishermen are used by traffickers to watch over movements on the border,⁵³⁶ while oth-

518 Interview #8.

519 Interview #18, interview by UNODC, 2022.

520 Interview #20, interview by UNODC, 2022.

521 Interview #21, interview by UNODC, 2022.

522 Ministerio del Interior, 'Plan Nacional de Seguridad Ciudadana y Convivencia Social Pacífica 2019-2030' (Quito - Ecuador: Ministerio del Interior, 2019), 213.

523 Secretaría Nacional Antidrogas (SENAD), 'Política Nacional Sobre Drogas Del Paraguay 2017 a 2022', 2018. p. 23.

524 Maria das Graças Rojas Soto et al., 'Crack Em Cidades Gêmeas: O Que Existe e Não Se Revela', in Anais Do VIII Simpósio Nacional de Geografia Da Saúde (Simpósio Nacional de Geografia da Saúde, Dourados, Brazil: Universidade Federal da Grande Dourados, 2017), 135-44, www.geosaude.org. 139-140.

525 Based on aggregate data for cocaine hydrochloride and coca paste (PBC), but excluding "crack."

526 Observatorio Nacional de Drogas, 'Décimo Cuarto Estudio Nacional de Drogas En Población General de Chile, 2020', 64, 74, 84.

527 Pilar Francisca Lizana Toresano, 'Respuestas Nacionales y "Soberanía efectiva" frente al problema transnacional de las drogas. Un estudio del caso Chileno' (Doctoral Thesis, Madrid, Universidad Complutense de Madrid, 2017), 275-276.

528 Academic research suggests that the correlation of cocaine with poverty in Tarapacá and Antofagasta is explained by lower price of coca paste (PBC) that is consumed by lower-income population as compared to cocaine hydrochloride. See *Ibid.*, 287.

529 Carlos Piñones-Rivera et al., 'Indigenous Border Migrants and (Im) Mobility Policies in Chile in Times of COVID-19', *International Journal of Environmental Research and Public Health* 19, no. 15 (2022): 9728.

530 *Ibid.*

531 Ministerio de Desarrollo Social y Familia, 'Caracterización Socioeconómica', DataSocial.Ministeriodesarrollosocial.gob.cl, 2020.

532 Lizana Toresano, 'Respuestas Nacionales y "Soberanía efectiva" frente al problema transnacional de las drogas. Un estudio del caso Chileno': 238. *Ibid.*, 269.

534 Ministerio de la Secretaría General de la Presidencia, 'Mensaje Presidencial. Región de Tarapacá', Digital.gob.cl, 2019, 18.

535 Ernesto Estupiñán Quintero, 'Plan de Desarrollo y Ordenamiento Territorial 2012 - 2022' (Gobierno Autónomo Descentralizado Municipal del Cantón Esmeraldas, 2013), 13-15.

536 Bargent, 'Esmeraldas: An Ecuador Province Gripped by Drug Conflict.'

ers smuggle cocaine on their boats.⁵³⁷ There are fishing companies in Esmeraldas, that are entirely dedicated to transporting cocaine shipments to other countries or to dropping the GPS-tagged illicit cargo in open seas to be collected by other vessels.⁵³⁸ In addition, as reported by media sources, many fishers have opted for smuggling subsidized gasoline to cocaine traffickers in Nariño, Colombia (for its use as a precursor in cocaine manufacturing), as their primary source of income. According to a law enforcement official cited in the media, when the gasoline is sold in the port of Tumaco in Colombia, on the Pacific coast, its price can be three times higher.⁵³⁹ Moreover, as suggested by media sources, with the possible upcoming removal of fuel subsidies in Colombia, the difference in the fuel price will be even higher, which is likely to increase the incentive for fishing communities to continue the resale of fuel.⁵⁴⁰

Overall, borderland communities are an example of a cocaine economy inserted in broader illicit flows. For example, communities of farmers (including women and children) depend economically on the cultivation of cannabis. Farmers in need may even receive payments in advance for future cannabis harvest from drug traffickers. Despite the significant share of the economy represented by the illicit activities, including cocaine trafficking, in communities situated along trafficking flows, border communities would seem to remain underdeveloped compared to other national areas. Moreover, security concerns can become a major impediment to the development of a tourism economy, as has been noted in the case of fishing communities in northern Ecuador.⁵⁴¹

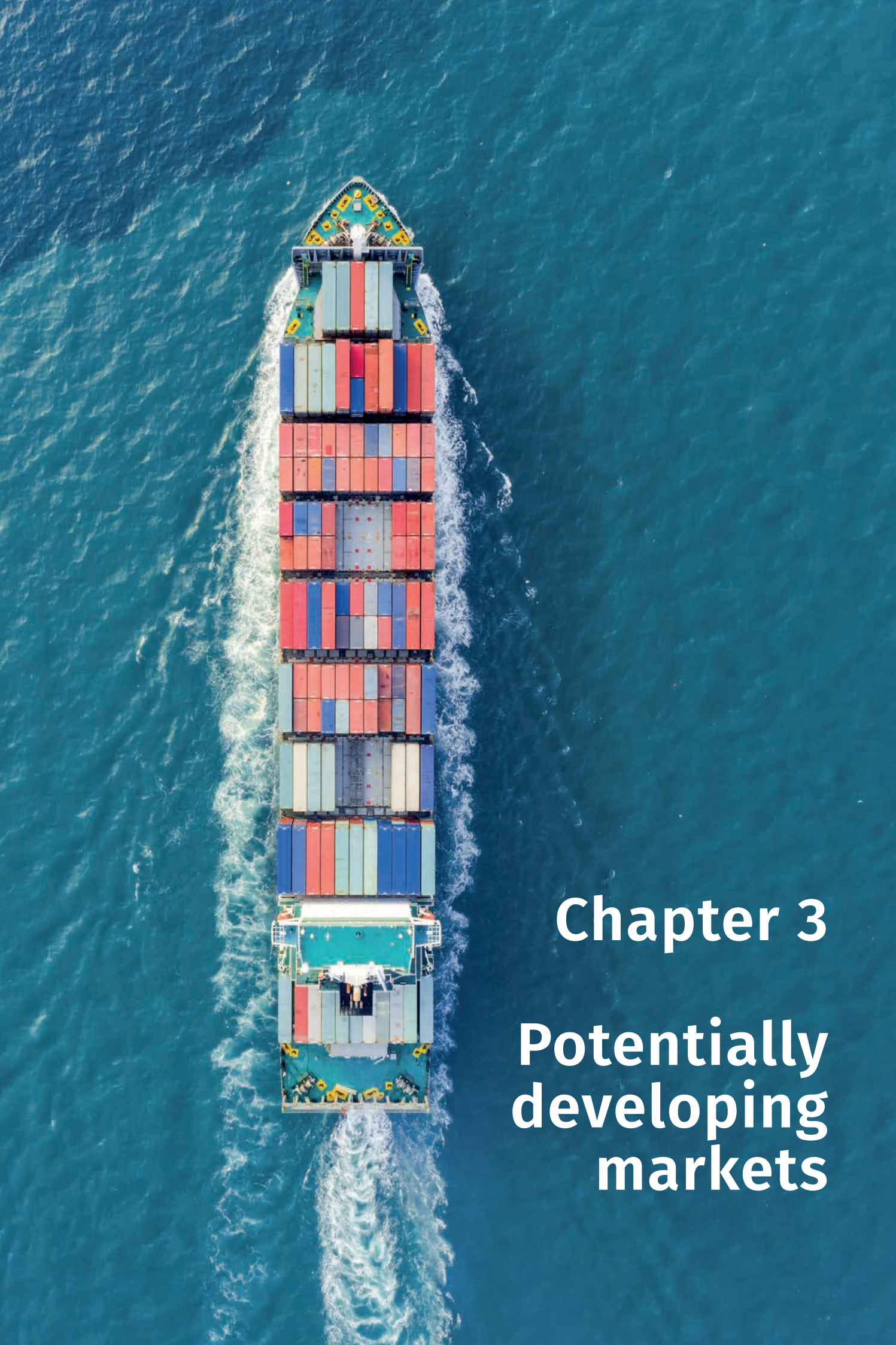
537 Rivera-Rhon and Bravo-Grijalva, 'Crímen organizado y cadenas de valor: el ascenso estratégico del Ecuador en la economía del narcotráfico'.

538 Ibid., 23-24.

539 Torres, 'Narcos Se Llevan La Gasolina Para Pesca Artesanal En Esmeraldas'.

540 Ibid.

541 Ileana Carolina Valero Zambrano and Zoila Pesantez Cedeño, 'Diagnóstico de Los Pequeños Pescadores de Conchas Negras de La Comuna El Playón Del Cantón Balao de La Zona 5 de Planificación Para Incorporarlos a La Economía Popular y Solidaria', Revista Observatorio de La Economía Latinoamericana, October 2018.



Chapter 3

Potentially developing markets

Potentially developing markets

Africa

Africa continues to play a significant part in the global cocaine market. While an important aspect of this is its role in as a transit region, this role has also likely contributed to the development of local markets. Nevertheless, cocaine trafficking and use remain uneven across different parts of Africa; while cocaine use has been a reality in certain parts of Africa for many years, it now appears to overlap to a large extent with the transit routes of West and Central Africa and North Africa (towards Europe) and Southern Africa. The prevalence of past-year use for Africa overall is estimated at 0.27 per cent as of 2020, an average level significantly less than the Americas, Europe and Oceania, but above Asia (0.07 per cent). However, Africa remains the region most affected by a lack of data on drug supply and demand and any estimate is affected by a high level of uncertainty.

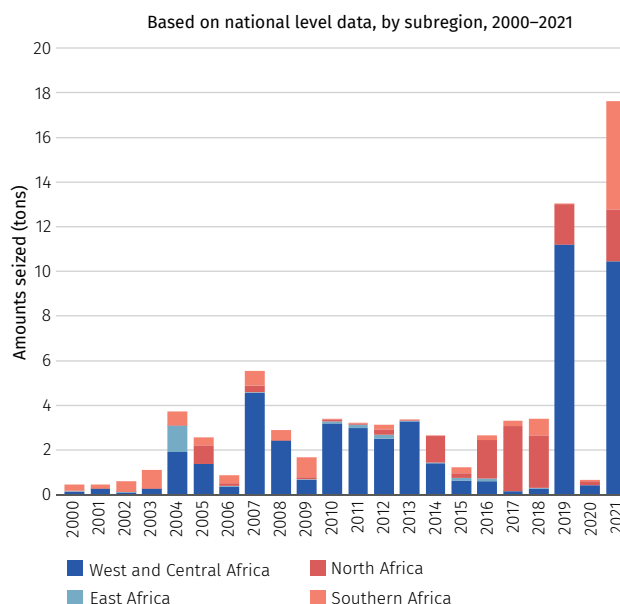
Seizure data suggest that the role of Africa, especially West and Central Africa, as a transit zone for cocaine on its way to destination markets such as Europe has expanded substantially starting in 2019. Indeed, both the total quantity seized in Africa (based on preliminary data), and the number of large seizures, appear to have reached record levels during 2021, following a temporary drop in 2020 coinciding with the onset of the COVID-19 pandemic.

West, Central and North Africa

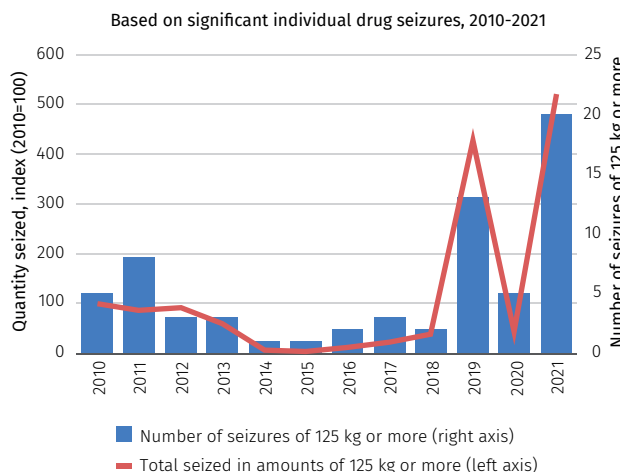
The geographical location of the subregion of West and Central Africa renders it a natural stopover point for cocaine originating from South America *en route* to Europe, especially for vessels departing from Brazil. The shortest distance between the South American and African landmasses – approximately 2,850km - is realized between the Brazilian state of Rio Grande do Norte and, in Africa, the Atlantic coast south of the Casamance River, approximately at the border between Senegal and Guinea-Bissau.

Indeed, as borne out by the location of significant seizures made on the Atlantic coast of Africa, and maritime routes described by MAOC-N,⁵⁴² the area around this westernmost extremity of Africa, including Cabo Verde, the Gambia, Guinea-Bissau and Senegal, is one of two major arrival zones for cocaine reaching West and Central Africa across the Atlantic, alongside the coast on the

Trends in cocaine seizures in Africa



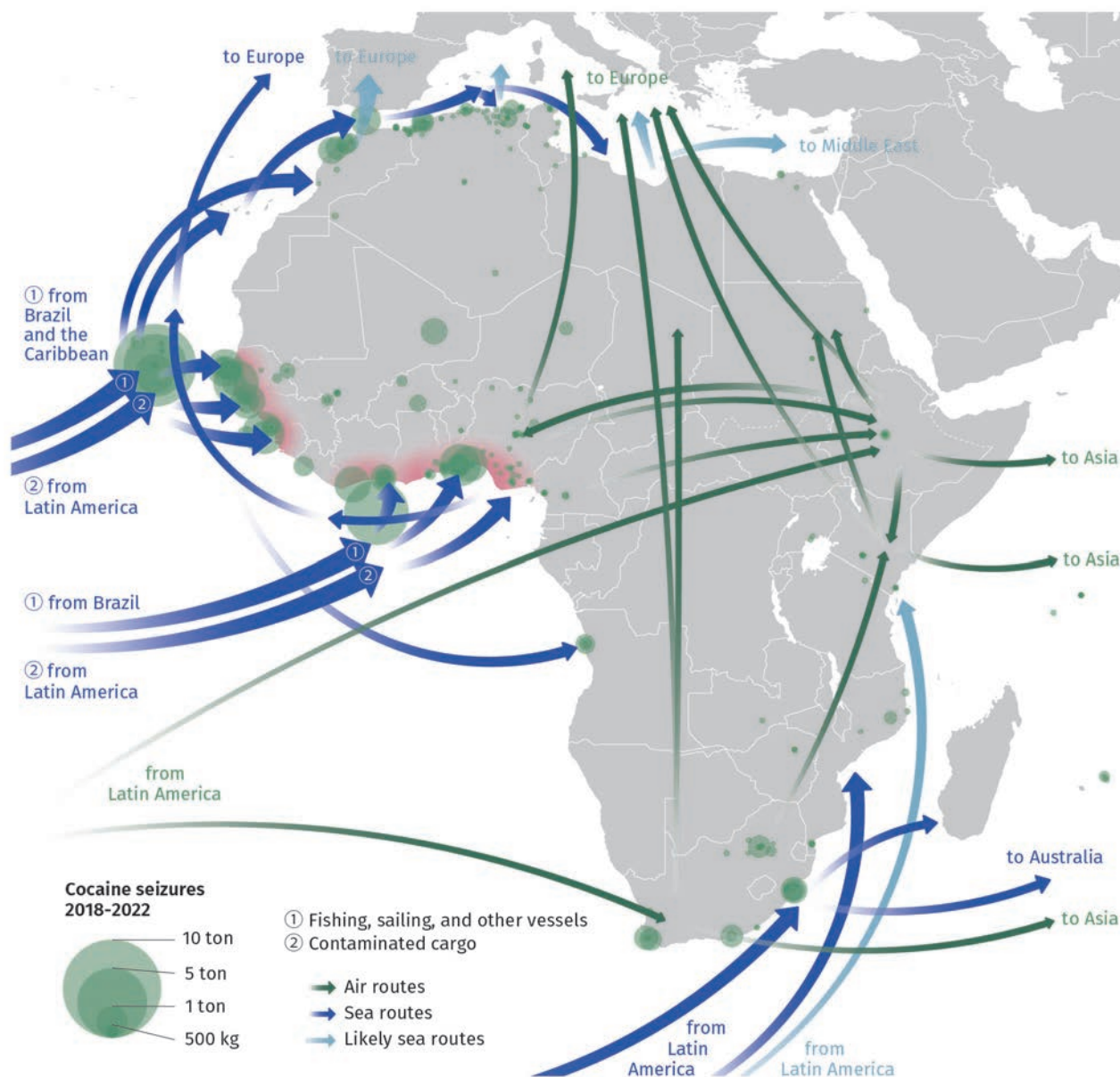
Note: Data for 2021 are incomplete and preliminary.
Source: UNODC, responses to the annual report questionnaire.



Note: In view of potentially incomplete and uneven coverage, time series is based on large seizures only.
Source: UNODC Drugs Monitoring Platform.

542 See Chapter *Established markets*, in this report.

Main cocaine trafficking routes into and out of Africa, and significant cocaine seizure cases in Africa, 2018–2022



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Final boundary between the Republic of Sudan and the Republic of South Sudan has not been yet determined. Sources: UNODC responses to the annual report questionnaire; UNODC, Drugs Monitoring Platform; UNODC Interviews, supplemented by open sources.

Gulf of Guinea (from Côte d'Ivoire eastwards). Data on individual seizures suggest that, most recently, the Gulf of Guinea has gained in importance;⁵⁴³ this may be linked to the increased frequency of certain types of vessels (discussed below) departing from Brazil (as opposed to northern South America or the Caribbean),⁵⁴⁴

Over the period 2019–2021, 13 cocaine seizures of 100kg or more were documented in countries with a coastline on the Gulf of Guinea,^{545 546} and another 16 were documented in the more westerly arrival zone centred around Guin-

ea-Bissau.^{547 548} Some of the largest seizures occurred in, or close to, Cabo Verde (9.5 tons in February 2019⁵⁴⁹ and 2.3 tons in August of the same year⁵⁵⁰ – followed by 5.7 tons in April 2022⁵⁵¹), Côte d'Ivoire (6 tons in March 2021), Senegal (5.1 tons in April 2020⁵⁵²) and the Gambia (3 tons in January 2021).⁵⁵³ In the case of Côte d'Ivoire, the seizure was made in open waters from a cargo ship, coming from São Paulo (Brazil) *en route* to Abidjan, Côte d'Ivoire;

543 UNODC, 'Drugs Monitoring Platform', n.d.

544 Interview #41, interview by UNODC, 2022.

545 UNODC, 'Drugs Monitoring Platform'.

546 Specifically, seizures made in or close to Benin, Côte d'Ivoire, Ghana and Togo.

547 UNODC, 'Drugs Monitoring Platform'.

548 Specifically, seizures made in or close to Cabo Verde, Gambia, Guinea, Guinea-Bissau, Senegal and Sierra Leone.

549 UNODC, 'Drugs Monitoring Platform'.

550 Ibid.

551 Ibid.

552 Ibid.

553 Ibid.

however, according to the crew, the cocaine was to be recovered at sea by a boat coming from Nigeria.⁵⁵⁴

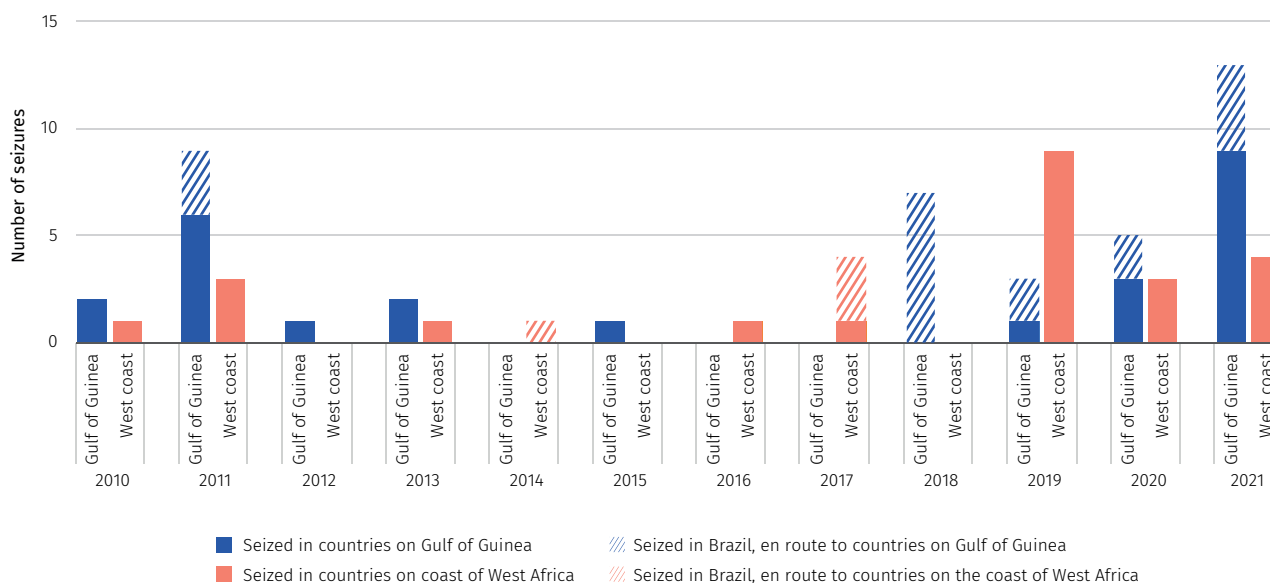
Brazil continues to be an important country of departure for cocaine trafficked to destinations in Africa. In September 2018, a seizure of 1.2 tons of cocaine in the Brazilian port of Santos was made from a consignment of heavy machinery about to be exported to a company in Abidjan, Côte d'Ivoire.⁵⁵⁵ According to an investigative journalist source sources based on court and police documents, Italian orders of custody, and interviews with law enforcement,, the trafficking scheme was orchestrated by an 'Ndrangheta member from the Romeo-Staccu clan, operating with the support of several individuals based in Abidjan, including Italian businessmen with links to the Camorra, while the arrangements in Brazil to supply the cocaine may have involved an individual with ties to the PCC as well as an 'Ndrangheta broker. Investigators also suspect the gang had been shipping cocaine in machinery since at least July 2017.⁵⁵⁶

In 2019, 5 instances of cocaine seized in Brazilian sea-ports with a known destination in Africa were recorded by the Federal Police of Brazil, going to Nigeria, Ghana (whose coastline abuts on the Gulf of Guinea) and Sierra Leone (on the western coast), amounting to 3.8 tons in total (with each of the three destinations countries

accounting for more than 1 ton).⁵⁵⁷ In 2020, coinciding with the onset of COVID-19,⁵⁵⁸ such seizures declined in Brazil, with only 123kg being seized with a known destination in West and Central Africa (specifically Côte d'Ivoire and Nigeria), in addition to one consignment destined for Egypt (654kg) and United Republic of Tanzania (267 kg).⁵⁵⁹ While comprehensive comparable data for 2021 were not available, it appears that trafficking from Brazil to West and Central Africa rebounded during 2021, as at least 3 cocaine consignments in excess of 500 kg each, amounting to 2.9 tons, were seized in Brazil with destination Ghana,⁵⁶⁰ in addition to smaller consignments meant for Nigeria and Sierra Leone.⁵⁶¹ In March 2022, 1 ton of cocaine was seized in the Brazilian port of Santos from two containers on their way to Belgium and Côte d'Ivoire.⁵⁶²

Overall, the available data on individual seizures linked to trafficking across the Atlantic to West and Central Africa confirm that this phenomenon has rebounded, and that the two arrival zones – at the Gulf of Guinea and the western coast of Africa - both remain important, with the Gulf of Guinea apparently gaining in importance.

Number of large cocaine consignments seized in or intended for West and Central Africa, by arrival zone, 2010–2021



Note: Based on seizures of 100kg or more.
Source: UNODC, Drugs Monitoring Platform.

554 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes' (CRIMJUST Annual Meeting - Africa, Ghana, 23 November 2021).

555 UNODC, 'Drugs Monitoring Platform'.

556 Cecilia Anesi, Margherita Bettoni, and Giulio Rubino, "Armed and Dangerous": Inside the 'Ndrangheta's Intercontinental Cocaine Pipeline', *IRPI Media*, 6 August 2021.

557 Brazilian Federal Police

558 For a detailed discussion of the changing dynamics of cocaine trafficking affecting Brazil, see UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', *Cocaine Insights 4* (Vienna: UNODC, July 2022).

559 Brazilian Federal Police

560 UNODC, 'Drugs Monitoring Platform'.

561 Ibid. (Destination Nigeria, 155kg and destination Sierra Leone, 37kg).

562 UNODC, Drugs Monitoring Platform., n.d.

Transatlantic trafficking to West and Central Africa occurs in containerized trade as well as merchant vessels, fishing vessels and sailing vessels. In 2021 and the first quarter of 2022, at least 5 seizures made in Brazilian ports with destination in Africa (Ghana, Côte d'Ivoire, Morocco, Sierra Leone and South Africa),⁵⁶³ as well as 2 seizures made in Togo⁵⁶⁴ were known to have been made from containers.⁵⁶⁵ During the same period, interventions in the Atlantic Ocean coordinated by the Maritime Analysis and Operations Centre (MAOC-N) led to at least 23 seizures in open waters from 4 fishing vessels, 7 merchant vessels and 12 sailing vessels (as opposed to container ships), including 3 whose location strongly suggests that the intended destination was in West and Central Africa.⁵⁶⁶ Brazil in particular appears to have gained importance specifically as a point of departure for vessels not connected to international shipping of legitimate cargo – such as sailing vessels – trafficking cocaine across the Atlantic.⁵⁶⁷

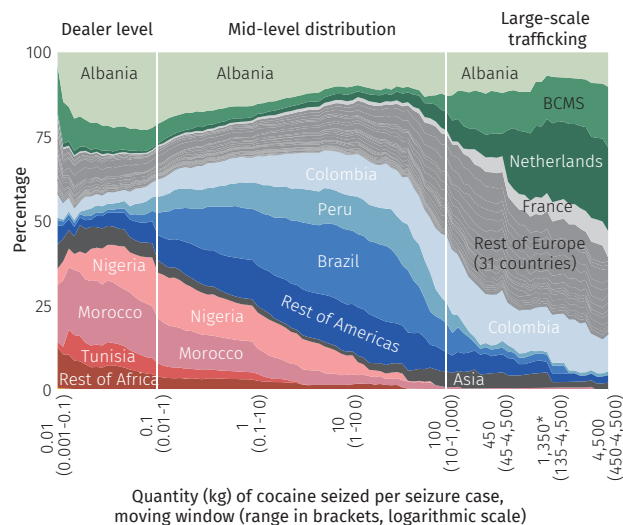
While shipments in containers are likely retrieved in the port of arrival, vessels other than container ships typically rendezvous with other vessels close to the African landmass to hand over the cocaine consignment before the drug continues its itinerary. The route typically continues northwards towards Europe, either via land or via maritime routes along the African coast, and frequently in smaller batches. The second maritime segment may involve the use of legal cargo dispatched to a European destination from a country in West and Central Africa, which traffickers may hope would be less likely to attract scrutiny versus a country of departure in South America.⁵⁶⁸ For example, one seizure at the port of Antwerp (Belgium) in February 2021 involved 840 kg of cocaine which had arrived in a ship from Côte d'Ivoire,⁵⁶⁹ and a similar instance occurred in June 2020, with a seizure in the same port of 1.2 tons coming from Sierra Leone.⁵⁷⁰

Trafficking through countries on the Gulf of Guinea

Nigerian traffickers, and to some extent the territory of Nigeria, appear to play a significant role in the consolidation of cocaine entering the subregion and distribution to other countries,⁵⁷¹ both within the subregion^{572 573 574} and beyond. Nigerian traffickers often work in collaboration with Nigerian counterparts in other countries, notably

members of “cult groups” in European destination countries^{575 576} as well as, according to media coverage citing Nigerian law enforcement, Nigerians operating in Brazil.⁵⁷⁷ From an analysis of foreign nationalities of individuals arrested in Europe in connection with individual cocaine seizures during 2018–2020, Nigeria emerges as the most prominent among African nationalities, followed by Morocco (but less prominent than some countries in Europe and South America). This analysis suggests that the role of Nigerians is relatively important at mid-level and dealer level, rather than large-scale trafficking.⁵⁷⁸

Distribution of foreign nationals arrested in Europe in connection with individual cocaine seizures, by nationality, according to size of seizure, 2018-2020



Note: BCMS stands for Bosnia and Herzegovina, Croatia, Montenegro and Serbia and thus includes the Serbo-Croat-speaking groups in Europe. The distribution at a given quantity is determined by considering all relevant cases in which the quantity seized was within a factor of 10 of the nominal value indicated on the axis (the moving window is indicated as a range in brackets). Since the largest seizure occurring in this universe was of 4.5 tons, for nominal values larger than 450 kg the moving window is effectively biased to the left.

Source: UNODC, Drugs Monitoring Platform.

Based on aggregate reporting to UNODC, by Nigeria and other countries, on the main cocaine trafficking routes during 2018–2021,⁵⁷⁹ trafficking of cocaine was reported from Nigeria to 20 countries or territories, including countries within the subregion (Burkina Faso, Mali, Niger, Ghana, Senegal, Liberia), transit countries in Africa (Algeria, Ethiopia, Morocco), and countries and territories in the Asia-Pacific region (Australia, China, Hong Kong, China, India, Malaysia, Sri Lanka), in the Near and Middle East/South-West Asia (Pakistan, Saudi Arabia, United Arab Emirates) and in Europe (Türkiye,

563 UNODC, 'Drugs Monitoring Platform'.

564 Ibid.

565 Information on the method of concealment, including whether the consignment was in a container or not, is not systematically available.

566 Data from MAOC-N.

567 Interview #41.

568 Ibid.

569 UNODC, Drugs Monitoring Platform.

570 Ibid.

571 Ana Aguilera, 'Drug Trafficking and Jihadism in Africa' (San Sebastian, Spain: Observatorio Internacional de Estudios sobre Terrorismo, 2022).

572 Ibid.

573 Dublin Group, 'Drugs Problem: Regional Situation in West Africa (September 2021)', SN 3635/21, 2021.

574 Interview #37, interview by UNODC, 2022.

575 Interview #40, interview by UNODC, 2022.

576 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets' (Columbia, 11 November 2021).

577 Nicholas Ibekwe and Daan Bauwens, 'Special Report: Drug Frontier: How Cocaine Trafficking Is Impacting West Africa', *Premium Times*, 1 January 2020.

578 UNODC, 'World Drug Report 2021, Booklet 4' (Vienna: UNODC, 2021), 28.

579 Data for 2021 are incomplete and preliminary.

United Kingdom).⁵⁸⁰ Data on 52 specific cases of cocaine seizures documented by UNODC confirm trafficking, from 2019 onwards, from Nigeria to several of these countries, and also provide additional evidence of trafficking to neighbouring countries (Benin, Cameroon, Equatorial Guinea), North Africa (Libya) and Europe (Cyprus, Italy, Spain).⁵⁸¹

Cocaine trafficking through Nigeria is especially visible in the trafficking of small quantities by means of mules on passenger flights. Among the 52 cocaine seizures mentioned above, all but one involved quantities of less than 20 kg.⁵⁸² Seizures made at destination (outside of Nigeria) were predominantly (except instances where the relevant information was not available) cases of trafficking by air, while seizures made in Nigeria itself included predominantly trafficking by mail or express parcel as well as commercial flights, aside from a minority of cases (4 out of 32 cases where the relevant data were available) involving vehicles.⁵⁸³

In Brazil, in each year over the period 2018-2020, and during the first four months of 2021, the most frequently occurring foreign nationality (i.e., non-Brazilian) of drug mules arrested at Brazilian airports was consistently Nigerian.⁵⁸⁴ In 2020, drug trafficking via passenger flights was in general disrupted due to the reduction of international flights in the context of the COVID-19 pandemic.⁵⁸⁵ In the case of Nigeria, the disruption in the aftermath of the closure of airports may have resulted in a spillover to Cotonou airport in neighbouring Benin, which had already reopened in July 2020 (while Nigerian airports remained closed until September 2020).⁵⁸⁶

Given that direct passenger flights do not always exist between any given pair of countries, air travel relies on a number of travel hubs with direct connectivity to a large number of destinations; some of these hubs may also play important roles as transit points for trafficking on passenger flights. In the case of trafficking into and out of Nigeria, one interviewee indicated that these hubs include airports in Ethiopia, Qatar and the United Arab Emirates, corresponding to hubs of airlines offering connectivity between South America and Africa.⁵⁸⁷ Based on analysis of the itinerary of 150 mules on passenger flights who were arrested during August 2020-May 2021 while trafficking drugs into, or out of, Nigeria or Benin,

(respectively from Brazil, or to Europe) Addis Ababa (Ethiopia) emerged as a particularly frequent transit airport.⁵⁸⁸

Cocaine arrives in Nigeria via a variety of channels, including: bulk carrier vessels arriving at seaports such as Apapa, Tincan Island and Onne; passenger flights into airports such as those of Lagos, Abuja, Enugu and Kano; across land borders at various locations, including Seme (on the border with Benin) and Ilela (on the border with Niger); and via parcels delivered by courier companies or postal services.⁵⁸⁹ The most prominent departure country for cocaine reaching Nigeria is Brazil.⁵⁹⁰

In Nigeria, instances of large seizures of cocaine linked to maritime routes have been relatively limited. In September 2022 the National Drug Law Enforcement Agency of Nigeria announced the seizure of 1.8 tons in a warehouse in a secluded estate in Lagos.⁵⁹¹ Moreover, the primary modalities for outbound cocaine trafficking from Nigeria appear to be mules on passenger flights, cargo flights and parcel services.⁵⁹² Thus, despite the established and well-connected presence of Nigerian traffickers within an international network of actors and counterparts trafficking cocaine (and other drugs), notably with regard to trafficking by air, in view of the available seizure data it is plausible that the volume of cocaine transiting Nigerian territory is a relatively modest share of the quantities reaching West and Central Africa. It should however be borne in mind that Nigerian traffickers are also active in neighbouring countries as well as North Africa.^{593 594} One law enforcement source even indicated that Nigerian traffickers were actively acquiring private planes to transport cocaine within Africa.⁵⁹⁵

The recent increased frequency of large individual cocaine seizures has been more noticeable in some of the neighbouring coastal countries along the Gulf of Guinea, especially in Benin, where authorities seized 6 consignments⁵⁹⁶ in excess of 100 kg during 2019-2021 (of which four took place in 2021), including 2.6 tons in one instance in September 2021, from a shipment originating in Suriname en route to the European ports of Antwerp and Rotterdam.⁵⁹⁷ In addition to this, Beninese law enforcement observed a new route from Brazil to Benin via the Canary Islands, and onward to Nigeria, relying on the identification papers of containers being changed

580 UNODC, 'Responses to the Annual Report Questionnaire from Member States 2018-2021', n.d. Responses for 2021 were incomplete and preliminary.

581 UNODC, Drugs Monitoring Platform.

582 One seizure at Lagos airport involved a shipment of 70 kg of cocaine sent through a courier company to the United Kingdom. UNODC, 'Drugs Monitoring Platform', dmp.unodc.org.

583 UNODC, Drugs Monitoring Platform.

584 Data from Federal Police of Brazil.

585 UNODC, 'World Drug Report 2021, Booklet 5' (Vienna: UNODC, 2021).

586 'CRIMJUST Interregional Investigative Case Forum' (Ghana, 27 January 2021).

587 Interview #40.

588 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

589 Interview #40.

590 Ibid.

591 UNODC, Drugs Monitoring Platform.

592 Interview #40.

593 Dublin Group, 'Drugs Problem: Regional Situation in West Africa (September 2021)'.

594 Interview #37.

595 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

596 UNODC, 'Drugs Monitoring Platform'.

597 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

while in trans-shipment at the port of Las Palmas in Gran Canaria.⁵⁹⁸ Nigeria, as well as other countries outside Africa, such as Italy, Spain and Qatar, were among the destinations for cocaine trafficking through Benin observed in 2021.⁵⁹⁹

Another country in the region which has seen a notable increase in large seizures is Côte d'Ivoire. Aside from seizures in open waters,⁶⁰⁰ large quantities were seized in this country in April 2022 (2.1 tons)⁶⁰¹ and February 2021 (1 ton).⁶⁰² In 2021, two significant seizures were also made in Togo, both from containers originating in Brazil (220 kg seized in July 2021⁶⁰³ and 55 kg in May 2021⁶⁰⁴).

Since 2013, the UNODC Drugs Monitoring Platform has recorded only one seizure of 100 kg or more in Ghana, specifically in September 2020 at Tema port.⁶⁰⁵ While this port is one of the busiest in Africa (alongside Abidjan and Lomé, in neighbouring Côte d'Ivoire and Togo, respectively),⁶⁰⁶ the 2021 report of the Dublin Group on the drug situation in West Africa⁶⁰⁷ assesses that the security systems render "rip-off" attempts particularly challenging for traffickers at this port.

Ghanaian law enforcement sources however report that Ghana continues to be a transit country for cocaine. For inbound trafficking, the maritime modalities, including containerized shipments but also the use of fishing boats and other vessels, were the primary channel, while outbound trafficking occurred mainly via passenger flights and postal and courier services. Based on seizure data for 2018-2021, the main destinations were in Europe (mostly the United Kingdom and the Netherlands) and, to a lesser degree, in Asia (mostly Thailand).⁶⁰⁸

One open source report has highlighted Ghanaian traffickers, alongside networks based in Nigeria and Guinea-Bissau, as major players for drug trafficking in West Africa.⁶⁰⁹ Groups that traffic cocaine in Ghana reportedly operate fluid networks, rather than highly organized hierarchical structures, and they have international collaborators who are mostly Ghanaians and Nigerians.⁶¹⁰ Trafficking by land from Nigeria to Ghana, across the land borders of Benin and Togo, also occurs.⁶¹¹

Trafficking through countries on the West African coast
During 2004-2007 when cocaine trafficking through West and Central Africa became especially pronounced, the small country of Guinea-Bissau was at the epicentre of this channel.⁶¹² According to one open-source report, cocaine flows through Guinea-Bissau expanded in the aftermath of the military coup of 2003, and, shortly after the 2005 election, were further facilitated by the presence of Colombian and Venezuelan traffickers as well as the emergence of local criminal entrepreneurs.⁶¹³

While cocaine flows through this country allegedly peaked in 2007,⁶¹⁴ recent developments, in particular some large shipments seized in 2019, point to the continued potential for this country to be used for cocaine trafficking by a variety of actors. In 2019, two large cocaine seizures were made in Guinea-Bissau, both with links to Mali. In March 2019, 789kg were seized in Guinea-Bissau from a truck⁶¹⁵ allegedly registered in Senegal and bound for Mali.⁶¹⁶ A report⁶¹⁷ on Mali by a UN Security Council panel of experts linked⁶¹⁸ this seizure to a sanctioned Malian individual found to use the proceeds of drug trafficking to support terrorist armed groups, in particular the sanctioned entity Al-Mourabitoun⁶¹⁹ affiliated with Al-Qaeda.⁶²⁰ A few months later in September 2019, 1.9 tons of cocaine were seized in the northwest of Guinea-Bissau,^{621 622} resulting in the arrest of six Bissau-Guineans, three Colombians and one Malian.⁶²³ This case was linked to one of the major Bissau-Guinean actors who emerged in the mid-2000s, alongside a co-conspirator of dual Mexican and Colombian nationality.^{624 625} A third consignment, consisting of 2 tons of cocaine, seized in October 2021 by Senegalese

598 Ibid.

599 Ibid.

600 6 tons of cocaine seized in March 2021 and 411kg seized in February 2020 (UNODC, Drugs Monitoring Platform).

601 UNODC, Drugs Monitoring Platform.

602 UNODC, 'Drugs Monitoring Platform'.

603 UNODC, Drugs Monitoring Platform.

604 Ibid.

605 UNODC, 'Drugs Monitoring Platform'.

606 Africa container shipping, 'Top 10 Ports in Africa in 2019 (by Volume in TEUs) and Port Projects in West Africa', africa-container-shipment.com, n.d.

607 Dublin Group, 'Drugs Problem: Regional Situation in West Africa (September 2021)', p. 5.

608 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

609 Aguilera, 'Drug Trafficking and Jihadism in Africa'.

610 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

611 Ibid.

612 UNODC, 'The Transatlantic Cocaine Market', Research Paper (UNODC, April 2011).

613 Lucia Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks', Research Report (Global Initiative Against Transnational Organized Crime, July 2022).

614 Ibid.

615 UNODC, 'Drugs Monitoring Platform'. Ibid.

616 Peter Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium', Research Paper (ENACT Africa, 17 September 2020).

617 UN Panel of Experts Established pursuant to Security Council Resolution 2374 (2017) concerning Mali, 'Final Report of the Panel of Experts Established Pursuant to Security Council Resolution 2374 (2017) on Mali and Renewed Pursuant to Resolution 2484 (2019)', S/2020/785 § (2020); UN Panel of Experts Established pursuant to Security Council Resolution 2374 (2017) concerning Mali, 'Final Report of the Panel of Experts Established Pursuant to Security Council Resolution 2374 (2017) on Mali and Renewed Pursuant to Resolution 2484 (2019)', S/2020/785/Rev.1 § (2020).

618 The report found that one of the traffickers involved in the trafficking of the shipment seized in March 2019 was an accomplice of the sanctioned individual.

619 United Nations Security Council, 'Mohamed Ben Ahmed Mahri', un.org, 10 July 2019.

620 United Nations Security Council, 'Al Mourabitoun', un.org, 2 June 2014.

621 UNODC, 'Drugs Monitoring Platform', dmp.unodc.org

622 UNODC, 'Largest Drug Seizure Ever Made in Guinea-Bissau by Law Enforcement Officials', unodc.org, n.d..

623 Ibid..

624 'CRIMJUST Interregional Investigative Case Forum'.

625 Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks'.

authorities some 360km off the coast,⁶²⁶ was believed to be headed to Guinea-Bissau.^{627 628}

One report indicates that investigations following the two above-mentioned seizures in Guinea-Bissau revealed networks of individuals spanning Senegal, Guinea-Bissau, Mali and Guinea,⁶²⁹ and suggests that Colombian traffickers move frequently between Guinea-Bissau and the neighbouring countries of Guinea and Senegal.⁶³⁰ A follow-up report suggests that Judicial Police in Guinea-Bissau have gathered evidence pointing to the emergence of a new network of local actors who, having travelled to Latin America, are engaging in direct negotiations with counterparts in this region.⁶³¹

The Bijagos archipelago, a group of 88 islands forming part of Guinea-Bissau, appears to play a prominent role as a point of entry for cocaine entering Guinea-Bissau.^{632 633} For example, according to media sources, the island of Caravela was used as a staging post in the importation of the consignment of 1.9 tons seized in September 2021.⁶³⁴ From Guinea-Bissau, cocaine may be further trafficked by road towards Mali via the bordering countries of Senegal and Guinea, and one open source⁶³⁵ suggests that onward trafficking from Guinea-Bissau also occurs on northward maritime routes. In recent years, the Gambia,⁶³⁶ Senegal,⁶³⁷ and Portugal⁶³⁸ have all ranked Guinea-Bissau among the top countries of provenance for seized cocaine shipments. According to media reports citing a senior intelligence officer from Mali's central agency in charge of countering drug trafficking, the *Office Central des Stupéfiants*, cocaine from Guinea-Bissau reaches Mali either via Guinea or via Senegal, passing through the Senegalese inland city of Tambacounda.⁶³⁹

Aside from the route to Mali, according to open sources, the land routes from Guinea-Bissau may branch at Tam-

bacounda (Senegal) towards Mauritania.^{640 641} Indeed, based on interviews conducted in 2019, the latter route had allegedly increased in importance due to insecurity along the routes towards Libya.⁶⁴² This is somewhat corroborated by reporting from Morocco, which indicates a small but increasing share of inbound cocaine flows entering Morocco by land, reaching 23 per cent in 2021.⁶⁴³

It is unclear to what extent cocaine reaching the African landmass directly via the Senegalese coast may contribute to the flows on outbound land routes from Senegal; most of the large seizures by Senegalese forces have been made at sea,⁶⁴⁴ in transit at the port of Dakar⁶⁴⁵ or close to tourist areas in Senegal.⁶⁴⁶

Some clandestine laboratories where cocaine was being processed have been dismantled recently. For instance, in January 2021, Senegal dismantled a laboratory in Ngarparou, seizing 675 kg of cocaine, leading to the arrest of nationals from Belgium, Spain and Senegal.⁶⁴⁷ In April 2022, the Ivorian law enforcement raided an apartment in Abidjan where 168kg of cocaine and conditioning equipment were seized.⁶⁴⁸ Niger also reported dismantling two clandestine laboratories where cocaine was transformed into crack in 2017.⁶⁴⁹ These developments highlight that the region is no longer a simple region of storage and transit, but an area where cocaine is being processed including for repackaging and transformation into crack.

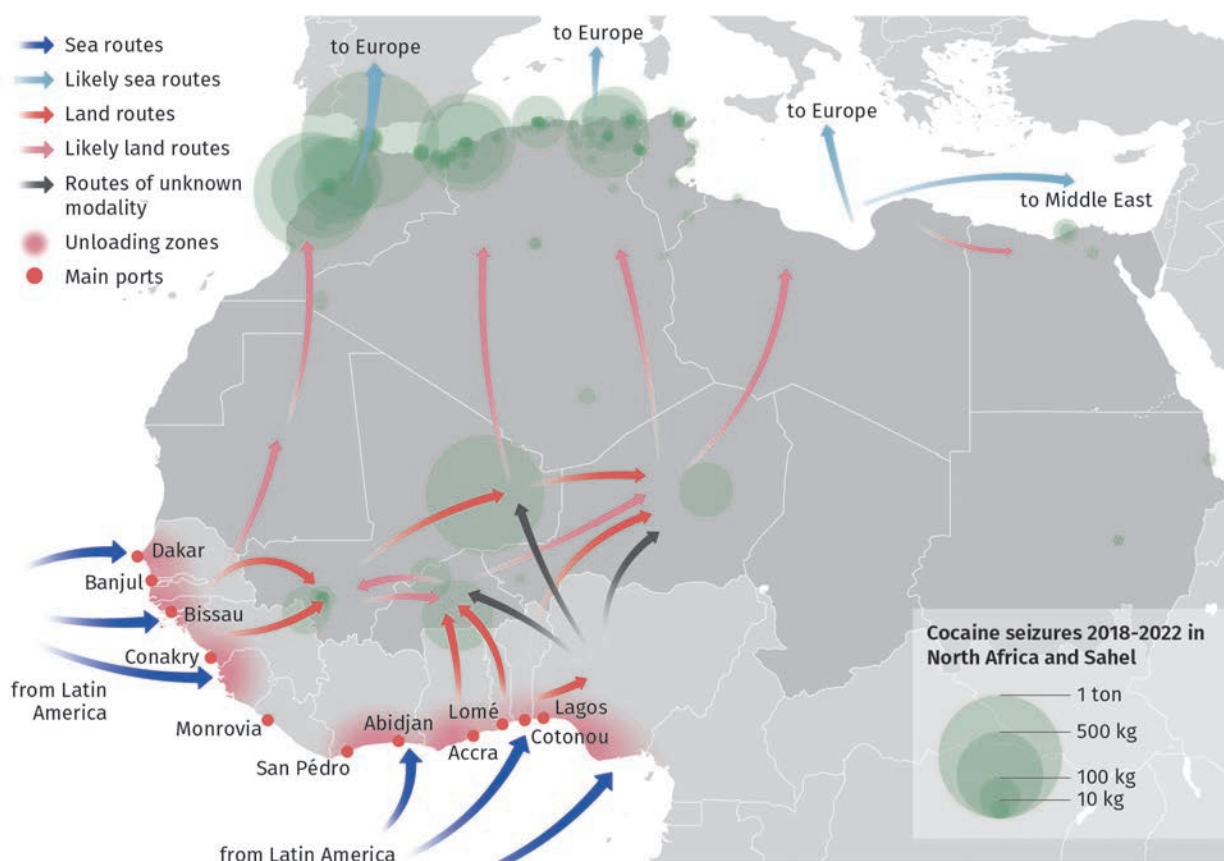
From the West African coast towards the destination markets

The territory of the landlocked countries of Mali and Niger is an important transit region for cocaine trafficked northwards via land routes. Both the arrival zone in the Gulf of Guinea and that in the west African coast appear to contribute to these land routes. In its official reporting for 2021, Mali identified Guinea, with whom it shares a border on the west, in second place (after Nigeria⁶⁵⁰) as a country of departure for cocaine hydrochloride in its territory.⁶⁵¹ Two seizures at Kouremalé, a border station between Guinea and Mali, confirm this entry channel: 20 kg seized in November 2021,⁶⁵² and 160 kg seized in August 2022.⁶⁵³

626 Diadie Ba, Aaron Ross, and Steve Orlofsky, 'Senegal Seizes Record 2 Tonnes of Cocaine off Atlantic Coast', *Reuters*, 20 October 2021.
627 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.
628 Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks'.
629 Lucia Bird, 'West Africa's Cocaine Corridor: Building a Subregional Response', Policy Brief (Global Initiative Against Transnational Organized Crime, April 2021).
630 Ibid.
631 Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks'.
632 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.
633 Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks'.
634 UNODC, Drugs Monitoring Platform.
635 Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks'.
636 UNODC, 'Gambia, Responses to the Annual Report Questionnaire 2021', n.d.
637 UNODC, 'Senegal, Responses to the Annual Report Questionnaire 2018, 2019', n.d.
638 UNODC, 'Portugal, Responses to the Annual Report Questionnaire 2020', n.d.
639 Micael Pereira, 'The Bissau Corridor', *Pulitzer Center*, 14 April 2022.

640 Bird, 'West Africa's Cocaine Corridor: Building a Subregional Response'.
641 Bird, 'Cocaine Politics in West Africa: Guinea-Bissau's Protection Networks'.
642 Lucia Bird and Lyes Tagziria, 'Organized Crime and Instability Dynamics: Mapping Illicit Hubs in West Africa', Research Report (Global Initiative Against Transnational Organized Crime, September 2022).
643 UNODC Annual Report Questionnaire, responses from Morocco.
644 UNODC, 'Drugs Monitoring Platform'.
645 UNODC, 'Drugs Monitoring Platform', dmp.unodc.org
646 UNODC, 'Drugs Monitoring Platform', dmp.unodc.org
647 UNODC, Drugs Monitoring Platform.
648 Ibid.
649 UNODC, 'Responses to the Annual Report Questionnaire', n.d.
650 Nigeria does not share a land border with Mali.
651 UNODC, 'Mali, Responses to the Annual Report Questionnaire 2021', n.d.
652 UNODC, 'Drugs Monitoring Platform'.
653 Ibid.

Cocaine trafficking routes from across West and North Africa



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations.

Final boundary between the Republic of Sudan and the Republic of South Sudan has not been yet determined

Note: In the above, only individual seizures made in countries in the Sahel and in North Africa are shown.

Sources: UNODC responses to the annual report questionnaire; UNODC UNODC, Drugs Monitoring Platform; UNODC Interviews, supplemented by open sources.

According to open sources, trafficking through Mali allegedly occurs mainly from west to east (hence likely originating from the westerly arrival zone on the Atlantic coast),⁶⁵⁴ towards the borders with Niger and the intersection of the borders of Algeria, Mali and Niger.⁶⁵⁵ However, one report suggests, on the basis of interviews conducted in 2019, that instability along some of the established routes through Mali's eastern borders may have spurred some trafficking from Mali (and from Senegal) northward into Mauritania.⁶⁵⁶ This is somewhat corroborated by reporting from Morocco, which indicates a small but increasing share of inbound cocaine flows entering Morocco by land, reaching 23 per cent in 2021.⁶⁵⁷

Some of the above sources also suggest that various cocaine land trafficking routes into Mali converge at Bamako (Mali) and subsequently bifurcate towards the two trafficking hubs of Timbuktu and Gao, before proceeding eastwards.⁶⁵⁸ In January 2022, police in Niger seized a

consignment of 214 kg of cocaine which had entered Niger from Gao (Mali) and was being transported to Libya.^{659 660} Some Malian individuals who have been sanctioned by the United Nations Security Council Committee established pursuant to resolution 2374 (2017) concerning Mali,^{661 662} and linked to drug trafficking activity (including cocaine trafficking in Guinea-Bissau),^{663 664 665} have strong ties to the Gao region.⁶⁶⁶ A quantity of 1 ton of cocaine was reportedly intercepted prior to 13 May 2019 in nearby Tabankort, Mali.⁶⁶⁷

654 Mali borders Senegal in the west, Guinea on the south-west and Mauritania in the north-west.

655 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

656 Bird and Tagziria, 'Organized Crime and Instability Dynamics: Mapping Illicit Hubs in West Africa'.

657 UNODC, 'Morocco, Responses to the Annual Report Questionnaire', n.d.

658 Bird and Tagziria, 'Organized Crime and Instability Dynamics: Mapping Illicit Hubs in West Africa'.

659 UNODC, 'Drugs Monitoring Platform'.

660 UN Panel of Experts Established pursuant to Security Council Resolution 2374 (2017) concerning Mali, 'Final Report of the Panel of Experts on Mali Established Pursuant to Security Council Resolution 2374 (2017)', S/2022/595 § (2022).

661 United Nations Security Council, 'Mohamed Ben Ahmed Mahri'.

662 United Nations Security Council, 'Mohamed Ould Mataly', un.org, 10 July 2019.

663 UN Panel of Experts Established pursuant to Security Council Resolution 2374 (2017) concerning Mali, Final report of the Panel of Experts on Mali established pursuant to Security Council resolution 2374 (2017).

664 UN Panel of Experts Established pursuant to Security Council Resolution 2374 (2017) concerning Mali, Final report of the Panel of Experts Established pursuant to Security Council resolution 2374 (2017) on Mali and renewed pursuant to resolution 2484 (2019), 2020.

665 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

666 Ibid.

667 UN Panel of Experts Established pursuant to Security Council Resolution 2374 (2017) concerning Mali, Final report of the Panel of Experts Established pursuant to Security Council resolution 2374 (2017) on Mali and renewed pursuant to resolution 2484 (2019), 2020.

Some trafficking of cocaine into Mali may also occur across the border from Burkina Faso;⁶⁶⁸ such flows would likely originate from the arrival zone of the Gulf of Guinea, as Burkina Faso identified Nigeria, Togo and Ghana as the most frequently detected transit countries for cocaine on its territory in 2021.⁶⁶⁹ In September 2022, 373 kg of cocaine were seized in Burkina Faso.⁶⁷⁰

Niger receives cocaine both from the west (specifically Mali, reportedly in the specific form of cocaine hydrochloride, in 2021) and from the south (specifically Nigeria and Benin, reportedly in the form of “crack” cocaine in 2021).⁶⁷¹ From Niger cocaine continues north into Algeria (which also receives, albeit less frequently, consignments directly from Mali)^{672 673} as well as Libya.^{674 675 676} The cocaine seized destined to the domestic market in Algeria is typically trafficked in small quantities by occasional smugglers, in particular from Mali and Niger, as a means to finance accommodation, transport and false documents for illegal immigration to Europe.⁶⁷⁷ Seizures have also been made on the border between Libya and Tunisia,⁶⁷⁸ and some trafficking from Algeria into Libya may also occur, although the relative importance of cocaine in this route, as opposed to cannabis resin originating in Morocco, is unclear.⁶⁷⁹

The southwest of Libya (traditionally known as Fezzan province) is an important point of entry for several drugs into Libya, especially the area around the Salvador pass (on the border between Niger and Libya) in the case of cocaine.^{680 681 682} Trafficking through the area around this pass is reportedly controlled by smugglers from the Tuareg and Tubu ethnic groups, and has allegedly fluctuated depending on the presence of troops in the nearby military base of Madama (Niger).^{683 684} Indeed, the

military presence of troops in the Sahel, in addition to inter-ethnic conflict in southern Libya, banditry in Niger and insecurity and violence in northern Mali, have been attributed, on the basis of information collected up till 2019, as factors which discouraged the use of land routes for the flow of cocaine towards Libya.^{685 686 687 688} These dynamics likely started in 2012 and developed progressively. It is plausible, even if not conclusively demonstrated by the available evidence, that they resulted in a general westward shift of the land routes towards North Africa, with a possible reduction in volumes into Libya and increase into Morocco or possibly Algeria. In parallel, North Africa saw an increase in inbound consignments on maritime routes, including through the Mediterranean coasts of Algeria and Libya. However, the above-mentioned recent seizures in Burkina Faso, Niger and Mali demonstrate that the land routes through the Sahel, including towards Libya, continue to be used.

Maritime routes into North Africa

From 2016 onwards, the increased importance of maritime trafficking emerges clearly in the case of Morocco, even while this country continues to be among those affected by overland cocaine trafficking routes. It appears that significant quantities of cocaine are arriving directly in Morocco in maritime shipments as opposed to being trans-shipped from West Africa.^{689 690} Morocco identified Colombia and Brazil as the predominant countries of departure for cocaine seized in 2021 and 2020, followed by Nigeria in 2020 (but not in 2021).⁶⁹¹ Moroccan authorities also reported that, in November 2019, a consignment of 476 kg of cocaine coming from Colombia was seized from a boat at Temara (south of Rabat on the Atlantic coast).⁶⁹² In December 2018, media outlets reported that seven individuals were arrested in Morocco in connection with the seizure of 1 ton of cocaine. The individuals were suspected of belonging to a criminal group which trafficked the cocaine by sea on a merchant vessel from Latin America to Moroccan waters, from where it was transported to El Jadida, in the vicinity of Casablanca, by a fishing vessel.⁶⁹³ Moreover, according to media reports, one of the largest seizures ever made close to the African coast - carrying 9.5 tons of cocaine seized in Cabo Verde

668 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

669 UNODC, 'Burkina Faso, Responses to the Annual Report Questionnaire 2021', n.d.

670 UNODC, 'Drugs Monitoring Platform'.

671 UNODC, 'Niger, Responses to the Annual Report Questionnaire 2021', n.d.

672 UNODC, 'Algeria, Responses to the Annual Report Questionnaire 2018-2020', n.d.

673 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

674 Interview #39, interview by UNODC, 2022.

675 Matt Herbert and Max Gallien, 'A Rising Tide: Trends in Production, Trafficking and Consumption of Drugs in North Africa', Research Report (Global Initiative Against Transnational Organized Crime, May 2020), p. 19.

676 Mark Micallef, 'Shifting Sands — Libya's Changing Drug Trafficking Dynamics on the Coastal and Desert Borders', Background paper (Switzerland: Global Initiative Against Transnational Organized Crime (commissioned by the EMCDDA), 2019).

677 Algeria, 'Official Communication to UNODC', 3 January 2023.

678 Interview #39.

679 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

680 Interview #39.

681 Micallef, 'Shifting Sands — Libya's Changing Drug Trafficking Dynamics on the Coastal and Desert Borders'.

682 Mark Micallef et al., 'After the Storm: Organized Crime across the Sahel-Sahara Following Upheaval in Libya and Mali' (Global Initiative Against Transnational Organized Crime, 2019).

683 Micallef, 'Shifting Sands — Libya's Changing Drug Trafficking Dynamics on the Coastal and Desert Borders'.

684 Alexandre Bish, 'Niger: Has Securitisation Stopped Traffickers?', ISPI Istituto per gli Studi di Politica Internazionale, 9 September 2019.

685 Ibid.

686 Micallef et al., 'After the Storm: Organized Crime across the Sahel-Sahara Following Upheaval in Libya and Mali'.

687 Herbert and Gallien, 'A Rising Tide: Trends in Production, Trafficking and Consumption of Drugs in North Africa'.

688 Fiona Mangan, 'Illicit Drug Trafficking and Use in Libya: Highs and Lows', Peaceworks (Washington, DC: United States Institute of Peace, 28 May 2020).

689 UNODC and Europol, 'The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All?', 1, Cocaine Insights 1 (Vienna: UNODC, September 2021), 1.

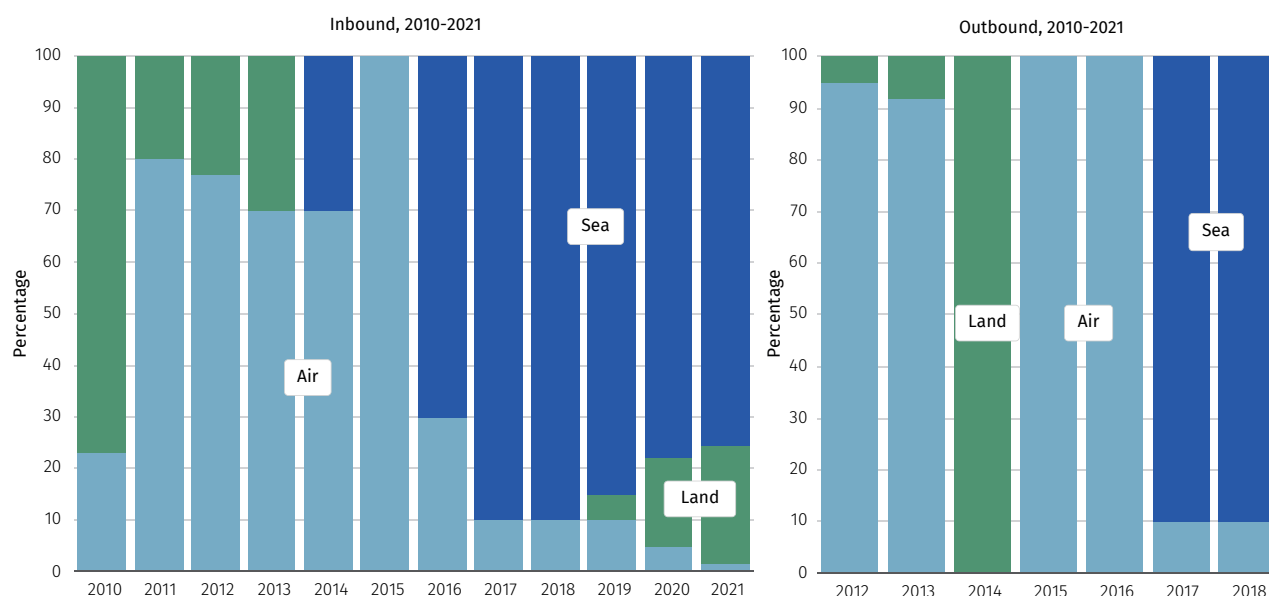
690 UNODC, 'Morocco, Responses to the Annual Report Questionnaire 2018', n.d.

691 UNODC, 'Morocco, Responses to the Annual Report Questionnaire 2021', n.d.

692 UNODC, 'Drugs Monitoring Platform'.

693 UNODC, Drugs Monitoring Platform.

Modes of transportation for inbound and outbound cocaine trafficking affecting Morocco



Note: Data for 2021 are preliminary. For 2019 and prior years, the reporting category was "road;" this is subsumed into "Land". Data on outbound seizures for 2010-2011 and 2019-2021 were not available.

Source: UNODC, responses to the annual report questionnaire from Morocco.

in 2019 – was made from a vessel which was initially headed to Tangier but had to make an emergency stop in Cabo Verde.⁶⁹⁴

The development of cocaine routes into and through Morocco may have been facilitated by long-standing routes for trafficking of cannabis resin into Spain. Concerns about the overlap among these routes between Morocco and Europe were already raised in 2011.⁶⁹⁵ According to media reports, one major player in the criminal underworld of the Netherlands, who initially was involved in cannabis trafficking from Morocco via Spain to the Netherlands, was subsequently also actively involved, around 2008, in setting up the logistics of waterborne trafficking of cocaine on the Moroccan coast.⁶⁹⁶ Around a decade later, the same criminal leader came under suspicion of forming part of a diverse consortium of traffickers importing large quantities of cocaine to Europe and

leveraging direct contacts with suppliers in South America. This consortium included an organized crime group, allegedly composed of individuals with roots in the same neighbourhood of Sarajevo (Bosnia and Herzegovina), with a presence in Rotterdam as well as Peru.^{697 698 699 700} Belgium reported that, as of 2019, groups of Moroccan (and Albanian) ethnicity, who were involved in the extraction of cocaine from the port and maintained close ties across the border with the Netherlands (sometimes based on family ties), had expanded their role in the procurement of cocaine and the development of contacts in South America.^{703 704}

694 UNODC, 'Drugs Monitoring Platform'.

695 UNODC, 'The Transatlantic Cocaine Market'.

696 Jessica Loudis, 'The Cartel, the Journalist and the Gangland Killings That Rocked the Netherlands', *The Guardian*, 6 October 2022.

697 UNODC and CoE Brazil, 'Cocaine Insights 4'.

698 NL Times, 'Taghi Part of "Super Cartel" Controlling Third of EU Cocaine Trafficking: Report', *NL Times*, 18 October 2019.

699 Koen Voskuil and Yelle Tieleman, 'Bundelen Cokekartels de Krachten in Dubai?', *AD*, 18 October 2019.

700 The Journal.ie, 'The Curious Case of Daniel Kinahan: Cocaine Scion or Boxing Power Broker?', *The Journal.ie*, 17 May 2020.

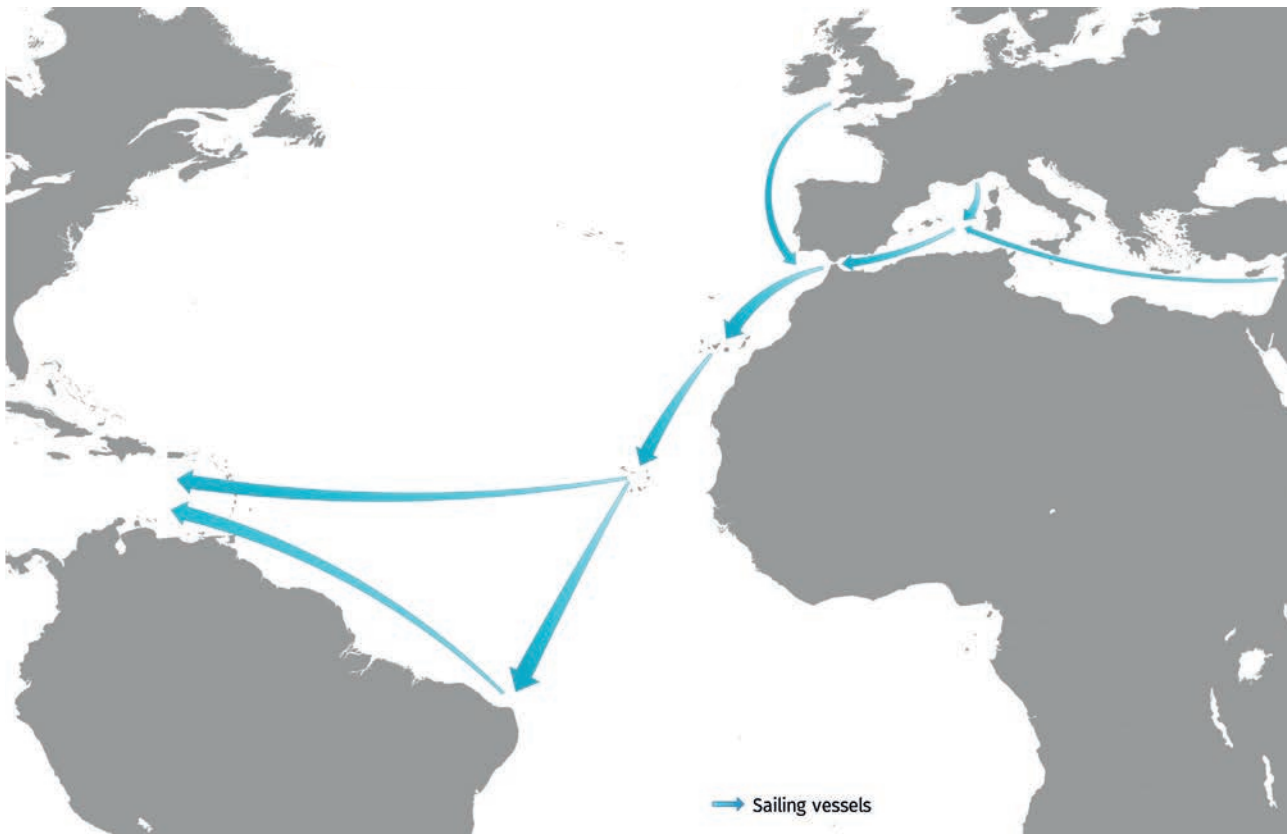
701 Owen Conlon, 'Dutch Drugs Baron Part of "Super-Cartel" with Daniel Kinahan Arrested in Dubai and Extradited Back to The Netherlands', *The Irish Sun*, 22 December 2019.

702 Maria Fernanda Ramirez, 'Cocaine – The Criminal Steroid', *InSight Crime*, 9 February 2021.

703 UNODC, 'Belgium, Responses to the Annual Report Questionnaire 2019', n.d., 2.

704 UNODC and Europol, 'Cocaine Insights 1'.

Typical routes for sailing vessels crossing from Europe towards the Americas, 2022



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Final boundary between the Republic of Sudan and the Republic of South Sudan has not been yet determined. Sources: Source: MAOC-N

Cabo Verde is a natural stopover point on maritime routes across the Atlantic Ocean towards North Africa or Europe, especially for sailing vessels.⁷⁰⁵ The 2021 report of the Dublin Group on the drug situation in West Africa assessed that Nigerian criminal gangs are well established in Praia (capital of Cabo Verde and a port city on the island of Santiago), in Mindelo (a port city on the island of São Vicente) and on the island of Sal, and that, while trafficking occurs mainly by sea, drugs are occasionally stored briefly on land.⁷⁰⁶

The Canary Islands (Spain) constitute the next important stopover point; out of nine seizures coordinated by MAOC-N and made in the vicinity of the Canary Islands over the period 2007-2021, eight were from sailing vessels.⁷⁰⁷

There are also indications of a growing pattern of drug trafficking across the Atlantic from east to west,^{708 709} reversing the route used for cocaine and possibly used in “bartering” arrangements as payment for cocaine

trafficked from west to east.⁷¹⁰ The drugs involved include synthetic drugs such as “ecstasy” and methamphetamine,⁷¹¹ but also cannabis resin.^{712 713 714} According to media sources, the Canary Islands and Cabo Verde once more appear to function as important nodes in these routes,⁷¹⁵ likely a natural consequence of the typical routes that sailing vessels need to follow in view of wind and swell conditions.⁷¹⁶ Brazil appears to be the top destination for cannabis resin trafficked across the Atlantic, from North Africa or from Europe.⁷¹⁷ In September 2020, large quantities of cannabis resin were intercepted from several sailing boats,⁷¹⁸ including two which were believed to make the transatlantic crossing on more occasions: 6 tons from a sailing boat close to Fuerteventura (Canary Islands) and 4.5 tons off the coast

705 See Chapter *Established markets*, in this report.

706 Dublin Group, ‘Drugs Problem: Regional Situation in West Africa (September 2021)’, p. 5.

707 See Chapter *Trafficking modalities*, in this report.

708 Interview #41.

709 ‘CRIMJUST Annual Meeting - Latin American and Caribbean’ (Colombia, 3 February 2022).

710 Pablo Almoguera, “‘Kilo por Kilo’: La ruta inversa del hachís: de moda en Sudamérica y los cárteles lo cambian por cocaína”, *El Confidencial*, 25 April 2021.

711 Alessandro Ford, ‘Uruguay Makes Historic Seizure of European Meth’, *InSight Crime*, 10 August 2022.

712 ‘CRIMJUST Annual Meeting - Latin American and Caribbean’.

713 Almoguera, “‘Kilo por Kilo’: La ruta inversa del hachís: de moda en Sudamérica y los cárteles lo cambian por cocaína’.

714 Alessandro Ford, ‘Hashish: New Player in Brazil Drug Markets’, *InSight Crime*, 24 June 2021.

715 Almoguera, “‘Kilo por Kilo’: La ruta inversa del hachís: de moda en Sudamérica y los cárteles lo cambian por cocaína’.

716 Interview #41.

717 Ford, ‘Hashish: New Player in Brazil Drug Markets’.

718 UNODC, Drugs Monitoring Platform.

of Mauritania.⁷¹⁹ In June 2021, 4.3 tons of cannabis resin were discovered in international waters, some 420 km from the Brazilian port of Recife, on a boat travelling from Portugal.⁷²⁰

The increases in maritime routes for cocaine trafficking, sometimes originating directly in South America, also affect other countries in North Africa. Algeria's port of Oran has been linked to two large cocaine seizures: 701 kg seized in May 2018 from a container originating in Brazil,⁷²¹ and 490 kg seized in June 2021 from the water 11 km away from the same port,⁷²² while 301 kg were found on a beach in Skikda in 2019.⁷²³

Several incidents point to a growing role of Libya's Mediterranean coast as an arrival zone for cocaine consignments.⁷²⁴ These include a seizure of 612 kg in Malta from a container *en route* to Libya, having departed from Ecuador and transited Colombia,⁷²⁵ and, 582 kg seized in the port of Guayaquil (Ecuador) from a container destined for Libya and Syria;⁷²⁶ these seizures occurred within a week of each other in December 2020. One report assessed that, as of 2019, the ports around Tripoli (on the west side of Libya's Mediterranean coast) had come to constitute a point of entry for cocaine shipped from North Africa (specifically Mauritania) or directly from South America, and also identified some smaller cocaine seizures (between 10 kg and 100 kg each), occurring in Colombia, Italy and Libya, pointing to the east coast of Libya, in particular Benghazi, being used in a similar fashion.⁷²⁷

From the countries of North Africa, notably Morocco⁷²⁸ and Algeria^{729 730}, cocaine flows proceed primarily north across the Mediterranean towards Europe. However, in the case of Libya, the destinations appear to be more diversified, and may include southern and south-eastern Europe,^{731 732} Egypt^{733 734} and countries in the Middle East.⁷³⁵ A portion of the incoming cocaine may possibly be

feeding a nascent domestic cocaine market.⁷³⁶ As of 2019, trafficking from Libya into Egypt likely occurred through the official border crossing at el-Salloum as well as across desert areas slightly further south (between Jaghub and Siwa).⁷³⁷ The eastern Mediterranean port town of Ajdabiya, on the Gulf of Sirte, reportedly functioned as an internal transit hub for flows through Libya towards Egypt, including consignments routed from the entry zone in the southwest border with Niger.⁷³⁸ However, as of 2022, maritime transportation was the primary modality for cocaine flows exiting Libya.⁷³⁹

The impact of cocaine trafficking on domestic markets

Cocaine trafficking through West and Central Africa, as well as North Africa, has led to the development of domestic markets in these countries. However, data measuring the extent of cocaine use are only available for a minority of countries, and those which are available often do not allow comparisons over time. Data for Morocco based on school surveys show an increase in past-year prevalence of use of cocaine hydrochloride among adolescents aged 15-17- from 0.4 per cent in 2013 to 0.7 per cent in 2017 – while prevalence of use of “crack” cocaine was stable at 0.4 per cent.⁷⁴⁰

Some experts perceive that the use of some type of “crack” cocaine has been on the rise among youth in Cabo Verde, and that this has been a major driver of an increase in violence.⁷⁴¹ This is corroborated by treatment data, which indicate that, as of 2017, cocaine accounted for 72 per cent of drug treatment provision in Cabo Verde (in terms of the primary drug used by patients).⁷⁴² According to media coverage, “crack” use, and associated violence, have reportedly also increased in Guinea-Bissau.⁷⁴³

Ghanaian law enforcement perceived that cocaine trafficking through Ghana had resulted in the establishment of a domestic market,⁷⁴⁴ which may also be the case in Côte d'Ivoire.⁷⁴⁵ As of 2017, cocaine accounted for 26 per cent of drug treatment provision in Ghana and 27 per cent in Côte d'Ivoire.⁷⁴⁶

Other countries in the region with significant shares of treatment provision attributable to cocaine use in recent years were: Liberia (50 per cent), Guinea (31 per cent), Benin (13 per cent), Sierra Leone (9.6 per cent); Mali (6.2

719 Ibid.

720 Ford, 'Hashish: New Player in Brazil Drug Markets'.

721 Jihane Ben Yahia and Raouf Farrah, 'Has Algeria Joined Africa's New "Cocaine Coast"?', Institute for Security Studies, 28 January 2019.

722 UNODC, 'Drugs Monitoring Platform'.

723 Algeria, 'Official Communication to UNODC', 3 January 2023.

724 Alessandro Ford, 'Libya, North Africa Emerge As Cocaine Transit Hubs', *InSight Crime*, 11 January 2021.

725 Department of Customs, Malta, 'Press Release: Largest Drug Haul by Customs Intercepted', [customs.gov.mt](https://www.customs.gov.mt/), 9 December 2020.

726 UNODC, 'Drugs Monitoring Platform'.

727 Micallef, 'Shifting Sands — Libya's Changing Drug Trafficking Dynamics on the Coastal and Desert Borders'.

728 UNODC, 'Morocco, Responses to the Annual Report Questionnaire 2021'. ARQ Morocco 2021

729 UNODC, 'Algeria, Responses to the Annual Report Questionnaire 2020', n.d.

730 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

731 Interview #39.

732 Micallef, 'Shifting Sands — Libya's Changing Drug Trafficking Dynamics on the Coastal and Desert Borders'.

733 Ibid.

734 Tinti, 'Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium'.

735 Interview #39.

736 Micallef, 'Shifting Sands — Libya's Changing Drug Trafficking Dynamics on the Coastal and Desert Borders'.

737 Ibid.

738 Ibid.

739 Interview #39.

740 Council of Europe, Pompidou Group, 'MedSPAD Survey - Morocco', 2017.

741 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

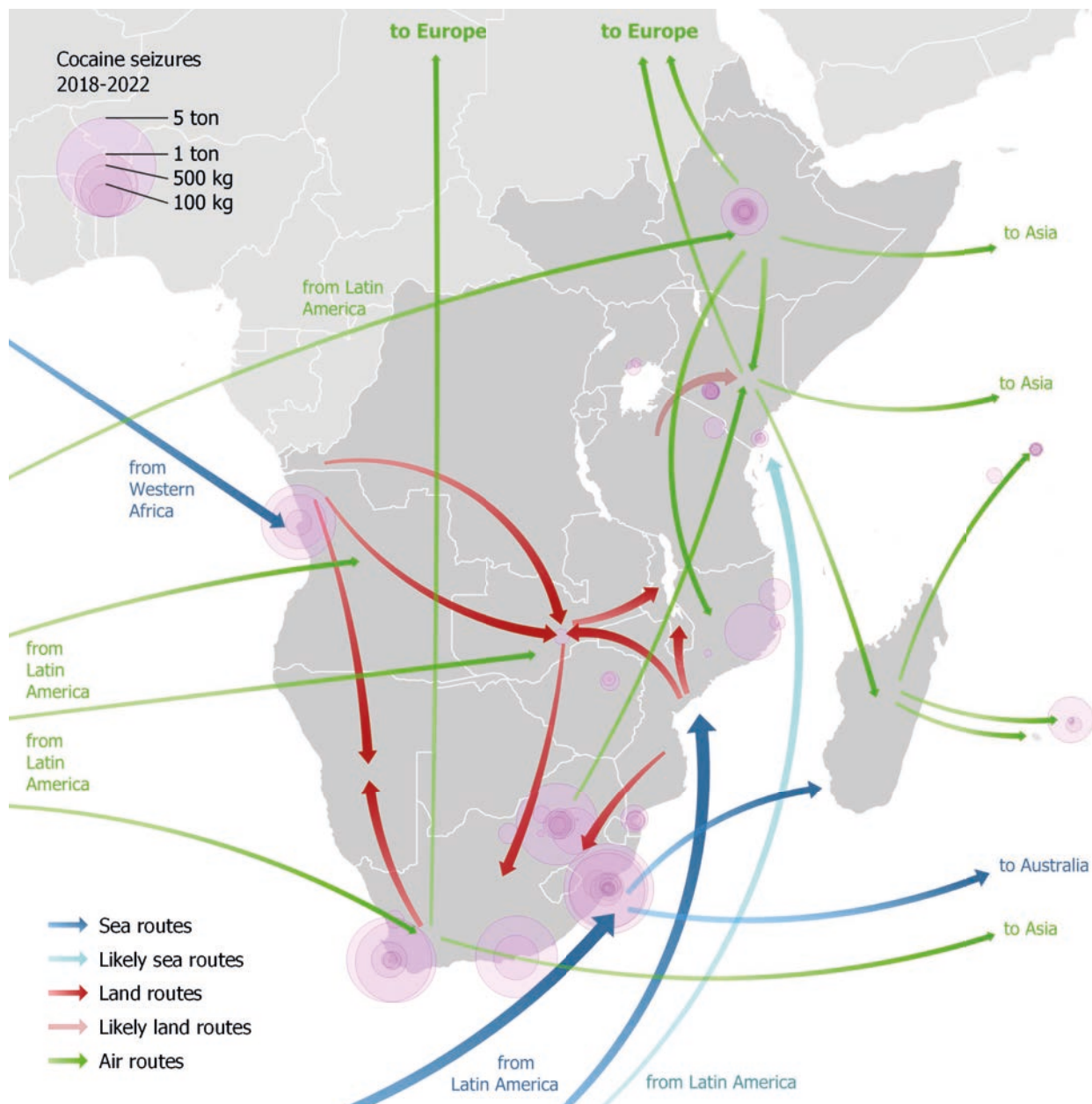
742 UNODC, 'World Drug Report 2022' (Vienna: UNODC, 2022).

743 Heiner Hoffmann, 'Drug Hub Guinea-Bissau: Who Stole the Ton of Coke?', *Spiegel Abroad*, 18 April 2022.

744 Annual Expert Meeting 2021, Girardot, Colombia

745 Ibekwe and Bauwens, 'Special Report: Drug Frontier: How Cocaine Trafficking Is Impacting West Africa'.

746 UNODC, 'World Drug Report 2022'.



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Sources: UNODC responses to the annual report questionnaire; UNODC, Drugs Monitoring Platform; UNODC Interviews; supplemented by open sources.

per cent), all in 2017; Senegal (5.8 per cent) in 2019; Togo (5.8 per cent) in 2018; and Burkina Faso (5.6 per cent) in 2017.⁷⁴⁷ In Senegal, mules are reportedly used to import small quantities of cocaine by land for the local market and then package it, or turn it into “crack”, before reselling it to a mainly urban client base.⁷⁴⁸ In Nigeria, 0.9 per cent of the population aged 15-64 used cocaine in the last year as of 2017.⁷⁴⁹

Southern Africa

Within the African continent, cocaine trafficking and use appear to have first emerged in South Africa in the early 1990s, likely facilitated (alongside the use of other drugs sourced from abroad) by the country’s strong links to high-income countries, including reopened borders and reinvigorated trade links which followed the end of the apartheid era.⁷⁵⁰ High levels of income inequality and unemployment may also have been conducive to increases in drug use, including cocaine alongside other

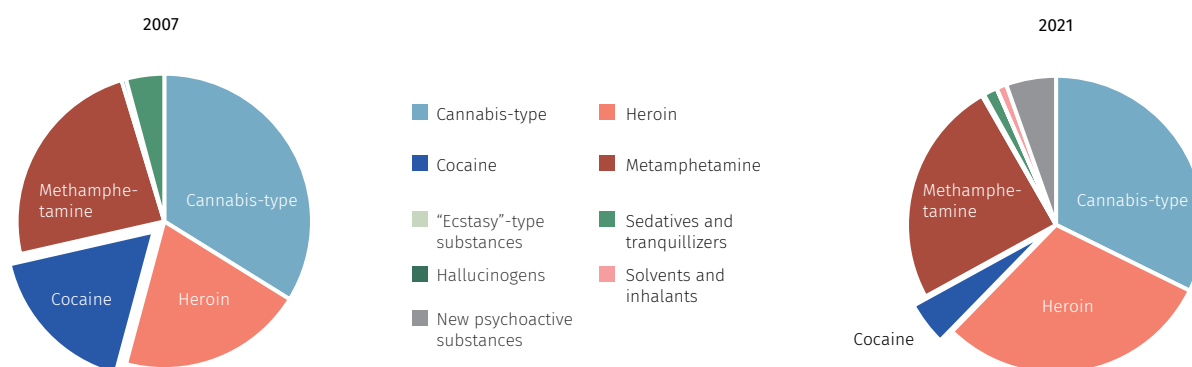
747 Ibid.

748 Dublin Group, ‘Drugs Problem: Regional Situation in West Africa (September 2021)’, 9.

749 UNODC, ‘World Drug Report 2022’.

750 UNODCCP, ‘Country Profile on Drugs and Crime, South Africa. Part I: Drugs’ (United Nations Office for Drug Control and Crime Prevention, October 1999).

Provision of drug treatment in South Africa, by primary drug, 2007 versus 2021



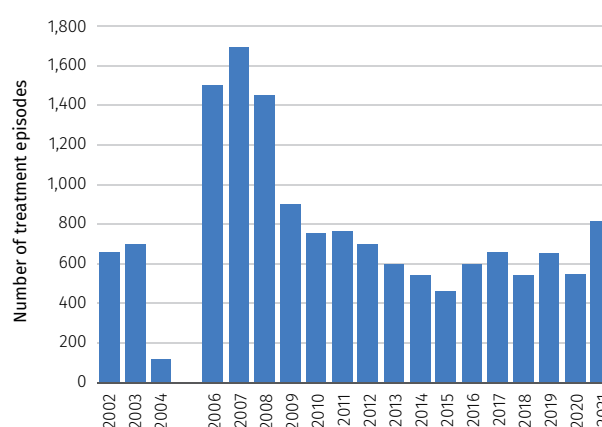
Source: UNODC, responses to the annual report questionnaire.

drugs, observed during the 1990s.^{751 752 753} Already in 1994, a survey among “African Blacks” aged 10-21 years in South Africa found a lifetime prevalence of cocaine (including “crack”) of 0.9 per cent.⁷⁵⁴

While recent data on prevalence of use in South Africa are not available, treatment data suggest that cocaine consumption in this country peaked around 2007 and has declined since then; in 2008, a household survey estimated prevalence of use at 0.78 per cent among the general population aged 15-64, noticeably higher than the most recent estimate for Africa (0.27 per cent as of 2020).⁷⁵⁵ Preliminary treatment data for 2021 suggest a rebound in this year.

Nowadays, experts perceive cocaine use to be mostly concentrated among the higher income population or used recreationally, but cocaine can also be used by tourists, men-who-have-sex-with-men (MSM) and sex workers.⁷⁵⁶ Since affluent cocaine users in need of treatment may resort to private treatment centres that do not participate in public health networks, it is possible that cocaine users are under-represented in treatment data. Nevertheless, experts perceive the cocaine domestic market in South Africa as stable.⁷⁵⁷

Provision of treatment for cocaine use disorders, South Africa, 2002-2021



Note: Data for 2021 are preliminary. Data for 2005 were unavailable. Sources: UNODC, responses to the annual report questionnaire; South Africa Medical Research Council.

751 Ibid.

752 A. Atkins, ‘The Illegal Drugs Trade and Development in South Africa: Some Observations’ (London: Catholic Institute for International Relations, 1997).

753 - South African Community Epidemiology Network on Drug Use (SACEN-DU), ‘Research Update’, various years.

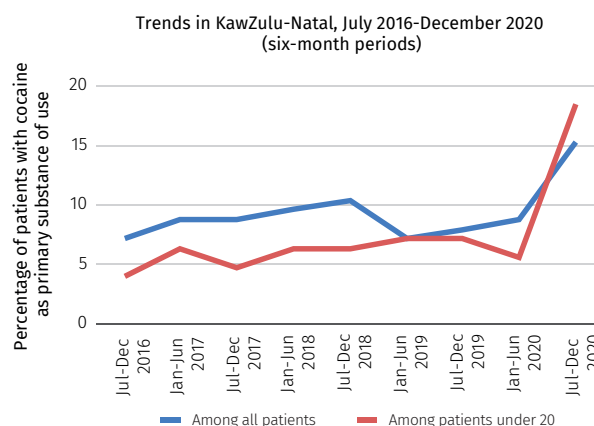
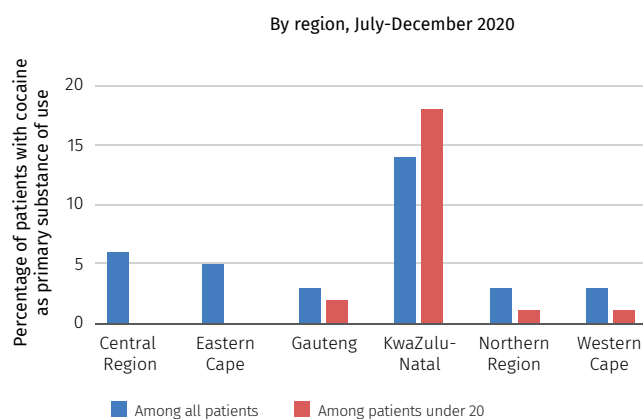
754 Karl Peltzer et al., ‘Illicit Drug Use and Treatment in South Africa: A Review’, *Substance Use & Misuse* 45, no. 13 (2010): 2221-43.

755 UNODC, ‘World Drug Report 2020’ (Vienna: UNODC, 2022).

756 Interview #43, interview by UNODC, 2022.

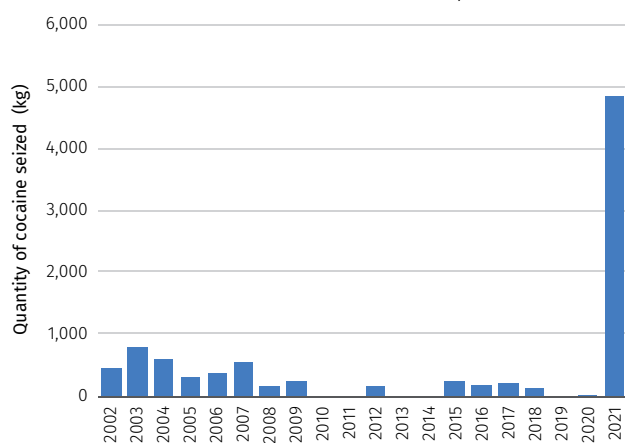
757 Ibid.

Share of primary cocaine users among patients receiving treatment for substance use, South Africa, by region and notable trends at regional level



Notes: Cocaine includes “crack”.
Source: SACENDU Full Reports 45, 49 and SACENDU Update Phase 49.

Cocaine seizures in South Africa, 2002–2021



Note: Aggregates for 2010, 2011, 2013, 2014, 2019 and 2019 were not available.
Sources: Responses to the annual report questionnaire.

However, the most recent available treatment data indicate a clear increase in one specific region of South Africa, namely KwaZulu-Natal, which shares part of South Africa’s border with Mozambique and also includes Durban, one of the busiest ports of Africa which has recently been linked to a spate of large cocaine seizures. According to media reports, in June 2021, 541 kg of cocaine were seized from a container in Isipingo, a suburb of Durban.⁷⁵⁸ In July 2021, 715 kg were seized in Aeroton, an industrial area of Johannesburg, from vehicles travelling from Durban port;⁷⁵⁹ this was followed by a related seizure of 1 ton of cocaine in the harbour of Durban in August 2021.^{760 761} According to media sources, a cocaine trafficking channel has been in operation

between the Port of Durban and the Port of Santos (Brazil) for two decades.⁷⁶²

Indeed, seizure data suggest that cocaine flows into South Africa have increased significantly in recent years, and a majority of this is likely further trafficked to other countries,⁷⁶³ consolidating South Africa’s long-standing role as a transit country, as confirmed by South African authorities.⁷⁶⁴ Over the period 2018–2021, reporting to UNODC via the Annual Report Questionnaire indicates trafficking from South Africa to 13 countries or territories, including regional neighbours but also disparate destinations such as Australia, India, Hong Kong, China, Macao, China, Pakistan, Timor-Leste and the United Kingdom.⁷⁶⁵ South African authorities further reported that the COVID-19 pandemic created a shift in international trafficking towards the use of vehicles and sea transportation, and confirmed trans-shipment of cocaine coming from South America.⁷⁶⁶

Aside from South Africa, there are indications that the broader region of Southern Africa is increasingly affected by cocaine trafficking. The ties of the two lusophone countries in this subregion – Angola and Mozambique – to Brazil may be a key facilitator of this. The role of the Brazil-Mozambique link in cocaine trafficking was documented as early as 2001.⁷⁶⁷ Such trafficking has likely continued on a small scale throughout the 2000s and 2010s, in particular via flights into Maputo airport in the

758 UNODC, ‘Drugs Monitoring Platform’.

759 Ibid.

760 Ibid.

761 Directorate for Priority Crime Investigation (HAWKS), ‘News: Half a Billion Worth of Drugs Seized at Durban Harbour’, Media Statement, South African Police Service, 8 August 2021.

762 Caryn Dolley, ‘Blood Ties: South Africa Caught in a Web of Murderous, Drug-Smuggling Brazilian Gangs’, *Daily Maverick*, 14 February 2022.

763 Directorate for Priority Crime Investigation (HAWKS), ‘News: Half a Billion Worth of Drugs Seized at Durban Harbour’.

764 UNODC, ‘South Africa, Responses to the Annual Report Questionnaire’, n.d.

765 UNODC, ‘Responses to the Annual Report Questionnaire from Member States 2018–2021’.

766 UNODC, ‘South Africa, Responses to the Annual Report Questionnaire 2021’, n.d.

767 Joseph Hanlon, ‘Drugs Now Biggest Business’, *Metical*, 28 June 2001, no 1017 edition.

capital city.⁷⁶⁸ During 2019-2022, at least 10 instances were documented where cocaine was trafficked from Brazil to Mozambique via air, of which 2 seizures were made in Maputo airport, and the others were made in Brazil (mainly at the international airport of São Paulo) with (unspecified) destination in Mozambique.⁷⁶⁹ All of these instances involved quantities of less than 20 kg, with the exception of 110 kg seized from air cargo at the international airport of São Paulo in June 2019.⁷⁷⁰

Recently there have been signs that OCGs have attempted to further develop this channel from Brazil to Mozambique to traffic larger quantities, sometimes via the use of maritime routes, and that cocaine trafficking has also come to affect the northern provinces of Mozambique, in particular the conflict-afflicted province of Cabo Delgado and the adjacent province of Nampula. In April 2020, according to media sources, an alleged high-level member of the Brazilian OCG *Primeiro Comando do Capital* was arrested in Mozambique.⁷⁷¹ In October 2021 police in Brazil seized 5 tons of cocaine in the port of Rio de Janeiro from a shipment bound for Mozambique.⁷⁷² According to open sources, the ports of Nacala (Province of Nampula) and Pemba (capital of Cabo Delgado Province) on the northern coast of Mozambique, in addition to Dar-es-Salaam (United Republic of Tanzania, further north on the eastern coast of Africa) receive cocaine, as of 2022, in containerized shipments from Brazil.⁷⁷³ In May 2022, police action to enforce traffic regulations led to the discovery of 425 kg of cocaine in a vehicle in Nampula province.⁷⁷⁴

Mozambique's geographical location places it also as a natural transit country along the long-standing heroin trafficking routes from Asia, across the Arabian Sea toward the eastern coast of Africa and onward towards South Africa; these routes have recently also been used for methamphetamine trafficking.^{775 776} It is plausible that cocaine reaching the eastern coast of Africa can proceed southward along the same land routes, as suggested by some open sources;⁷⁷⁷ indeed South Africa indicated Mozambique as one of the transit countries through which it received cocaine, as of 2018, and Mozambique also indicated cross-border cocaine trafficking between

the two countries in the same year.^{778 779} Moreover, cross-border trafficking from Mozambique to its western neighbours also occurs; in 2019, Zambia ranked Mozambique in first place as a country from which it received cocaine (followed by Angola, on the western flank, in second place) and also reported that cocaine trafficking and consumption was detected in many housing compounds such as "*kimboni*" ("shanty towns").⁷⁸⁰ One year prior, Zambia had ranked Malawi – which shares borders with Mozambique and United Republic of Tanzania, as well as Zambia – in first place as the transit country from which it received cocaine, and South Africa in second place as a destination (second only to Zambia itself)⁷⁸¹ – suggesting that both Malawi and Zambia could be transit countries for cocaine trafficking from the eastern coast of Africa to South Africa.⁷⁸² This is corroborated by one report which suggests that, as of 2022, routes may also be developing from Mozambique across the western border into Malawi.⁷⁸³ However, from Mozambique cocaine may still also continue to European countries, such as France, Italy and Switzerland, which were reported as the major destinations as of 2019.⁷⁸⁴

The lusophone link to Brazil is also visible in the case of Angola. While aggregate data for this country are limited, specific incidents and reporting in open sources point to a relatively established channel for trafficking by air into Luanda airport in the capital.⁷⁸⁵ During 2019-21, seven seizures of small quantities of cocaine (the largest amounting to 12 kg) being trafficked by air from Brazil to Angola were documented by UNODC, of which six were made in São Paulo (Brazil),⁷⁸⁶ and the other one in Luanda (Angola).⁷⁸⁷ According to media sources citing the Angolan Criminal Investigation Services (SIC), in December 2020, Angolan law enforcement dismantled an international cocaine drug trafficking group which was using mules on commercial flights to traffic cocaine from the airport of São Paulo (Brazil); the group was operating out of Palanca, an urban district of Luanda, and had links in Angola, Brazil, the Democratic Republic of Congo and Portugal,⁷⁸⁸ suggesting that Angola was being used as a transit country in this instance. Moreover, "crack"

768 Alessandro Ford, 'Mozambique Becoming Southern Africa's Cocaine Platform', *InSight Crime*, 18 June 2021.

769 UNODC, 'Drugs Monitoring Platform'.

770 UNODC, 'Drugs Monitoring Platform', dmp.unodc.org

771 BBC, 'Fuminho: One of Brazil's Most Wanted Criminals Arrested in Mozambique', *BBC News*, 14 April 2020.

772 UNODC, Drugs Monitoring Platform.

773 Julia Stanyard et al., 'Insurgency, Illicit Markets and Corruption: The Cabo Delgado Conflict and Its Regional Implications', Research Report (Global Initiative Against Transnational Organized Crime, February 2022).

774 UNODC, 'Drugs Monitoring Platform'.

775 UNODC, 'World Drug Report 2022'.

776 Stanyard et al., 'Insurgency, Illicit Markets and Corruption: The Cabo Delgado Conflict and Its Regional Implications'.

777 Ibid.

778 UNODC, 'South Africa, Responses to the Annual Report Questionnaire 2018', n.d.

779 UNODC, 'Mozambique, Responses to the Annual Report Questionnaire 2018', n.d.

780 UNODC, 'Zambia, Responses to the Annual Report Questionnaire 2019', n.d.

781 UNODC, 'Zambia, Responses to the Annual Report Questionnaire 2018', n.d.

782 Information on cocaine trafficking routes into and out of Zambia in 2020 and 2021 was not available.

783 Stanyard et al., 'Insurgency, Illicit Markets and Corruption: The Cabo Delgado Conflict and Its Regional Implications'.

784 UNODC, 'Mozambique, Responses to the Annual Report Questionnaire 2019', n.d.

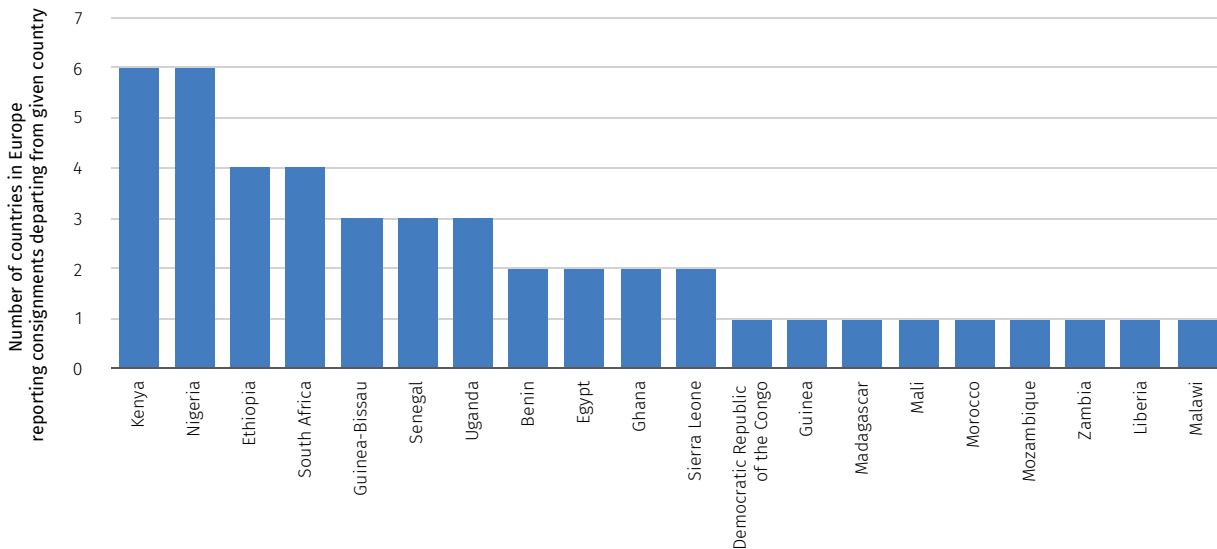
785 Alessandro Ford, 'South Africa Raises Profile as Cocaine Trafficking Hub', *InSight Crime*, 14 September 2021.

786 UNODC, 'Drugs Monitoring Platform'.

787 Ibid.

788 Angola Press Agency (Luanda), 'Angola: Cocaine Trafficking Group Dismantled', *AllAfrica*, 7 December 2020.

African countries of departure for inbound cocaine seized at airports by customs authorities in Western and Central Europe, by number of seizing countries, 2018–2021



Source: WCO RILO (Regional Intelligence Liaison Office) Western and Central Europe.

cocaine was reportedly the second most consumed drug in Angola.⁷⁸⁹

Furthermore, some emerging signs point to the possibility that, similar to the case of Mozambique, maritime routes are being used to traffic larger quantities of cocaine into Angola. In August 2022, 164 kg of cocaine were seized in the Port of Luanda.⁷⁹⁰ At the port of Dakar (Senegal), 798 kg of cocaine were seized in June 2019, concealed within cars bound for Angola; the vessel had departed from Brazil.^{791 792}

Namibia’s geographical location, with borders shared with both Angola and South Africa as well as a coast on the Atlantic, make it vulnerable to the development of trafficking routes as well as a domestic market for cocaine use. As of 2020, a number of mules trafficking cocaine from Brazil had been arrested at Namibian airports;⁷⁹³ moreover Namibia reported that, as of 2021, cocaine reached Namibia through air trafficking from Brazil via Ethiopia, and that the destination was Namibia itself, suggesting that a local market for this drug exists in Namibia. However, cocaine seizures in this country have been very limited, with the exception of 2018, when 412 kg of cocaine originating in Santos (Brazil) were seized in Walvis Bay.⁷⁹⁴ Such a large quantity could potentially have been meant for further trafficking.

Eastern Africa

Trafficking by air plays a significant role in cocaine flows affecting Eastern Africa. Based on 156 documented seizures of outbound consignments made in Brazil with a known destination in Africa, 65 were bound for Ethiopia (more than any other country), and all of these were made at airports in Brazil.⁷⁹⁵ As discussed above, some of these may have been in transit to intermediate destinations such as Nigeria. However, the airports of Ethiopia,⁷⁹⁶ alongside those of Kenya, also play an important role in cocaine trafficking from Africa towards Western and Central Europe and other consumer markets.

Kenya identified the Netherlands, Canada and the United Arab Emirates as the top three destinations for outbound cocaine trafficking in 2021.⁷⁹⁷ Kenya further identified Ethiopia in first place as a transit country from which cocaine entered its territory, followed by the United Republic of Tanzania.⁷⁹⁸ Moreover, Kenya assessed that, as of 2019, 80 per cent of inbound cocaine reached its territory via trafficking by air.⁷⁹⁹ In Kenya, a significant domestic market for cocaine also exists. Past-year prevalence of “crack” use was estimated at 0.1 per cent of the population aged 15–64 in 2016.⁸⁰⁰

Media coverage suggests that cocaine also reaches Kenya via maritime routes,⁸⁰¹ and other open sources indicate

789 Global Initiative Against Transnational Organized Crime, ‘Angola’, Global Organized Crime Index, 2021.
 790 UNODC, ‘Drugs Monitoring Platform’.
 791 Ibid.
 792 Abdul Tejan-Cole, ‘Learning Lessons from Latin America’s Failed Drugs War’, *Político SL*, 13 July 2019.
 793 Thirtieth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, ‘Country Report: Namibia’, Country report (UNODC, 27 July 2020).
 794 Ibid.

795 UNODC, ‘Drugs Monitoring Platform’.
 796 ‘CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes’.
 797 UNODC, ‘Kenya, Responses to the Annual Report Questionnaire 2021’, n.d.
 798 Ibid.
 799 UNODC, ‘Kenya, Responses to the Annual Report Questionnaire 2019’, n.d.
 800 UNODC, ‘World Drug Report 2022’.
 801 Jean-Michel Renovic and Catharine Hamilton, ‘Kenya’s Second-Largest City Becomes World’s New Drug Trafficking Hub’, *France24*, 18 October 2019.

the same phenomenon applies to the United Republic of Tanzania⁸⁰² and Madagascar.⁸⁰³

One report assesses that Madagascar is acquiring importance as a trans-shipment point for heroin and, to a lesser extent, cocaine.⁸⁰⁴ Madagascar reported that incoming cocaine flows originated, as of 2018, in South Africa.⁸⁰⁵ As suggested by the above report, as of 2021 this may include shipments in containers from South America transiting South Africa; in addition, cocaine may reach Madagascar via Kenya and the United Republic of Tanzania (by air).⁸⁰⁶ From Madagascar, cocaine may be further trafficked to Mauritius and the island of Réunion (France),⁸⁰⁷ as well as the Seychelles, Europe and the United States.⁸⁰⁸

Cocaine use is perceived to be low but rising in Madagascar, as well as Seychelles. Demand for cocaine is also perceived to have risen in Réunion.⁸⁰⁹

Asia

East, South-East and South Asia

The indications of cocaine use and trafficking in East and South-East Asia are limited and point mainly to moderate levels of use in specific urban pockets, and to the exploitation of some countries in this subregion as transit points for cocaine trafficked towards urban consumer centres or other destination markets such as Australia. However, this subregion accounts for a large share of the world's population and a number of these countries have experienced strong economic growth, creating a burgeoning middle class which could be susceptible to the initiation of cocaine use.

One such country is China, where most indications of the presence of cocaine relate to the coastal region in the southeast of the country. According to open sources, attempts by South American traffickers to develop a market for cocaine in China were observed by officials in the coastal province of Fujian (on the Taiwan Strait) as early as 2007.⁸¹⁰

Nowadays, most of the evidence of cocaine trafficking points to Hong Kong, China and Macao, China, as well as to neighbouring areas close to the coast of Guangdong. Seizures in Hong Kong, China tend to exceed the quantities seized in the rest of the country and have increased substantially in recent years. Hong Kong, China also regularly reports seizures of kitchen laboratories producing “crack” or other cocaine products.^{811 812} Based on incidents recorded in the UNODC Drugs Monitoring Platform, over the period January 2019-March 2022, seizures in 12 countries⁸¹³ were made with destination Hong Kong, China, while seizures made in Hong Kong, China itself had departed from 30 different countries, notably Brazil (14 cases), Ethiopia (7 cases), Malaysia (5 cases), Netherlands (5 cases), and South Africa (5 cases).

The location of seizure incidents and circumstantial information from media sources suggest that the nearby coast of Guangdong is also used as a point of entry, including Futian border control in Shenzhen and the Jiazi Port of Lufeng in Shanwei.^{814 815} In April 2018, 1.3 tons of cocaine were seized in Guangzhou.^{816 817} In this case, a boat allegedly set sail from the port of Jiazi, through the Bashi channel and across the Pacific to Peruvian waters where it picked up the cocaine and returned to the coast of Guangdong; from there the cocaine was routed towards Hong Kong, China.^{818 819} Another instance of suspected trafficking across the Pacific towards Hong Kong, China came to light in April 2021, when 700 kg of cocaine were seized by Hong Kong Police.⁸²⁰

In 2021 two significant seizures were also made from ports in the northeast of China – 215 kg seized at the port of Qingdao Shi in June⁸²¹ and 200 kg seized from a ship at the port of Dalian Shi in November.⁸²²

There are indications that Hong Kong, China is also used as a transit location in onward trafficking of cocaine towards other countries in the Asia-Pacific region, notably Australia. In its official reporting for the calendar years 2019–2021, Hong Kong, China identified Australia (in 2021), China (in 2020), Japan (in 2020) and the Philippines

802 Stanyard et al., 'Insurgency, Illicit Markets and Corruption: The Cabo Delgado Conflict and Its Regional Implications'.

803 Lucia Bird et al., 'Changing Tides: The Evolving Illicit Drug Trade in the Western Indian Ocean', Political economy analysis (Global Initiative Against Transnational Organized Crime, June 2021).

804 Ibid.

805 UNODC, 'Madagascar, Responses to the Annual Report Questionnaire 2018', n.d.

806 Bird et al., 'Changing Tides: The Evolving Illicit Drug Trade in the Western Indian Ocean'.

807 UNODC, 'Madagascar, Responses to the Annual Report Questionnaire 2018'.

808 Bird et al., 'Changing Tides: The Evolving Illicit Drug Trade in the Western Indian Ocean'.

809 Ibid.

810 Ko-lin Chin and Sheldon Zhang, 'The Chinese Connection: Cross-Border Drug Trafficking between Myanmar and China' (Report submitted to the United States Department of Justice, April 2007).

811 UNODC, 'Hong Kong (SAR) of China, Responses to the Annual Report Questionnaire 2015, 2016, 2018, 2019, 2020, 2021', n.d.

812 In addition, Hong Kong reported one packaging facility in 2021.

813 Belgium, Brazil, Dominican Republic, Germany, Nepal, South Africa, Spain, Suriname, Trinidad and Tobago, United States, Uruguay, Venezuela (Bolivarian Republic of).

814 Song Liu and Yihe Ding, '“围猎”可卡因毒枭 广东“705”特大跨境贩毒案侦破记', *China News*, 26 June 2020.

815 China News, 'Cocaine Drug Lord Guangdong “705” Super-Large Cross-Border Drug Trafficking Case Detected', 25 June 2020, Teller Report edition.

816 Liu and Ding, '“围猎”可卡因毒枭 广东“705”特大跨境贩毒案侦破记'.

817 China News, 'Cocaine Drug Lord Guangdong “705” Super-Large Cross-Border Drug Trafficking Case Detected'.

818 Liu and Ding, '“围猎”可卡因毒枭 广东“705”特大跨境贩毒案侦破记'.

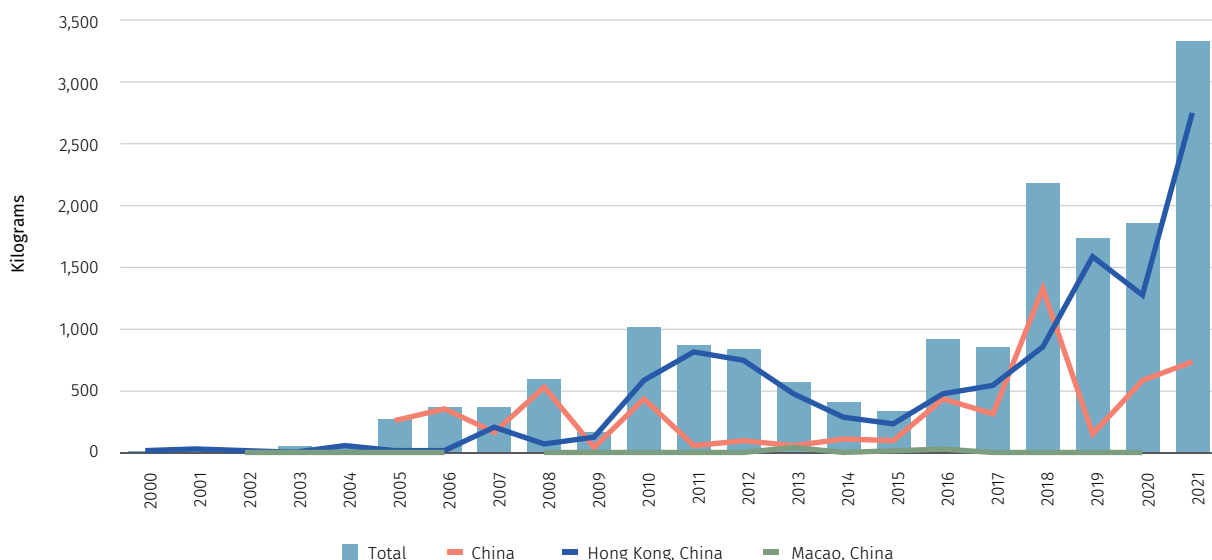
819 China News, 'Cocaine Drug Lord Guangdong “705” Super-Large Cross-Border Drug Trafficking Case Detected'.

820 UNODC, 'Drugs Monitoring Platform'.

821 Ibid.

822 Ibid.

Cocaine seizures in China, including Hong Kong, China, and Macao, China, 2000–2020

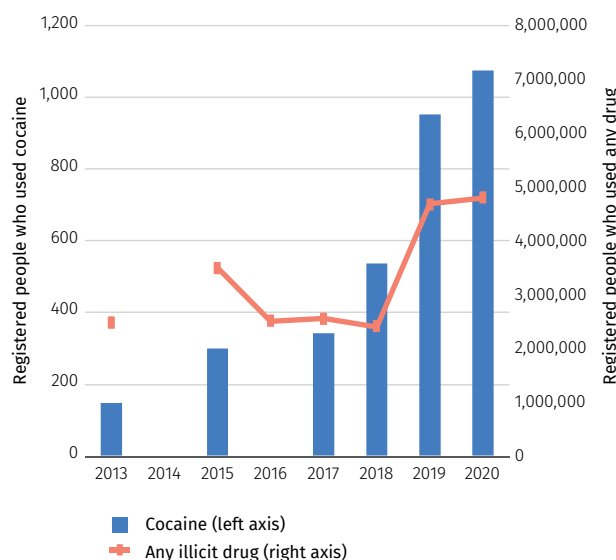


Sources: UNODC, responses to the annual report questionnaire.

(in 2019) among the top three countries of destination of cocaine consignments seized in Hong Kong, China,⁸²³ while Australian authorities ranked Hong Kong, China in third place among the countries or territories of departure for cocaine hydrochloride detected in Australia in 2021.⁸²⁴ In May 2021, Australian Federal Police seized 160 kg of cocaine arriving into Melbourne, via Sydney, from Hong Kong, China. The shipment was allegedly coordinated by an OCG operating out of Hong Kong, China and Türkiye.⁸²⁵ In November 2021, Hong Kong Customs seized about 145 kg of suspected cocaine from an air cargo consignment, arriving from Guatemala, *en route* to Australia via Hong Kong, China.⁸²⁶ In their reporting for the 2019 calendar year, Indonesian authorities also identified Hong Kong, China among the most important point of departure (in first place) for the (limited quantities of) cocaine salts detected in Indonesia.^{827 828}

Aside from local actors, media sources suggest that Nigerian groups are particularly active in the trafficking of cocaine from Brazil to Hong Kong, China.⁸²⁹ Criminal groups with ties to the Western Balkan region have also been linked to cocaine trafficking in the region; one inter-

Registered people who used cocaine and registered people who used any drug in China, 2013–2020



Source: UNODC, responses to the annual report questionnaire.

national investigation revealed a Balkan-based network operating in Europe, South America and Hong Kong, China and led to the seizure of 421 kg of cocaine carried out by Hong Kong Customs and Macanese Judicial Police, and to the arrest of 5 individuals in Hong Kong, China.⁸³⁰

⁸³¹ In its reporting for the calendar year 2019, Mexico identified China among the top three destinations for cocaine consignments seized in Mexico.⁸³²

Trafficking of drugs, notably opiates and methamphetamine, across the Myanmar-China border is a

823 Nevertheless, over this period the top ranked destination was consistently Hong Kong, China itself; in particular, 99 per cent of cocaine seized in 2019 in Hong Kong, China was reportedly destined for Hong Kong, China itself.

824 UNODC, 'Australia, Responses to the Annual Report Questionnaire 2021', n.d.

825 Australian Federal Police, 'IRONSIDE: Alleged Australian Drug Boss and Syndicate Nabbed after 160kg Cocaine Import in Melbourne', Australian Federal Police, 20 June 2021.

826 The Government of the Hong Kong Special Administrative Region, 'Hong Kong Customs Seizes Suspected Cocaine and Suspected Methamphetamine Worth about \$164 Million (with Photos)', Press Releases, 25 November 2021.

827 UNODC, 'Indonesia, Responses to the Annual Report Questionnaire 2021', n.d.

828 Cocaine seizures in Indonesia in 2019 amounted to 8.4kg.

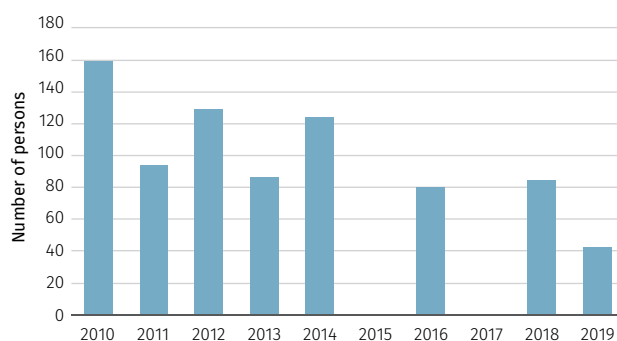
829 Raquel Carvalho and Marcelo Duhalde, 'Narcos: The Hidden Drug Highways Linking Asia and Latin America', *South China Morning Post*, 24 November 2018.

830 Europol, 'Balkan Cartel Trafficking Cocaine around the Globe in Private Planes Busted', europol.europa.eu, 25 July 2019.

831 UNODC and Europol, 'Cocaine Insights 1'.

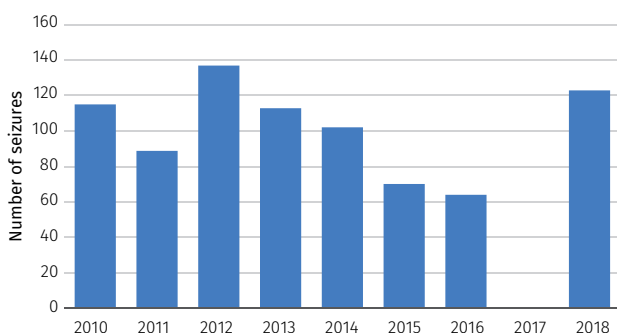
832 UNODC, 'Mexico, Responses to the Annual Report Questionnaire 2019', n.d.

Number of persons brought into formal contact with the criminal justice system on suspicion of cocaine trafficking offences, China, 2010–2019



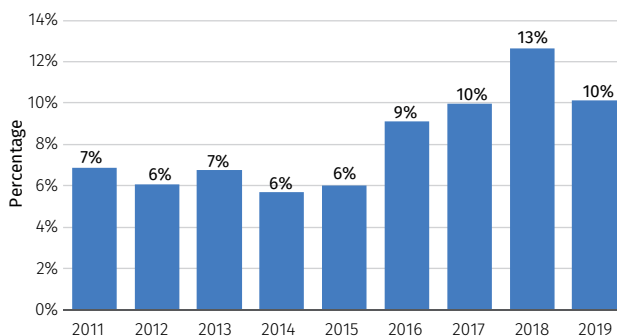
Source: UNODC, responses to the annual report questionnaire.

Number of seizure cases of cocaine-type drugs in China, 2010–18



Source: UNODC, responses to the annual report questionnaire. Note: Data for 2017, 2019 and 2020 were not available.

Share of persons suspected of cocaine-related offences among all persons brought into formal contact with the criminal justice system for drug-related trafficking offences, Hong Kong, China, 2011–2019



Source: UNODC, responses to the annual report questionnaire.

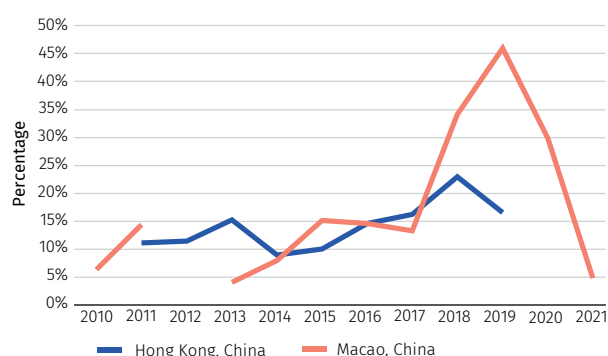
long-standing phenomenon.⁸³³ While evidence of cocaine in Myanmar is very limited, in February 2017, 450 kg of cocaine were seized from a warehouse in the Shwepyithar industrial zone, having entered the country through the industrial port of Yangon.⁸³⁴ The most recent wastewater-based study conducted in late 2021 in 21 undisclosed cities in southwest China did not however find evidence of cocaine consumption.⁸³⁵

833 UNODC, 'China, Responses to the Annual Report Questionnaire, Various Years, 2002–2021', n.d.

834 UNODC, 'Drugs Monitoring Platform', Cases 731286, 731287

835 Huanbo Wang et al., 'Consumption of Common Illicit Drugs in Twenty-One Cities in Southwest China through Wastewater Analysis', *Science of The Total Environment* 851 (December 2022): 158105.

Share of cases of seizures of cocaine-type drugs among all drugs, Hong Kong, China, and Macao, China, 2010–2021



Source: UNODC, responses to the annual report questionnaire. Notes: Data for 2021 are preliminary. Data for Hong Kong, China for 2010, 2020, 2021 and for Macao, China for 2012, were unavailable.

The available data which allow comparisons over time of the domestic cocaine market in mainland China present a mixed picture of trends; while data on registered drug users suggest an increase in cocaine use, the number of persons brought into formal contact with the criminal justice system on suspicion of cocaine trafficking offences has declined. Moreover, data on cocaine seizures do not indicate a clear trend. In Hong Kong, China, on the other hand, the most recent available data do suggest an overall medium-term expansion of the cocaine market, beginning around 2016, reflected for example in data on seizure quantities, seizure cases, and persons suspected of cocaine-related offences. Moreover, the number of kitchen laboratories processing cocaine (mainly “crack” laboratories), which averaged 9 over the period 2012–2020,⁸³⁶ rose to 25 in 2021 (the highest on record).^{837 838}

A domestic market for cocaine also exists in Macao, China and likely in Taiwan Province of China. In 2019, almost one half of drug seizure cases in Macao, China were related to cocaine (85 out of 185, followed by 42 cases of crystal methamphetamine). In the same year, the same ranking across drug types (cocaine in first place, methamphetamine in second place) was reflected in data on the number of drug users in prison while, among individuals recorded in the Central Registration System of Drug-dependent Persons, cocaine ranked in second place (23 per cent) in terms of the primary drug used, after methamphetamine (37 per cent).⁸³⁹

In Taiwan Province of China, the past-year prevalence of cocaine use among the adult population was estimated at 0.1 per cent of as of 2005.⁸⁴⁰ The available data on seizure quantities suggest that the domestic market remains

836 Data for 2017 were not available and are not taken into account in the average.

837 UNODC, 'Hong Kong (SAR) of China, Responses to the Annual Report Questionnaire 2012–2021', n.d.

838 In addition, Hong Kong, China reported one packaging facility in 2021.

839 Instituto de Acção Social do Governo da RAEM, 'Report on Drug Control in Macao 2019' (Macao: Social security office in the Municipality of Macau, 2019).

840 UNODC, 'World Drug Report 2022'.

limited, with annual aggregates typically under 10 kg. One departure from this pattern appears to have occurred in December 2016, when, according to media sources, 218 kg were seized in Taiwan Province of China from a consignment originating in Brazil, in an instance which, like more recent, similar incidents in Hong Kong, China, suggests that Taiwan Province of China was, as of 2016, also being used as a transit point for cocaine trafficking to destinations such as Australia.^{841 842}

The importance of Malaysia in the global cocaine market has been limited thus far. However, Malaysia plays a significant role as a transit country for trafficking various types of drugs to countries in South-East Asia and Oceania. According to Malaysian authorities, as of 2019 drug trafficking organizations were exploiting Malaysia's proximity to the drug-producing region around the triple border of Myanmar, Lao People's Democratic Republic and Thailand to use Malaysian territory as a hub to transport drugs to other countries, especially Indonesia, China, Japan, Republic of Korea and Australia.⁸⁴³ Malaysian law enforcement agencies also regularly detect and seize significant numbers of clandestine laboratories (on average 32 annually over the period 2012-2021), mainly producing heroin, methamphetamine and "ecstasy".⁸⁴⁴

While drug trafficking out of Malaysia relates predominantly to opiates and synthetic drugs, some incidents point to the possible expansion of this phenomenon to cocaine. In 2019, two very large cocaine seizures were made in Malaysia, both of which were believed to have been in transit to other countries: 3.2 tons seized in Shah Alam (close to Port Klang and Kuala Lumpur) in August 2019;⁸⁴⁵ and a reported quantity of 12 tons of cocaine, mixed with coal, seized from a vessel at Butterworth Port in September 2019.^{846 847} In its aggregate reporting for the 2019 calendar year, Malaysia reported a new route for cocaine trafficking from Colombia via Malaysia to Australia, and identified Australia as the only country, aside from Malaysia itself, which was the intended destination of cocaine seized in Malaysia.⁸⁴⁸ Cocaine has also been seized in European seaports from legal cargo originating in Malaysia. According to media reports, in May 2021, 570 kg of cocaine were detected in Rotterdam in a container with computer parts from Malaysia,⁸⁴⁹ and 354 kg of cocaine were seized in Belgian seaports from

consignments with Malaysia as the departure country during 2019.⁸⁵⁰

Trafficking of cocaine by air through Malaysia also occurs. In 2019 and 2020, Hong Kong Customs seized 5 consignments of cocaine, ranging between 1 kg and 11 kg in size, which had departed from Malaysia; 3 of these had been trafficked by mules on passenger flights, and the fourth was seized from air cargo.⁸⁵¹ According to media sources, in September 2021, Malaysian police arrested seven individuals suspected of being involved in distribution of small quantities⁸⁵² of cocaine, including to Qatar and Hong Kong, China.⁸⁵³ Media sources have documented some rather convoluted itineraries involving drug trafficking by mules travelling through Malaysia; one Malaysian passenger who was arrested at Tribhuvan International Airport (Nepal) in 2015 had reportedly travelled via India to Brazil, where she picked up the drug, then flew to Nepal and was due to return to Malaysia before travelling to her final destination of Rome. Allegedly the same mule had similarly trafficked 11 previous cocaine consignments to destinations such as Rome and Amsterdam.⁸⁵⁴ In 2020, as drug trafficking by air was disrupted due to restrictions related to COVID-19, drug trafficking organizations resorted to courier services to send drugs in parcels from Malaysia to other countries, including Australia, Republic of Korea, Hong Kong, China, Taiwan Province of China, Indonesia and New Zealand.⁸⁵⁵

While the domestic market for cocaine in Malaysia is small, like other countries in East and South-East Asia, Malaysia has experienced strong economic growth in recent years,⁸⁵⁶ raising the prospect for consumption to develop. Wastewater testing in 2017 detected low levels of cocaine consumption in Kuala Lumpur, with an average estimate of 12 mg per 1000 inhabitants per day.^{857 858} The use of cocaine in Malaysia, albeit among a limited sample of people, was confirmed by an exploratory study conducted in Kuala Lumpur in 2022.⁸⁵⁹

841 Xinhua News, 'Taiwan Seizes 200 Kg of Cocaine in Drug Case', *China.Org.Cn*, 6 December 2016.
 842 The track record of previous activities of the company which imported the legal goods (vehicle batteries, used as a cover) suggests that they were likely to be re-exported to Australia.
 843 UNODC, 'Malaysia, Responses to the Annual Report Questionnaire 2019', n.d.
 844 UNODC, 'Malaysia, Responses to the Annual Report Questionnaire 2012-2021', n.d.
 845 UNODC, 'Drugs Monitoring Platform'.
 846 Ibid.
 847 The Straits Times, 'Malaysia's Biggest Drug Bust: 12 Tonnes of Cocaine Worth S\$791m Seized in Penang', *The Straits Times*, 20 September 2019.
 848 UNODC, 'Malaysia, Responses to the Annual Report Questionnaire 2019'.
 849 UNODC, 'Drugs Monitoring Platform'.

850 WCO RILO (Regional Intelligence Liaison Office) Western Europe
 851 UNODC, 'Drugs Monitoring Platform'.
 852 Seizures of cocaine in this case amounted to 4.9kg
 853 'Cocaine Distribution: In Selangor, Cops Nab Seven, Seize 174 Sacks of Drug-Processing Chemicals Worth over RM50m', *Malay Mail*, 20 September 2021.
 854 Manish Gautam, 'Cocaine through Kathmandu', *The Kathmandu Post*, 17 July 2015.
 855 UNODC, 'Malaysia, Responses to the Annual Report Questionnaire 2020', n.d.
 856 Based on data from the World Bank, year-on-year GDP growth in Malaysia was between 4 and 6 per cent throughout 2002-2019, with the exception 2009, which coincided with a recession worldwide.
 857 Peng Du et al., 'Monitoring Consumption of Common Illicit Drugs in Kuala Lumpur, Malaysia, by Wastewater-Cased Epidemiology', *International Journal of Environmental Research and Public Health* 17, no. 3 (January 2020): 889.
 858 Average of three estimates based on measurements made in each of June, July and August.
 859 See Box "Cocaine use in Malaysia: an explorative study in Kuala Lumpur" in this section, based on: Universiti Sains Malaysia, preliminary findings of an exploratory study on cocaine use, 2022.

Cocaine use in Malaysia: an exploratory study in Kuala Lumpur

In 2022, the Centre for Drug Research, Universiti Sains Malaysia, conducted an exploratory qualitative study to gain insights into the contextual use of cocaine in Malaysia.^a The participants of the study (12 at the time of writing) were either current users of cocaine or had used the drug in the past year; they were 6 men, 5 women, and 1 non-binary, all of whom were employed and residents of Kuala Lumpur.^b

All the respondents had been using cocaine for prolonged periods of time (4.5 years on average), and on a regular basis (at least once a week). Respondents used cocaine for various reasons or motives – to improve focus; to remain alert, active, or confident during long hours of partying; and to enjoy the partying atmosphere or exuberance. All respondents reported administering cocaine powder by snorting; cocaine users inhaled 1-2 “lines” if the cocaine was of high purity, or 3-4 “lines” in the case of a lower purity cocaine.^c No smoking or diluting cocaine powder in alcoholic beverages was reported. Cocaine was reported to be commonly used on its own (without mixing or co-ingesting it with other drugs). A few respondents mentioned having used cocaine concurrently with illicit drugs such as ecstasy, ketamine, MDMA and crystal methamphetamine, but they experienced unpleasant effects (e.g., a hangover) as a result. All the respondents claimed that, to boost the euphoric effects, they usually consumed alcohol prior to slowly moving to snorting cocaine. None of the study’s participants had noticed health issues after having used cocaine and none had sought treatment for their cocaine use.

While most participants reported having about 5 to 10 friends who used cocaine, they preferred a smaller circle (3-7 people) when consuming the drug. The preferred setting to consume cocaine was a private space, such as a friend’s place, including home-based parties with a small group of friends. A public setting, such as a club or a bar, was typically not perceived safe by cocaine users as it may attract attention from other party goers and law enforcement personnel. It was also mentioned that cocaine is available in the city’s premium clubs for consumption by upper-class individuals. One female respondent claimed that she normally used cocaine after parties.

The respondents claimed that their cocaine supply usually came from overseas, with varying purity levels. Based on their personal experience and dealers’ assurance, male respondents perceived that cocaine purity levels were usually high (allegedly ranging between 75 to 90 per cent). Female respondents, however, claimed their cocaine supply to be sub-standard (of lower purity levels). A few respondents

complained that some street dealers tended to sell a low purity cocaine. One male respondent reported that sometimes, his cocaine supply was spiked with higher amounts of ephedrine, which he was able to determine given his wide experience in cocaine consumption. There have also been situations where buyers were tricked into acquiring Special K (ketamine) instead of cocaine (as they could infer from the sedative and hallucinatory effect, not typical for the latter).

The respondents reported obtaining their cocaine supply from local dealers, and a few have obtained it from foreigners who reside in Malaysia. In addition, the dealers cannot be easily identified or approached directly; they would only communicate with trusted customers. Therefore, almost all of the participants claimed that they usually obtained their cocaine supply through close contacts or trusted friends who also used cocaine or who happened to know someone who distributed cocaine. In fact, cocaine supply seems to go through many layers of people before it is distributed. All cocaine purchasing activities are reported to occur via communication networks (mobile phones) and the dealers usually deliver the drugs at a preferred location. A substantial number of respondents believed that dealers often obtained their cocaine supply from the *dark web*. None of the respondents had experienced any difficulties in obtaining cocaine, except for the period during Covid-19-related movement restrictions. Respondents claimed that, to purchase high-purity cocaine, one must know the right person or dealer; inferior- or low-quality cocaine can be easily obtained but it is not worth the money.

The study also found that cocaine is sold at a high price compared to other illicit substances in Malaysia. One gram of cocaine can range between RM 600 (approximately USD 150) to RM 1,000 (approximately USD 200). One respondent claimed that cocaine prices used to be as low as RM 500 (approximately USD 130) per gram a few years ago. Given the high price, most respondents said that they think twice before purchasing cocaine.

Notes:

^a Study participants were selected through purposive sampling through key informants who were familiar with the local entertainment scene. Current cocaine users and those who have used cocaine in the last 12 months were eligible to take part in the study. A total of 12 semi-structured interviews (conducted online) were conducted during March-September 2022.

^b In terms of ethnic identity, half of the participants identified as Indians, five were Malays, one was a Yemeni national who lived in Malaysia, and one participant did not reveal their ethnicity. Most of the respondents were employed professionals (e.g., self-employed, chef, marketing executives, personal assistant, holistic practitioner, director of shipping company, music teacher, food and beverage industry, digital marketer, performer, and architect); everyone earned more than RM 5,000 / USD 1,075 a month.

^c According to the respondents, one gram of cocaine is enough to prepare 15 to 20 “lines”. Each “line” is estimated to be 5-7 centimetres long.

In Thailand, the market for stimulant drugs appears to be dominated by methamphetamine. Over the period 1991-2021, aggregate seizures of cocaine never exceeded 70 kg in a single year.⁸⁶⁰ In 2019, 87 per cent of drug treatment was provided for methamphetamine use, while cocaine accounted for less than 1 per cent.⁸⁶¹ However, in reporting by Member States for the calendar year 2021, Thailand was identified among the top 3 countries of destination of cocaine-type drugs by two important transit countries for cocaine trafficking: Uruguay (which ranked Thailand in third place) and Ghana (in second place).

Viet Nam may also play a role as a transit country for cocaine trafficked to neighbouring countries. Cocaine seizures in Viet Nam exceeded 100 kg in 2018 and 2019.⁸⁶² According to the United States Government, cocaine arrives in Viet Nam both to supply local consumption and for further distribution to countries such as Japan and Australia. Cocaine reportedly reaches Viet Nam on sea freight containers, inside air shipments or concealed by human couriers.⁸⁶³ In 2018, two cases of cocaine trafficking to Viet Nam shared a number of similarities, as they both involved female drug mules of Malaysian nationality trafficking cocaine from Brazil, on passenger flights, to Ho Chi Minh City, Viet Nam: one was arrested in October 2018 with 3.3 kg cocaine, and the second one in November 2018 with 4.1 kg.⁸⁶⁴

The market for cocaine in Indonesia and the Philippines appears to be limited; however sporadic seizures occasionally raise the prospect of potential attempts to introduce cocaine into these countries in significant quantities. In September 2022, 179 kg of cocaine were found in the waters near Merak port on Java island, Indonesia – the largest cocaine seizure on record in the country.⁸⁶⁵ This case appears to be linked to a consignment of cocaine which reached Newcastle (New South Wales, Australia);⁸⁶⁶ however, the fact that the cocaine consignment appears to have been split in Indonesia raises the possibility that one part of it was intended to explore the Indonesian market.

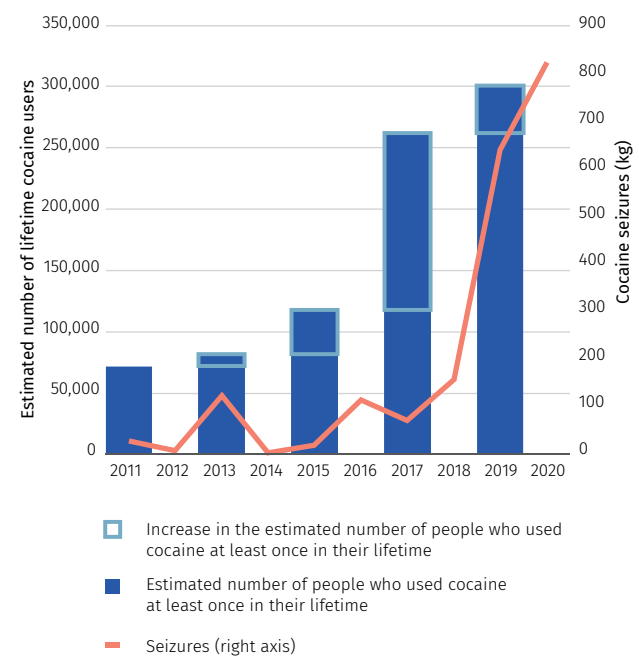
In 2021, 661 kg of cocaine were seized in the airport serving Quito, Ecuador, concealed in industrial machinery to be sent to the Philippines via Miami (United States).⁸⁶⁷ On several other occasions, cocaine has been found floating in open sea close to the Philippines, or having washed up on the shores of the Philippines, for example in March

2022⁸⁶⁸ and several times during 2019.^{869 870} However, given that the detected packages of cocaine were loosely scattered, these instances may represent losses from trafficking routes with unknown destination.

In Japan, a small domestic market for cocaine has existed for several years. Total seizures averaged 31 kg annually over 1990-2017 (ranging between 2 kg and 124 kg).⁸⁷¹ While these quantities are relatively small, there are some indications that the market in Japan has grown in recent years. The estimated number of lifetime users of cocaine doubled between 2015 and 2017;⁸⁷² in other words, more than one half of people who had ever used cocaine in Japan as of 2017 had done so for the first time within the previous two years.⁸⁷³ As of 2019, the number of lifetime users of cocaine was estimated at 300,000.⁸⁷⁴ Experts perceived the demand for cocaine in Japan to be linked to communities of South American origin.⁸⁷⁵

In 2018-2020, larger quantities of seized cocaine were registered in Japan, driven by individual large seizures at ports; however, in these cases it was unclear whether

Cocaine market indicators in Japan, 2011-2020



Sources: Seizures: UNODC, responses to the annual report questionnaire; Number of users: DAINAP.

860 UNODC, 'Responses to the Annual Report Questionnaire'.

861 UNODC, 'World Drug Report 2020'.

862 UNODC, 'Responses to the Annual Report Questionnaire'.

863 Bureau of International Narcotics and Law Enforcement Affairs, '2022 International Narcotics Control Strategy Report' (United States Department of State, 1 March 2022).

864 UNODC, 'Drugs Monitoring Platform'.

865 Ibid.

866 Mark Reddie, 'Police Probe Whether "spectacular" Indonesian Drug Haul Is Linked to NSW's Dead Cocaine Diver', *ABC News*, 12 May 2022.

867 UNODC, 'Drugs Monitoring Platform'.

868 Gulf News Report, "'Cocaine Bricks' Found Floating off Philippine Waters – Again', *Gulf News*, 24 March 2022.

869 BBC, 'Cocaine Bricks Keep Washing up in the Philippines', *BBC News*, 9 July 2019.

870 Gulf News Report, "'Cocaine Bricks' Found Floating off Philippine Waters – Again'.

871 UNODC, 'Responses to the Annual Report Questionnaire'.

872 Drug Abuse Information Network for Asia and the Pacific (DAINAP)

873 By way of comparison, in the "mature" market of the United States, based on estimates from the National Survey on Drug Use and Health, slightly less than 3 per cent of people who had ever used cocaine in 2020 had initiated use in 2020 or 2019.

874 Drug Abuse Information Network for Asia and the Pacific (DAINAP)

875 Interview #30, interview by UNODC, 2022.

the destination was Japan.⁸⁷⁶ For example, in April 2020, about 722 kg of cocaine (the largest quantity ever seized in a single instance in Japan) were detected in a sea cargo vessel that had arrived in Yokohama Port from Ecuador but customs officers suspected it might have been a result of a failure to unload the drugs in a previous port along the route.^{877 878} According to media sources, a similar case was detected in the Republic of Korea in November 2021: 400 kg of cocaine were seized from a container in Busan, the largest cocaine seizure ever registered in the Republic of Korea.⁸⁷⁹ The itinerary of the container had involved Peru, Ecuador, Guatemala, and Mexico, and it had also transited Japan before the cocaine was accidentally detected in the Republic of Korea. Korean prosecutors reportedly assessed that the intended destination was likely not the Republic of Korea,⁸⁸⁰ and the circumstances of the case suggest that there may have been a failure in an intended ‘rip-off’ unloading somewhere earlier along the route. Irrespective of potential recent increases, the domestic market in Japan remains relatively small; as of 2020, only 429 out of 19,676 seizure cases in Japan concerned cocaine.⁸⁸¹

Aside from trafficking directly from South America, some cocaine is trafficked to Japan by mail from European countries, such as the Netherlands and Germany, and, less frequently, from North American countries.⁸⁸² Those involved in cocaine trafficking by passenger flights often include second generation immigrants with Brazilian nationality living in Japan; other nationalities include Mexican, American, Spanish and Thai. With the restriction on passenger flights due to COVID-19, there was a shift in cocaine trafficking modalities from air passengers to air cargo. Moreover, concealment methods observed in Japan have become increasingly sophisticated, including cases of cocaine mixed with a solid substance, such as carbon (“black cocaine”, trafficked by mail), impregnated in clothes, and concealed in correspondence/documents (also trafficked by mail).⁸⁸³

Despite the large population of India, supply side data do not reflect a large domestic cocaine market. Until 2020, annual seizure aggregates had never exceeded 150 kg.⁸⁸⁴ In 2020, both the number of seizures and the quantity seized declined – a fact which has been attributed to the impact of the COVID-19 pandemic and associated restrictions.⁸⁸⁵

876 Ibid.

877 Ibid.

878 Kyodo News, ‘Record 700 Kg of Cocaine Seized at Yokohama Port’, *Kyodo News*, 16 April 2020.

879 Prior to 2019, total annual seizures in the Republic of Korea had never exceeded 24kg. In August 2019, a seizure of 101 kg was made in the port of Taean. UNODC, ‘Drugs Monitoring Platform’.

880 Ji-hye Han, “‘역대 최대 규모’ 코카인 400kg 밀반입 적발...1401억 원 추산”, *Donga*, 24 November 2021.

881 UNODC, ‘Japan, Responses to the Annual Report Questionnaire 2020’, n.d.

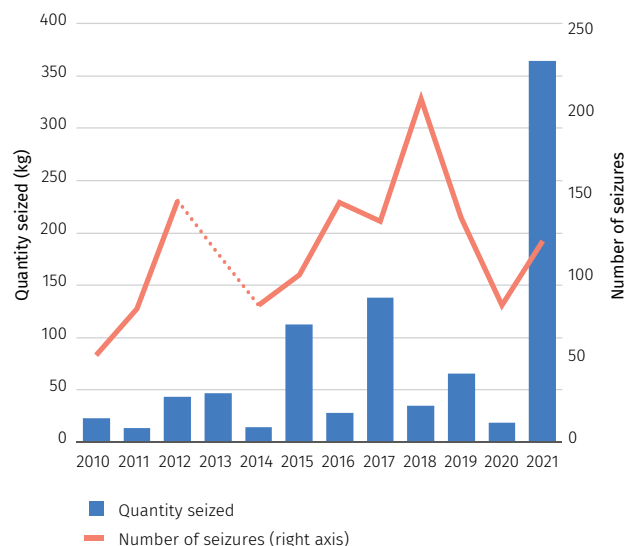
882 Interview #30.

883 Ibid.

884 UNODC, ‘Responses to the Annual Report Questionnaire’.

885 The *Economic Times*, ‘Drug Seizures in India in 2020 Highest in Five Years: NCB’, *The Economic Times*, 7 April 2022.

Cocaine seizures in India, 2010–2021



Source: UNODC, responses to the annual report questionnaire.

A household survey of drug use conducted across India in 2018⁸⁸⁶ estimated an annual prevalence of 0.11 per cent of the general population aged 10-75: 0.18 per cent among males and 0.01 per cent among females. Although these levels are well below the global average on a per capita basis, as the same study points out, they translate into 1.1 million past-year users, or 5 per cent of the global number of users.

High levels of past-year prevalence were found in two states on the northern borders – Arunachal Pradesh (3.0 per cent) in the northeast and Punjab in the northwest (0.7 per cent) – and in some western administrative regions, namely Daman and Diu (1.4 per cent), Dadra and Nagar Haveli (0.8 per cent), Maharashtra (including the city of Mumbai) and the archipelago of Lakshadweep (0.6 per cent), which is also a tourist destination.⁸⁸⁷ According to media sources, the Narcotics Control Bureau of India has concerns about cocaine present in Mumbai in particular.⁸⁸⁸ As of 2017, provision of treatment services for drug use in India was dominated by opioids (55 per cent) and cannabis (36 per cent) as the primary drug used, with cocaine accounting for only 0.3 per cent.⁸⁸⁹

It appears that the domestic market in India is usually supplied by small shipments. In 2019, seizures of incoming cocaine consignments, amounting to 33 kg in total, were mainly from air and land channels, with none

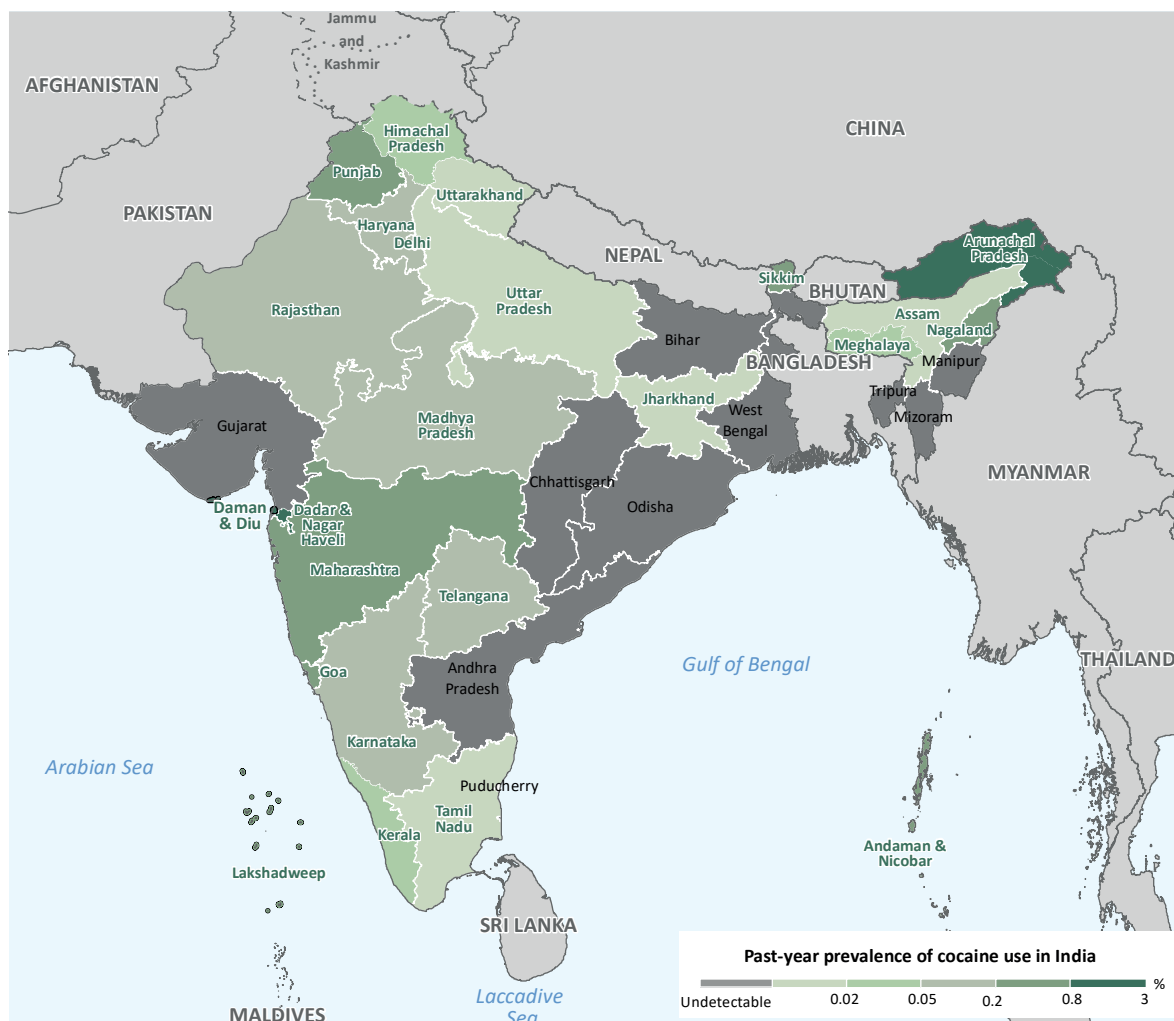
886 A. Ambekar et al., ‘Magnitude of Substance Use in India’ (New Delhi: Ministry of Social Justice and Empowerment, Government of India, February 2019).

887 The union territories of Daman and Diu, Dadra and Nagar Haveli and Lakshadweep are geographically small and have higher population densities than the national average for India. The union territories of Daman and Diu and Dadra and Nagar Haveli were merged into one as of 2020.

888 Shishir Gupta, ‘Mundra Port Seizure Had a Dry Run on June 9, Govt Alarmed over Drug Menace’, *Hindustan Times*, 4 October 2021.

889 UNODC, ‘World Drug Report 2022’.

Past-year prevalence of cocaine use in India, by state or union territory, 2018



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations. Dotted line represents approximately the line of Control in Jammu und Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not been yet agreed by the parties. Source: Ministry of Social Justice and Empowerment, Government of India, *Magnitude of Substance Use in India*, New Delhi, 2019.

reported from sea channels.⁸⁹⁰ In 2020, the restrictions on international air travel may have spurred an increase in the use of mail, which accounted for more than one third of inbound consignments by weight; nevertheless trafficking by air accounted for the remainder.⁸⁹¹ However, in 2021, sea transportation was the predominant mode of transportation, accounting for 95 per cent of inbound seizures by weight.⁸⁹² This is likely driven by a large (303 kg), intelligence-led seizure, documented in open sources,⁸⁹³ made in Tuticorin port in South India from a consignment which had originated in Panama and transited through Antwerp (Belgium) and Colombo (Sri Lanka). Based on the most recent official reporting from Indian authorities, the most important countries of departure for cocaine seized in India in 2021 are Pan-

ama, South Africa, Ethiopia (in that order) and Brazil (via Qatar, in 2020).⁸⁹⁴

India also appears to play a minor role within the global cocaine market as a transit country for cocaine, or related products, both to neighbouring countries and to more distant destinations. It is notable that, even though India is not a major cocaine consumption country and is geographically removed from the cocaine production zones of South America, some trafficking through India appears to involve raw or intermediate “cocaine-type” products. Canadian authorities assessed that India was the second most frequently occurring departure country (after Peru but ahead of Colombia) for intermediate cocaine products in the form of coca paste (PBC) or refined cocaine base seized in Canada in 2021.⁸⁹⁵ Similarly, India was identified by authorities in South Africa (in 2020, in first

890 UNODC, ‘India, Responses to the Annual Report Questionnaire 2019’, n.d.ARQ 2019 India

891 UNODC, ‘India, Responses to the Annual Report Questionnaire 2020’, n.d.

892 UNODC, ‘India, Responses to the Annual Report Questionnaire 2021’, n.d.

893 SATP, ‘India: 303 Kg of Cocaine Seized at Tuticorin Port in Tamil Nadu, Says Report’, Detail of Terrorism Update, South Asia Terrorism Portal (SATP), 23 April 2021.

894 UNODC, ‘India, Responses to the Annual Report Questionnaire 2020, 2021’, n.d.

895 UNODC, ‘Canada, Responses to the Annual Report Questionnaire 2021’, n.d.

896 Data for 2021 are preliminary.

place⁸⁹⁷) and Australia (in 2017, in third place⁸⁹⁸) as a departure country for trafficking coca leaf.⁸⁹⁹ Moreover, in March 2019, 31.5 kg of cocaine in base form were seized from a vessel in the Port of Bar (Montenegro), having departed from India.⁹⁰⁰

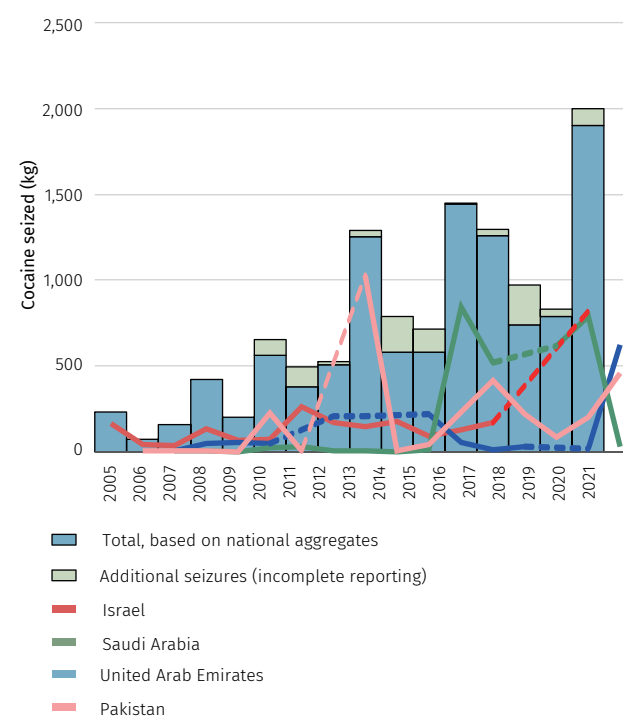
India has also been identified as a departure or a transit country for trafficking of cocaine salts, in 2019, by Sri Lanka and Nepal. Moreover, aside from the above-mentioned incident in Montenegro, several other specific instances have been documented of non-negligible quantities of cocaine seized as they were about to depart from India, or in destination countries from shipments or individuals having departed from India; from 2019 onwards, the destination countries included Australia,⁹⁰¹ Belgium,⁹⁰² Italy,⁹⁰⁴ and Sri Lanka.⁹⁰⁵ The largest of these involved 771 kg seized in January 2021 in Belgium, having departed from India.⁹⁰⁶

According to media sources quoting the National Drug Agency of the Maldives, cocaine trafficking to the Maldives has increased recently, and the country is being used as a transit point for such trafficking.⁹⁰⁷ Indeed, a joint report of the same agency and the World Health Organization assessed that the type of drugs trafficked into the Maldives had seen radical change over the period 2011-2020 with cocaine and MDMA acquiring importance.⁹⁰⁸ A recent study of wastewater from nine different sites across Malé confirmed the consumption of cocaine in the Maldives, albeit at low levels.⁹⁰⁹

Near and Middle East, Southwest Asia, Central Asia and the Transcaucasian Countries

Within the subregion of the Near and Middle East/South-West Asia, the clearest signs of a domestic cocaine market are in Israel and Lebanon. Based on the most recent available data, these two countries account for the highest share of treatment provision for cocaine use disorders among countries in this region: 15 per cent in

Cocaine seizures in Near and Middle East/South-West Asia, total and selected countries, 2005–2020



Sources: National aggregates: UNODC, responses to the annual report questionnaire; Additional seizures: individual seizures cases from UNODC Drugs Monitoring Platform and World Customs Organization.

Notes: Data for 2021 are preliminary. Additional seizures are only included in cases when the national aggregate in a given country was not available. In order to preserve comparability over time, additional seizures are not included in data at country level. Dashed lines indicate gaps in national aggregate data (intermediate years).

Lebanon (as of 2020) and 9.5 per cent in Israel (already as of 2016⁹¹⁰).⁹¹¹ In Lebanon, shares in excess of 15 per cent were also registered consistently each year during 2013-2017.⁹¹² In 2020, Israel also accounted for the highest quantities of cocaine seized in this region.⁹¹⁴

In its response to the UNODC Annual Report Questionnaire, Israel identified Egypt, Libya and Lebanon (in that order) as the main transit countries from which it detected inbound cocaine trafficking, as of 2021. Based on incidents documented by UNODC and occurring from 2019 onwards, Israel was believed to be the intended destination of cocaine consignments seized in eight different countries.⁹¹⁵ However, at least one instance has also been recorded in which Israel appears to have been used as a nominal destination for a cocaine shipment concealed in containers as a decoy to deflect scrutiny from law enforcement, while the intended point

897 UNODC, 'South Africa, Responses to the Annual Report Questionnaire 2020', n.d.
 898 UNODC, 'Australia, Responses to the Annual Report Questionnaire 2017', n.d.
 899 The amounts of coca leaf trafficked to these countries is however limited, with seizures amounting to 3kg in South Africa in 2020 and 0.75kg in Australia in 2017.
 900 UNODC, Drugs Monitoring Platform. (32 kg seized in Montenegro in March 2019, having departed from India.)
 901 Ibid. (55 kg seized in Australia in June 2019 and 109 pellets in October 2019, having departed from India.)
 902 Ibid. (10 kg seized in India in May 2021 with Australia as the intended destination.)
 903 Ibid.
 904 Ibid. (3.9 kg seized in Italy in October 2019, having departed from India.)
 905 Ibid. (3 kg seized in India in May 2020 with Sri Lanka as the intended destination.)
 906 Ibid.
 907 Abdulla Lamya, 'Police: Cocaine Smuggling to Maldives on the Rise', *The Edition*, 8 September 2021.
 908 WHO, 'Situational Analysis of Drugs in the Maldives 2021' (World Health Organization and National Drug Agency of the Maldives, 2021).
 909 Luca Fallati et al., 'Use of Legal and Illegal Substances in Malé (Republic of Maldives) Assessed by Wastewater Analysis', *The Science of the Total Environment* 698 (January 2020): 134207.

910 More recent data for Israel were not available.
 911 UNODC, 'World Drug Report 2022'.
 912 Data for 2018 were unavailable, and data for 2019 appear to be exceptional, with a share of 8 per cent.
 913 UNODC, 'World Drug Report 2022'.
 914 UNODC, Drugs Monitoring Platform.
 915 Brazil, Czechia, Italy, Germany, Greece, Paraguay, Panama, Ukraine.
 916 UNODC, 'Drugs Monitoring Platform'.

of recovery of the cocaine was in an intermediate port of the transit.^{917 918}

There are also some signs of a potentially emerging market in Saudi Arabia. Already in April 2020, authorities in Saudi Arabia observed an increase in cocaine trafficking by air from Nigeria.⁹¹⁹ Nigeria ranked Saudi Arabia in first place among the most frequently detected countries of destination of cocaine seized in 2020,⁹²⁰ and in second place in 2021.⁹²¹ In recent years, Ghana⁹²² and Benin⁹²³ have also identified Saudi Arabia among the main destination countries for trafficking of cocaine products. Based on incidents documented by UNODC, aside from instances of small quantities seized in Kenya⁹²⁴ and Nigeria⁹²⁵ bound for Saudi Arabia, since 2020 two large consignments seized in Ecuador were headed for Saudi Arabia: 398 kg seized in October 2020 and 500 kg seized in January 2022.⁹²⁶

In Saudi Arabia, cocaine seizures, which had never exceeded 30 kg until 2015, increased distinctly as of 2016, averaging 691 kg over 2016–2020.⁹²⁷ However, in 2021 such seizures fell to 28 kg.^{928 929} In view of the established market for stimulants in this country, Saudi Arabia may represent a market with a potential to develop further. The retail price of cocaine in Saudi Arabia is especially high,⁹³⁰ suggesting that availability is still relatively low, but potentially also influenced by demand, and further rendering this country attractive for traffickers.

In the United Arab Emirates, a seizure of around half a ton of cocaine was made in October 2021.⁹³¹ While the cocaine had entered in a container via a seaport, it was subsequently moved within the country and one arrested individual was suspected of purchasing power tools to retrieve the cocaine from the container, suggesting that the cocaine may have been intended for the local market or for distribution within the region.

917 German De los Santos and Gabriel Di Nicola, 'El misterioso tránsito por la Argentina de 16 toneladas de cocaína descubiertas en Alemania', *La Nación*, 27 March 2021.
 918 DataClave, 'El mayor cargamento de cocaína de la historia decomisado en Europa fue embarcado en Buenos Aires', DataClave, 24 March 2021.
 919 'Country Report by Saudi Arabia', in *Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East Fifty-Fifth Session*, UNODC/SUBCOM/55/CRP1, 2020.
 920 UNODC, 'Nigeria, Responses to the Annual Report Questionnaire 2020', n.d.
 921 UNODC, 'Nigeria, Responses to the Annual Report Questionnaire 2021', n.d.
 922 UNODC, 'Ghana, Responses to the Annual Report Questionnaire 2020', n.d., in second place for cocaine hydrochloride
 923 UNODC, 'Benin, Responses to the Annual Report Questionnaire 2021', n.d., in first place for "crack" cocaine
 924 UNODC, 'Drugs Monitoring Platform'.
 925 Ibid.
 926 Ibid.
 927 Data for 2018 were unavailable.
 928 Data for 2021 are preliminary.
 929 UNODC, 'Saudi Arabia, Responses to the Annual Report Questionnaire 2021', n.d.
 930 See Chapter *Established markets*, in this report.
 931 UNODC, 'Drugs Monitoring Platform'.

Eastern and South-Eastern Europe

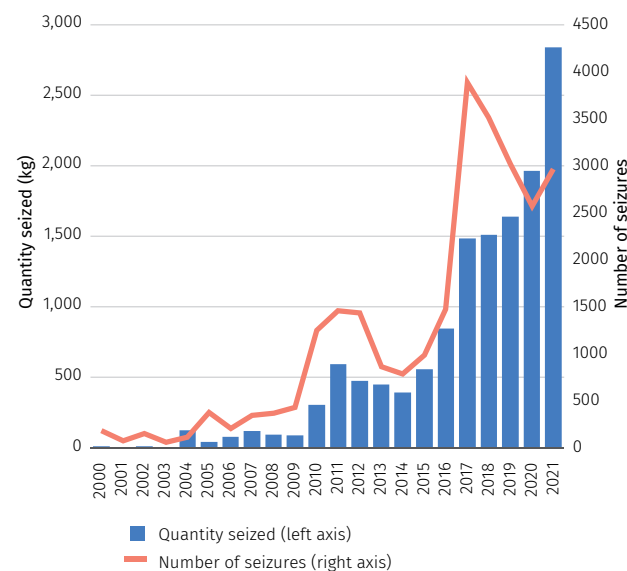
The role of South-Eastern Europe in cocaine trafficking is likely to continue to grow

South-Eastern Europe is another entry point for cocaine destined primarily for European markets. Based on seizures, cocaine appears to be increasingly trafficked through Türkiye to reach South-Eastern and Eastern Europe via air (couriers) and sea routes.⁹³² Since 2014, the quantities of cocaine seized in the country increased sevenfold, from 393 kg to a record 2.8 tons in 2021.^{933 934} The points of departure for cocaine trafficking to Türkiye remain in South America.⁹³⁵

Trafficking of small quantities of cocaine into Türkiye by air is frequent.⁹³⁶ Air couriers often land in Istanbul airport and may arrive from South America as well as Africa, in particular Western Africa. But trafficking by sea is also occurring. For example, Turkish traffickers seem to have been involved in the seizure of 528 kg of cocaine off the coast of Guinea from a Turkish-flagged fishing boat in February 2022, according to Turkish law enforcement.⁹³⁷

In recent years, large quantities have been seized in individual cases, both in Türkiye and *en route* to Türkiye in Latin American countries. In May 2020, 4.9 tons of cocaine were seized at the port of Buenaventura (Colombia)

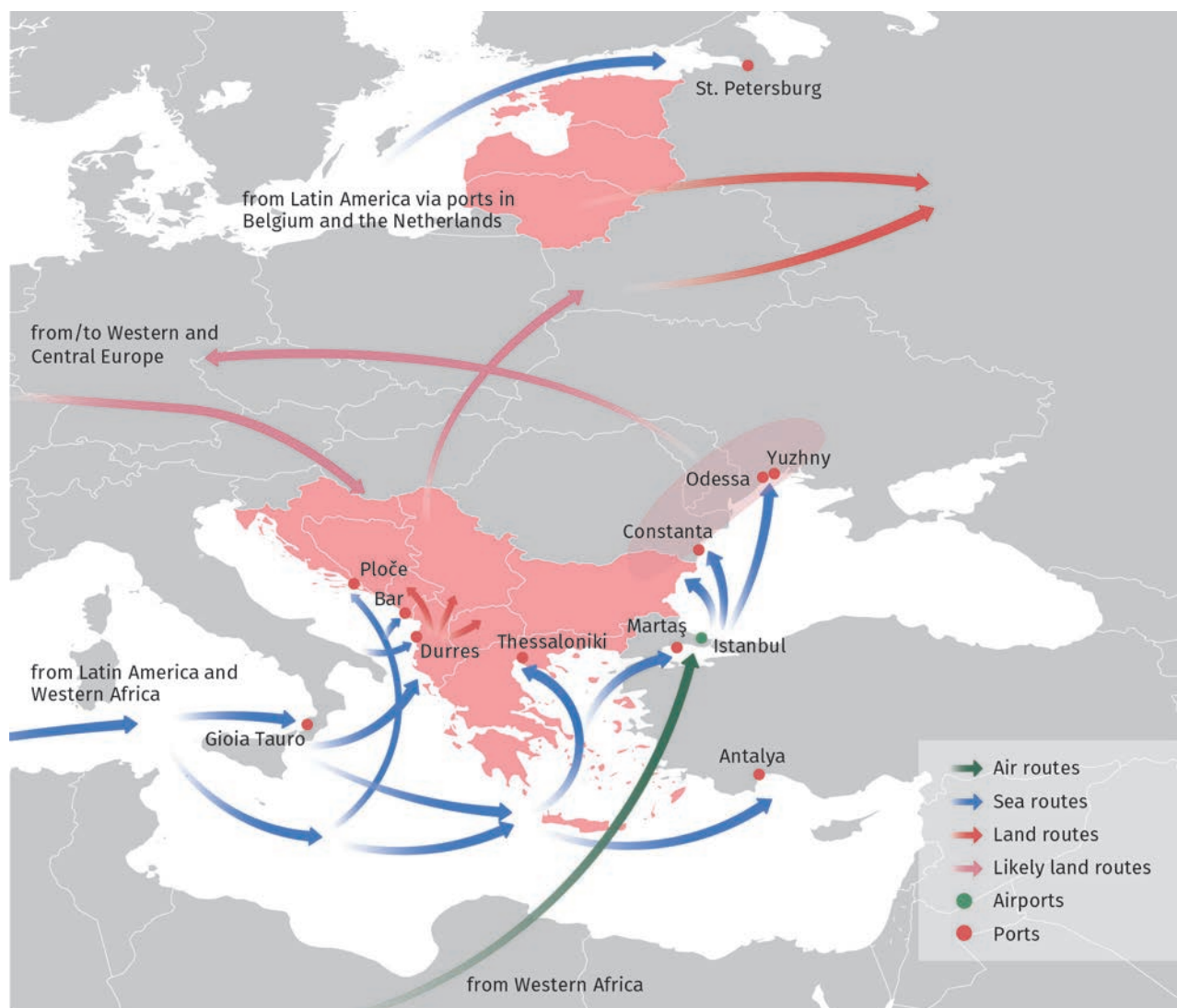
Cocaine seizures in Türkiye, 2000–2021



Note: Data for 2021 are preliminary.
 Source: UNODC, responses to the annual report questionnaire.

932 Turkish National Police Counter Narcotics Department, "2021 Turkish Drug Report" (Ankara: Ministry of Interior, 2021), 38.
 933 Data for 2021 are preliminary.
 934 UNODC, 'Responses to the Annual Report Questionnaire', n.d.
 935 'Country Report by Türkiye', in *Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East*, UNODC/SUBCOM/55/CRP4, 2020.
 936 Ibid.
 937 General Directorate of Security, 'Tarihli Basın Açıklaması', *Republic of Türkiye, Ministry of Interior* (blog), 7 February 2022.

Cocaine trafficking routes affecting Eastern and South-Eastern Europe



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations.

Sources: UNODC Drugs Monitoring Platform;

UNODC, Responses to Annual Report Questionnaire;

UNODC Interviews #31, #35, #42;

DCSA, 'Relazione Annuale 2022' (Ministero Dell'Interno, Direzione Centrale per i Servizi Antidroga, 2022);

Turkish National Police Counter Narcotics Department, "2021 Turkish Drug Report" (Ankara: Ministry of Interior, 2021), <http://narkotik.pol.tr/kurumlar/narkotik.pol.tr/TUB%C4%B0M/2021-TURKISH-DRUG-REPORT.pdf>,

Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East. Country Report by Türkiye, April 2020. UNODC/SUBCOM/55/CRP4

Directia de Investigare a Infractiunilor de Criminalitate Organizata și Terorism, Raport de activitate 2021, Romania

Open source judicial database « судебные решения рф ». Available at: <https://xn--90afdbaav0bd1afy6eub5d.xn--p1ai/>

from a container bound for Türkiye.⁹³⁸ In June and July of 2021, police in Guayaquil (Ecuador) seized 846 kg and 96 kg of cocaine respectively with destination Türkiye.⁹³⁹ ⁹⁴⁰ In August 2022, Turkish law enforcement seized 242 kg of cocaine on a merchant vessel that had sailed from Brazil to Tekirdağ Martas Port west of Istanbul at the Sea of Marmara.⁹⁴¹ In October 2022, 184 kg of cocaine were

seized at Antalya Port from a cargo ship (from an undisclosed point of departure).⁹⁴²

Turkish authorities also highlight that Türkiye's growing role as a transit country for cocaine flows might potentially affect other South-Eastern and Eastern European countries, as well as Greece.⁹⁴³ Criminal groups involved in the trafficking of heroin along the Balkan route may exploit their connections to also expand into the potentially emerging cocaine markets of Eastern Europe, the Caucasus, and Middle East.

⁹³⁸ UNODC, 'Drugs Monitoring Platform', n.d.

⁹³⁹ Comando Zona 8, "Agentes antinarcóticos decomisan en un puerto de Guayaquil 845.750 gramos de cocaína," *Policía Nacional de Ecuador*, June 23, 2022.

⁹⁴⁰ Comando Zona 8, "En uno de los puertos de Guayaquil la Policía decomisa 95.808 gramos de cocaína," *Policía Nacional de Ecuador*, July 18, 2022.

⁹⁴¹ Turkish Coast Guard Command, 'Approximately 242 Kg Of Cocaine Was Seized During The Operation On A Commercial Vessel In Tekirdağ,' *Republic of Türkiye, Ministry of Interior* (blog), 31 July 2022.

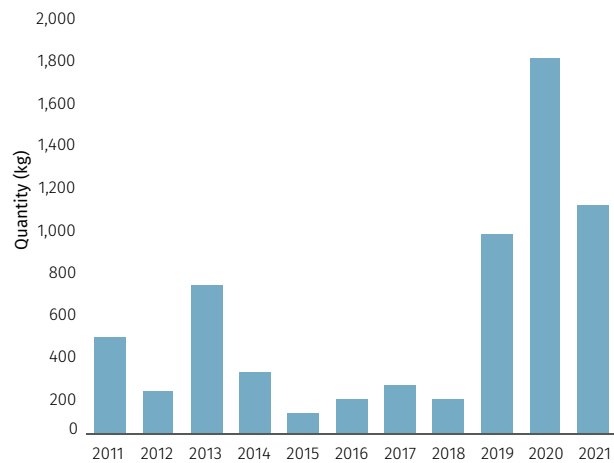
⁹⁴² Turkish Coast Guard Command, 'Approximately 184 Kg Of Drugs Were Seized At Antalya Port,' *Republic of Türkiye, Ministry of Interior* (blog), 12 October 2022.

⁹⁴³ Turkish National Police Counter Narcotics Department, "2021 Turkish Drug Report", 38.

Turkish authorities suggest that, beyond its role as a transit country, Türkiye is itself targeted by cocaine traffickers as a destination market.⁹⁴⁴ Prior to 2019, it was mentioned as a destination for cocaine seized in Armenia, Bulgaria, Georgia, Italy and Romania. More recently, Serbia has mentioned Türkiye as a destination for cocaine seizures every year since 2018, and again Bulgaria in 2021.⁹⁴⁵ There has been a steep increase in the number of cocaine seizure cases between 2014 and 2017. In 2021, there were 2,961 cocaine-related incidents in Türkiye in which 4,714 suspects were detained.⁹⁴⁶ Of those incidents, 66 per cent were related to cocaine use, and 34 per cent to cocaine trafficking.⁹⁴⁷ Furthermore, wastewater analysis suggests that cocaine consumption could be higher in some cities in Türkiye, than reflected in recent household surveys.^{948 949} Nevertheless, these cocaine consumption estimates are still several times lower than those reported in Western European countries.⁹⁵⁰

From Türkiye, the outbound cocaine flows towards European countries likely transit north through the Black Sea and the Balkans, which have been traditionally associated with trafficking of opiates and smuggling of cigarettes but have been recently growing in prominence as a transit sub-region for cocaine trafficking routes. Container shipments of fresh fruit from South America, especially Ecuador, have been a typical method of concealment for cocaine that arrives at the Balkan seaports (as illustrated by the examples mentioned below). In addition, according to Italian authorities, since 2020, Italian ports (mainly the southern port of Gioia Tauro) have been increasingly used as a transshipment point for cocaine directed eastward to the Balkan ports on the Aegean Sea and on the Black Sea. At these ports, large shipments of cocaine from South America are received by Balkan criminal groups, in particular Albanian and Serbian-Montenegrin nationals, who ensure its wholesale distribution and transportation to markets and to stockpiling areas in Greece, Bulgaria, Romania and Ukraine.^{951 952}

Seizures of cocaine in Greece, 2011–2021 (in kilograms)



Note: Data for 2021 are preliminary.

Source: UNODC, responses to the annual report questionnaire.

For example, seizure data suggest that, starting in 2019, Greece has been receiving growing quantities of cocaine.⁹⁵³ Brazil and Ecuador have been repeatedly mentioned by Greece as departure countries, in their responses to the UNODC Annual Report Questionnaire for the 2012–2021 period. Some shipments make a stopover in other European ports prior to arriving in Greece, from where the drug typically travels through the Balkan countries to the rest of Europe. For instance, according to media reports, in March 2022, 100 kg of cocaine were seized from a shipment of bananas in the port of Thessaloniki on a ship that arrived from Malta. In June 2022, four British nationals were arrested in Thessaloniki for trafficking 300 kg of cocaine, also in a shipment of bananas. Reportedly, the drugs were bound for distribution in other European countries and Australia. Before arriving to Thessaloniki, the drugs had been transported to the Italian region of Calabria, which suggests the involvement of *'Ndrangheta'*.⁹⁵⁴ In addition, according to open sources Bulgarian networks seem to be active in Greek ports by infiltrating legal business and using fake companies to receive shipments from Latin America, while Albanian nationals are believed to provide logistical support with cocaine trafficking to Bulgaria and Serbia.⁹⁵⁵

In the last decade, Albanian-speaking groups have become major players on Europe's cocaine market,^{956 957} while relying on a vast network of associates among the Albanian diaspora abroad⁹⁵⁸ and often working in con-

944 'Country Report by Türkiye', 4

945 UNODC, "Serbia, Responses to the Annual Report Questionnaire," 2018–2021.

946 Turkish National Police Counter Narcotics Department, "2022 Türkiye Uyuşturucu Raporu (2022 Turkish Drug Report)" (Ankara: Ministry of Interior, 2022), 35.

947 Turkish National Police Counter Narcotics Department, "2022 Türkiye Uyuşturucu Raporu (2022 Turkish Drug Report)" (Ankara: Ministry of Interior, 2022), 36.

948 UNODC, "World Drug Report 2022, Booklet 4" (Vienna: UNODC, 2022), 31.

949 While the annual prevalence of cocaine use in the general population in Türkiye (0.05 per cent as of 2017) was approximately 29 times lower than in Western and Central Europe, the average level of benzoylecgonine in Turkish cities (30 mg/1000 population/day, based on measurements for 2020 recorded in the SCORE dataset) was only 7.7 times lower than the average value in cities in Western and Central Europe.

950 Nebile Daglioglu, Evsen Yavuz Guzel, and Serdar Kilercioglu, 'Assessment of Illicit Drugs in Wastewater and Estimation of Drugs of Abuse in Adana Province, Turkey', *Forensic Science International* 294 (2019): 132–39.

951 UNODC, 'Italy, Responses to the Annual Report Questionnaire 2021', n.d.

952 DCSA, 'Relazione Annuale 2022' (Ministero Dell'Interno, Direzione Centrale per i Servizi Antidroga, 2022).

953 See Chapter *Established markets*, in this report.

954 Mark Lowen, 'British Men in Greek Court over Cocaine Smuggling', *BBC News*, 15 June 2022.

955 Scaturro and Kemp, "Portholes: Exploring the Maritime Balkan Routes," 75.

956 UNODC and EUROPOL, "The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All?," *Cocaine Insights* 1 (Vienna: UNODC, September 2021)

957 Europol, '45 Arrests in Crackdown on Albanian-Speaking Criminals Flooding Europe with Cocaine', *Europol News* (blog), 15 February 2022.

958 Maurizio Franco, Youssef Hassan Holgado, and Filippo Poltronieri, 'How the Albanian Mafia Conquered the Cocaine Market in UK', *IRPI Media*, 3 March 2022.

junction with Italian criminal groups.⁹⁵⁹ According to Italian authorities, the increase of cocaine trafficking through South-Eastern Europe signals further consolidation of Balkan criminal organizations, able to establish close collaborative relationships both with the criminal groups in producing countries and with local European traffickers.⁹⁶⁰ Albanian and Albanian-speaking criminal groups have expanded their influence across Europe, allegedly facilitated by the extensive diaspora-based network, in turn associated with the migration of Albanian and Kosovar refugees during the Kosovo⁹⁶¹ War in 1998-1999.^{962 963 964} According to Italian authorities, this network has contributed to establishing profitable relationships with criminal groups in host countries and has allowed Albanian groups to penetrate different illicit markets in the European context. Over the years, this has resulted in a high criminal capacity achieved with the possibility to exploit criminal alliances across wide geographical areas.⁹⁶⁵

While Albanian groups are very active in receiving cocaine shipments across Western Europe, especially at the ports of Belgium and the Netherlands,⁹⁶⁶ some cocaine also arrives in Albania's main port of Durres. Seizures of cocaine in Albania have increased sharply since 2018,⁹⁶⁷ driven by large individual seizures in the port (613 kg in 2018 and 137 kg in 2019),⁹⁶⁸ possibly as a result of cooperation between Albanian, Kosovar and Italian police.⁹⁶⁹ As reported in open sources, a seizure in May 2021 of 400 kg of cocaine by the police in Kosovo,⁹⁷⁰ in a cargo of meat from Brazil, reflects the link between Balkan and Italian traffickers, as the shipment had arrived from the port of Gioia Tauro in southern Italy prior to reaching Durres and proceeding towards the town of Lipjan in Kosovo.^{971 972} As reported by Albanian authorities, it is less common than before to detect cocaine inside a container structure; the drug is more likely to be concealed inside boxes containing bananas. Other types of cargo used as conceal-

ment include shrimps (from Ecuador) and coal. Albanian law enforcement also noted a new trafficking modality: cocaine can be hidden in heavy tonnage vehicles and shipped from Italy to Albania by ferry, with the aim of proceeding to other EU countries via Montenegro, North Macedonia and Kosovo.⁹⁷³

The Montenegrin port of Bar is also an active transit point for Balkan criminal groups. Nationals of Montenegro have for some time featured frequently in detected cases of cocaine trafficking, especially as crew members of sea vessels,⁹⁷⁴ likely reflecting the sea-faring tradition of Montenegro and their linguistic commonality with other Serbo-Croatian-speaking groups which have emerged as major players orchestrating transatlantic cocaine shipments.⁹⁷⁵ For example, in June 2019, authorities in the port of Philadelphia, United States, seized the remarkable quantity of 20 tons of cocaine from a container ship⁹⁷⁶ *en route* to the port of Rotterdam in the Netherlands, and arrested several Montenegrin members of its crew.⁹⁷⁷

Montenegrin authorities assessed that, between 2017 and 2021, police seized over 30 tons of cocaine worldwide in cases where criminals from Montenegro were involved.⁹⁷⁸ While the individuals involved in several of these cases may have been lower-level operatives, Montenegrin authorities also identified, as reported in open sources, the Skaljari and Kavac groups as powerful and high-risk organized crime groups in the country.⁹⁷⁹ Moreover, according to media sources, an Austria-based Montenegrin national who allegedly occupies a leadership position in a drug trafficking ring, together with two Croatian associates (who are in custody in Croatia), are suspected by law enforcement agencies to have links to large cocaine consignments seized in Colombia and Italy. Notably, according to the same media sources, a large quantity of heroin stored in Austria was to be shipped as payment for cocaine shipments.⁹⁸⁰ If confirmed, the case would be another example of convergence of different trafficking flows and "bartering" arrangements as payment.

A similar exchange reportedly involving Croatian crew members appears to have occurred in 2018, with cannabis resin from Morocco being shipped to South America in exchange for cocaine.⁹⁸¹ In Croatia itself, the largest

959 UNODC and EUROPOL, "The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All?," Cocaine Insights 1 (Vienna: UNODC, September 2021), 10.

960 UNODC, 'Italy, Responses to the Annual Report Questionnaire 2021'.

961 References to Kosovo shall be understood to be in the context of Security Council resolution 1244 (1999).

962 Franco, Holgado, and Poltronieri, 'How the Albanian Mafia Conquered the Cocaine Market in UK'.

963 DCSA, 'Relazione Annuale 2022'.

964 Tony Saggars, 'An Assessment of the Extent of Albanian(-Speaking) Organised Crime Groups Involved in Drug Supply in the European Union: Characteristics, Role and the Level of Influence' (Lisbon: EMCDDA, November 2019).

965 DCSA, 'Relazione Annuale 2022'.

966 DCSA, 57.

967 From 1999 to 2017, quantities of cocaine seized in Albania annually were under 30 kg. In 2018, 631 kg of cocaine were seized, followed by 145 kg in 2019. UNODC, "Albania, Responses to the Annual Report Questionnaire 1999-2019."

968 Scaturro and Kemp, "Portholes: Exploring the Maritime Balkan Routes", 4.

969 Ibid.

970 References to Kosovo shall be understood to be in the context of Security Council resolution 1244 (1999).

971 References to Kosovo shall be understood to be in the context of Security Council resolution 1244 (1999).

972 Isobel Van Hagen, 'Kosovo Authorities Seize a Record 400 Kilograms of Cocaine', OCCRP, 20 May 2021.

973 UNODC, 'Albania, Responses to the Annual Report Questionnaire 2021'.

974 UNODC and Europol, 'Cocaine Insights 1'.

975 Ibid.

976 UNODC, 'Drugs Monitoring Platform'.

977 UNODC and Europol, 'Cocaine Insights 1'.

978 Vlada Crne Gore – Biro za operativnu koordinaciju, 'SOCTA 2021: Procjena Opasnosti Od Teškog i Organizovanog Kriminala u Crnoj Gori' (Podgorica, March 2022).

979 Samir Kajosevic, 'Drug Crime Casts Long Shadow over Montenegrin Coast', *Balkan Insight*, 26 October 2022.

980 Michaela Reibenwein, 'US agents hunt down alleged drug lord in Austria', *Kurier*, 9 October 2022.

981 See Chapter *Criminal actors*, in this report.

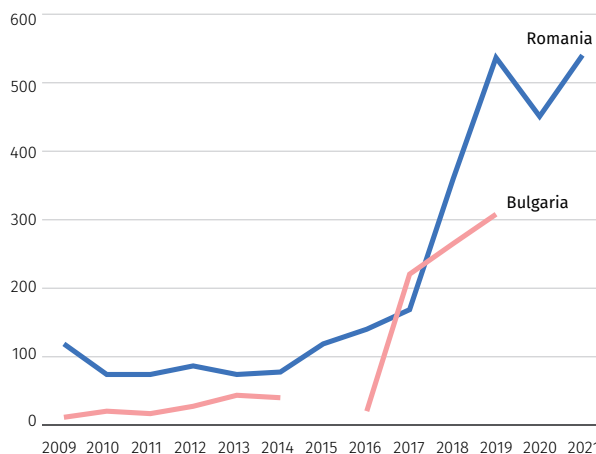
cocaine seizure in the country's history took place in 2021, when police found 575 kg of cocaine hidden in a container with bananas from Ecuador that had arrived in the port of Ploče.⁹⁸²

On the Black Sea shore, Bulgaria and Romania have container ports where, according to open sources, cocaine arrives to be moved to Western and Central Europe by land or, occasionally, via the Danube River; the latter also being used to smuggle cigarettes, oil and migrants, and to traffic cannabis.⁹⁸³ In January 2022, Colombian police seized a ton of cocaine from a shipment of bovine skins bound for Bulgaria.⁹⁸⁴ Moreover, both Bulgaria and Romania show an upward trend in the number of seizures since 2016-2017, which may signal a growing domestic market for cocaine. Indeed, Romania's authorities noted that domestic cocaine consumption was on the rise in 2021, especially among the young and high-income population.⁹⁸⁵

In 2021, Romania reported a significant increase in seizures of cocaine, from 43 kg in 2020 to 875 kg in 2021.⁹⁸⁶ Large quantities were also reported in previous years, including over a ton of 90 per cent pure cocaine from a capsized boat in the Danube Delta, seized in 2019.⁹⁸⁷ In July 2022, a cocaine secondary extraction site was discovered for the first time in Romania. According to Romanian law enforcement, the site was organized in a rented rural cottage by two Romanian nationals and one Israeli. Cocaine camouflaged in coffee was brought on a passenger plane by two Colombian nationals familiar with the chemical extraction process. At the site, authorities seized 148 grams of non-crystallized cocaine and 5 kg of coffee mixed with cocaine.⁹⁸⁸ The same month, Romanian law enforcement discovered 610 bags of synthetic flower soil mixed with cocaine in a shop selling ceramic pottery from Tunisia. According to media sources, the drugs originated in Colombia and were shipped to Romania through the Port of Constanța, having made a stopover in Morocco, and, based on law enforcement information, the separation was to be conducted in the same clandestine laboratory described previously.⁹⁸⁹

In a 2021 report, Romanian authorities noted that the port of Constanța remains an alternative for introducing large quantities of cocaine into Europe to avoid stricter

Number of seizures of cocaine in Bulgaria and Romania, 2010–2021



Note: Data for Bulgaria for 2015, 2020 and 2021 are not available.
Source: UNODC, responses to the annual report questionnaire.

controls in Western European ports.⁹⁹⁰ The involvement of traffickers both from Romania and from the Balkans is increasingly noticeable in Romania.⁹⁹¹ Moreover, Romanian law enforcement points out the increasing levels of collaboration between criminal networks, versus the creation of *ad hoc* temporary alliances to satisfy a specific need. Criminal networks become increasingly “poly-trafficking” by using the infrastructure developed for trafficking synthetic drugs and heroin to transport cocaine, often under a disguise of legitimate commercial activity.⁹⁹²

According to Romanian authorities, the growing convergence of trafficking routes has allowed traffickers to connect the heroin production areas of Afghanistan, Pakistan and Iran (Islamic Republic of) with the main points of entry into Europe for large quantities of cocaine from South America, but also with production areas of synthetic drugs (such as the Netherlands), the latter drug types having a very high retail price in the Middle East and in Arab states.⁹⁹³

Prior to the start of the armed conflict in February 2022, Ukraine also saw increased levels of cocaine quantities seized in 2019 (837 kg) and 2020 (166 kg), in contrast with annual amounts of less than 50 kg seized in the country in the previous years.⁹⁹⁴ A law enforcement operation in which 400 kg of cocaine were seized in Kyiv in 2019 shows the multinational nature of criminal groups that operate in Ukraine; among the detainees were citizens of the United Kingdom, the Netherlands, the Russian Federation, Türkiye and Ukraine.⁹⁹⁵ The increase in cocaine seizures was partly a result of relatively large seizures in Ukraine's southern ports, from where the route would typically fol-

982 UNODC, 'Drugs Monitoring Platform'.

983 Ruggero Scaturro and Walter Kemp, "Portholes: Exploring the Maritime Balkan Routes" (GI-TOC, July 2022), 46.

984 National Police of Colombia, 'Frustramos El Envío de Una Tonelada de Cocaína Que Iban Dentro de Pieles de Bovinos Con Destino al País de Bulgaria', 8 January 2022.

985 DIICOT, "Raport de activitate 2021" (Direcția de Investigare a Infrațiunilor de Criminalitate Organizată și Terorism), 35.

986 UNODC, 'Romania, Responses to the Annual Report Questionnaire 2021', n.d.

987 UNODC, 'Drugs Monitoring Platform'.

988 DIICOT, 'Comunicat de presa 12.07.2022', *Direcția de Investigare a Infrațiunilor de Criminalitate Organizată și Terorism* (blog), 12 July 2022.

989 Marian Pavalasc, 'Cum folosesc cartelurile columbiene Portul Constanța pentru a aduce tone de droguri în Europa', *Europa Liberă România*, 2 August 2022.

990 DIICOT, "Raport de activitate 2021", 33.

991 Ibid., 35.

992 Ibid., 33.

993 Ibid., 32.

994 UNODC, 'Ukraine, Responses to the Annual Report Questionnaire 1999-2020', n.d.

995 UNODC, 'Drugs Monitoring Platform'.

low to Western Europe by land, while smaller quantities remained in the country to supply the domestic market.^{996 997} In 2019, Ukrainian police seized 257 kg of cocaine concealed in bananas that arrived at the port of Yuzhny from Venezuela (Bolivarian Republic of).⁹⁹⁸ The same year, about 200 kg of cocaine were discovered in the same port, dissolved in construction paint from Colombia.⁹⁹⁹

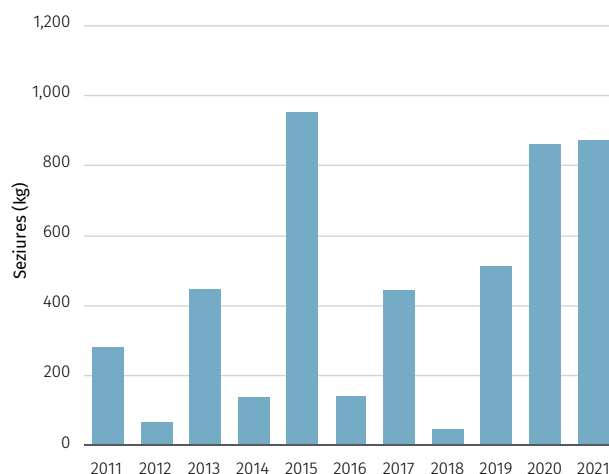
Ukraine's ports have been possibly used by foreign criminal groups to diversify the trafficking routes eastward, away from law enforcement controls at Western European ports. For example, according to media coverage of a press statement by the Ukrainian Ministry of Internal Affairs and the State Border Service, in August 2021, two shipments of cocaine (60 kg each) that belonged to 'Ndrangheta were seized in Odessa and Yuzhny sea ports. During the operation, a Ukrainian, an Albanian and a Romanian national were detained.¹⁰⁰⁰ Although some of the cocaine that arrives at Ukrainian ports may potentially be bound for the Russian Federation, there is no clear evidence of this route.

As conflicts may disrupt and shift drug trafficking routes,¹⁰⁰¹ it is likely that some flows through Ukraine might eventually be diverted to other Black Sea ports, such as those of Romania and Bulgaria. Moreover, the growing supply of cocaine transiting Türkiye adds another stream through the Balkans. With Balkan criminal actors more active in the European cocaine market than ever, the Balkan route is likely to continue growing in importance.

Expanding traffic of cocaine to the Russian Federation is performed by fluid networks of criminal actors from diverse ethnic backgrounds

There are signs that cocaine has become more available in the Russian Federation in recent years. Cocaine used to be distributed mainly in a few major cities (such as Moscow, St. Petersburg and Ekaterinburg),¹⁰⁰² as confirmed also in media sources.¹⁰⁰³ In contrast, by 2018, the drug was sold in all subregions across the country.¹⁰⁰⁴ The Russian Federation reported one clandestine cocaine-type processing facility detected in 2020.¹⁰⁰⁵ In terms of quantities, seizures of cocaine in the country increased

Seizures of cocaine in the Russian Federation, 2011–2021



Source: UNODC, responses to the annual report questionnaire.

six-fold between 2016 and 2021, from 144 kg to 872 kg.¹⁰⁰⁶ One international expert indicated that the size of individual cocaine seizures in the Russian Federation has also increased, as commercial sea containers began to be used more often for trafficking.¹⁰⁰⁸ Previously, individual quantities seized were typically under 50 kg, trafficked mostly from Western Europe by land in trucks or private cars, or by air passengers from South America.¹⁰⁰⁹

Ecuador has been traditionally a common country of departure for significant quantities of cocaine seized in the Russian Federation,¹⁰¹⁰ especially at the port of St. Petersburg. A search of sentencing documents included in an open source judicial database¹⁰¹¹ of court cases occurring in the Russian Federation yielded 4 cases referring to the importation of cocaine by sea, and all four took place in the port of St. Petersburg.¹⁰¹² From 2013 onwards, open sources documented at least six detections of attempted trafficking of cocaine into St. Petersburg, of which five displayed known connections to Ecuador.^{1013 1014}

As with countries in South-Eastern Europe, cocaine is often concealed in shipments of bananas. For example, in 2020 an operation of the Russian Security Service,

996 EMCDDA, "Звіт щодо наркотичної та алкогольної ситуації в Україні за 2020 рік (за даними 2019 року)" (Kyiv: EMCDDA, 2020), 33.

997 Interview #31, interview by UNODC, 2022.

998 National Police of Ukraine, "На Одещині вилучили рекордну партію кокаїну вартістю понад 50 мільйонів доларів США", 21 March 2019.

999 Корреспондент.net, "СБУ Нашла в Порту Одессы Кокаин, Растворенный в Краске", *Korrespondent.Net*, 13 June 2019.

1000 Oksana Zhitnyuk, "В Одесском Порту Нашли "Товар" Итальянской Мафии. В Банахах Был Кокаин На \$10 Млн – Видео", *Liga*, 16 August 2021.

1001 UNODC, "World Drug Report 2022, Booklet 2" (Vienna: UNODC, 2022), 68.

1002 Interview #42, interview by UNODC, 2022.

1003 Ilya Koritskiy, "Бананы с кокаином", *МК*, 28 May 2014.

1004 Interview #42.

1005 UNODC, "Russian Federation, Responses to the Annual Report Questionnaire 2020", n.d.

1006 Data for 2021 are preliminary.

1007 UNODC, "Russian Federation, Responses to the Annual Report Questionnaire 2016-2021", n.d.

1008 Interview #42.

1009 Ibid.

1010 Ecuador was mentioned 9 times in the responses to the UNODC Annual Report Questionnaires from 2007 to 2021 by the Russian Federation.

1011 ООО «ПИК-пресс», "Судебные Решения РФ", Open source judicial database, СудебныеРешения.рф, n.d.

1012 Case numbers: 1-48/2014; 1-318/2015; 2-22/2015; 22-4393/2017; 2-10/2018. See Дело №1-48/2014 (sentence), No. 1-48/2014 (Kirovskiy District Court of St. Petersburg 9 April 2014). ; Дело №1-318/2015 (sentence), No. 1-318/2015 (Kirovskiy District Court of St. Petersburg 28 April 2015). ; Дело №2-22/2015 (sentence), No. 2-22/2015 (St. Petersburg City Court 19 January 2015). ; Дело №22-4393/2017 (appellation), No. 22-4393/2017 (St. Petersburg City Court 4 December 2017). ; Дело №2-10/2018 (sentence), No. 2-10/2018 (St. Petersburg City Court 19 February 2018).

1013 UNODC, "Drugs Monitoring Platform".

1014 Stanislava Simonova, "Брикеты с зельем шли по морю", *MVD Media*, 13 September 2021.

conducted in collaboration with foreign law enforcement, resulted in the dismantlement of a cocaine trafficking scheme and in three seizures amounting to at least 330 kg of cocaine, including 295 kg seized in the Moscow region in November.¹⁰¹⁵ More recently, in September 2022, 50 kg of cocaine were seized among Ecuadorean bananas in the port of St. Petersburg.¹⁰¹⁶ While some of the cocaine that reached St. Petersburg is likely intended for the domestic market, as pointed out in media reports, the port's proximity to the border allows for some of the cocaine to follow by land to Western and Central Europe.¹⁰¹⁷

Some cocaine reaches the Russian Federation from Western and Central Europe by land, mostly via Belarus, as traffickers exploit the open border of the Customs union agreement between the two countries. According to a Belarus law enforcement source, the actors in control of this transit route are predominantly Lithuanian, Serbian and Russian nationals (in order of frequency) who act through logistics companies that deliver goods from Western and Central Europe to the Russian Federation. These actors, known to have links to western European criminal groups (such as Spanish and Belgian), do not "own" the drugs but rather provide logistics services by concealing them among legal goods in containers or in a truck structure and smuggling them into the Russian Federation from western European ports.¹⁰¹⁸ ¹⁰¹⁹ Sometimes, cocaine enters Belarus from Baltic states, especially Lithuania.¹⁰²⁰ ¹⁰²¹

According to one international expert, there are two eastward streams from Western and Central Europe to the Russian Federation, which are characterized by the presence of a diverse set of actors who enter *ad hoc* opportunistic alliances. Serbians are the main traffickers on the route from Western and Central Europe eastward, via Balkan countries and Belarus, while cooperating with Albanian-speaking groups to coordinate the logistics. Albanian-speaking actors, in turn, cooperate closely with Lithuanian-based actors to traffic cocaine to the Russian Federation via the Baltic states.¹⁰²² Smaller quantities of cocaine transiting Belarus are trafficked by individual couriers who are predominantly Russian nationals, in the case of passenger vehicles; and Belarusian nation

als hired by Russian criminal groups, in the case of air passengers.¹⁰²³

Direct trafficking from source countries to the Russian Federation seems to be organized by a fluid set of actors of various nationalities. It can be Russian nationals with access to special channels affording logistical advantages, for example in a case involving almost 400 kg of cocaine smuggled via Argentina in 2016.¹⁰²⁴ Or it can be Serbian groups; one judicial case describes how, around 2011, a group of Serbian nationals trafficked 4.5 kg of cocaine on a bulk carrier from Port Bolivar in Ecuador.¹⁰²⁵ There are also cases where Ecuadorean traffickers have organised trafficking operations to the Russian Federation themselves, without resorting to intermediaries. In 2018, for example, an Ecuadorean-Spanish national was detained in St. Petersburg port after having organised a "dry run" shipment of 7 kg of cocaine in a sea container. Prior to his detention, the supplying Ecuadorean OCG with operations in Spain was planning to traffic 50 kg of cocaine weekly to the Russian Federation.¹⁰²⁶

Prior to the armed conflict in Ukraine, the domestic market for cocaine was expanding both in the Russian Federation and Ukraine

On the Eastern European markets,¹⁰²⁷ cocaine remains an expensive drug that only a limited group of consumers can afford. Cocaine consumption in Belarus, Republic of Moldova, and Ukraine appears to be limited due to its high price. In the case of Belarus, for example, cocaine is not readily available; small quantities of the drug are typically pre-ordered and trafficked back from the Russian Federation to supply the domestic market.¹⁰²⁸ It should be noted however, that circles of cocaine users in contexts where cocaine is an expensive "elite" drug tend to be very closed and hardly accessible for health providers. Therefore, data on cocaine use in Eastern Europe may not always fully capture the phenomenon of drug use.

Yet, as described above, cocaine availability in the Russian Federation may have increased in recent years. Due to its high price and the high availability of synthetic drugs, cocaine in the Russian Federation is typically consumed by high-income individuals (including business people, politicians, wealthy youth), mostly in a recreational setting and via insufflation, as pointed out by media sources.¹⁰²⁹ However, the current socioeconomic

1015 UNODC, 'Drugs Monitoring Platform'.

1016 Ibid.

1017 Evgeniy Kolesnikov, 'Счет - на тонны. Кокаин в Петербург идет уже 30 лет', *Novye Izvestiya*, 12 June 2019.

1018 Interview #35, interview by UNODC, 2022.

1019 Lithuanian-based logistics providers also distribute other drugs. See, for example: Redacción, 'Frustrado en Almería un transporte por carretera de droga oculta en el interior de un semirremolque frigorífico', *Diario de Almería*, 14 July 2022.

1020 ABW, 'Дальнобойщик Получил 12 Лет За Три Килограмма Кокаина, Которые Вез Из Франции в Россию Через Беларусь', *ABW*, 21 April 2021.

1021 Lithuania also mentioned the Russian Federation as a destination for cocaine in the Annual Report Questionnaire from 2017 to 2019. UNODC, 'Lithuania, Responses to the Annual Report Questionnaire 2017-2019', n.d.

1022 Interview #42.

1023 Interview #35.

1024 UNODC, 'Drugs Monitoring Platform'.

1025 Дело №1-318/2015 (sentence).

1026 UNODC, 'Drugs Monitoring Platform'.

1027 Eastern Europe includes Belarus, Republic of Moldova, the Russian Federation and Ukraine.

1028 Interview #35. The law enforcement source also mentioned that cocaine is often mixed with mephedrone at the retail distribution stage.

1029 E1.RU, 'Екатеринбург кокаиновый: высокопоставленный полицейский рассказал E1.RU, где прятали наркотики в клубе "Пушкин"', *E1.RU*, 19 June 2014.

situation¹⁰³⁰ in the country may eventually affect the purchasing power of some cocaine consumers who may opt for cheaper synthetic alternatives.

A similar consumer profile was observed in Ukraine,¹⁰³¹ where cocaine was limited to certain groups of recreational users with high purchasing power (such as students of elite universities, female workers of elite escort services, politicians, and business people).^{1032 1033} ¹⁰³⁴ One expert noted some changes in cocaine consumption patterns stating that, during 2000-2014, cocaine was an “elite drug”, sold exclusively offline by “mono-dealers” (dealers who sell only one type of drug) through personal contacts. In the wake of the 2014 political crisis, many traditional cocaine consumers (members of the business and political elite) emigrated, leaving a surplus of cocaine stocks in the country. This, among other factors, may have led to the gradual “democratisation” of cocaine distribution; dealers who sold other drugs also received access to cocaine, which may have led to the spread of cocaine use to wider segments of the population (including top managers, youth in the night clubs, etc).¹⁰³⁵ Indeed, treatment data suggest a recent increase in use, as the number of registered patients in treatment increased sharply from 40 in 2018 to 346 in 2019.¹⁰³⁶ It is worth mentioning that the aforementioned jump in seizures of cocaine also occurred in 2019, but it is unclear if the two phenomena (increase in seizures and in treatment) are related.

Nevertheless, one expert noted that cocaine did not become a street drug in Ukraine, as there was a significant competition from cheaper synthetic drugs, such as mephedrone and its derivatives (e.g., alpha-PVP, 2-CB).¹⁰³⁷ The overall evidence on cocaine availability in Ukraine before the current conflict with the Russian Federation is not conclusive. On the one hand, cocaine was offered on online distributing platforms across all regions of the country.¹⁰³⁸ On the other hand, some public health professionals stressed that other drugs were often sold online as cocaine, for branding purposes.¹⁰³⁹ Real cocaine, in contrast, was distributed almost exclusively offline through personal contacts.¹⁰⁴⁰

In sum, cocaine use in Eastern Europe is generally limited to specific groups of high-income consumers due to its high price. While the domestic market for cocaine is likely to have been expanding in the Russian Federation in recent years, the economic impact of the armed conflict in Ukraine and sanctions¹⁰⁴¹ may disrupt consumption habits of cocaine users. In the case of Ukraine, which also showed signs of an expanding cocaine market prior to February 2022, recreational settings, typically associated with cocaine use, are currently not a reality. Cocaine consumption in a humanitarian setting, however, remains to be studied.

1030 World Bank, ‘Social Protection for Recovery’, Europe and Central Asia Economic Update (Fall) (Washington, DC: World Bank, 2022).

1031 Information on cocaine consumption patterns in Ukraine is based on four interviews with Ukraine’s public health professionals conducted by UNODC virtually in February 2022, prior to the armed conflict with the Russian Federation.

1032 Interview #3, interview by UNODC, 2022.

1033 Interview #4, interview by UNODC, 2022.

1034 Interview #6, interview by UNODC, 2022.

1035 Interview #4.

1036 EMCDDA, “Звіт щодо наркотичної та алкогольної ситуації в Україні за 2020 рік (за даними 2019 року)” (Kyiv: EMCDDA, 2020), 14.

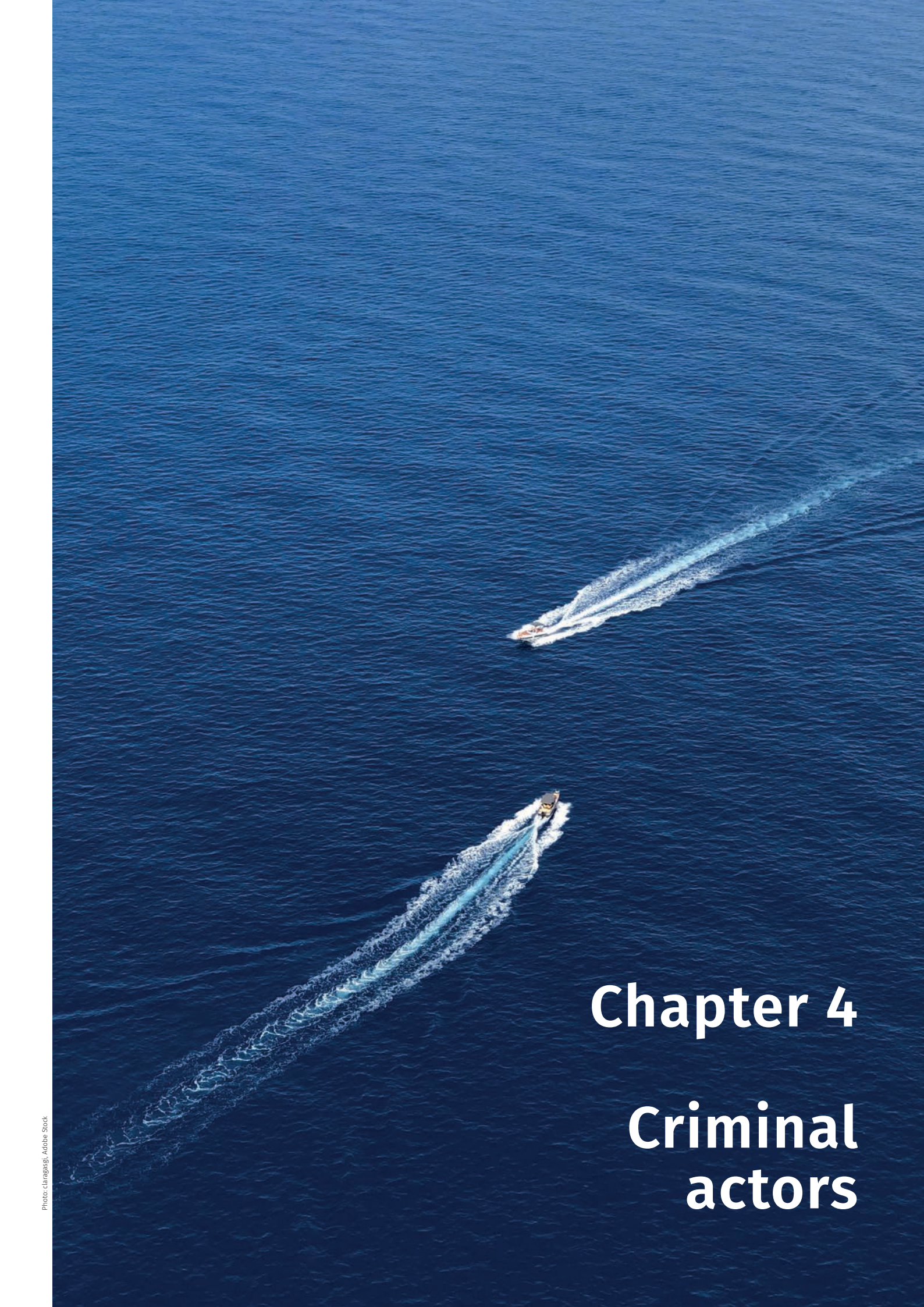
1037 Interview #4.

1038 Interview #31.

1039 For example, mephedrone can be sold online as „Chinese cocaine” (Interview #3; Interview #4).

1040 Interview #4.

1041 World Bank, ‘Social Protection for Recovery’.



Chapter 4

Criminal actors

Criminal actors

The United Nations Convention against Transnational Organized Crime (UNTOC) defines an *organized criminal group*¹⁰⁴² as “a structured group of three or more persons, existing for a period of time and acting in concert with the aim of committing one or more serious crimes or offences established in accordance with this Convention, in order to obtain, directly or indirectly, a financial or other material benefit”.¹⁰⁴³ With this rather broad characterization, there is a variety of groups involved in cocaine trafficking globally. Organized criminal groups (OCGs) vary across a range of dimensions, which can be consequential for policy makers and law enforcement.

With the global market for cocaine booming,¹⁰⁴⁴ the related trafficking activity is likely to involve a growing number of diverse actors, from high-profile large-scale criminal organizations to individual traffickers working in association with a small number of people. For some of these actors, cocaine trafficking is just one activity among a broader criminal repertoire. For others, it represents the main source of revenue and determines the OCG’s *modus operandi*. This chapter provides an overview of the main actors involved in cocaine trafficking, their geographical reach, structure, and interaction with other actors.

Geography and types of actors involved in cocaine trafficking

The cocaine supply chain is typically structured according to the geography of production and consumption of cocaine products. OCGs involved in cocaine trafficking can be roughly divided into those operating at origin (production stage), globally (cross-border trafficking operations) and at destination (wholesale and retail distribution).¹⁰⁴⁵ These actors vary significantly in their geographical reach. Some criminal organizations are present on multiple continents, while others are limited to one region, and others operate within one country. Cocaine-related activities may be conducted at the domestic level (across or within parts of a single country); in border areas (but mainly based in one country); at the regional level (in two or more countries, beyond

border areas, within one geographical region); or at the interregional level (in more than one geographical region).

In the earlier days (1980s-1990s) of large-scale cocaine trafficking, the entire drug supply chain tended to be dominated by some big players, the notorious Colombian organized crime groups,¹⁰⁴⁶ later substituted by Mexican drug trafficking organizations. Currently, instead of controlling the whole supply chain, most trafficking organizations only manage a certain part of it (a specific stage or a function). While fragmentation of the supply chain is not a new phenomenon, experts interviewed from different regions agree that it has become increasingly common, and that the actors involved have become increasingly specialized in specific tasks required at different stages.

In line with the general trend of the organized crime landscape observed in the European Union,¹⁰⁴⁷ global cocaine trafficking relies heavily on service providers and brokers. Major OCGs (those who “own” the drug) subcontract smaller service providers to carry out certain jobs. These service providers have become increasingly specialized in areas such as transportation, money laundering, corruption of state agents, etc. They do not typically own the drug but only manage it during a specific stage of the supply chain. These specialized groups charge the “owners” of the drug a fee for services rendered. These actors may be involved in trafficking different types of drugs (such as cocaine and cannabis) and can service different clients.^{1048 1049 1050}

OCGs involved in cocaine trafficking also vary in terms of their main sources of revenue.¹⁰⁵¹ For example, some groups traffic multiple drugs, while others are active in additional criminal markets, such as illegal mining, arms trafficking or trafficking in persons, among others. While OCGs are generally driven by an aim to extract profit from their illicit activities, some groups are entirely focused on the illicit trade (business-oriented), while others also seek power over a certain territory (governance-oriented).

1042 In the present report, the terms “group”, “organization” and “network” are used interchangeably. The tendency, however, is to refer to loosely structured criminal entities as “networks”. “Group” and “organization” refer to criminal entities with more clearly delineated structure and identity, where an “organization” would be larger than a “group”.

1043 United Nations, “United Nations Convention Against Transnational Organized Crime and The Protocols Thereto,” Article 2(a) (2004).

1044 UNODC, ‘World Drug Report 2022, Booklet 4’ (Vienna: UNODC, 2022).

1045 UNODC and Europol, ‘The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All?’, 1, Cocaine Insights 1 (Vienna: UNODC, September 2021).

1046 Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC) - Sistema Integrado de Monitoreo de Cultivos Ilícitos (SIMCI), “Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021” (Bogotá: UNODC-SIMCI, October 2022), 62-63.

1047 EUROPOL, “European Union Serious and Organised Crime Threat Assessment,” EU SOCTA, 2021, 2.

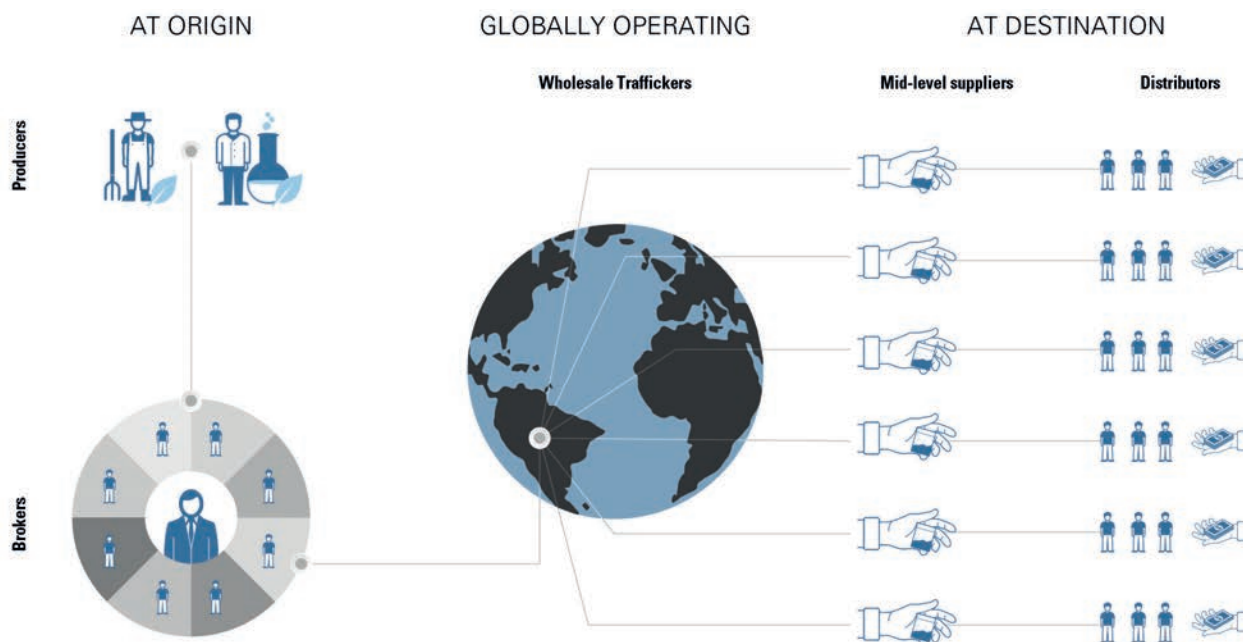
1048 Interview #19, interview by UNODC, 2022.

1049 Interview #10, interview by UNODC, 2022.

1050 Interview #38, interview by UNODC, 2022.

1051 Not all criminal activities perpetrated by a criminal group constitute a source of revenue. For example, homicide and sexual violence can be employed as tools to influence population through intimidation, rather than to extract profit.

Type of actors, and their roles, in the cocaine supply chain



Source: UNODC and EUROPOL, “The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All,” Cocaine Insights 1 (Vienna: UNODC, September 2021)

ed).¹⁰⁵² The presence of OCGs on multiple markets has important implications for communities; typically, these are territory-based (governance-oriented) OCGs that employ strategies aimed at criminal governance (such as dispute settlement, protection, racketeering, intimidation, debt recovery or enforcement of criminal groups agreements).

Actors in source countries
Colombia: a myriad of actors

In Colombia, the country accounting for the largest share of cocaine manufacture, the illicit economy is the basis for operations of a myriad of criminal actors, many of whom emerged out of a decades-old political armed conflict. Demobilization of the country’s largest guerrilla group, the *Fuerzas Armadas Revolucionarias de Colombia (FARC)* following the 2016 Peace Agreement led to a greater number of various splinter groups vying for control over the cocaine supply chain.¹⁰⁵³ This complex set of non-state armed actors includes the *FARC* dissidents, active insurgencies (e.g., *Ejército de Liberación Nacional*), drug trafficking groups (e.g., the *Clan del Golfo*, *Los Pachencas*) and numerous smaller criminal groups that control the production and trafficking of cocaine to vary-

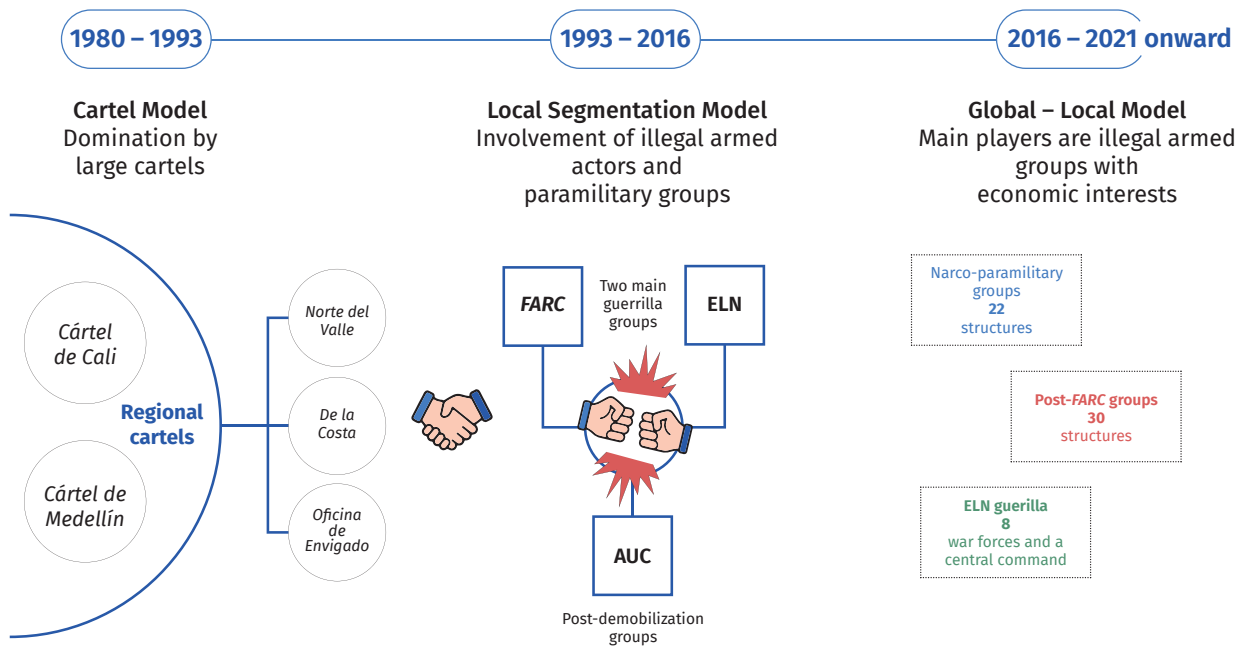
ing degrees across different regions of the country.^{1054 1055}

Increases in the area under coca bush cultivation and cocaine manufacturing have taken place in the context of the restructuring and regrouping of these criminal actors.¹⁰⁵⁶ Firstly, as pointed out in open sources, over the last two years, there has been a tendency towards integration and consolidation of some of these criminal actors, namely the *FARC* dissident groups.

From 30 splinter groups, there are now two factions encompassing about 38 dissident groups spread across coca cultivating areas.¹⁰⁵⁷ Both factions have raised the idea of “reviving” the secretariat model.¹⁰⁵⁸ In August 2019, Iván Márquez, a former member of the *FARC* secretariat, announced the creation of the “*segunda marquetalia*” after withdrawing from the peace process and returning to arms. The consolidation of a new version of the secretariat in a scenario where multiple groups participate in drug trafficking,¹⁰⁵⁹ power is highly fragmented

1052 Paolo Campana and Federico Varese, ‘Organized Crime in the United Kingdom: Illegal Governance of Markets and Communities’, *The British Journal of Criminology* 58, no. 6 (2018): 1381–1400.
1053 The *FARC* controlled a proportion of the area under coca bush cultivation and regulated access to the cocaine supply available to brokers and international traffickers. The peace agreement resulted in the end of *FARC*’s integrated command structure and the emergence of various splinter groups exercising control over different regions and the cocaine production therein. See UNODC and EUROPOL, “The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All,” 7-8.

1054 Indepaz, ‘Los focos del conflicto en Colombia: Informe sobre presencia de grupos armados’ (Bogota: Instituto de Estudios para el Desarrollo y la Paz, 2021).
1055 Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC) - Sistema Integrado de Monitoreo de Cultivos Ilícitos (SIMCI), ‘Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021’.
1056 Ibid.
1057 According to open sources, the first faction has about 2,200 armed members and holds territorial influence in the south of the country (departments of Meta, Caquetá, Guaviare, Putumayo, Vaupés and Amazonas). The second faction is less articulated, has about 650 armed members and limited territorial influence due to its geographical spread across Colombia. See Fundación Ideas para la Paz (FIP), ‘Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque’ (Bogotá, May 2022), 20-22.
1058 ‘Segunda Marquetalia: Disidencias, rearmados y un futuro incierto’, *Fundación Ideas para la Paz (FIP)*, 7 July 2021.
1059 UNODC and Europol, ‘Cocaine Insights 1’.



Note: Initially, during the 1980-1990s, coca bush cultivation, cocaine manufacturing and cocaine trafficking were dominated by two to six large criminal organizations (such as the *Cártel de Cali*, the *Cártel de Medellín*, the *Cártel del Norte del Valle*, and the *Cártel de la Costa*). At the same time, illegal armed actors, – including three main insurgent groups (*Fuerzas Armadas Revolucionarias de Colombia (FARC)*, *Ejército de Liberación Nacional (ELN)* and *Ejército Popular de Liberación (EPL)*) and paramilitary groups (such as the *Autodefensas Unidas de Colombia (AUC)*) – participants of the Colombia’s internal political conflict, increased their reliance on illicit economies, including cocaine trafficking, to finance their political agenda. After the demobilization of the *FARC* in 2016-2017, the control over coca/cocaine production areas has been distributed among the *ELN*, the *FARC* dissident groups, and other armed actors (e.g., the *Clan del Golfo*, the *Puntilleros*, the *Pelusos*, the *Rastrojos*).
Source: UNODC-SIMCI, “Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021” (Bogotá: UNODC-SIMCI, October 2022), 56-58.

and political discourse is worn out, constitutes a threat to the implementation of the peace agreements. Unlike the *FARC* insurgency, which used illegal activities to finance its political project of confronting the State, the dissident groups’ main objectives are related to having control over the illicit markets, mainly cocaine trafficking.¹⁰⁶⁰ The consolidation of these criminal actors, however, has not resulted in a cohesive and vertical chain of command; instead, each faction resembles a federation of groups where local warlords establish their own rules in their controlled territories.¹⁰⁶¹

Secondly, the *Ejército de Liberación Nacional (ELN)* has succeeded to increase its military power and expand its territorial presence by occupying the areas left by the *FARC* after the demobilization.¹⁰⁶² In addition, as pointed out in open sources, the *ELN* would seem to have expanded its presence to Venezuela (Bolivarian Republic of).^{1063 1064} As analysts indicate, in areas where it has consolidated territorial control (e.g., Arauca and Catatumbo), the *ELN* is less inclined to employ violent

tactics in its relationship with the communities. In turn, in areas disputed with other armed actors, such as the *Clan del Golfo*, the *ELN* tends to base its criminal governance on coercion and violence.¹⁰⁶⁵ The *ELN*’s involvement in coca bush cultivation, cocaine manufacturing, illegal mining and illegal logging reportedly also varies across its geographic areas of influence. While in some areas (e.g., Chocó, Cauca, Catatumbo) the *ELN* groups engage in activities related to cocaine trafficking, in others (e.g., Arauca), they adopt a position against coca bush cultivation.¹⁰⁶⁶

Finally, after the demobilization of the *FARC*, territorial control over cocaine trafficking routes was disputed by illegal armed actors such as the *Clan del Golfo*, the *Puntilleros*, the *Pelusos*, the *Rastrojos*, among others.¹⁰⁶⁷ However, as indicated by open sources, over the past four years, clashes with rivals and aggressive action by state forces led to the eventual weakening or dismantling of most of these actors. This has in turn resulted in a more localized and fragmented criminal landscape, in which smaller actors become coopted or form alliances with

1060 Fundación Ideas para la Paz (FIP), ‘Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque’, 20.
 1061 Fundación Ideas para la Paz (FIP), 22-23.
 1062 Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC) - Sistema Integrado de Monitoreo de Cultivos Ilícitos (SIMCI), “Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021,” 59.
 1063 Fundación Ideas para la Paz (FIP), 24.
 1064 Venezuela Investigative Unit, ‘Venezuela and the ELN’s Love-Hate Relationship with Drug Trafficking’, *InSight Crime*, 3 October 2022.

1065 Fundación Ideas para la Paz (FIP), 25.
 1066 Fundación Ideas para la Paz (FIP), 25.
 1067 Defensoría del Pueblo, ‘Informe Especial: “Economías Illegales, Actores Armados y Nuevos Escenarios de Riesgo En El Post-Acuerdo’ (Bogotá: Defensoría Delegada para la Prevención de Riesgos de Violaciones a los Derechos Humanos y el DIH; Sistema de Alertas Tempranas (SAT), 2018), 10, 63.

more powerful groups.¹⁰⁶⁸ Currently, there is a myriad of criminal cells, most of which have limited territorial presence (community- or city-level). Criminal groups that act in the smallest territorial units (e.g., neighbourhood-based) use their local knowledge to provide services for larger groups. They are believed to work with multiple groups and may easily shift alliances.¹⁰⁶⁹ In this highly complex context, the *Autodefensas Gaitanistas de Colombia*, also known as the *Clan del Golfo* or the *Urabeños*, is the criminal organization with the largest territorial reach in Colombia.¹⁰⁷⁰ It is also alleged in the media to export about 20 tons of cocaine per month to at least 28 countries,¹⁰⁷² facilitated (as reported in open sources) by its partnerships with Mexican organized criminal groups (the *Cártel de Jalisco Nueva Generación* and the *Cártel de Sinaloa*), Italian mafias (*Ndrangheta* and *Cosa Nostra*), and criminal networks from the Balkans.¹⁰⁷³ According to open sources, the *Clan del Golfo* operates mainly along the Pacific and Caribbean coasts of Colombia, controlling maritime cocaine trafficking corridors to the United States. In addition, the vicinity of Panama gives it control over cocaine flows directed north via the Central American land corridor, while the seaport of Cartagena provides a strategic location to export cocaine across the Atlantic.¹⁰⁷⁴ Open sources further indicate that the *Clan del Golfo* also has established links with several Panama-based trafficking groups that provide logistics services for cocaine shipments from Colombia,¹⁰⁷⁵ while, on the Caribbean coast of Colombia, including the port of Cartagena, the *Clan del Golfo* is reportedly challenged by *Los Pachencas*, a smaller illegal armed group with its operational base in Sierra Nevada (Colombia) and significant influence over the Caribbean cocaine trafficking routes.¹⁰⁷⁶ Official reports claim that *Los Pachencas* control some cocaine trafficking routes to the United States, to some Asian countries, to the Dominican Republic and to Europe.¹⁰⁷⁷

According to open sources, the *Clan del Golfo* organization has a mixed networked structure, which allows it to have a presence in at least 12 departments of the coun-

try.¹⁰⁷⁸ In some departments, mainly in the northwest of Colombia, the *Clan del Golfo* owns numerous cells, which have different degrees of autonomy from central command and impose territorial control over illicit markets, including cocaine production sites, illegal mining and extortion.¹⁰⁷⁹ In other departments, the organization sub-contracts or forms alliances with smaller local criminal groups.¹⁰⁸⁰

Accordingly, the *Clan del Golfo* central command would seem to consist of a group of leaders¹⁰⁸¹ based in the Urabá area who independently manage their own trafficking routes.¹⁰⁸² The *Clan del Golfo* regulates coca bush cultivation and the market for cocaine base (including production of cocaine base), and also provides protection for cocaine processing sites. Territorial control over coca bush cultivation areas and trafficking corridors inside Colombia allows the *Clan del Golfo* to provide services (such as escorting shipments of cocaine, providing storage and dispatch services) for other traffickers.¹⁰⁸³ As pointed out in the media, after the capture of the main leader of the *Clan del Golfo*, Otoniel, in October 2021, the organization may fragment as its remaining commanders are likely to vie for the leadership position.¹⁰⁸⁴ Nevertheless, analysts note that, as of early 2022, there were no signs of violent rivalry between Otoniel's successors.¹⁰⁸⁵

It has been posited that the fragmentation of the criminal landscape in Colombia after the breakdown of the *FARC's* monopoly led to a proliferation of criminal actors who do not have the capacity to wield enough control over the cocaine supply chain. Colombian OCGs used to be able to arrange large-scale shipments for foreign clients on previously agreed terms; foreign actors, meanwhile, used to send "emissaries" to observe and control the fulfilment of contracts at ports and border crossings. After the Peace Agreement, the atomization of criminal actors and the vacuum in territorial control imposed constraints on foreign buyers' capacity to negotiate the sourcing of cocaine in Colombia. This propelled foreign criminal organizations, including Mexican and Balkan OCGs, to travel to Colombia to conduct negotiations in

1068 Fundación Ideas para la Paz (FIP), "Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque," 28.

1069 Fundación Ideas para la Paz (FIP), 28-29.

1070 Fundación Ideas para la Paz (FIP), "Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque," 25.

1071 Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC) - Sistema Integrado de Monitoreo de Cultivos Ilícitos (SIMCI), 'Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021'. 59.

1072 EFE, 'El Clan del Golfo saca de Colombia 20 toneladas de coca mensuales a 28 países', *Swissinfo*, 3 November 2021.

1073 Fundación Ideas para la Paz (FIP), "Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque," 25.

1074 Indepaz, 'Los focos del conflicto en Colombia: Informe sobre presencia de grupos armados'.

1075 Lara Loaiza, 'Raids Reveal Urabeños' Grasp Reaches Panama', *InSight Crime*, 6 December 2021.

1076 Fundación Ideas para la Paz (FIP), "Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque," 28.

1077 Indepaz, "Los focos del conflicto en Colombia: Informe sobre presencia de grupos armados," 54.

1078 The Republic of Colombia's territory consists of 32 departments and a Capital District. See Fundación Ideas para la Paz (FIP), "Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque," 25.

1079 InSight Crime, 'Urabeños - Gulf Clan', *InSight Crime*, 8 November 2022.

1080 Indepaz, "Los focos del conflicto en Colombia: Informe sobre presencia de grupos armados," 49-52.

1081 La Opinion, 'Un "Otoniel" Afectado Por La Diabetes Está al Mando de 1.770 Hombres Del Clan Del Golfo', *La Opinion*, 24 January 2021.

1082 InSight Crime, 'Urabeños - Gulf Clan'.

1083 Ibid.

1084 EFE, 'El Clan del Golfo saca de Colombia 20 toneladas de coca mensuales a 28 países'.

1085 Fundación Ideas para la Paz (FIP), "Ni Paz Ni Guerra. Escenarios Híbridos de Inseguridad y Violencia En El Gobierno de Iván Duque," 26.

the cultivation areas with brokers and owners of crystallization laboratories.^{1086 1087}

According to media sources, since about 2010, Mexican OCGs have sent their emissaries (*emisarios*) to Colombia to permanently settle and oversee cocaine production and trafficking operations.¹⁰⁸⁸ It appears that after the demobilization of the FARC, the presence of Mexican OCGs has been incremental, spreading to more production areas of Colombia.¹⁰⁸⁹ For example, recently, Mexican *emisarios* have been especially present in the south of Colombia, where they acquire cocaine from Colombian suppliers and negotiate its transportation. Mexican OCG representatives are also present during the processing of coca paste (PBC) to ensure the quality of the final product.¹⁰⁹⁰

As pointed out in media sources, representatives of Mexican OCGs (*CJNG* and *Cártel de Sinaloa*) collaborate with FARC dissidents to export cocaine shipments from areas in Colombia close to the Pacific. In the northern Colombian region of Catatumbo, where the illegal armed groups *ELN* and *EPL* vie for territorial control, Mexican emissaries reportedly only arrive to “close the contracts” for the export of large quantities of cocaine.¹⁰⁹¹ In the department of Córdoba, on the Caribbean coast, representatives of Mexican OCGs are also present to guarantee cocaine shipments. However, due to the highly fragmented criminal landscape, they allegedly have to negotiate with different local actors, which further fuels violence.¹⁰⁹² In urban areas, such as Cali, Mexican OCG representatives also engage in arranging cocaine shipments due to the inability of their Colombian counterparts to control the supply chain towards the United States.¹⁰⁹³

The removal of centralized control over much of the cocaine supply chain and the opening of the cocaine supply market in Colombia may now be providing an opportunity for smaller international trafficking organizations to gain access to supplies of wholesale quantities of cocaine.¹⁰⁹⁴ While not aiming at establishing vast territorial control in Colombia, international traffickers arguably aim at strengthening the efficiency of the supply chain by moving closer to the source and creating conditions for quick cocaine production locally. In this context, non-Colombian OCGs incentivize coca bush cultivation

and finance all stages of the supply chain in order to increase volumes of cocaine production.¹⁰⁹⁵

Domestic criminal groups of Bolivia (Plurinational State of) and Peru

Unlike their Colombian counterparts, the presence of Bolivian and Peruvian criminal actors is rarely mentioned by experts from other continents. Peru does not have a single dominant criminal organization; the criminal landscape is rather fragmented, consisting primarily of domestic family clans who have a strong presence in cocaine production areas and supply cocaine to foreign traffickers, mainly Colombian, Mexican and lately Brazilian.¹⁰⁹⁶ Official sources in Bolivia (Plurinational State of) also report that there is no record of any large criminal organisation composed, or in the process of being composed, by various criminal organizations in the country.¹⁰⁹⁷

A senior Brazilian law enforcement officer,¹⁰⁹⁸ corroborated by open sources,¹⁰⁹⁹ suggests that the Brazilian criminal organizations *Primeiro Comando da Capital* (PCC) and *Comando Vermelho* have representatives in Bolivia (Plurinational State of) and in Peru, from where they organize the logistics of transporting cocaine to Brazil.¹¹⁰⁰ According to Bolivian authorities, there has been a number of homicides at the border with Brazil, in the town of San Matías, and in the city of Santa de la Sierra, but to date it is not clear whether such killings were related to drug trafficking nor whether they were committed by members of the PCC or the *Comando Vermelho*; there is no evidence, according to this official source, of disputes over drug trafficking routes that would have resulted in favour of one drug trafficking organization in the sector.¹¹⁰¹

In terms of Brazilian criminal groups participating in the cocaine crystallization process in neighbouring source countries, one interviewed law enforcement official from Brazil claimed not to have knowledge of such a presence in Bolivia (Plurinational State of),¹¹⁰² while another Brazilian police source claimed that Brazilians sometimes oversee cocaine production process in the country.¹¹⁰³ However, as mentioned in a Bolivian official

1086 Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC) - Sistema Integrado de Monitoreo de Cultivos Ilícitos (SIMCI), “Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021,” 65-66.

1087 UNODC and Europol, ‘Cocaine Insights 1’.

1088 Vanda Felbab-Brown, ‘Opinion: The Foreign Policies of the Sinaloa Cartel & CJNG – Part I: In the Americas,’ *Mexico Today*, 22 July 2022.

1089 La Silla Vacía, ‘Sin las FARC, el narcotráfico tiene más acento mexicano,’ *La Silla Vacía*, 9 January 2019.

1090 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’ (Colombia, 11 November 2021).

1091 La Silla Vacía, ‘Sin las FARC, el narcotráfico tiene más acento mexicano.’

1092 Ibid.

1093 Ibid.

1094 UNODC and Europol, ‘Cocaine Insights 1’.

1095 Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC) - Sistema Integrado de Monitoreo de Cultivos Ilícitos (SIMCI), ‘Monitoreo de Territorios Afectados Por Cultivos Ilícitos 2021’.

1096 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1097 Ministerio de Gobierno Bolivia, ‘Organizaciones criminales del narcotráfico desbaratadas estaban conformadas por clanes familiares y personas extranjeras’, *mingobierno.gob.bo*, 12 April 2022.

1098 Interview #38.

1099 Alessandro Ford, ‘How Brazil’s Gangs Took Their War to Santa Cruz, Bolivia’, *InSight Crime*, 10 February 2022.

1100 Interview #38.

1101 Official communication from the Plurinational State of Bolivia, January 2023. Based on information from the *Fuerza Especial de Lucha Contra el Narcotráfico*.

1102 Interview #38.

1103 Interview #36, interview by UNODC, 2022.

source, Bolivian nationals are occasionally hired by Colombian and Brazilian traffickers to operate cocaine production sites in the area between Santa Cruz (Plurinational State of Bolivia) and Brazil.¹¹⁰⁴ Peru also reports that the PCC and the *Comando Vermelho* may send their members to the areas of Peru bordering Brazil to control the cocaine production process.¹¹⁰⁵

According to open sources referring to Peruvian law enforcement, in the past, Peruvian cocaine was trafficked mostly to the United States from the country's coastal areas, with trafficking operations financed by Colombian and Mexican traffickers.¹¹⁰⁶ In recent years, trafficking routes for cocaine sourced in Colombia and Peru have diversified¹¹⁰⁷ towards other South American countries (such as Argentina, the Plurinational State of Bolivia, and Brazil), which is facilitated by links between the Peruvian family clans and traffickers from other countries, including countries in South America (Plurinational State of Bolivia and Brazil) and Europe (Italy, Belgium, Serbia).¹¹⁰⁸ ¹¹⁰⁹ In the context of the growing activity of drug traffickers from the Western Balkans who procure large amounts of cocaine at source in Latin America,¹¹¹⁰ Peru has seen a significant presence of Serbian traffickers.¹¹¹¹ For example, a Serbian national and leading member of the transnational criminal organization “Group America” was reportedly arrested in 2016, while attempting to traffic 800 kg out of Peru.¹¹¹²

Family clans from coca production areas of Peru either have direct links with foreign buyers or sell cocaine to brokers in the coastal areas who own the infrastructure for large quantities of cocaine to be stockpiled and shipped from the Peruvian seaports.¹¹¹³ Recent open sources suggest that Peruvian criminal groups who typically act as such brokers might be expanding their operations to ship large quantities directly to Europe.¹¹¹⁴ ¹¹¹⁵ Thus, the establishment of new cocaine consumption

markets and trafficking corridors provides Peruvian family clans and logistics groups with opportunities to enter new stages of the supply chain.

Overall, domestic Peruvian family clans act primarily as producers and first-tier suppliers of cocaine or its derivatives. Their structure is not clear and their role in the production and trafficking of cocaine seems relatively limited compared to the larger OCGs with a transnational reach, such as the Brazilian PCC or the Colombian *Clan del Golfo*.

As mentioned by an Argentinian prosecutor for example, despite the relatively low profile at the international level, some Bolivian criminal groups provide logistics services to transport cocaine by small planes to Argentina. These groups are often composed of Bolivians who reside in Argentina or Paraguay.¹¹¹⁶

Given the increases in coca cultivation and cocaine manufacture in Bolivia (Plurinational State of) and Peru,¹¹¹⁷ their domestic criminal groups may grow more powerful and become more interconnected with foreign actors, thus posing a significant threat to the respective societies.

Actors in transit countries

Brazilian criminal group PCC expanding its presence in transit regions

As Brazil has been gaining importance as a country of departure for cocaine reaching Europe and Africa, its criminal landscape has evolved. According to one Brazilian prosecutor and media sources, drug trafficking in the past was dominated by notorious individuals who worked independently to procure cocaine from source countries and sold it directly to European buyers or to Brazilian domestic criminal groups such as the *Primeiro Comando da Capital (PCC)* and the *Comando Vermelho*.^{1118 1119 1120} However, according to the Brazilian source, after the arrest of these figures, drug trafficking and other criminal activities in the past 4-5 years have been increasingly concentrated in the hands of three large organizations – *Comando Vermelho*, PCC, and *Família do Norte* – with each dominating their respective territory and fighting for the control of disputed illicit markets.¹¹²¹ The PCC, whose stronghold is the trafficking hub of São Paulo port, is considered the largest and the most powerful among these organizations. It also seems to have the largest involvement in cocaine trafficking, while

1104 Ministerio de Gobierno Bolivia, ‘Organizaciones criminales del narcotráfico desbaratadas estaban conformadas por clanes familiares y personas extranjeras’.

1105 Policía Nacional del Perú, “Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú” (Peru Ministry of Interior, 2020) , 31.

1106 Anna Grace, ‘Peru Drug Trafficking Groups Expanding to New European Markets’, *InSight Crime*, 18 October 2018.

1107 A portion of Peruvian cocaine is trafficked to Bolivia. In addition, Peru has been recently used as a transit country for Colombian cocaine that finds its way to the northern coastal area of Paita to be exported by sea. ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’ (Tolima, Colombia, 11 November 2021).

1108 Grace, ‘Peru Drug Trafficking Groups Expanding to New European Markets’.

1109 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1110 UNODC and Europol, ‘Cocaine Insights 1’.

1111 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1112 Sadie Brown, ‘Peru Sentences “Group America” Drug Boss Jakšić to Prison... Again’, OCCRIP, 25 February 2022.

1113 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1114 Oscar Chumpitaz, ‘Así cayó el “Gordo Tobi” y su banda, que iba a enviar 1.881 kilos de cocaína a Europa’, *La Republica*, 29 June 2022.

1115 Gabrielle Gorder, ‘Two Coca Regions in Peru, One Cocaine Shipment to Europe’, *InSight Crime*, 5 July 2022.

1116 Interview #19.

1117 The total area under coca bush cultivation in the Plurinational State of Bolivia and Peru in 2021 stood at 84 per cent higher than the level in 2015, while the total estimated manufacture of cocaine in the two countries in 2020 stood at 58 per cent higher than the level of 2015.

1118 Daniel Haidar, ‘Preso pela PF: saga do maior traficante da América do Sul chega ao fim em Sorriso (MT)’, *El País*, 2 July 2017.

1119 Globo.com, ‘Traficante Que Manteve Negócios Com Pablo Escobar é Preso Em Guarujá, SP’, *Globo.Com*, 19 September 2015.

1120 Interview #15, interview by UNODC, 2022.

1121 Ibid.

its geographical reach exceeds that of other Brazilian OCGs.^{1122 1123}

The shift from individual traffickers to large organizations marks a change in the structure and operations of cocaine trafficking in Brazil. As portrayed in the media, the PCC, for example, consists of multiple factions with a diffuse group leadership and collective decision making, even at the neighbourhood level.¹¹²⁴ It originated as a prison gang by establishing a code of conduct to maintain order inside prisons, but quickly spread to spaces outside prisons,¹¹²⁵ and seems to have become involved in other illicit activities, such as illegal mining.^{1126 1127} Its structure represents a network of factions, each specialized in a specific criminal activity such as cannabis trafficking, cocaine trafficking, assaults or hitmen services.¹¹²⁸ As one expert noted, the PCC resembles a corporation with a horizontal command, rather than led by a single leader, making it more difficult for law enforcement to tackle its activities.¹¹²⁹ Such large networks of virtually autonomous cells are far from being homogeneous and eventually may experience internal infighting, before splitting into rival factions.

At the same time, other groups have been actively entering the booming cocaine trafficking market in Brazil. While the PCC may control several stages of the cocaine supply chain (overseeing cocaine hydrochloride production abroad, sourcing cocaine from the producing countries, transporting cocaine across Brazil, dealing with wholesale buyers and organizing logistics to dispatch cocaine shipments to Europe or Africa), there has been a proliferation of smaller criminal groups specialized only in logistics operations in recent years. According to a senior police official from Brazil, these are business-oriented actors who focus on drug transportation, rather than controlling an entire supply chain, and who avoid using violence in their operations.¹¹³⁰ These groups act as “service providers” that can be hired by any of the larger OCGs (*Comando Vermelho*, PCC, or *Família do Norte*) to organize the logistics in ports or other transit points. Generally, they collaborate peacefully with larger organizations, but may pick a side when an area is disputed.¹¹³¹ In addition, as the police official explained, the PCC also

has a logistics arm that lends its services to other OCGs on territories it controls, especially in the port of Santos, one of the PCC's strongholds. When independent logistics groups deliver cocaine from producing countries to a buyer in Europe or elsewhere via the port of Santos, they pay the PCC for the usage of the port.¹¹³²

Outside of Brazil, the PCC operates in several countries in the region by financing trafficking operations and subcontracting local groups for logistics services. The PCC appears to have a presence in neighbouring Paraguay, where it disputes territories with the *Comando Vermelho*. However, the presence of the PCC and the *Comando Vermelho* in Paraguay is not new; these organizations are alleged to have been sending their members to establish a foothold in the country at least since 2010 and currently may have a dominant presence in Paraguayan prisons.¹¹³³ According to Paraguayan law enforcement, in recent years, PCC cells have been migrating towards strategically located cities in Paraguay, such as Ciudad del Este, Pedro Juan Caballero and Asunción, to avoid detection and exploit money laundering opportunities.¹¹³⁴ Brazilian PCC-affiliated traffickers with links to European wholesale buyers often act as brokers and use Paraguayan logistics groups to traffic large cocaine shipments along the Paraguay-Paraná waterway.¹¹³⁵ Connected to this waterway, Uruguay and Argentina, with their seaports, are especially vulnerable to the rapid spread of the PCC, which typically finds a foothold among prison populations.^{1136 1137} In addition, open sources suggest that the PCC has been establishing links in Mozambique, a Portuguese speaking country; a notorious Brazilian drug trafficker “Fuminho” with links to the PCC was arrested in Mozambique in 2020.¹¹³⁸

Mexican OCGs remain powerful actors at the global level

The Mexican criminal landscape is also becoming increasingly more complex and fragmented. Currently, Mexico's authorities have identified nine major OCGs that include approximately a total of 53 groups, that in turn consist of 65 cells across Mexico.¹¹³⁹ As pointed out by an international expert, smuggling routes across the border between Mexico and the United States are usually controlled by the logistics cells of an OCG. A typical cell is led by one high-ranking coordinator who has two lieutenants. The cell only facilitates drug transportation across the border or charges independent traffickers to allow

1122 Ibid.

1123 UNODC, 'Brazil, Responses to the Annual Report Questionnaire 2019', n.d.

1124 Naiara Galarraga Gortázar and Gil Alessi, 'PCC, a Irmandade dos Criminosos', *El País*, 12 June 2020.

1125 American University's Center for Latin American & Latino Studie and InSight Crime, "Criminal Networks in the Americas," CLALS Working Paper Series (American University's Center for Latin American & Latino Studie, 2022), 25.

1126 Clara Britto, 'PCC se aproxima de garimpeiros para lavagem de recursos', *Reporter Brasil*, 24 June 2021.

1127 Emily Costa and Katia Brasil, 'Como o PCC se infiltrou nos garimpos em Roraima', *Amazonia Real*, 11 May 2021.

1128 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets', 11 November 2021.

1129 Interview #15.

1130 Interview #38.

1131 Interview #15.

1132 Interview #38.

1133 InSight Crime, 'Paraguay', *InSight Crime*, 11 May 2018.

1134 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets', 11 November 2021.

1135 Interview #34, interview by UNODC, 2022.

1136 Germán De los Santos, "Tenés que ir a matar a alguien, si no, morís": Así operan la hermandad criminal brasileña que llegó a Argentina', *La Nación*, 12 June 2022.

1137 Laura Avila, 'Brazil Gang in Uruguay Shows Country's Growing Role in Drug Trade', *InSight Crime*, 27 January 2017.

1138 Alessandro Ford, 'Mozambique Becoming Southern Africa's Cocaine Platform', *InSight Crime*, 18 June 2021.

1139 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets', 11 November 2021.

passage. It is typically affiliated to one OCG at a time but may switch allegiance.¹¹⁴⁰ In addition, there are numerous local criminal groups within Mexico, who lend specific services to the OCGs at the municipal level.

Overall, OCGs tend to form a decentralized network of bosses who conduct illicit activities by controlling certain territories and make alliances with each other and local criminal groups.¹¹⁴¹ The *Cártel de Sinaloa*, for example, can be described as a “networked alliance”¹¹⁴² of multiple specialized cells, each having a specific function in the supply chain. Their functions may include acquiring vessels and formalizing their new ownership; picking up a drug shipment in South America, or in Central America, to transport it to Mexico; or collecting the drugs in the south of Mexico and transporting them towards the border of the United States by land or by air.¹¹⁴³

Cocaine trafficking is only one part of the criminal economy in which Mexican OCGs are inserted. An OCG can control up to 7 criminal markets (including the trafficking in cannabis, heroin, methamphetamine, arms trafficking and trafficking in persons among others),¹¹⁴⁴ and may take over some licit economies, such as the seafood production chain.¹¹⁴⁵ However, this landscape is constantly shifting; most Mexican OCGs are fragmented remnants of former larger organizations that constantly shift their alliances and fight over territorial control.^{1146 1147}

As far as drug trafficking (mainly cannabis, cocaine and synthetic drugs) is concerned, out of nine main criminal organizations identified by law enforcement in Mexico, two have significant links to markets abroad — the *Cártel de Sinaloa* and the *Cártel de Jalisco Nueva Generación (CJNG)*.¹¹⁴⁸ According to open sources, the *Cártel de Sinaloa* is believed to operate in at least 50 countries¹¹⁴⁹ and the *CJNG* is quickly catching up by establishing its presence throughout the Americas, but also in Australia and South-East Asia.¹¹⁵⁰

Open sources point out that these rival OCGs differ in the way they achieve territorial control in Mexico, with the *CJNG* basing its power on force and intimidation tech-

niques (which fuels violence)¹¹⁵¹ and the *Cártel de Sinaloa* relying on relatively moderate violence and predictable patterns of extortion.¹¹⁵² However, the expansion of these OCGs into foreign territories may not necessarily follow the domestic pattern. According to some analysts, the rise in drug-related violence across South and Central America has been fuelled mostly by the competition between local proxies of these two OCGs.¹¹⁵³

In an instance of Colombian-Mexican collaboration, individuals linked to the *Cártel de Sinaloa* are known to be settling down in Costa Rica and using their administration skills to help Colombian OCGs establish their operations in the country.¹¹⁵⁴ At the same time, as pointed out by a Costa Rican prosecutor, Mexican hitmen might be behind a recent wave of violence occurring in Costa Rica, in which several local traffickers have been killed, possibly to be replaced by members of the Colombian-Mexican alliance.¹¹⁵⁵

Mexican operatives can be also sent to transit countries temporarily to oversee the logistics for cocaine shipments. For example, in one trafficking operation in Paraguay in 2021, a *Cártel de Sinaloa* representative oversaw a cocaine consignment being sent from Peru to storage locations in Paraguay by an independent small logistics group. The cocaine was to be shipped concealed in heavy machinery, through a newly established export company, with the Netherlands as destination. The group was composed of Paraguayan and Mexican nationals, with Paraguayans providing logistics services, such as guaranteeing processing through customs and legal formalities for the cargo, as well as providing transport for the Mexicans. The Mexicans, in turn, oversaw the operational details, such as the process of concealment.¹¹⁵⁶

Media sources indicate that recently, Ecuador has seen a drastic increase in homicide rates driven primarily by drug-related violence.^{1157 1158} The most affected coastal provinces, situated on the cocaine trafficking routes, host a myriad of criminal groups that provide support

1140 Interview #42, interview by UNODC, 2022.

1141 June S. Beittel, ‘Mexico: Organized Crime and Drug Trafficking Organizations’ (Congressional Research Service, 2022).

1142 Beittel, 26.

1143 Investigaciones Zeta, ‘Cártel de Sinaloa trafica cocaína por el Pacífico’, *Zeta*, 16 May 2022.

1144 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1145 Vanda Felbab-Brown, ‘Opinion: Organized Crime Is Taking Over Mexican Fisheries – Part I’, *Mexico Today*, 20 February 2022.

1146 James Bargent, ‘Northwest Mexico Erupts in Violence in Next Generation Cartel Wars’, *InSight Crime*, 27 March 2017.

1147 Beittel, ‘Mexico: Organized Crime and Drug Trafficking Organizations.’

1148 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1149 Cecilia Anesi and Giulio Rubino, ‘Inside the Sinaloa Cartel’s Move Toward Europe’, *OCCRP*, 2020.

1150 InSight Crime, ‘Jalisco Cartel New Generation (CJNG)’, *InSight Crime*, 27 March 2017.

1151 Vanda Felbab-Brown, ‘Opinion: How Mexico’s Cartel Jalisco Nueva Generación Rules’, *Mexico Today*, 29 May 2022.

1152 Vanda Felbab-Brown, ‘Opinion: How the Sinaloa Cartel Rules’, *Mexico Today*, 3 April 2022.

1153 Felbab-Brown, ‘Opinion: The Foreign Policies of the Sinaloa Cartel & CJNG – Part I: In the Americas.’

1154 Prosecutors from Panama and Costa Rica cite instances of collaboration between Mexican and Colombian traffickers, who often use Central America as a meeting point to arrange shipments of cocaine to the North American drug markets (Interview #18, interview by UNODC, 2022.; Interview #20, interview by UNODC, 2022.).

1155 Interview #20.

1156 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1157 The official homicide data indicate that homicide rate in Ecuador was gradually from 2017 (5.78 per 100,000 inhabitants) to 2020 (7.78 per 100,000 inhabitants). See UNODC, ‘Victims of Intentional Homicide’, *cabo*, dataUNODC, n.d. Moreover, according to media sources, the rate (per 100,000 inhabitants) may have risen to 13.89 in 2021 and to 15.48 in 2022, already as of September. Carolina Mella, ‘Ecuador Alcanza La Tasa Más Alta de Muertes Violentas de La Última Década’, *Primicias*, 2 September 2022.

1158 El Universo, ‘Estas son las cinco provincias con más muertes violentas en lo que va del 2022’, *El Universo*, 18 February 2022.

to operations led by Mexican and Colombian OCGs.¹¹⁵⁹ On the one hand, media sources link the recent wave of violence in the country to the rivalry between coalitions of local groups affiliated with the rival Mexican *Cártel de Sinaloa* and *CJNG*.^{1160 1161} On the other hand, while Mexican OCGs retain influence over some drug trafficking corridors, the role of local Ecuadorian groups might be expanding.¹¹⁶² Open sources suggest that after 2019, the *Cártel de Sinaloa* changed its modus operandi. Instead of establishing fixed operations with Mexican operators permanently based in Ecuador, it has been relying on sending small cells of brokers to set up trafficking logistics with local “contractors” and then leaving the country.¹¹⁶³

Domestic “service providers” in transit countries may grow powerful enough to conduct trafficking operations independently

In transit countries where there are no home-grown large criminal organizations, foreign actors typically subcontract smaller local groups to organize logistics within the country. These “service providers” may work for multiple clients; a transportation network may organize deliveries of cocaine to different buyers who operate in different locations. Lieutenants of foreign OCGs often travel to a transit country to establish their operations with local “service providers”. Some of them stay, while others return to their base leaving the domestic operators in charge of overseeing logistics and day-to-day operations.^{1164 1165} Subcontracting local criminal groups for logistics within a country has been described as a widespread practice by experts from many countries in South and Central America, the Caribbean and Africa.¹¹⁶⁶ These actors typically do not own the illicit cargo, but guarantee its delivery for a fee, which depends on the quantity trafficked.

It should be borne in mind that after operating for a prolonged period in their territories, some logistics criminal groups may develop political protection, succeed to increase their operational capacity and begin trafficking larger quantities of drugs.^{1167 1168} Eventually, such groups may shift from a small-scale logistics support to a full

subcontracting model; they may gain more power and may even become independent traffickers with their own capacity to acquire drugs instead of just providing services for other traffickers. Such actors pose a significant threat to the communities they are embedded in as their increased resources, including firepower, allow them to enter additional markets and diversify their sources of revenue.

In South America, Ecuador is a telling example of the threat posed by local criminal groups who collaborate with foreign traffickers. Besides Colombian¹¹⁶⁹ and Mexican OCGs, who have had a long-established relationship with local criminal groups, traffickers from the Balkans and members of Italian OCGs have been coming to the country to settle and establish supply lines to European markets.^{1170 1171} According to Ecuadorian law enforcement, these actors act mostly as financiers, while domestic OCGs are in charge of the logistics and the dispatch of large shipments of cocaine to Europe.¹¹⁷² However, recently, Ecuadorian home-grown criminal groups, such as the most prominent *Los Choneros*,¹¹⁷³ have been splitting into factions and fighting for control over illicit economies, which also fuelled critical levels of prison violence in 2021.¹¹⁷⁴ Meanwhile, according to media sources, their rivals *Los Tiguerones* started their own cocaine production.^{1175 1176}

There are also signs of Ecuadorian traffickers carrying out large-scale operations to Africa independently. According to Gambian and Ecuadorian law enforcement sources, an Ecuadorian OCG seems to be behind a 3-ton shipment of cocaine to the Gambia (the largest in the country’s history) in January 2022.^{1177 1178} The container with cocaine was shipped from Guayaquil, Ecuador, through Las Palmas, Spain, and belonged to a French national of Gambian descent residing in the Gambia.¹¹⁷⁹ The suspect, who had a long history of involvement in cocaine trafficking, had already started looking for a shipping company to send cocaine in smaller batches to the port of Valencia, Spain.¹¹⁸⁰ His involvement with an Ecuadorian group points out that there may be direct links between domestic

1159 Primicias, ‘Carteles y grupos narcodelictivos activan la violencia en Esmeraldas’, *Primicias*, 20 April 2022.
 1160 Juliana Manjarrés, ‘Colombian and Mexican Cartels Pick Sides in Ecuador’s Drug War’, *InSight Crime*, 9 May 2022.
 1161 Primicias, ‘Carteles y grupos narcodelictivos activan la violencia en Esmeraldas’.
 1162 Chris Dalby, ‘Lots of Blame, Little Proof - Mexico’s Cartels Behind Violence in Ecuador?’, *InSight Crime*, 16 November 2021.
 1163 James Bargent and Mayra Bonilla, ‘Telmo Castro - The Sinaloa Cartel’s Man in Ecuador’, *InSight Crime*, 5 February 2020.
 1164 Interview #29, interview by UNODC, 2022.
 1165 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.
 1166 Ibid.
 1167 US Department of Justice, ‘Dominican Drug Lord Extradited to the United States from Colombia to Face Drug Trafficking Charges’, Justice.gov, 22 December 2021.
 1168 US Department of the Treasury, ‘Treasury Sanctions Guatemala’s Los Huistas Drug Trafficking Organization with Ties to Mexican Cartels’, Treasury.gov, 2022.

1169 Such as Frente Oliver Sinisterra (FOS), a dissident faction of FARC active in Nariño, a coca-growing region bordering Ecuador.
 1170 UNODC and Europol, ‘Cocaine Insights 1’.
 1171 Scott Mistler-Ferguson, ‘Albanian Drug Traffickers Jockey for Position in Ecuador’, *InSight Crime*, 28 February 2022.
 1172 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.
 1173 *InSight Crime*, ‘Choneros’, *InSight Crime*, 4 October 2021.
 1174 Primicias, ‘Bandas crecen a la sombra de la pobreza y el abandono’, *Primicias*, 26 February 2021.
 1175 In March 2021, police discovered a crystallisation lab that belonged to Los Tiguerones gang, Los Choneros’ rivals. See Primicias, ‘Antinarcóticos investiga posible creación de “microcarteles” en Ecuador’, *Primicias*, 11 March 2022.
 1176 Juan Manuel Yezpez, ‘Los Tiguerones salen de Guayaquil y se expanden a ciudades como Quito y Quevedo’, *Primicias*, 23 March 2022.
 1177 ‘CRIMJUST Annual Meeting - Latin American and Caribbean’ (Colombia, 3 February 2022).
 1178 Interview #37, interview by UNODC, 2022.
 1179 UNODC, ‘Drugs Monitoring Platform’, n.d.
 1180 Interview #37.

actors of transit countries who have expanded beyond logistics services.

In Paraguay, where criminal groups that specialize in logistics are also common,¹¹⁸¹ in January 2022, authorities detained a group of logistics operators who were preparing a shipment of 947 kg of cocaine in containers bound for Belgium.¹¹⁸² According to a Paraguayan law enforcement official, the same group was responsible for a previous large shipment of cocaine to Spain.¹¹⁸³ Among the suspects were five Paraguayans and one Ukrainian national. Notably, the leader of the criminal group was planning to run for Governor of one department in Paraguay; his role was to plan and organize the reception of drug shipments trafficked by air as well as their further transportation, security, and storage. The role of the Ukrainian national, in turn, was to be the intermediary between the Paraguayans and a European OCG. At the moment of arrest, he had lived in Paraguay for about two years.¹¹⁸⁴ This case shows the previously described *modus operandi* of European criminal groups who relocate their emissaries to source countries in order to coordinate cocaine shipments to Europe.

The “melting pot” of cocaine trafficking in Africa

As far as the African continent is concerned, large cocaine shipments usually arrive from South America to West Africa by sea and require small boats to collect the drugs off the West African coast. Law enforcement officials agree that this stage is mostly operated by small West-African criminal groups, who provide cocaine collection and storage logistics services to foreign, mostly European, traffickers.^{1185 1186 1187} Most Traffickers based in West Africa frequently seem to operate independent fluid networks held together by ties of kinship and friendship, not affiliated to any large international drug trafficking organization.^{1188 1189} Nevertheless, the recent detections of cocaine trafficking through Guinea-Bissau and Mali¹¹⁹⁰ illustrate the ability of African criminal groups, notably Malian actors, to orchestrate and organize complex trafficking operations autonomously.

However, experts note that European OCGs often oversee the operations in Africa and sometimes establish their

presence in West Africa to coordinate the logistics.¹¹⁹¹ One such group was dismantled in April 2022 during a police operation in Côte d’Ivoire. According to media reports, at least ten members of a cocaine trafficking network were arrested, nationals of Spain, Colombia, Côte d’Ivoire, Lebanon and Portugal. The group was reportedly headed by a Spanish national who is believed to have operated in West Africa, facilitating the logistics of cocaine trafficking, for more than a decade, from Colombia by air and sea to Europe, while keeping a part of the drug as a commission. ¹¹⁹²

Overall, a major feature of cocaine trafficking in Africa is its multinationalism. According to media sources, for example, cocaine trafficking through the port of Abidjan, Côte d’Ivoire, is controlled by Brazilian, Italian, Lebanese and Nigerian criminal groups.¹¹⁹³ Operation “Spaghetti Connection” in 2019 revealed the involvement of Camorra and ‘Ndrangheta, two OCGs from Italy, in Côte d’Ivoire. The first group was supplying small hands on the ground while the second was in charge of the trafficking. During the operation, 6 Italians, 1 Franco-Turk and 3 Ivorians were detained, showing the internationality of the criminal groups involved in West Africa.¹¹⁹⁴

Cocaine trafficking from Africa to Europe seems to be organized by loose networks of traffickers, rather than a major African-based OCG.^{1195 1196 1197}

Criminal networks from Nigeria, mainly from the south-east of the country, appear to play an especially important role in smuggling activities across West and North Africa. Nigerian traffickers reportedly operate in Benin, Cabo Verde, Ghana, the Gambia, and Libya among others.^{1198 1199 1200} They are also active globally, supported by a segment of the Nigerian diaspora and a large network of drug couriers.¹²⁰¹ In 2021, Nigerian law enforcement found that Nigerian traffickers use Venezuelan nationals as drug couriers to traffic drugs from Africa to Europe by passenger planes.¹²⁰² Nigerian law enforcement also warns about the recent spread of Nigeria Cult groups (such as Black Axe, Eiyé, Buccaneers fraternities) across

1181 Scott Mistler-Ferguson, ‘Landlocked Paraguay Becoming Major Cocaine Link to Europe’, *InSight Crime*, 12 January 2022.

1182 UNODC, ‘Drugs Monitoring Platform’.

1183 Follow-up consultation to the ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1184 German De los Santos, ‘Al exsoldado ucraniano, que se había escondido en un baúl, lo detuvieron en Paraguay con 947 kilos de cocaína’, *Aire de Santa Fe*, 11 January 2022.

1185 Interview #24, interview by UNODC, 2022.

1186 Interview #41, interview by UNODC, 2022.

1187 ‘CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes’ (CRIMJUST Annual Meeting - Africa, Ghana, 23 November 2021).

1188 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

1189 Ana Aguilera, ‘Drug Trafficking and Jihadism in Africa’ (San Sebastian, Spain: Observatorio Internacional de Estudios sobre Terrorismo, 2022).

1190 See Chapter *Potentially emerging markets*, in this report.

1191 Interview #41, interview by UNODC, 2022.

1192 Pablo Muñoz, ‘Un Expolicia Expulsado Del Cuerpo Dirigía Una de Las Mayores Redes de La Ruta Africana de La Cocaína’, *ABC España*, 30 April 2022.

1193 Daan Bauwens and Nicholas Ibekwe, ‘Hezbollah in Africa: Forgotten Link in Cocaine Trafficking to Antwerp, Rotterdam’, *Premium Times*, 31 July 2021.

1194 Franceinfo Afrique, ‘Un trafic de cocaïne impliquant les mafias italiennes démantelé en Côte d’Ivoire’, *Franceinfo*, 12 June 2019.

1195 Interview #41.

1196 Interview #24.

1197 Fahd Iraqi, ‘Maroc: la nouvelle route de la cocaïne’, *JeuneAfrique*, 20 March 2019.

1198 Dublin Group, ‘Drugs Problem: Regional Situation in West Africa (September 2021)’, SN 3635/21, 2021.

1199 Interview #37.

1200 Interview #39, interview by UNODC, 2022.

1201 Dublin Group, ‘Drugs Problem: Regional Situation in West Africa (September 2021)’, 7.

1202 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

European countries who play important role in drug trafficking across Europe. Law enforcement authorities have detected that the Black Axe has its headquarters in Italy. Several other countries in Europe (including Sweden, France, Spain, Belgium and most recently, the Netherlands) have reported the secret cult groups to Nigeria as being involved in drug trafficking.¹²⁰³

Most criminal groups identified in Nigeria consist of Nigerian nationals who collaborate with a larger OCG outside of Nigeria (often consisting of Nigerians based abroad). A Nigerian law enforcement source stated that most OCGs in the country are small tribe-based cells of 4-5 members, where each member of the cell is typically linked to about 5 or more people working for them, without knowing the members of the core group.¹²⁰⁴

Criminal groups from the Balkans are also mentioned in relation to cocaine trafficking via Africa. For example, Slovenian and Montenegrin networks appear in the case of 405 kg of cocaine seized in May 2020 in Côte d'Ivoire from a Slovenian sailboat under a Spanish flag. During the operation, 6 people of Slovenian and Ghanaian nationalities were arrested. The cocaine was bound to Europe for a Montenegrin criminal group.¹²⁰⁵ More recently (April 2022), the arrest of two Montenegrin and five Brazilian sailors was reported in the media at sea near Cabo Verde from a Brazilian fishing boat carrying 5.6 tons of cocaine.¹²⁰⁶

In another case involving South European nationals, almost 1 ton of cocaine was seized in South Africa in 2021 from a ship with 6 crew members from Myanmar and 4 Bulgarians (as part of the Interpol's Lionfish operation).¹²⁰⁷ Three of the Bulgarians had entered the country illegally using falsified documents¹²⁰⁸ and were suspected to belong to a Bulgarian OCG with links to a drug trafficking network with operations in South Africa.¹²⁰⁹

Finally, the seizure of 9.5 tons of cocaine in Cabo Verde in 2019 from a vessel with a Russian crew points out that Russia-based groups dedicated to logistics may also use Africa as a springboard for European markets.¹²¹⁰ The vessel sailed from Panama to Morocco but had to make an emergency stop in Cabo Verde, where the drug was discovered by the police. Given that the Russian market is unlikely to absorb such a large quantity of cocaine and that Morocco is a traditional transit point for West-

ern European-bound drugs, it is likely that the operation was conducted in collaboration with other European OCGs.

Actors in the destination markets ***Mexican criminal groups remain unchallenged in the North American cocaine market***

The North American cocaine market has been traditionally shaped by the presence of Mexican and Colombian OCGs. According to official sources, Mexican OCGs, especially the *Cártel de Sinaloa* and the *CJNG*, and to a lesser degree the *Cártel de los Beltrán Leyva*, remain major players in drug trafficking in the United States, they control smuggling corridors at the border between Mexico and the United States. Mexican OCGs also control cocaine transportation routes throughout the United States in cooperation with criminal groups and street gangs from the United States, on whom they also rely for retail-level distribution within the United States.¹²¹¹ While Dominican criminal groups transport cocaine and other drugs through the Caribbean corridor, their main suppliers are Mexican OCGs.¹²¹²

Some observers note a shift in the criminal landscape of Canada, where cocaine trafficking used to be dominated by the Italian mafia-type organizations (*Ndrangheta* and *Cosa Nostra*), outlaw motorcycle gangs (OMGs) (such as the *Hells Angels*) and urban gangs based in specific cities. Around 2013, the control over this criminal activity shifted into the hands of the *Wolfpack* group, a young generation of Canada-based criminals. The *Wolfpack* facilitated the entry of Mexican groups in the Canadian drug market who began travelling or settling down in Canada.^{1213 1214} Nowadays, some Mexican emissaries travel or establish residence in Canada, and are likely to play a more direct role in cocaine importation.¹²¹⁵ According to Canadian authorities, Canadian traffickers also travel to source and transit countries to meet with drug suppliers.¹²¹⁶

Like in many other established drug markets, Canadian OMGs are also associated with cocaine trafficking at the local, regional and interprovincial level.¹²¹⁷ As reported by Canadian law enforcement, five of the 10 key facilitators¹²¹⁸ of organized crime assessed in 2020 were key

1203 Ibid.

1204 Interview #40, interview by UNODC, 2022.

1205 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1206 UNODC, 'Drugs Monitoring Platform'.

1207 Ibid.

1208 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1209 Aron Hyman, 'Saldanha "cocaine Ship" Suspects Stay behind Bars until next Court Date', *Sunday Times*, 12 March 2021.

1210 UNODC, "Massive Drug Operation by Cabo Verdean Authorities Successfully Seizes 9.5 Tons of Cocaine in Praia," unodc.org, February 5, 2019.

1211 Drug Enforcement Administration, "2020 National Drug Threat Assessment" (Washington D.C.: United States Department of Justice, March 2021), 33, 65.

1212 Drug Enforcement Administration, 73.

1213 Alessandro Ford, 'How Mexican Cartels Settled in Canada', *InSight Crime*, 13 December 2021.

1214 California 18, 'The "Wolfpack", the Criminal Alliance between the Sinaloa Cartel and the Canadian Mafias That Changed the Business', *California 18*, 15 December 2021.

1215 Criminal Intelligence Service Canada, "2020 Public Report On Organized Crime In Canada" (Ottawa: Criminal Intelligence Service Canada, February 28, 2021), 12.

1216 Criminal Intelligence Service Canada, 12.

1217 Criminal Intelligence Service Canada, 13.

1218 A "key facilitator" was defined as a person responsible for coordinating the work of a criminal network, or who plays an important role within it, whose disruption may compromise the criminal activities of multiple groups in this network.

cocaine brokers, most of whom were also involved in “mafia-structured” networks and OMG networks.¹²¹⁹

Wholesale cocaine distribution in Europe and Australia is dominated by domestic (national) or regional criminal groups

Based on expert interviews, it appears that the entry of cocaine into Europe is controlled by European-based criminal groups, of which some facilitate the receipt of the drug and others specialize in its distribution. For example, as pointed out by a Brazilian law enforcement official, European organizations are predominant in Europe, despite the presence of the PCC members there.¹²²⁰

Similar to their counterparts from transit countries, European experts also note a high number of “service providers”, i.e., groups that fully manage specialized parts of the supply chain (such as extraction of cocaine from the port, transportation, violence, etc.). Typically, the group that offers the service is independent from the client and can service multiple clients. Service providers handle the drug but do not own it and do not decide on whom to sell it to.^{1221 1222 1223} According to a Belgian prosecutor, one of such “service providers” is a Belgian national who coordinates the logistics in the port of Antwerp, Belgium, for at least three different OCGs. While his client OCGs have direct contacts with suppliers in different countries of South America, the logistics group only controls the part from when the cocaine enters the port until it leaves the port.¹²²⁴

With the shift of the epicentre of the cocaine market in Europe towards the ports of Antwerp, Belgium, and Rotterdam, the Netherlands, criminal organizations based in the Netherlands with transnational connections have become central in managing the import of cocaine into Europe. The majority of cocaine reaching Antwerp is likely intended for organizations operating out of the Netherlands, from where the cocaine is further distributed to other European destinations.¹²²⁵

Belgian and Dutch OMGs appear to be highly involved in cocaine trafficking to the ports of Antwerp and Rotterdam. However, it is not clear if this activity involves the gang as a whole or just some individual members. As reported by a Belgian prosecutor, several Belgian nationals, members of an OMG residing in the south of Spain, have been acquiring cocaine shipments from South America without being present in Antwerp. Instead, they have been hiring “service providers” to receive the

shipments. The same OMG also manages the transfer of cocaine consignments from Antwerp to the Netherlands, where the drug is unloaded.¹²²⁶ In addition, Dutch OMGs are involved in the trafficking of synthetic drugs. Also, the increasing demand for ecstasy in South America has been providing an opportunity for Dutch criminal groups to trade ecstasy for cocaine.¹²²⁷

Spain and Portugal constitute another cluster of trafficking networks. According to a Portuguese prosecutor, Spanish-based OCGs tend to travel to Portugal to establish links with Portuguese “intermediaries”. These “intermediaries” are often businesspeople who own an import company and agree to receive cocaine in Portugal, concealed among licit goods (often fruits), in exchange for a fee. When delivered, they retrieve the cocaine and pass it to their Spanish partners who transport it to Spain and redistribute it further in Europe.¹²²⁸ Besides Spanish groups, other OCGs were identified in Portugal, such as the Italian ‘*Ndrangheta*,¹²²⁹ the OMG *Hells Angels* and *Los Bandidos*,^{1230 1231} and the Brazilian PCC.¹²³² Retail distribution in Portugal is managed by Portuguese-based groups who keep a portion (30–40 kg) of large cocaine shipments they help import and distribute it locally.¹²³³

Albanian-speaking groups have been found operating wholesale cocaine distribution in many parts of Europe, particularly in the United Kingdom and the Netherlands.^{1234 1235} It appears that Albanian-speaking groups may manage cocaine distribution networks across Europe with a certain degree of transnational coordination, in addition to forming direct relationships with suppliers in Latin America.¹²³⁶ Balkan OCGs appear to be also using their contacts and access to wholesale supply in Latin America to traffic cocaine not only to Europe, but also to other profitable destination markets in Asia and Oceania, where they seem to cooperate with local OCGs for the distribution of the drug.¹²³⁷ In 2018, 6 Chinese and 1 Montenegrin nationals were apprehended at sea near Papua New Guinea for the trafficking of about 55 kg of cocaine on a fishing boat.¹²³⁸ The presence of one Montenegrin

1219 Criminal Intelligence Service Canada, 4.
1220 Interview #38.
1221 Interview #12, interview by UNODC, 2022.
1222 Interview #7, interview by UNODC, 2022.
1223 Interview #10, interview by UNODC, 2022.
1224 Interview #12.
1225 UNODC and Europol, ‘Cocaine Insights 1’.

1226 Interview #12.
1227 M. van Laar et al., ‘Nationale Drug Monitor Jaarbericht 2020’ (Utrecht: Trimbus Instituut, 2021), 539.
1228 Interview #5, interview by UNODC, 2022.
1229 Rute Coelho, ‘Portugal é um refúgio para as mafias sicilianas’, *Diário de Notícias*, 24 October 2010.
1230 Valentina Marcelino, ‘89 Hells Angels acusados. Associação criminosa, homicídio, violência e tráfico’, *Diário de Notícias*, 11 July 2019.
1231 Roberto Bessa Moreira, ‘Portugal é dos países com menos crimes mas não faltam casos de corrupção e tráficos’, *Jornal de Notícias*, 30 September 2021.
1232 Luís Adorno, ‘Investigação detecta membros do PCC em EUA, Europa e América do Sul’, *Universo Online*, 6 October 2020.
1233 Interview #5.
1234 Jeremy Mcdermott, ‘The Future of the Cocaine Trade to Europe’, *InSight Crime*, 9 February 2021.
1235 Dame Carol Black, ‘Review of Drugs Executive Summary’ (Government of the United Kingdom, 2020), 8.
1236 UNODC and Europol, ‘Cocaine Insights 1’.
1237 Europol, ‘Balkan Cartel Trafficking Cocaine around the Globe in Private Planes Busted’, *EUROPOL News*, July 25, 2019.
1238 UNODC, ‘Drugs Monitoring Platform’.

raises the possibility of a link to an OCG from the Balkan region.

Australian OCGs are often reported in the media as receivers of drugs in Australia and New Zealand.¹²³⁹ They are reportedly one of the key links between South American criminal groups and the Australian and New Zealand drug markets.¹²⁴⁰ As for foreign actors, Mexican OCGs, especially the *Cártel de Sinaloa*, have been identified as active in Australia over the past decade. They have been importing crystal methamphetamine and cocaine to Australia and may have established presence in the country.¹²⁴¹ There are also reports of Asian criminal groups (particularly Chinese) operating drug trafficking routes in countries in the Pacific, sometimes in collaboration with Mexican and South American OCGs and sometimes being challenged by them.¹²⁴² In 2019, 9 people were arrested in India who were allegedly involved in the trafficking of 55 kilograms of cocaine to Australia in a shipping container. Among those detained were 5 Indian nationals, 2 Nigerian nationals, 1 national from the United States, and 1 Indonesian national. They allegedly sourced cocaine from Canada, where other members of Indian origin resided.¹²⁴³

OCGs from the Balkan region are main actors in large-scale cocaine trafficking in Eastern Europe

The less explored cocaine markets of Eastern Europe have been supplied mostly by Albanian and Serbian criminal groups. In particular, Serbian criminal groups would seem to have been long active in trafficking cocaine from Ecuador to the Balkans, but also to the Baltic states and the Russian Federation.¹²⁴⁴ For example, according to an international expert, Serbians typically procure larger shipments of cocaine by sending emissaries to source countries in order to settle down and establish trafficking logistics to Russia. Russian traffickers, in contrast, do not usually travel to source countries but instead organize logistics at the domestic level.¹²⁴⁵ Court documents from Russia show that this modus operandi is not new; in 2011, 4.5 kg of cocaine were trafficked aboard a bulk carrier with bananas from the port of Bolivar to the port of St. Petersburg. The criminal group was led by a Serbian national who had long resided in Ecuador and whose associates travelled from Serbia to Russia to receive the shipment.¹²⁴⁶ ¹²⁴⁷Currently, Ecuador's wave of violence is compounded by high-profile assassinations

of members of Balkan OCGs, including Serbian¹²⁴⁸ and Albanian¹²⁴⁹ nationals.¹²⁵⁰ With the market for cocaine in Europe and elsewhere expanding, the fight between Balkan OCGs among themselves and with Latin American rivals over trafficking routes is likely to continue.

Unlike Serbian groups, who ensure a presence in source countries, Lithuanian OCGs seem to operate more locally. They are the predominant traffickers in North-Eastern Europe and the Baltic states, where, as reported by various sources, they use transport companies to traffic cocaine in small quantities (and other drugs) by land.¹²⁵¹ ¹²⁵² ¹²⁵³ However, Lithuanians may also be involved in transatlantic shipments of cocaine. For example, media sources have documented how, from 2013 to 2019, a Lithuanian-Russian OCG led by a Lithuanian national imported a total of about 500 kg of cocaine in 6 separate shipments from Ecuador to the Russian Federation. The drugs were hidden in containers with fruits that sailed to the port of St. Petersburg.¹²⁵⁴

1239 Duncan McNab, 'Mexican Drug Cartels: How They Infiltrated Australia and Have More Power than Ever', *7News*, 12 April 2019.

1240 Jose Sousa-Santos, 'Drug Trafficking in the Pacific Islands: The Impact of Transnational Crime,' *Lowy Institute*, February 16, 2022.

1241 Ibid.

1242 Ibid.

1243 UNODC, 'Drugs Monitoring Platform'.

1244 Vladislav Litovchenko, 'Сербский наркобарон дошел до Кировского райсуда', *Kommersant*, 1 March 2015.

1245 Interview #42.

1246 Дело №1-48/2014 (sentence), No. 1-48/2014 (Kirovskiy District Court of St. Petersburg April 9, 2014).

1247 Дело №1-318/2015 (sentence), No. 1-318/2015 (Kirovskiy District Court of St. Petersburg 28 April 2015).

1248 Stalin Carrión, 'Serbio asesinado en Plaza Navona tenía cuatro meses en Ecuador', *Extra.ec*, 21 July 2020.

1249 El Universo, 'Dashi Ergys, el albanés asesinado en Guayaquil, era parte de una banda de narcotraficantes, según medios europeos', *El Universo*, 24 January 2022.

1250 Mistler-Ferguson, 'Albanian Drug Traffickers Jockey for Position in Ecuador'.

1251 Interfax, 'В РФ будут судить наркоторгера, который ввез из ЕС 312 кг кокаина', *Interfax*, 21 May 2021.

1252 Interview #42.

1253 Transinfo News, 'Литовец попытался провезти крупную партию кокаина в Россию через Беларусь', *Transinfo News*, 9 October 2020.

1254 Stanislava Simonova, 'Брикеты с зельем шли по морю', *MVD Media*, 13 September 2021.

Contactless delivery allows multi-layered retail distribution networks

At the lower levels of the supply chain, dealers typically offer multiple drugs and are easily replaceable. In some countries, drugs are sold by territory-oriented street gangs who vie for controlling drug distribution points in specific neighbourhoods. In other contexts, low-level distribution networks are exclusively profit-oriented and do not seek power over a certain territory.

Examples of profit-oriented drug retail networks can be found in Central Asia and in the Russian Federation, where drugs are often distributed to consumers via contactless means. Such a distribution method does not require control over a specific territory; small drug caches are hidden in public spaces (dead drops) and coordinates are shared with a buyer via a messaging application after the payment is received. These distribution networks consist of linked cells which, despite being structured in layers, are coordinated from the top by the “leaders,” who also communicate directly with consumers. The members of the cells communicate via encrypted messaging platforms, and some of those at intermediate levels may also themselves be consumers.

In a typical scheme of this kind, based on judicial files, in the Russian Federation, after receiving a batch of drugs from a supplier, the “leader” of the network

assigns the task of splitting the drugs into smaller quantities to a “first tier” dealer. Multiple batches of different drugs are then passed further down from higher to lower tiers by hiding them in drug caches and communicating the location to the “leaders”. At each step, the quantities passed to the next link are smaller than at the previous level, until they reach the size of a consumption unit.^{a b c}

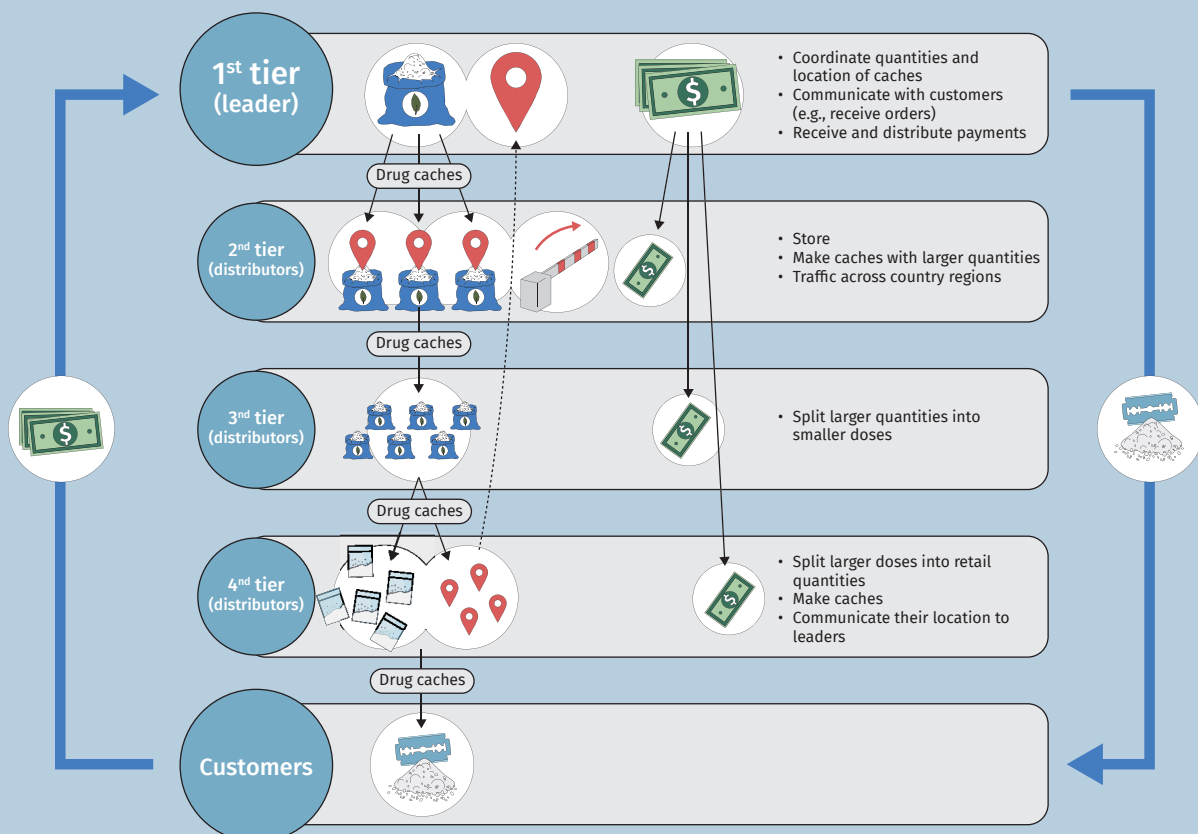
The “leaders” of the network can “promote” its members or impose monetary sanctions for mistakes. For example, according to the sentencing file of one of the members of a retail distribution network in the Russian Federation, the defendant initially occupied a “third tier” position (in this case distributing to consumers) until September 2017, when he was promoted to a “second tier” dealer, and in November 2018, he was promoted to the next higher level.^a

^a Case Law 1-121/2019 (sentence) (Atkarskiy Court of Saratov Oblast 4 December 2019).

^b Case Law 1-308/2020 (sentence) (Zavodskoy District Court of Orel city 30 September 2020).

^c Case Law 1-8/2021 (sentence) (Zavodskoy District Court of Orel city 11 February 2021).

Example of a contactless distribution network in the Russian Federation



Sources: Case Law 1-121/2019 (sentence), (Atkarskiy Court of Saratov Oblast December 4, 2019); Case Law 1-308/2020 (sentence), Zavodskoy District Court of Orel city, 30 September 2020; Case Law 1-8/2021 (sentence), Krasnoyarskiy District Court of Volgograd city, 11 February 2021.

Structure of criminal groups

The organizational structure of a criminal group is mainly defined by the role of its leadership and the relationships between its members.¹²⁵⁵ Leadership types may range from a highly decentralized (horizontally structured) to a highly centralized (vertically hierarchical) command structure. In a decentralized structure, leadership is loose, consisting of relatively independent cells, each with their respective bosses. This type of organization generally works like a franchise. That is, an OCG can have a group leadership, which can act either as a board, or a council, where all leaders have relatively equal decision-making power. In a centralized organization, in contrast, there is usually a single leader who holds much of the decision-making power.

As the analysis above shows, large-scale drug trafficking nowadays appears to be dominated by small- to medium-sized criminal groups that function like networks rather than well-delineated organizations with stable membership and a clearly established chain of command. As noted by one expert from Costa Rica, only the highest members of the criminal hierarchy in that country may belong to a stable criminal structure. The lower levels are reported to be more fluid, while establishing clientelist relationships of convenience with various actors.¹²⁵⁶ The review of OCGs at different levels of the supply chain shows that even relatively hierarchical entities, such as Mexican or Brazilian criminal groups, operate as business-oriented networks, with operations spread across multiple specialized cells that can act semi-autonomously.

Transportation networks play an increasingly important role in the cocaine supply chain

The segmentation of cocaine-trafficking organizations is also illustrated in the proliferation of logistics networks – mostly groups specialized in drug transportation. As drug trafficking organizations have been outsourcing logistics services to independent agents, specialized transportation networks have come to play an increasingly important role in international trafficking. These actors may be involved in trafficking different types of drugs in large quantities (such as cocaine and cannabis) and can service different clients. They tend to maintain business-client relationships with various types of groups operating in the same territory. As mentioned by some experts, sometimes logistics networks collect drugs from several suppliers to maximize the capacity of the transport, such as a small plane or a container.^{1257 1258 1259} In this case, at

the point of arrival, the cargo is likely to be received by several buyers.¹²⁶⁰ Logistics operators usually receive part of the payment in advance and the rest after delivering the drug “successfully”.¹²⁶¹

Logistics operators work across geographies; cocaine producers in source countries may hire them to deliver the drug to an exportation point (such as a seaport) in a transit country. On the receiving side, transportation networks guarantee the retrieval at the destination and sometimes provide transportation to the buyer. Transportation networks typically represent a business-oriented criminal culture as they focus on specific routes/entry points, rather than controlling a whole territory and all its illicit activities.¹²⁶²

The offer of these type of groups is their well-established infrastructure and professional members. As mentioned by an Argentinian prosecutor and a Brazilian police official, groups that use general aviation as their main modality of trafficking have landing strips, planes, and storage places, as well as highly skilled pilots.^{1263 1264} According to a Brazilian expert, pilots are normally independent contractors, rather than members of an OCG. However, the *PCC* and the *Comando Vermelho* are known to pay for the training of young pilots, as the flights are very dangerous because they involve flying at high altitudes to avoid detection by surveillance radar.¹²⁶⁵ Besides pilots, transportation networks may include aviation mechanics and assistants responsible for opening the aircraft fuselage to store or hide the drugs.¹²⁶⁶

Similarly, groups that rely on maritime trafficking modalities, typically possess different types of vessels and consist of seamen or fishermen who know the routes well and are capable of navigating in rough waters, including crossing the Atlantic Ocean.^{1267 1268 1269} Transportation groups do not typically need to become involved in other stages of the supply chain as it would entail higher risks and greater complexity.

1255 Maurizio Catino, 'How Do Mafias Organize? Conflict and Violence in Three Mafia Organizations', *European Journal of Sociology* 55, no. 2 (2014): 177–220.

1256 Interview #21, interview by UNODC, 2022.

1257 Interview #19.

1258 Interview #8, interview by UNODC, 2022.

1259 Laura Álvarez, 'Así cayó en Colombia la organización que mandó cocaína a Galicia en el confinamiento', *La Razón*, 27 November 2020.

1260 Interview #8.

1261 Sometimes, however, the logistics groups are paid for their services in kind, which may lead to the increasing availability of the drug in the communities where the criminal actors are based.

1262 Angel Rabasa et al., 'Counternetwork: Countering the Expansion of Transnational Criminal Networks' (RAND Corporation, 2017).

1263 Interview #19.

1264 Interview #36, interview by UNODC, 2022.

1265 Ibid.

1266 Diário de Pernambuco, 'Polícia Federal prende, na Imbiribeira, doleiro por tráfico internacional de drogas', *Diário de Pernambuco*, 19 April 2022.

1267 Interview #41.

1268 Interview #8.

1269 Interview #5.

Case study 1. Shipping 3.8 tons of cocaine from Colombia to Galicia, Spain (April 2020)

Galicia in Spain is a hub where experienced boatmen have been known for their long-standing involvement in smuggling tobacco and trafficking cannabis and cocaine.^{a b c} As explained by a Spanish prosecutor, these actors do not typically acquire cocaine and thus are not linked with the suppliers in South America directly, but rather provide transportation services to multiple clients.^d In April 2020, Spanish law enforcement seized 3.8 tons of cocaine on board of a Togo-flagged vessel *en route* to Galicia.^e Based on the official press release,^e media reports^{f g h} and prosecution documentation, it is possible to reconstruct the trafficking operation and the structure of the criminal network involved. This case provides an example of the structure of an important criminal group specialized in logistics services that operated in Galicia between 2019 (or earlier)ⁱ and 2020.

The network on the receiving side of the operation consisted of two Galicia-based clusters - a logistics group and a distribution group. The logistics group, comprised of about 11 members, offered their services of collecting cocaine at sea to various OCGs. In this case, they were to receive the 3.8-ton shipment of cocaine by unloading it from the mother ship and delivering it to the shore by speed boats. The group's leader (#1) coordinated the operation and managed communications with the Colombia-based suppliers. He also relied on a corrupt customs official (#13) for the relevant information on investigative activities by police; the customs officer, in turn, also participated in drug transportation and mid-level distribution

in Spain. The leader's brother (#3) was in charge of coordinating maritime trafficking operations and providing technical means to avoid communications surveillance.

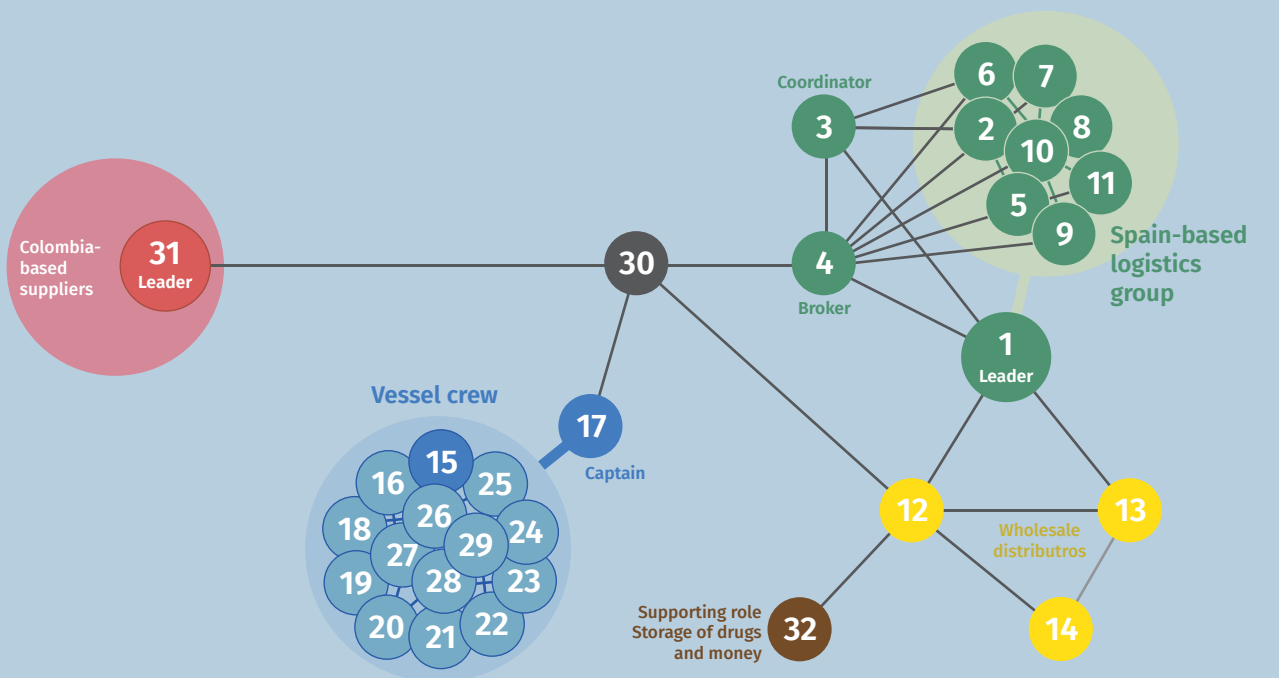
The group had multiple boats and engines stored in different locations between northern Portugal and Galicia. The boats were acquired and prepared through a boat-maintenance company, whose owner (#4) was a key member as he possessed specialized skills on maintaining and adapting different types of boats for trafficking operations. He also seemed to be a contact person for the broker, a Portugal-based "observer" (#30) hired by the supplier to inform them of the vessel's voyage and to control the delivery of the cocaine.

As logistics OCGs often retain part of the cocaine shipments for distribution in the domestic market, the second cluster consisted of three individuals, including one Colombian national (#12), who transported and distributed medium-sized quantities of cocaine (from 0.1 to 1 kg) in Spain. The Colombian national seemed to be the only member of this cluster who maintained contact with the broker.

A third cluster consisted of the crew members, almost all of whom (15 in total) were Nepal and Bangladesh nationals, except one Galician, who appeared to act as a "guarantor" for the owners of the shipment. According to media sources, only 3 crew members, including the captain and the Galician, were allegedly involved knowingly in the operation.

Later the same year, on the other side of the Atlantic, a criminal group responsible for the dispatch of the

Structure of a transportation network (example of one trafficking operation)



Source: UNODC analysis based on prosecution documents.

3.8-ton shipment was dismantled in Colombia.^f The group operated since at least 2015 and was focused on providing transportation services to connect cocaine production areas in the Colombian jungle with the Alta Guajira coastal area, on the border with Venezuela (Bolivarian Republic of). From there, the group sent large cocaine shipments to Central America, the Caribbean, the United States and Europe by loading cocaine onto mother ships from go-fast boats. The leader of the group had been linked to over 10,000 tons of cocaine seized in multiple counterdrug operations.[!] The 3.8 tons of cocaine were also loaded onto the mother ship at sea using small boats, after the ship passed the port of Panama.

^a Nacho Carretero, *Snow on the Atlantic: How Cocaine Came to Europe* (New York: Bloomsbury Publishing, 2018).

^b Javier Romero, 'Los Charlines, un clan ideado a imagen y semejanza de las familias de la mafia siciliana', *La Voz de Galicia*, 19 January 2022.

^c Victor Mendez, 'Una narcolancha para cada escenario', *Diario de Pontevedra*, 15 February 2022.

^d Interview #8, interview by UNODC, 2022.

^e European Anti-Fraud Office, 'Spain: Four Tons of Cocaine Seized and 28 People Arrested in a Blow to Drug Trafficking in Galicia', *European Anti-Fraud Office*, 4 May 2020.

^f Laura Álvarez, 'Así cayó en Colombia la organización que mandó cocaína a Galicia en el confinamiento', *La Razón*, 27 November 2020.

^g Brais Cedeira, 'Policías Españoles Participaron En La Captura de "Otoniel", Responsable Del Narcosubmarino', *El Español*, 25 October 2021.

^h Javier Romero, 'Un Marinero Del Karar Confiesa Que Él y Otros Dos Tripulantes Sabían Que En El Buque Se Escondían 3.800 Kilos Cocaína', *La Voz de Galicia*, 23 April 2022.

ⁱ Several of the detained members had previous charges on drug trafficking. However, it is unclear from open sources when the group began its operations.

^j Numbers, such as (#1), correspond to the number assigned to the respective node on the figure: Structure of a transportation network (example of one trafficking operation).

[!] Luis Antonio Hernández Barbosa, *Extradición CP177-2021, No. Radicación 58647, Acta 294* (Corte Suprema de Justicia, República de Colombia 10 November 2021).

quantity of cocaine. If the Guatemalan group does not have the amount needed or the capacity at the moment, it communicates with other domestic groups to fulfil the order. This suggests a certain degree of coordination and respect for each other's territory. This development might be part of an adaptation strategy by the OCGs that prefer to attract less attention from the police.¹²⁷¹

Similarly, on the European destination market front, many of the European-based actors who procure wholesale cocaine shipments from South America constitute business-oriented networks, where several groups of traffickers coexist. As an expert in Belgium reported, drug traffickers there "are not competing, they are using each other's experiences and, because there is so much demand, they can exist besides each other. They are more colleagues than competitors."¹²⁷² In other words, OCGs in Belgium create opportunistic alliances by using the same "service providers," rather than competing with each other. As a result, there has been relatively little drug-related violence in Belgium.

The Netherlands, in turn, has experienced an increase in violence in the last few years as a result of the rivalry between multiple drug trafficking organizations.¹²⁷³ The conflicts occur among both high-level criminals and within lower ranks. For example, a suspected Dutch-Moroccan leader of the "Mocro Maffia" was allegedly linked to the murders of a prominent journalist (2021) and a lawyer (2019).¹²⁷⁴ He appears to have used hitman services to systematically eliminate his rivals and trial witnesses. Meanwhile, another drug trafficking organization has been assassinating his people as well.¹²⁷⁵ In another example from the media, a trafficker from Rotterdam had built contacts with a Colombian OCG, and was managing a drug-trafficking organization,¹²⁷⁶ when in 2020, seven shipping containers converted into cells and torture chambers, built on his orders, were discovered between Rotterdam and Antwerp near the Belgian border.^{1277 1278}

The establishment of new business-client relationships can also start with the hiring of a new "service provider" *ad hoc* which then leads to a subsequent collaboration on a regular basis. In a case described by a prosecutor in Belgium, when a contaminated container suddenly was selected for inspection, the receiving OCG could not

Formation of networks and alliances

Since most OCGs do not control the entire supply chain of cocaine from South America to destination markets, groups of traffickers at different stages of the chain form mutually beneficial partnerships. These collaborations are often highly dynamic and unstable, as for example in the case of Mexico, where yesterday's criminal allies may become today's enemies and vice versa.¹²⁷⁰ As a result, competition among OCGs for trafficking corridors or distribution points often generates violence. In other cases, however, groups may collaborate with each other at any level of the supply chain.

For example, a prosecutor from Guatemala pointed to a greater coordination between cocaine traffickers active in the country in recent years. According to this source, it is not uncommon to see a potential Mexican buyer who contacts a Guatemalan group to request a specific

1271 Interview #16, interview by UNODC, 2022.

1272 Interview #12.

1273 Elian Peltier, 'Belgian Port City Grapples With a Flood of Cocaine', *The New York Times*, 4 December 2021.

1274 David Gormezano, 'Dutch PM under Protection as the "Mocro Mafia" Drug Cartel Sows Fear in the Netherlands', *France24*, 2 October 2021.

1275 More on conflicts in the Dutch underworld, see Laar et al., "Nationale Drug Monitor Jaarbericht 2020," 542.

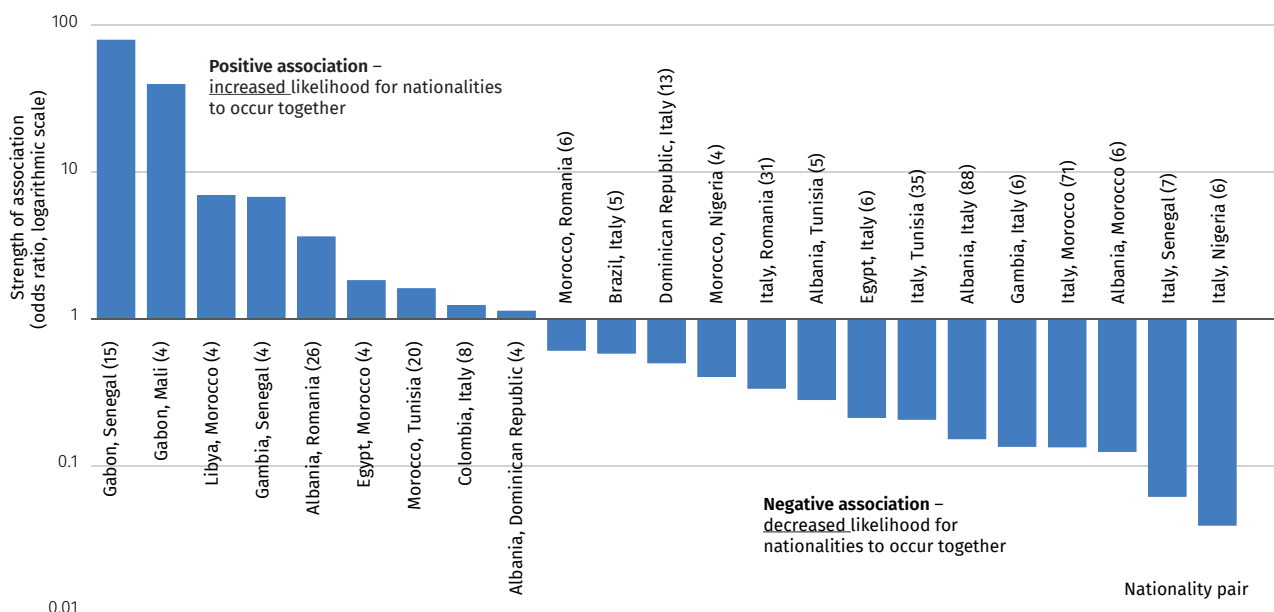
1276 Peter Cluskey, 'Infamous Dutch Cocaine Trafficker Begins 15-Year Jail Sentence', *Irish Times*, 12 April 2022.

1277 Daniel Boffey, 'Dutch Torture Container "Shows Cocaine Users the Consequences of Their Habits"', *The Guardian*, 7 February 2022.

1278 *NL Times*, 'Hit List with 18 Names Found in Investigation into Rotterdam Cocaine World: Report', *NL Times*, 27 November 2020.

1270 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets', 11 November 2021.

Strength of association between pairs of nationalities of individuals arrested simultaneously in connection with cocaine seizures in Italy, 2017–2020



Source: UNODC Drugs Monitoring Platform.

Note: In the above figure, a value (ratio) greater than 1 indicates a propensity for the two given nationalities to occur together and a value less than 1 indicates a propensity for the nationalities not to occur together. The neutral value of 1 indicates that the two nationalities occur independently of each other. More precisely, the value shown (odds ratio) for a given pair of nationalities (N1, N2) expresses the increase (or decrease) in likelihood that the second nationality (N2) occurs when the first nationality (N1) is present, in comparison with the scenario when the first nationality is not present. The value of the odds ratio is unchanged if the roles of N1 and N2 are inverted.

The calculations are based on cocaine seizure cases in which at least 2 individuals of known nationality were arrested.

For a given nationality pair, the number in brackets indicates the number of cases in the dataset where the two nationalities occurred together. Only pairs of nationalities which occurred in at least 4 cases are considered.

proceed with the planned *modus operandi* (the “switch” method) and thus the recipient had to find another OCG who could use another extraction method. The new organization had access to the port through a port driver; they retrieved the container, extracted the bags with cocaine and returned the container to the harbour. That operation became the start of a new cooperation, as both OCGs collaborated in the same way about 5-7 times afterwards.¹²⁷⁹

Overall, criminal consortia among European traffickers seem to be occurring more often than before, especially since some of these drug trafficking organizations now have direct access to cocaine producers in Latin America, but individually lack the capital required to procure cocaine in quantities that would ensure sufficient profit margins. In some cases, these drug trafficking organizations pool their capital to jointly purchase larger quantities and maximize profits.¹²⁸⁰ It is plausible that a dynamic and stimulated global market for cocaine will continue to engender such patterns of collaboration in the procurement and trafficking of cocaine in the future.¹²⁸¹

To achieve levels of trust needed to conduct an illegal activity, actors form alliances based on shared characteristics, such as ethnicity, kinship, religion, shared environment, geographical¹²⁸² or social¹²⁸³ proximity. Trust becomes especially relevant in the context of an increasingly fragmented criminal landscape and the diversity of nationalities involved¹²⁸⁴ in cocaine trafficking. Mexican OCGs for example are known for solving the problem of trust by placing family members at the head of important operations at home and abroad.¹²⁸⁵ Analysis of cocaine seizures in Italy shows that traffickers tend to associate with individuals from a similar ethnic background or the same linguistic group.¹²⁸⁶

1279 Interview #12.

1280 EMCDDA and Europol, ‘2019 EU Drug Markets Report’ (Publications Office of the European Union, Luxembourg: European Monitoring Centre for Drugs and Drug Addiction and Europol, 2019).

1281 UNODC and Europol, ‘Cocaine Insights 1’.

1282 Cecilia Meneghini, ‘Structure and Evolution of Drug Trafficking Networks in North Africa: The Impact of Rule of Law and Corruption’, in *The Evolution of Illicit Flows: Displacement and Convergence among Transnational Crime*, ed. Ernesto U. Savona, Rob T. Guerette, and Alberto Aziani (Cham: Springer International Publishing, 2022), 173–92, https://doi.org/10.1007/978-3-030-95301-0_10.

1283 Luca Giommoni, Alberto Aziani, and Giulia Berlusconi, ‘How Do Illicit Drugs Move Across Countries? A Network Analysis of the Heroin Supply to Europe’, *Journal of Drug Issues* 47, no. 2 (1 April 2017): 217–40.

1284 UNODC, ‘World Drug Report 2021, Booklet 4’ (Vienna: UNODC, 2021), 28.

1285 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’, 11 November 2021.

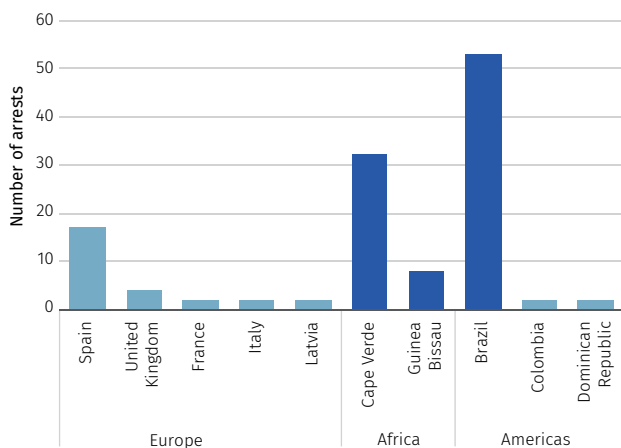
1286 UNODC, ‘Drugs Monitoring Platform’.

Similarly, among individuals detained in association with cocaine trafficking in Portugal in 2020, nationals of lusophone countries prevail.¹²⁸⁷

The calculations are based on cocaine seizure cases in which at least 2 individuals of known nationality were arrested.

For a given nationality pair, the number in brackets indicates the number of cases in the dataset where the two nationalities occurred together. Only pairs of nationalities which occurred in at least 4 cases are considered.

Most prominent nationalities of non-Portuguese individuals arrested in Portugal on cocaine trafficking charges, by nationality, 2020



Note: Nationalities with only one arrestee are excluded from the figure. They are: Belarus, Bosnia and Herzegovina, Bulgaria, Germany Macedonia, Montenegro, Morocco, Peru, Romania, Russian Federation, and USA.

Source: Unidade Nacional de Combate ao Tráfico de Estupefacientes Portugal, “Combate ao Tráfico de Estupefacientes em Portugal Relatório Anual 2020” (Polícia Judiciária Portugal, 2021), 55.

Beyond Europe, the *Cártel de Sinaloa* from Mexico, Colombian traffickers have used Equatorial Guinea as a transit point for their transatlantic cocaine shipments. These links might have been facilitated by the common language (Spanish).¹²⁸⁸ Similarly, anecdotal evidence points out that Brazilian traffickers might have links with the Portuguese-speaking African countries, such as Cabo Verde¹²⁸⁹ 1290 1291 and Angola¹²⁹², besides Mozambique.¹²⁹³

1287 Unidade Nacional de Combate ao Tráfico de Estupefacientes Portugal, “Combate ao Tráfico de Estupefacientes em Portugal Relatório Anual 2020” (Polícia Judiciária Portugal, 2021), 14, 55.

1288 Thomson Reuters Legal, ‘Money-Laundering Methods of Drug Cartels and the Capture of El Chapo’, 2016.

1289 MAOC-N, ‘MAOC-N Supports the Seizure of 5668kg of Cocaine in a Joint International Operation in the Atlantic’, maoc.eu, April 2022.

1290 C. Cohen, ‘Development of the Brazilian Drug Market Toward Africa: Myths, Evidence and Theoretical Questions’, *Journal of Illicit Economies and Development* 1, no. 2 (2019): 134–44.

1291 Ford, ‘Mozambique Becoming Southern Africa’s Cocaine Platform’.

1292 UNODC, ‘World Drug Report 2021, Booklet 4’, 30.

1293 Ford, ‘Mozambique Becoming Southern Africa’s Cocaine Platform’.

Mid-level cocaine distribution network in four cities across Spain^a

The case of a drug trafficking network active in Spain from at least September 2017 until November 2018,^a when it was taken down, illustrates how different groups establish linkages and collaborate. Rather than being a unified structure under a single command, the network consisted of 4 separate groups of mid-level suppliers, wholesale buyers and retail distributors who operated in 4 cities across Spain (Palma, Barcelona, Madrid, and Sevilla). Some of the groups had links with suppliers in Colombia and with logistics operators across Europe; others operated only within Spain. Out of 36 people involved, 11 were of Colombian origin;^b and a small portion of members were related by family or romantic ties (8 out of 71 ties). One third of the members were female, with some occupying important positions within the network.

The Palma-based group's main activity was to acquire mid-scale quantities of cocaine and cannabis resin in other Spanish cities and distribute them in Mallorca to retail drug dealers and users alike. In spring 2018, its leader (#1) sought to expand the pool of suppliers beyond his traditional Barcelona stream. Therefore, a broker (#8), who belonged to the Madrid-based group, introduced the Palma group's leader (#1) to a Colombia-born couple, who acted as mid-level leaders of the Madrid group (#9 and #10).^c In addition, the Palma group's leader travelled personally to Sevilla, Barcelona and Madrid to negotiate the supply of cocaine consignments and to deliver payments in cash.

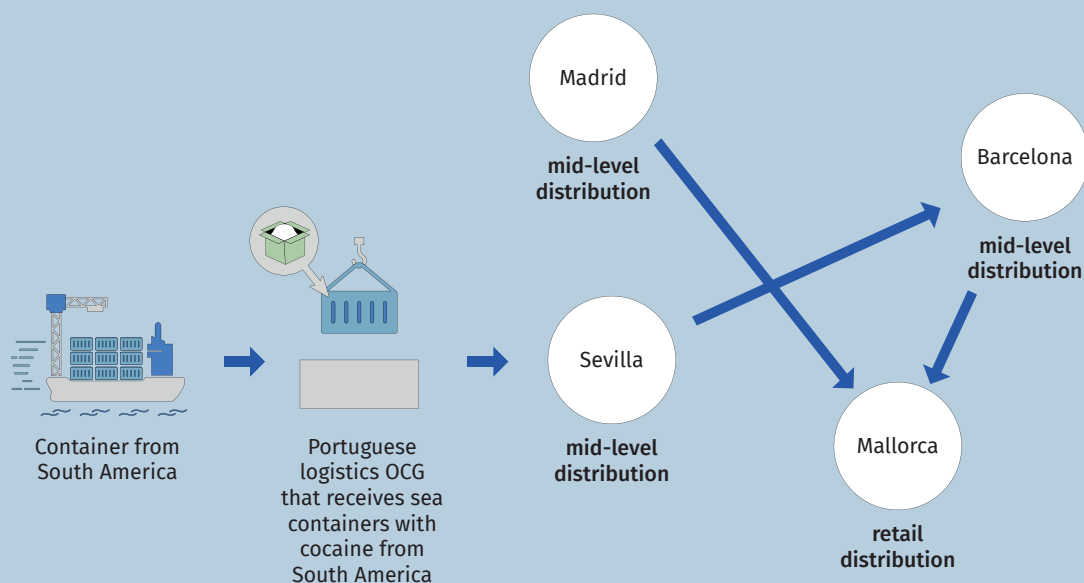
On the other side, the Sevilla-based cluster (#13 to #17) received cocaine directly from Portugal and supplied it to the Barcelona group, the Palma group and other

locations in Spain, including to Spain-based Albanian buyers. To pay the Portuguese suppliers for cocaine consignments, the Sevilla group resorted to services of a Chinese money broker based in Spain. To avoid physical movement of cash or bank transfers, the money broker would receive payment in cash from the Spanish cocaine distributors, provide them with a numeric code and pass the code to his associate abroad. The associate abroad (in Portugal or another country) would pay the corresponding amount of money (upon having deducted a commission) to a Portuguese supplier's representative after the latter had presented the numeric code. On one occasion, over 50,000 euro were moved at one time.

Finally, the Barcelona-based group had multiple suppliers. It procured cocaine in Spain and other European countries, including the Netherlands. After a trusted member (#14) introduced his boss (#18) to the Sevilla group's leadership, the Barcelona group began obtaining some of its cocaine supply from the Sevilla group. Later, the same broker shared with the Barcelona group's leader that the Sevilla group had an established relationship with the Portuguese suppliers, after which the three of them (#13, #14, and #18) decided to travel to Portugal to initiate the collaboration between the Barcelona group and the Portuguese.^d

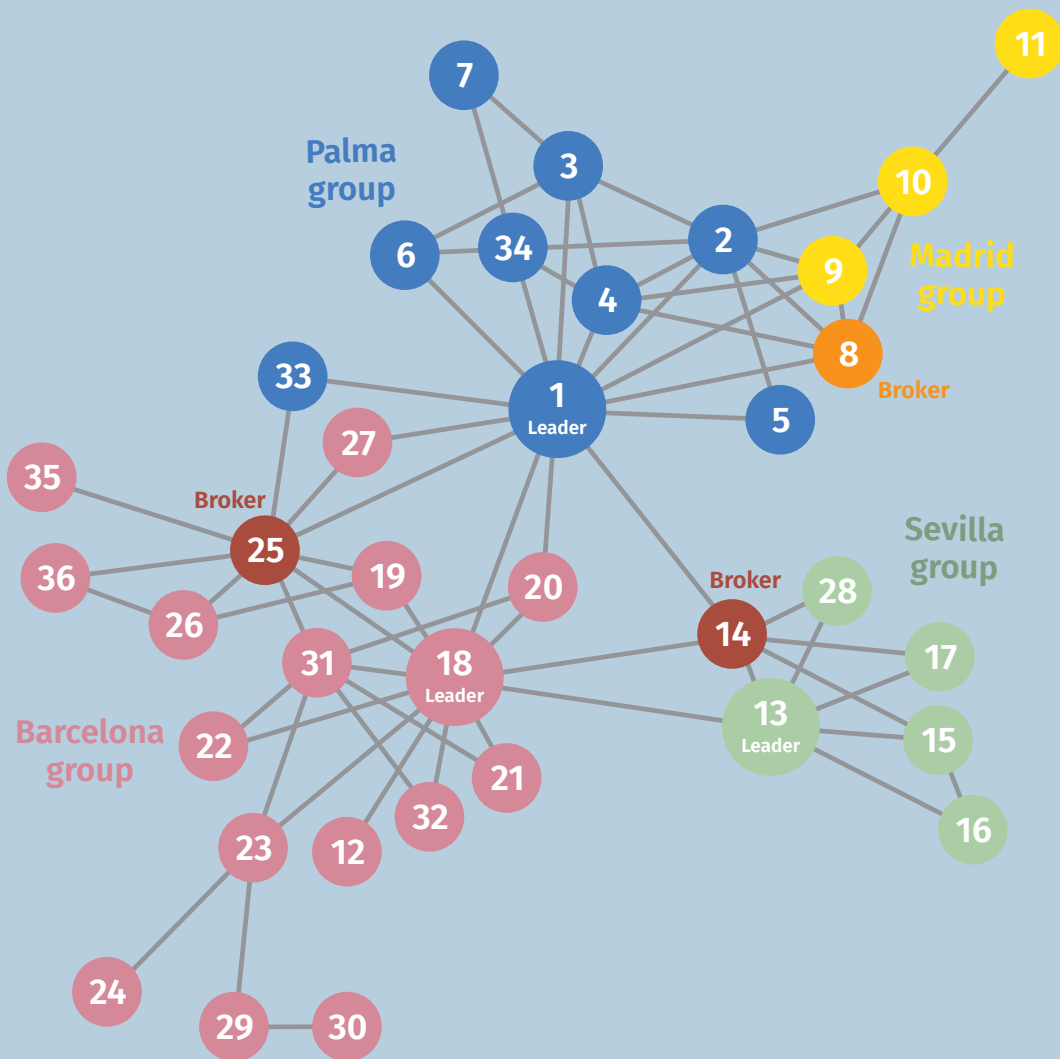
At the same time, the Barcelona group also conducted negotiations directly at the source, in Colombia. The contacts with the Colombia-based suppliers were facilitated by family ties of one of the members, a woman of Colombian origin (#25), whose father and brother were involved to some degree in cocaine trafficking. On at least one occasion, the woman travelled to South America to negotiate large-scale container

Structure of a cocaine mid-level distribution network in Spain



Source: UNODC analysis based on Audiencia Provincial, Palma de Mallorca, SAP IB 919/2021, 24 February 2021.

Internal links and roles of a cocaine mid-level distribution network in Spain



Source: UNODC analysis based on Audiencia Provincial, Palma de Mallorca, SAP IB 919/2021, 24 February 2021.

shipments. In addition, she was also in charge of negotiating the supply for the Palma group and travelled to Mallorca to collect payment from it after cocaine was distributed in the island.

The interactions within this network highlight the key role of the brokers (nodes #8, #14 and #25) in connecting the suppliers with the distributors at the national level. Brokers are trusted members of an OCG and have the highest number of ties and serve as a bridge between different clusters. This case also illustrates the collaborative rather than competitive dynamics of the structure; cocaine distributors at the national level are in constant search to diversify their suppliers, while forming non-exclusive business partnerships

with multiple groups. For example, the Sevilla group distributed cocaine to dealers and consumers in Madrid, independently of the Madrid group. Moreover, it apparently had no reservation in facilitating the direct contact between its Portuguese supplier and its buyer, the Barcelona group.

^a Based on the analysis of a sentencing document: Audiencia Provincial, Palma de Mallorca, SAP IB 919/2021, 24 February 2021.

^b "Of Colombian origin" refers to a person who was born in Colombia. The information on their immigration status in Spain, however, is not available.

^c The analysed sentencing file contains little detail about the Madrid-based group, hence only four members are presented in the Madrid cluster of the graph (#8 to #11). The Tier 1 leader of the Madrid group is not mentioned in the document and thus does not appear on the graph.

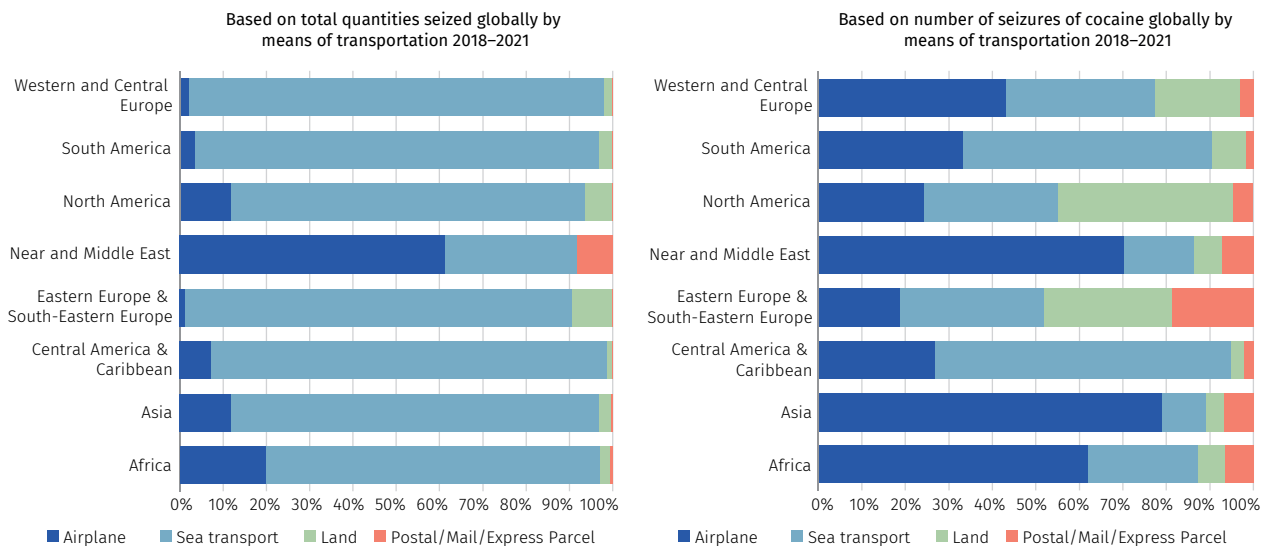
^d The Sevilla group leader accompanied the Barcelona group leader in order to introduce him to the Portuguese.

Chapter 5

Tafficking modalities

Trafficking modalities

Distribution of cocaine seizures documented in the UNODC Drugs Monitoring Platform, by subregion and means of transportation, 2018–2021



Source: UNODC Drugs Monitoring Platform.

To arrive from a production site to a consumer market abroad, a shipment of cocaine is typically transported by multiple means – sometimes combining waterborne, airborne and land routes – while moving between different storage points and exchanging hands from one actor to the next. Routes and modalities typically shift in response to drug interdiction efforts. Traffickers do not always choose the shortest geographical route; rather their strategy to deliver the drugs to their next buyer is aimed at avoiding law enforcement measures. Moreover, the supply chain to consumer markets involves multiple transactions between various actors, often acting autonomously, so that the overall route is not necessarily determined by one grand design but reflects rather the path of least resistance, even if that path may appear circuitous in geographical terms.

Changes in external factors, as well as law enforcement efforts, determining this path of least resistance may lead to shifts in destinations, shifts between different geographical routes and shifts between different means of transportation. Such changes are often referred to as the “balloon effect”, especially when linked to law enforcement efforts and when they result in geographic displacement. For example, successful law enforcement along the cocaine trafficking route from South to North America likely contributed indirectly to the increased appeal for traffickers of West and Central Europe as a destination market, and to rendering the transatlantic

route the new “path of least resistance”,¹²⁹⁴ a channel which itself expanded through extensive use of containerized shipments for trafficking. Similarly, in the aftermath of COVID-19, difficulties in crossing (multiple) land borders on the northward route through Central America may potentially have made maritime trafficking channels towards Europe more attractive than the route towards North America,¹²⁹⁵ while in Brazil the shifting landscape following the onset of COVID-19 appears to have resulted in an increased use of air modalities as opposed to trafficking by land.¹²⁹⁶ A Guatemalan prosecutor pointed out that sea transport and aircraft seemed to alternate in Guatemala in seizure incidents during 2018–2021, likely due to switching between maritime and aerial trafficking routes. Meanwhile, land routes remained consistent.¹²⁹⁷

Containerized shipments, typically transported (especially in the case of cocaine, as opposed to other drugs) in ocean-going vessels for long segments of their itinerary, and maritime modalities in general, allow for large quantities to be transported in single consignments.

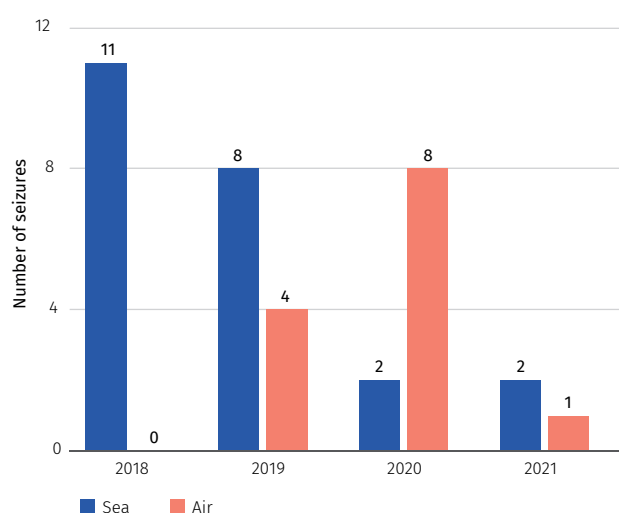
1294 UNODC and Europol, ‘The Illicit Trade of Cocaine from Latin America to Europe from Oligopolies to Free-for-All?’, 1, Cocaine Insights 1 (Vienna: UNODC, September 2021).

1295 Interview #20, interview by UNODC, 2022.

1296 UNODC and Europol, ‘Cocaine Insights 1’.

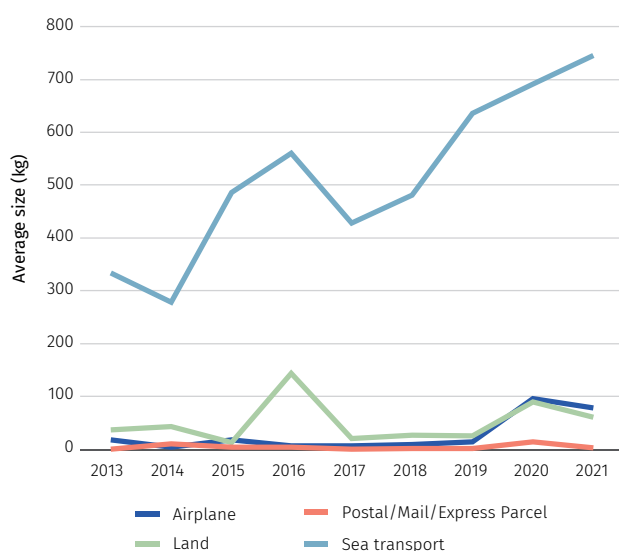
1297 Interview #16, interview by UNODC, 2022.

Number of cocaine seizures greater than 125 kg in Guatemala in air-borne and seaborne consignments documented in the UNODC Drugs Monitoring Platform, 2018–2021



Source: UNODC Drugs Monitoring Platform.

Average size of cocaine seizures documented in UNODC Drugs Monitoring Platform, by means of transportation, 2013–2021



Source: UNODC Drugs Monitoring Platform.

Maritime trafficking

Waterborne modalities have been instrumental in enabling the flow of increasing volumes of cocaine towards destination markets. Based on seizures documented in the UNODC Drugs Monitoring Platform, the share of cocaine quantities seized associated with maritime trafficking reached 89 per cent in 2021.¹²⁹⁸ To move cocaine over water, traffickers use commercial and private vessels, as well as underwater drones and semi-submersibles.

¹²⁹⁸ UNODC, 'World Drug Report 2022, Booklet 4' (Vienna: UNODC, 2022), 25.

Moreover, in South America, waterways and their ports play an increasingly important role in the movement and trans-shipment of cocaine on its way to a seaport. For example, as confirmed by interviewed Paraguayan customs officers, large quantities of cocaine leave Paraguay by river vessels, mainly through inland ports (typically Asunción), where cocaine is loaded into containers. River vessels can also make stops in other inland ports where cocaine can be trans-shipped. The containers then travel downstream along the Paraguay-Paraná Waterway and are loaded onto container vessels in deeper waters to reach the Atlantic via the River Plate estuary (close to Montevideo and Buenos Aires).¹²⁹⁹ In addition, according to Uruguayan authorities, the Uruguay River, on the border between Argentina and Uruguay, is used to transport cocaine via barges.¹³⁰⁰ Further north, limited evidence suggests that the Amazonian waterways are also used for cocaine trafficking,^{1301,1302} including towards the Atlantic coast.^{1303 1304 1305} The semi-submersible detected off Spanish shores in November 2019 appears to have been manufactured in a shipyard in the vicinity of Leticia, a major port on the Amazon River located at the juncture of the Brazilian, Colombian and Peruvian border, and made its way to the Atlantic along the Amazon River.^{1306 1307 1308}

Containers continue to be actively used for transoceanic shipments of cocaine

While cocaine traffickers have long taken advantage of legal trade in containerized goods, their techniques of "contamination"¹³⁰⁹ and concealment continuously evolve. As interviewed experts agree, the logistics of container trafficking are becoming more complex and sophisticated, requiring a network of collaborators among port workers, transport companies, drivers, or customs officials. Although not new, the use of container vessels to conceal cocaine still seems to be on the rise. Law enforcement officials point out a significant movement of contaminated containers from such countries as Panama, Ecuador, Costa Rica, Dominican Republic, and Brazil.^{1310 1311 1312 1313}

¹²⁹⁹ Interview 38, interview by UNODC, 2022.

¹³⁰⁰ Poder Judicial (Uruguay), 'Responses to the CRIMJUST Questionnaire', 7 November 2020.

¹³⁰¹ Interview #15, interview by UNODC, 2022.

¹³⁰² Interview #36, interview by UNODC, 2022.

¹³⁰³ Michelle Carrere, 'As Gangs Battle over Peru's Drug Trafficking Routes, Communities and Forest Are at Risk', *Mongabay*, 8 November 2022.

¹³⁰⁴ Tom Phillips and Dan Collins, 'Police Losing Narco War in Deadly Amazon Region Where Duo Disappeared', *The Guardian*, 16 June 2022.

¹³⁰⁵ Sam Jones, 'In Too Deep: The Epic, Doomed Journey of Europe's First Narco-Submarine', *The Guardian*, 4 February 2022.

¹³⁰⁶ Jesús Cañas and Patricia Ortega Dolz, 'La Narcolancha Semisumergible de "El Cojo", Una Creación "Made in Spain"', *El País*, 12 March 2021.

¹³⁰⁷ UNODC and Europol, 'Cocaine Insights 1'.

¹³⁰⁸ Jones, 'In Too Deep: The Epic, Doomed Journey of Europe's First Narco-Submarine'.

¹³⁰⁹ Term "contamination" refers to placing drugs in a container.

¹³¹⁰ Interview #24, interview by UNODC, 2022.

¹³¹¹ Interview #18, interview by UNODC, 2022.

¹³¹² 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets' (Colombia, 11 November 2021).

¹³¹³ 'CRIMJUST Annual Meeting - Latin American and Caribbean' (Colombia, 3 February 2022).

A common pattern reported in various sources has been to contaminate containers in ports that are not a typical source of cocaine shipments, or to route a contaminated container through a transit port which is not “suspicious.”^{1314 1315 1316} But, as was stated by one prosecutor, traffickers also may “contaminate” routes on purpose. This may happen to divert more police attention to the route to stop it from being used by a rival criminal group. In other cases, a criminal group itself may facilitate the detection of a contaminated container by the police on a non-traditional route to divert attention from a larger shipment of cocaine that is about to arrive via a typical route.¹³¹⁷

Cocaine trafficked in container ships can be introduced into the container at different stages: away from the port (e.g., in the case of shipments of agricultural produce, on the farm where the produce originates); in transit to the port (on a road or railroad, or in a warehouse); in the port itself; or at sea. As widely documented in media coverage, when concealing cocaine among legitimate goods on a farm or in a warehouse, traffickers often use creative methods of camouflage, such as stuffing fruits with cocaine as fruit pulp,¹³¹⁸ and imitating sugar¹³¹⁹ or flour¹³²⁰, among others. In Uruguay, soya and wool cargoes have been often used for concealing cocaine, with the contamination occurring before the container is delivered to the port.^{1321 1322} In other cases, cocaine can be concealed in the structure of a container (such as flooring, walls, or a refrigeration unit¹³²³).¹³²⁴

Large quantities of cocaine have been also found concealed within heavy machinery shipped in containers. For example, in July 2019, over 380 kg of cocaine were found inside construction machinery in an Australian town. The cocaine was concealed inside the steel hydraulic lifting arm of an excavator. The drug arrived at Port Botany in a shipment from South Africa.¹³²⁵ In January 2022, 464 kg of

cocaine hidden inside an 11-ton grinding machine were seized by Spanish authorities. The drug was introduced from Colombia through the port of Valencia.¹³²⁶ Similarly, in October 2022, 66 kg of cocaine were seized in Spain hidden inside industrial machinery. According to open sources, the criminal group responsible for the shipment was acquiring industrial machinery in Peru, where several people with specialized mechanical knowledge equipped it with hidden compartments to conceal cocaine and send it to Spain by sea. To extract the cocaine in such cases, traffickers often need to use specialized equipment.¹³²⁷ In the past decade, however, traffickers have been increasingly opting for the “rip-on/rip-off” (*gancho perdido / gancho ciego*) technique.¹³²⁸ This method involves “piggy-backing” on a legitimate shipment without the shipper’s knowledge, and relies on port workers, truck drivers or other individuals with access to the terminal to introduce the drug into a container together with the licit cargo, for later retrieval at the port of destination.¹³²⁹ In this method, criminal groups typically pick large legitimate companies and target their licit cargo. Brazilian interviewees indicate that PCC, which is a major player in cocaine trafficking from the Brazilian port of Santos, has extensive links among truck drivers and long-shoremen to ensure the “right” people are connected to the “right” cargo.¹³³⁰ Open sources confirm that “rip-on/rip-off” is widely used to ship medium to large quantities of cocaine (from tens of kilograms to several tons).¹³³¹ According to one Spanish interviewee, it is the most common contamination method in the port of Valencia, Spain, that also surpasses other Spanish ports in cocaine seizures involving this method.¹³³²

To open a sealed container, traffickers break the original customs seal and then replace it with a replica to avoid signs of tampering. In Costa Rica, where traffickers have been increasingly using shipments of fruits and vegetables to send cocaine to Europe,¹³³³ cloning of customs seals (known as the “three seals method”) is often used when the container is contaminated while still on the farm or *en route* to the port.¹³³⁴ This modus operandi involves one original seal and two replicas that are interchanged while the goods are transported.¹³³⁵ Alternatively,

1314 Carolina Sampo and Valeska Troncoso, ‘Cocaine Trafficking from Non-Traditional Ports: Examining the Cases of Argentina, Chile and Uruguay’, *Trends in Organized Crime*, 2022.
 1315 Tim Boekhout Van Solinge, ‘Global Cocaine Flows, Geographical Displacement, and Crime Convergence’, in *The Evolution of Illicit Flows: Displacement and Convergence among Transnational Crime*, ed. Ernesto U. Savona, Rob T. Guerette, and Alberto Aziani (Springer, 2022), 57–81.
 1316 UNODC and CoE Brazil, ‘Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19’, *Cocaine Insights 4* (Vienna: UNODC, July 2022).
 1317 Interview #10, interview by UNODC, 2022.
 1318 EuropaPress, ‘Desarticulado un grupo que introducía cocaína en piñas “preñadas” desde Cantabria’, *EuropaPress*, 8 May 2021.
 1319 Globo.com, ‘Receita Federal localiza mais de 700 kg de cocaína em carga de açúcar no Porto de Santos, SP’, *Globo.com*, 29 December 2021.
 1320 Ramon Mella, ‘Más de 3 toneladas de cocaína camuflada en harina’, *CadenaSer*, 21 January 2019.
 1321 Poder Judicial (Uruguay), ‘Responses to the CRIMJUST Questionnaire’, 7 November 2020.
 1322 Ministry of Interior (Uruguay), ‘Responses to the CRIMJUST Questionnaire’, 9 November 2020.
 1323 Cooling Post, ‘Refrigeration Units Targeted by Cocaine Smugglers’, *Cooling Post*, 15 April 2019.
 1324 EMCDDA and Europol, ‘2019 EU Drug Markets Report’ (Publications Office of the European Union, Luxembourg: European Monitoring Centre for Drugs and Drug Addiction and Europol, 2019), 62.
 1325 UNODC, *Drugs Monitoring Platform*, n.d.

1326 Ibid.
 1327 Tony Kingham, ‘Seized 66 Kilos of Cocaine That Were to Be Introduced into Spain Hidden inside Industrial Machinery’, *Border Security Report*, 20 October 2022.
 1328 EMCDDA, ‘Perspectives on Drugs: Cocaine Trafficking to Europe’ (European Monitoring Centre for Drugs and Drug Addiction, 2016).
 1329 UNODC, ‘CCP Glossary of Terms’, unodc.org, n.d., <https://www.unodc.org/ropan/en/BorderControl/container-control/ccp-glossary-of-terms.html>.
 1330 Interviews conducted for UNODC and CoE Brazil, ‘Cocaine Insights 4’.
 1331 Maria Fernandez Ramirez, ‘Container Shipping: Cocaine Hide and Seek’, *InSight Crime*, 9 February 2021.
 1332 Interview #10.
 1333 Beatriz Murillo Paz and Valeria Soto Ramírez, ‘Corroboración de la implementación de la normativa y recomendaciones sobre buenas prácticas, para la prevención del tráfico ilícito de drogas y otras actividades de delincuencia organizada, realizadas por medio de contenedores marítimos en la Terminal Moín, Costa Rica, 2020’ (San José: Instituto Costarricense Sobre Drogas, 2020), 67.
 1334 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’.
 1335 Fernandez Ramirez, ‘Container Shipping: Cocaine Hide and Seek’.

as mentioned by a Panamanian prosecutor, smugglers may take the doors off of a container and place them back on after contaminating it.¹³³⁶

Contamination can also occur in areas close to the port. In one scenario, the container enters the port “clean” and is registered at the entry. Then, shortly before loading the vessel, it is removed clandestinely from the port at night to be contaminated. It is then returned to the port and loaded onto the ship.¹³³⁷ For example, Brazilian customs officials suspect that some containers are contaminated in Santos Metropolitan Area, so that the truck carrying the container remains close to the port which reduces the risk of the loss of the cargo.¹³³⁸

There are several ways to unload cocaine from a container in the destination port. For example, the “switch method” – which, according to a Belgian interviewee, was first detected in the port of Antwerp, Belgium, and then spread to other European ports – involves dock workers transferring the illicit cargo from an overseas, “risky” container to a container coming from an EU country, before an inspection takes place.¹³³⁹ In doing so, the traffickers’ associates at the docks sometimes ensure the two containers are located close to each other. After the drugs are transferred, a complicit driver removes the newly contaminated container from the port to unload the cocaine.¹³⁴⁰

In other instances covered in the media, cocaine “collectors” have been known to hide for days in a container stored in the port, before retrieving the drug with the assistance of dock workers.¹³⁴¹ This tactic, sometimes called “Trojan horse”, is relatively new and not seen often. It may also be deadly if the “collectors” are trapped inside and run out of oxygen.¹³⁴²

The described techniques generally require complicity of corrupt port employees or customs officials. Customs officers may be bribed to turn a blind eye on a contaminated container or to swap it for a legitimate one. In an example from Costa Rica, a female scanner operator at the port regularly let “clean” containers pass the scanner first, sent their pictures to the customs officers for review and then would pass the contaminated containers without sending the pictures. She received \$90,000 for each operation.¹³⁴³

1336 Interview #18.

1337 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’.

1338 Interviews conducted for UNODC and CoE Brazil, ‘Cocaine Insights 4’.

1339 A container coming from South America is more likely to be subject to a customs inspection than an EU-originated container.

1340 Interview #12, interview by UNODC, 2022.

1341 Andy Young, ‘A “Brit” Gangster Executed in Cold Blood on Just Another Day in Antwerp’, *Daily Mail*, 1 February 2022.

1342 Linda Pressly and Michael Gallagher, ‘The “Cocaine Collectors” Retrieving Smuggled Drugs in Rotterdam’, *BBC News*, 26 November 2021.

1343 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’.

Failures to retrieve cocaine at a destination are not uncommon

Errors or lack of coordination among traffickers may lead to trafficked commodities remaining within licit cargo and moving on to the next port. In November 2021, 400 kg of cocaine were discovered in a shipping container in South Korea, the largest seizure of cocaine in its history. The container’s route was Peru – Ecuador – Guatemala – Mexico – Japan – South Korea. Bags with the illicit cargo were discovered accidentally, among avocados, during a quarantine procedure. As the bags were placed in the front part of the container, with no intention of hiding them, the Korean authorities believe that it might have been a result of a failed ‘rip-off’ unloading at some point along the route.^a

One international expert explained that, in February 2022, 50 kg of cocaine concealed in a container structure were seized in the port of Gdansk (Poland). The container’s route had been from Ecuador via Mexico to Antwerp and then St. Petersburg (the Russian Federation), where the drug was to be picked up by the receiver. It appears that the drug failed to be retrieved from the container in St. Petersburg, and the ship continued its trajectory to Poland.^b

In another instance reported by Estonian authorities (as cited in the media), 3.5 tons were seized in Muuga Harbor (Estonia) in March 2022, hidden among bananas from Ecuador, in one of the largest seizures in the Baltic and Nordic region. According to an Estonian public prosecutor (as cited in the media), the case could have been the result of a failed drug retrieval from the port of Rotterdam, and according to the Tax and Customs Board of Estonia, the ship had left from Rotterdam.^b

In another case, described by a Belgian prosecutor, a container in the port of Antwerp turned out to be inaccessible for the drug “collectors”. As wiretapped conversations showed, a criminal organisation had two “rip-off” extractions of cocaine cargo planned in the harbour that day. While one was successful, the other one failed because the container had been placed out of reach (on top of other two containers). Hoping to reach the container, smugglers contacted a crane operator who asked for a large financial compensation (€1 million) for the “service”. The smugglers were unwilling to pay such a high fee and had to abandon the cargo.^c

References:

^a UNODC, Drugs Monitoring Platform., n.d.

^b Interview #42, interview by UNODC, 2022.

^c Interview #12, interview by UNODC, 2022.

To imitate business activity on maritime routes, traffickers use increasingly sophisticated methods

Front companies

In the context of high volumes of international trade facilitated by maritime transportation and more stringent customs controls in ports, cocaine traffickers who operate on maritime routes resort to increasingly sophisticated business schemes. For example, customs officials in Brazil note that about ten years ago, criminal groups would use shell companies to ship cocaine abroad. This allowed law enforcement to detect the illicit cargo by screening a non-existent company. Suspicious cargoes – those being shipped through an unusual route or with unusual contents – were used more frequently and would raise suspicion of law enforcement. Nowadays, traffickers are more sophisticated, and customs officials highlight the increasing difficulty in detecting illicit shipments through container imagery.¹³⁴⁴

Unlike the “rip-on/rip-off” method described above – which implies that traffickers take advantage of legitimate companies without their knowledge – some companies are complicit in cocaine trafficking. These may be both existing businesses, acquired by a trafficker, with a history of legitimate commercial activity, and companies specifically established for the purposes of cocaine trafficking. According to one Spanish prosecutor, the latter method is more common.¹³⁴⁵

Companies set up by traffickers are aimed at imitating legitimate export-import activity. As multiple interviewed experts noted, prior to sending cocaine consignments, traffickers often carry out one or more “trial runs” (or “dry runs”) in which they send “clean” shipments with legitimate goods. Afterwards, they may send smaller amounts of cocaine (200-300 kg) to ensure the cargo is not seized, before shipping larger quantities. Such activity allows the company to acquire the status of a functioning legitimate enterprise and to avoid scrutiny by customs officials.^{1346 1347} In Costa Rica, for example, farms and packaging companies have been used by traffickers as fronts to hide cocaine in legitimate cargo. Traffickers may either buy an existing company or set up a new one.¹³⁴⁸

False paperwork

In order to mislead customs officials about the origin of a shipment, traffickers can on occasion forge shipping documents for containers, so that they appear to be coming from a port deemed to be of “low risk”. This was mentioned in the case of Benin in regard to shipments

that originate in Brazil and are transhipped in Spain.¹³⁴⁹ In Chile as well, according to one interviewee paperwork is sometimes modified to reflect a change in the companies owning the container or its legal cargo. That is, contaminated merchandise imported from Colombia to Chile is nominally imported (“nationalised”) and then exported (“reexportación”) from Chile to European ports.¹³⁵⁰ Another interviewee indicated that, in some cases, shipping documents for containers sometimes declare a false route (not indicating the real destination).¹³⁵¹

False business dynamics represent a major challenge for law enforcement and prosecutors as they typically involve intricate webs of companies and unclear ownership. As a prosecutor from Spain explained, in the case of companies complicit in trafficking, there is often a continuous change of ownership registered on paper, depending on where the illicit cargo is directed. For example, as soon as an OCG finds out that its contaminated container has been intercepted, it can quickly change the destination of the container through a fictitious sale in an attempt to dispose of the responsibility for the cargo. When confronted by the investigators, the receiving companies usually claim that they were not aware of a change in ownership during the transit; or that the merchandise was intended for another buyer who changed their mind, leading them to sell the goods to the highest bidder. Therefore, it can be extremely difficult for prosecutors to attribute authorship of the trafficking operation to the recipient company.¹³⁵²

Complex logistics and technological advances allow smaller watercraft to carry cocaine across oceans with greater efficiency than before

Pleasure vessels (yachts), commercial vessels (tugboats, ferries, and cargo ships) and fishing vessels are extensively used to traffic cocaine globally. Besides the fact that navigation technology has become more advanced, enhancing the capabilities of some of these vessels, the logistics of maritime trafficking represent an increasingly complex relay system that relies on well-coordinated actions between multiple actors. In addition, as highlighted by international experts, when it comes to the choice of a vessel, logistics operators are opportunistic; one trafficker can acquire different types of vessels to expand their range of services.¹³⁵³ Furthermore, as suggested by one expert, the choice of vessel for a trafficking operation often depends on what asset an OCG has in the area.¹³⁵⁴

1344 Interviews conducted for UNODC and CoE Brazil, ‘Cocaine Insights 4’.

1345 Interview #7, interview by UNODC, 2022.

1346 Ibid.

1347 Interview #36.

1348 Ministerio de Seguridad Pública Costa Rica, ‘Comunicado de Prensa No. CP-0737-2018’, seguridadpublica.go.cr (blog), 7 September 2018.

1349 ‘CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes’ (CRIMJUST Annual Meeting - Africa, Ghana, 23 November 2021).

1350 Interview #2, interview by UNODC, 2022.

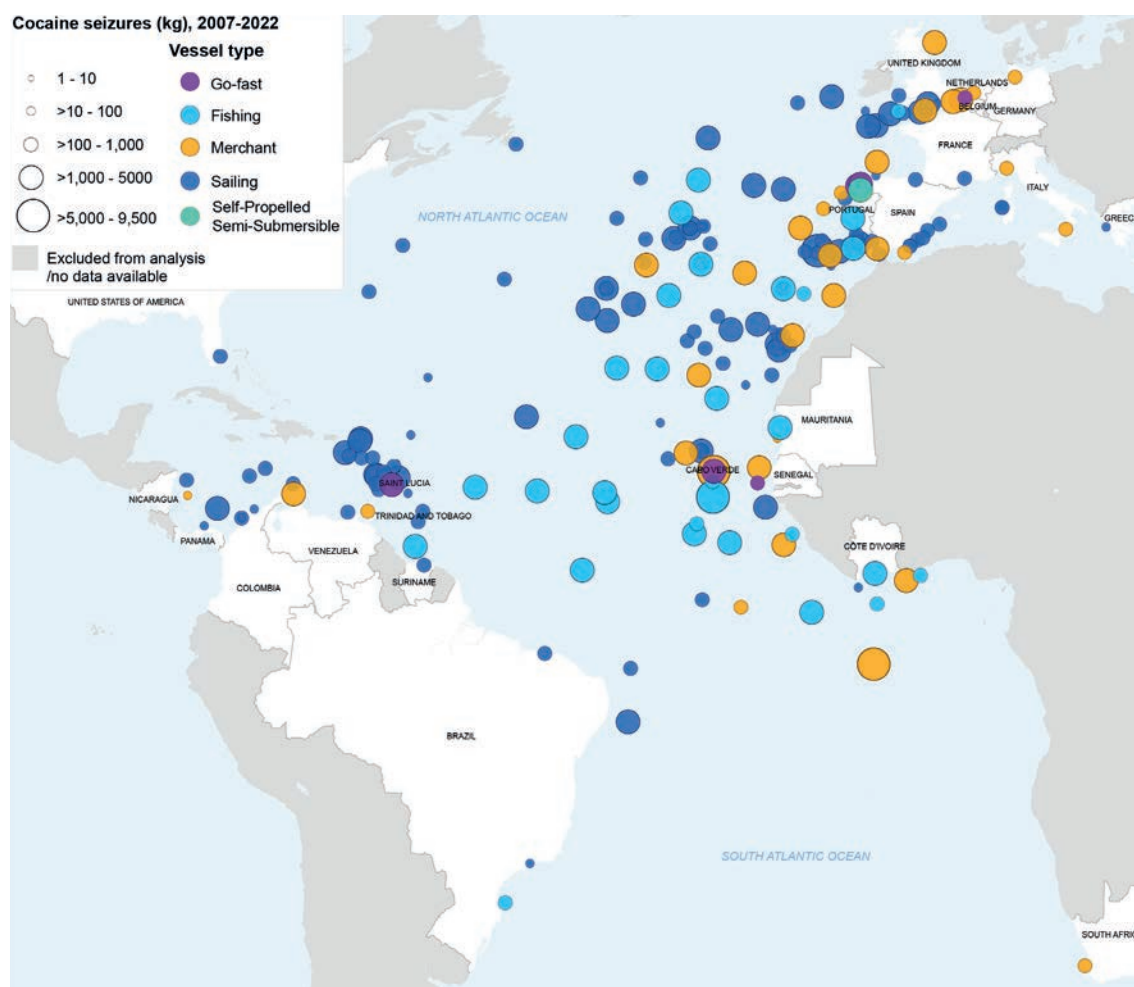
1351 Interview #34, interview by UNODC, 2022.

1352 Interview #7.

1353 Interview #41, interview by UNODC, 2022.

1354 Interview #25, interview by UNODC, 2022.

Location of cocaine seizures in the Atlantic ocean coordinated by the Maritime Analysis and Operations Centre (Narcotics), by type of vessel from which cocaine was seized, 2007 – April 2022



Source: MAOC-N.

To avoid law enforcement measures at seaports, traffickers often offload cocaine from the mother ship in open seas before reaching the port (the “drop-off” method). Ship-to-ship transfers occur at *rendezvous* points using small and medium-sized boats, such as speedboats (“go-fast”) and fishing vessels. This modality is extensively used off the coasts of transit regions, such as in western and northern Africa,^{1355 1356 1357} in Central America and the Caribbean,¹³⁵⁸ and in the area of the Pacific islands.¹³⁵⁹ A sailing vessel (rather than a speed boat or a fishing vessel) can also sail from Europe to pick up the drug during a *rendezvous* in the Atlantic.¹³⁶⁰

According to interviewees from MAOC-N, container vessels have also been “dropping off” cocaine, especially off the Belgian and Dutch coasts. While the vessel keeps

moving at the same speed, the cocaine is dropped over the board to be picked up by speedboats. This method implies the involvement of crew members in the trafficking operation or the presence of a stowaway.^{1361 1362} There have been crews and vessels detected that are involved in this method repeatedly.¹³⁶³

Anecdotal evidence suggests that small watercraft might be increasingly used off the coast of West Africa, possibly as a response to strengthened controls in ports. Cocaine that arrives in Western Africa is often offloaded from vessels before reaching the port, and is further transported in small quantities by boats¹³⁶⁴ to be stored in a warehouse on land.¹³⁶⁵ One media source suggests that some fishing vessels in this region are retrofitted to be able to transport between a ton and a half of cocaine

1355 Interview #41.

1356 Ibid.

1357 Mark Micallef, ‘Shifting Sands — Libya’s Changing Drug Trafficking Dynamics on the Coastal and Desert Borders’, Background paper (Switzerland: Global Initiative Against Transnational Organized Crime (commissioned by the EMCDDA), 2019).

1358 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’.

1359 Mark Saunokonoko, ‘Mother Ships and Huge Underwater Caches: How South American Cartels Smuggle Cocaine into Australia’, 9News, 7 September 2019.

1360 Interview #25.

1361 An illegal actor who hides on the ship and assists with unloading the drug. See CMCON, ‘Modalidades del Narcotráfico Marítimo 2022’ (Centro Internacional de Investigación y Análisis Contra el Narcotráfico Marítimo, Armada de Colombia, 2022).

1362 Interview #8, interview by UNODC, 2022.

1363 Interview #41.

1364 Ibid.

1365 David Zounmenou, ‘Drug Trafficking: Is Benin under Siege?’, *Institute for Security Studies* (blog), 4 December 2021.

in one trip.¹³⁶⁶ Senegalese law enforcement report that they observe an increase in the use of vessels rather than containers to traffic cocaine.¹³⁶⁷ In February 2021, 2 tons of cocaine were seized in international waters off Dakar (Senegal) from a motor yacht on its way from Gambia to Guinea-Bissau.¹³⁶⁸ Before being loaded on the yacht, the drugs had been transhipped at sea from a ship using light boats coming from Latin America.¹³⁶⁹

In the Pacific Ocean, although containers are one of the primary modes of trafficking illicit drugs according to one open source yachts and pleasure craft are also used for transiting between the Pacific islands, Australia and New Zealand because of their high versatility.¹³⁷⁰ Media coverage indicates that Australia-bound cocaine is often transferred from a mother ship to light boats that can easily hide among numerous atolls along the coastline.¹³⁷¹ There have been cocaine bricks washed up on beaches of Fiji and Philippines believed to be bound for Australia. Police and locals in Polynesia also have found large stores of cocaine anchored underwater in huge nets and tagged with GPS beacons.¹³⁷²

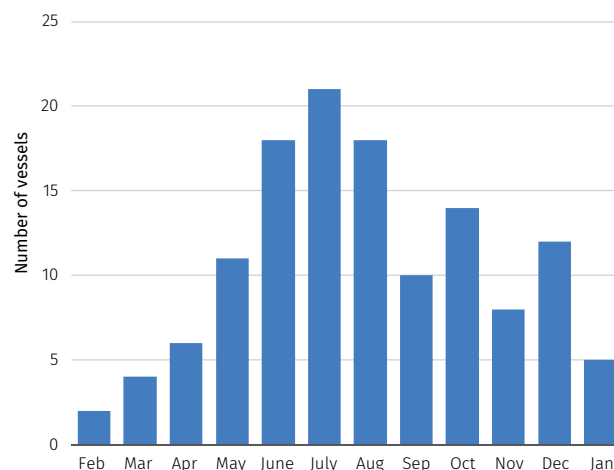
Sailing vessels

According to MAOC-N, technological advances in maritime navigation allowed sailing vessels (including pleasure craft) to diversify their departure ports on the Atlantic coast from where they deliver cocaine to Europe or Africa. In the past, sailing vessels were more dependent on the wind direction and mostly sailed from the Caribbean to Europe. Nowadays, however, Brazil has become one of the main departure points for the sailing vessels, despite this route being going against the prevailing wind.¹³⁷³

According to MAOC-N, this change has been facilitated by the advanced navigation technology available on modern sailing vessels.¹³⁷⁴

In order to lower the risk of detection, sailing vessels that depart from the Caribbean typically do not stop on intermediate islands on their way to Europe. A stopover is more likely when traffickers are confident that the cocaine is well concealed, and the risk of detection is low. This is typically the case when the drugs had been loaded onshore as opposed to on the high seas.¹³⁷⁵

Number of sailing vessels trafficking cocaine intercepted in the Atlantic in operations coordinated by MAOC-N, 2008-2021, by month of interception



Source: MAOC-N.

Fishing vessels

Fishing vessels of all types, from industrial to artisanal, have been long involved in drug trafficking. Larger fishing vessels can act as “mother ships”¹³⁷⁶ (vessels that carry large quantities of cocaine and from which smaller vessels traffic drugs to-and-from). Medium and small fishing vessels can provide go-fast boats in transit with fuel and supplies. Smaller fishing vessels traffic drugs in and out of harbours in smaller quantities, frequently transhipping drugs to or from mother ships outside territorial waters.¹³⁷⁷

The involvement of individual fishers in the drug trafficking supply chain has been a growing concern in some countries, especially those that are home to vulnerable coastal communities.¹³⁷⁸ It is not uncommon for small-scale fishers from South and Central America to be involved in cocaine trafficking by supplying fuel or transporting drugs north along the Pacific coast to Central America or Mexico.¹³⁷⁹ For example, the Caribbean and Pacific coasts of Costa Rica are home to vulnerable communities with lack of access to employment opportunities. These areas are used to traffic cocaine in go-fast and fishing boats that carry drugs for short distances to other Central American countries, or carry fuel supply for other smugglers. In recent years, larger fishing vessels that can load more cocaine and move slower than speed boats have been increasingly used on the Pacific coast of Central America.¹³⁸⁰

1366 Arnaud Jouve, 'Trafic de drogue en Afrique de l'Ouest: état des lieux', *RFI*, 22 January 2022.

1367 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1368 MAOC-N, 'MAOC-N Supports Senegalese Cocaine Seizure Off West Africa', *maoc.eu*, n.d.

1369 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1370 Jose Sousa-Santos, 'Drug Trafficking in the Pacific Islands: The Impact of Transnational Crime', *Lowy Institute* (blog), 16 February 2022.

1371 Saunokonoko, 'Mother Ships and Huge Underwater Caches: How South American Cartels Smuggle Cocaine into Australia'.

1372 Ibid.

1373 Some of these vessels sail either to Cabo Verde (from where they reach either West African coast or Western Europe) or to the Gulf of Guinea (to reach West Africa).

1374 Interview #41.

1375 Ibid.

1376 Laura Bautista, 'Interceptado en aguas canarias un pesquero con tres toneladas de cocaína valoradas en 90 millones de euros', *ABC España*, 17 April 2022.

1377 UNODC, 'Transnational Organized Crime in the Fishing Industry' (Vienna: UNODC, 2011), 74-94.

1378 Joshua Rapp Learn, 'The Number of Small Fishing Vessels Smuggling Illegal Drugs Has Tripled', *Smithsonian Magazine*, 12 November 2020.

1379 David Soud, Ian Ralby, and Rohini Ralby, 'Hidden in Plain Sight: Fishing Boats as Links in Illicit Supply Chains', *Windward* (blog), 15 July 2019.

1380 Interview #29, interview by UNODC, 2022.

In 2021, fishing vessels intercepted in the Atlantic Ocean by MAOC-N (over 20 cases in total) departed primarily from Suriname, Colombia, and Venezuela (Bolivarian Republic of). In 2022, there are signs of the growing role of Brazil as a departure point for fishing vessels destined to the area between the Gulf of Guinea and south of Cabo Verde, where drug interdiction is significantly weaker than off the European coasts.¹³⁸¹ In April 2022, for example, five tons of cocaine were seized from a Brazilian fishing boat near Cabo Verde.¹³⁸²

Speed boats (go-fast)

According to one expert from an international law enforcement agency, in the Caribbean, go-fast boats are typically used for trafficking over shorter stretches and fishing vessels are used for longer distances. Go-fast boats with 500-700 kg of cocaine on board can cross the Caribbean Sea from Venezuela (Bolivarian Republic of) to the Dominican Republic or Puerto Rico because they carry additional fuel tanks.¹³⁸³ Often, *transportistas* from the Dominican Republic meet with the go-fast boat at 20-30 nautical miles from the Dominican coast and pick up the cargo either on a go-fast or a fishing boat.¹³⁸⁴

Meanwhile, on the Pacific coast of Central America, there has been a tendency for go-fast boats to increase their range off the coast. To deliver cocaine to Mexican ports on the Pacific coast, go-fasts sailing from Colombia or Ecuador make several stops on their way north in order to refuel from fishing boats that act as “petrol stations”.¹³⁸⁵ These logistics allow go-fast boats to sail distances up to 1,000-1,500 km and go as far as west of the Galapagos Islands to avoid law enforcement activity.¹³⁸⁶ Law enforcement sources in El Salvador confirm this shift to sailing at an increased distance from the shore. Initially, traffickers used to sail at 50 nautical miles (90 km) away from the coast. With time, the routes have moved further away and now they may reach even over 500 nautical miles (900 km) away from the coast.^{1387 1388 1389}

As described by Salvadoran law enforcement, long-range maritime routes (further than 100 nautical miles from the coast) are used for trafficking quantities above 500 kg by go-fast boats with two or three engines, or by semi-submersibles. Smaller quantities (below 500 kg) are trafficked at short range (within 10 nautical miles of the coast) by less powerful boats with one or two engines, mostly fiberglass fishing boats (*pangas*). In this case, Salvadoran and Guatemalan traffickers pick up cocaine

in Nicaraguan or Costa Rican waters or on shore. Thus, the shipment makes stops from one country to another and does not need to go further into the sea. These boats often leave the drugs floating with GPS beacons for fishers to pick them up and bring them ashore.^{1390 1391}

Go-fast boats are also used in crossings of the Atlantic from South America to Europe. In this case, traffickers often transfer cocaine between different vessels (go-fast and fishing vessels) two or three times per “journey”. Vessels that provide refuelling or other logistical support are also often used in the Atlantic. Each trip requires two to three vessels to tow a go-fast or to provide it with supplies or fuel.^{1392 1393}

Merchant vessels

According to experts from MAOC-N, tugboats, general cargo vessels and bulk carriers used to traffic cocaine across the Atlantic typically do not surpass 100 meters in length. They are cheaper and easier to dock in ports than larger vessels; and are sometimes bought only for one run.¹³⁹⁴ Such was the case of “Eser”, a general cargo ship that carried 9.5 tons of cocaine from Panama to Morocco but had to make a stopover in Cabo Verde.¹³⁹⁵ According to one source familiar with the case, the vessel was bought in a deteriorated shape specifically for one trafficking operation. Technical problems, together with a sudden death of one of the crew members, forced the ship to dock in the port of Praia, Cabo Verde, where the drugs were seized.¹³⁹⁶

Merchant vessels that leave European ports to pick up cocaine at sea, sometimes pretend to go in the direction of West Africa. They then switch off the GPS system and reroute to South America. In many cases, cocaine is picked up in waters near Suriname. It can be loaded on a bulk carrier off the coast after the vessel has been loaded with a legitimate cargo. In this case, the crew is likely to be involved in the operation. Then, the vessels sail back to Europe, offloading the drugs at sea before entering the port.¹³⁹⁷

(Semi)-submersibles and water drones

Semi-submersibles are artisanal vessels built specifically for trafficking drugs and designed for single use. Self-propelled semi-submersibles (SPSS) and Low-profile vessels (LPVs) have been routinely detected in the Caribbean and the Pacific coast of Central America.¹³⁹⁸ Although media sources report the existence of a so-called “cemetery of narcosubs” in the waters near the

1381 Interview #41.

1382 UNODC, Drugs Monitoring Platform.

1383 Interview #25.

1384 ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets.’

1385 Ibid.

1386 Interview #24.

1387 Interview #32, interview by UNODC, 2022.

1388 Interview #33, interview by UNODC, 2022.

1389 UNODC, ‘Informe de análisis de tráfico de drogas y precursores químicos: El Salvador’ (UNODC, 2019), 39.

1390 Interview #32.

1391 Interview #33.

1392 Interview #25.

1393 Interview #41.

1394 Ibid.

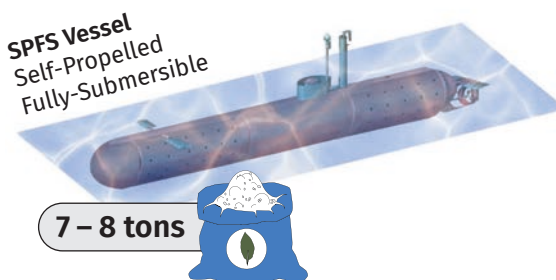
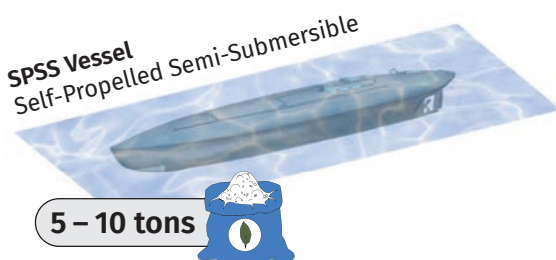
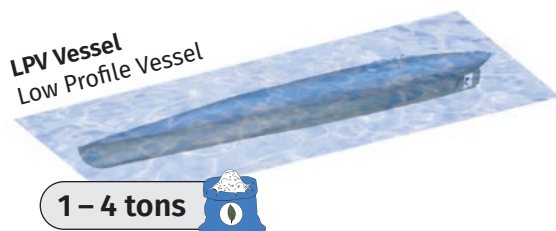
1395 UNODC, Drugs Monitoring Platform.

1396 Interview #42, interview by UNODC, 2022.

1397 Interview #41.

1398 CMCON, ‘Modalidades del Narcotráfico Marítimo 2022.’

(Semi)-Submersibles and their capacities to carry drugs



Water drones and their capacities to carry drugs



Sources:

CMCON, 'Modalidades del Narcotráfico Marítimo 2022' (Centro Internacional de Investigación y Análisis Contra el Narcotráfico Marítimo, Armada de Colombia, 2022).
Scott Savitz, 'Opportunities for the Brazilian Navy to Employ Additional Unmanned Systems', Perspective (RAND Corporation, August 2021).
Gonzalo Araluze, 'Estos son los "drones submarinos" intervenidos por la Policía para traer droga de Marruecos', *Vozpopuli*, 4 July 2022.

Canary islands, interviewed experts claimed to not have the evidence of such phenomenon.¹³⁹⁹ To date, there has been only one report of a semi-submersible involved in cross-Atlantic cocaine trafficking, the semi-submersible that brought 3 tons of cocaine to the Galician coast in 2019.¹⁴⁰⁰

Among the latest technological advances is the emerging use of "water drones" for drug trafficking purposes. Uncrewed underwater vehicles (UUVs, also known as "autonomous underwater vehicles", are self-propelled devices that move underwater following a pre-programmed trajectory. One such drone was found in 2014 in Colombia in an abandoned camp that belonged to a criminal group.¹⁴⁰¹ More recently, Spanish police, cited in

media sources, reported the discovery of several underwater drones in the process of manufacture, designed for transporting cocaine from Morocco to Spain across the Gibraltar Strait and capable of covering a distance of over 30 km.¹⁴⁰²

Uncrewed Surface Vehicle (USVs) are remotely controlled drones designed for legitimate purposes that can be potentially used to move small quantities of drugs at relatively short distances.¹⁴⁰³

1399 J. M. Zuloaga, 'Oubiña confirma la existencia de un "cementerio" de narcosubmarinos en aguas de Canarias', *La Razón*, 19 January 2021.

1400 Patricia Ortega Dolz et al., '26 Días De Travesía en Un Narcosubmarino', *El País*, 16 December 2019.

1401 CMCON, 'Modalidades del Narcotráfico Marítimo 2022', 97.

1402 Gonzalo Araluze, 'Estos son los "drones submarinos" intervenidos por la Policía para traer droga de Marruecos', *Vozpopuli*, 4 July 2022.

1403 CMCON, 'Modalidades del Narcotráfico Marítimo 2022', 96.

Modality “Parasite” is evolving and extending to new geographical regions

Another modality is when cocaine is attached to the vessel from the outside, below the waterline. It can be placed in an external container attached to the hull of the ship, tied with chains to the ship or concealed in a hidden compartment. In these cases, the process of installation (at the point of departure) and extraction (at the point of arrival) are conducted by professional divers. This modality can be used to transport small to medium quantities (tens or a few hundreds of kilograms) on any type of a larger vessel, sometimes without the crew’s knowledge.¹⁴⁰⁴

Initially, when it first appeared in the 1980s, the method involved metal cylinders or boxes filled with cocaine and attached to a vessel’s hull. Nowadays, traffickers have perfected the “parasite” method by inventing new techniques to avoid detection by law enforcement. Contemporary “parasites” are often placed inside sea chests¹⁴⁰⁵ or hung from boats through steel ropes hooked to rings welded to the hulls of the boat. Some of the “parasites” are even equipped with air chambers to float and compressor valves to inject water and submerge the box to evade underwater inspections.¹⁴⁰⁶ However, interviewees perceived “parasites” as an uncommon method detected in the transatlantic operations of MAOC-N, as their use involves complex logistics and high risk of failure.¹⁴⁰⁷

The “parasite” modality has been detected in South America on numerous occasions, in Brazil and Colombia,^{1408 1409} but also in the case of Chile; cocaine destined for domestic consumption is often trafficked to Chile by fishing vessels (mainly Peruvian)^{1410 1411} attached to the vessel’s body below the waterline. These often depart from south of Peru and meet with smaller Chilean vessels to transfer cocaine onto them.^{1412 1413}

In 2018, Colombian police seized bags with 120 kg of cocaine that were attached with chains to a fishing vessel’s keel.¹⁴¹⁴ The ship made a stop at the Buenaventura port before heading to China.¹⁴¹⁵ According to media

sources, in Australia, the “parasite” modality came to the attention of police during an operation over the period 2018-2021, and police suspect that this technique has been growing in use by criminal groups.¹⁴¹⁶ In Australian ports, this modality has involved cocaine concealed inside tyres attached to the vessel with chains.¹⁴¹⁷

When this method is used, it involves one or more highly-skilled divers who may travel to the port from abroad to extract the drug. These may be hired by the suppliers, the receivers or both.¹⁴¹⁸ The extraction process is not without challenges; the operation may fail due to poor weather conditions or an accident, and may result in a diver’s death.¹⁴¹⁹ In the port of Valencia (Spain), on at least two occasions, cocaine has been found inserted in an empty missile-shaped container and attached to a merchant ship’s hull. In one of the instances, police detected two divers in the water nearby a port. Both had apparently been hired by the cocaine supplier in South America and travelled to Spain to extract the drugs. The extraction operation failed; one of the divers was found dead of hypothermia. As suggested by the expert, not knowing the area well, the divers may have entered the waters too far from the port, which led to them freezing (the case occurred in December).¹⁴²⁰

1404 Ibid.

1405 A sea chest is a recess in the hull of a ship which allows controlled water intake for piping systems.

1406 CMCON, ‘Modalidades del Narcotráfico Marítimo 2022’.

1407 Interview #41.

1408 Ashley Pechinski, ‘Cargo Ships Act as Trans-Atlantic Drug Carriers, with Crews Unaware’, *InSight Crime*, 30 August 2021.

1409 Caracol Radio, ‘Cayó red de narcotráfico que operaba en el Caribe colombiano’, *Caracol Radio*, 29 August 2021.

1410 Alejandra Rodríguez, ‘Record Drug Seizure Caps off Difficult Year for Chile’, *InSight Crime*, 4 December 2020.

1411 Meganoticias, ‘Detienen a banda que ingresaba drogas y armas a Chile en el casco de un buque’, *Meganoticias*, 28 August 2020.

1412 Fiscalía de Chile, ‘Informe 2021 Observatorio del Narcotráfico en Chile’ (Fiscalía de Chile, 2021).

1413 Interview #2.

1414 A keel is the longitudinal structural element at the bottom of a vessel.

1415 UNODC, Drugs Monitoring Platform.

1416 Olivia Day, ‘Accused Drug Smuggler Accidentally Drops a \$45 Million Cocaine Brick to the Ocean Floor in Disastrous Blunder - and “Crime Bosses Are Furious”’, *Daily Mail*, 16 May 2022.

1417 Ibid.

1418 Interview #10.

1419 Nahuel Gallota, ‘Misterio en Australia: un magnate de los yates, un buzo muerto y 50 kilos de cocaína en un barco que salió de Santa Fe’, *Clarín*, 15 May 2022.

1420 Interview #10.

Convergence of routes and infrastructure for trafficking activities

When routes and modalities used to traffic different drugs intersect, the same actors may become involved in different trafficking activities.^a Galician smuggling networks, for example, service a range of trafficking activities. For example, some Galician OCGs specialize in manufacturing drug boats (*narcolanchas*) that may be used by Algeciras-based hashish traffickers, mainly Moroccan nationals, who smuggle hashish from Morocco to the south of Spain. The same type of boats has been used by smugglers of migrants from African coasts.^b Other Galician-based experienced boatmen may themselves provide transportation services for drug trafficking across Gibraltar, be it for cocaine transported in Africa or for hashish of African origin.^c

Galician smuggling networks are also active in redistributing heroin across Galicia, the rest of Spain and Portugal by land, thanks to their long-standing relationship with Turkish and Afghan smugglers.^d On account of their experience and their capacity to distribute drugs both in Spain and Portugal, such networks are also involved in the distribution of heroin coming from the Netherlands as they have formed alliances with Bulgarian and Albanian OCGs.^e According to media sources, it would seem that some Galician cocaine smuggling groups may have transitioned from cocaine to heroin distribution as this appears to be a more lucrative and less risky business.^f

The interconnectedness of trafficking networks can be illustrated by an emerging trade of cocaine in exchange for cannabis resin. As pointed out by MAOC (N), in the past two years, there has been a trend of cannabis resin being trafficked by sailing vessels from Europe south towards West Africa and South America.^g Another anonymous law enforcement source noted that African cannabis resin is in high demand in the Brazilian market and is typically trafficked by a route via Morocco to West Africa to Brazil. Analysis by a law enforcement source indicates that, due to the existing trafficking infrastructure, there is an overlap between cannabis and cocaine routes and actors.^h

Such was the case of “Wall Street”, a sailing vessel under the Dutch flag with destination to Galicia, that was intercepted by Spanish police in 2018 with 1.5 tons of cocaine on board. The crew consisted of two Croatians and one Spanish-US citizen. Notably, the vessel had sailed from Spain to South America to deliver Moroccan hashish and to return with cocaine. The exchange allegedly occurred off the coast of Guayana.ⁱ The vessel was hired by a Gibraltar-based Moroccan smuggler of hashish who had recruited crew members through an Eastern European criminal group.^j

Within Mexico also this convergence of the routes is

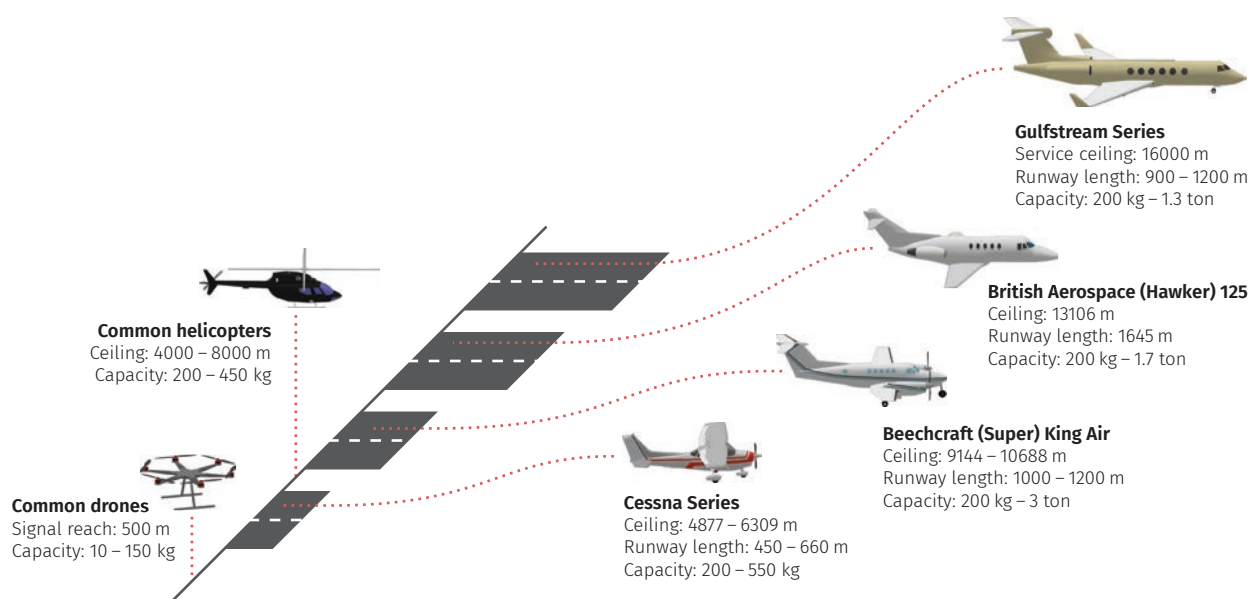
reported. Land is the main trafficking modality with 12 routes identified for trafficking cocaine that overlap with methamphetamine routes.^k

Trafficking of cocaine sometimes occurs along the same routes as smuggling of legal goods. For example, according to a Brazilian prosecutor, the PCC uses the same logistics to transport cigarettes and drugs (cocaine and cannabis) into Brazil, which is facilitated by their control over the smuggling corridors at the border in Mato Grosso Do Sul state.^l Argentina’s law enforcement sources point out that cocaine and coca paste (PBC) were traditionally imported through the country’s north-western border with the Plurinational State of Bolivia (provinces of Salta and Jujuy), a hot spot for contraband; while the north-eastern part of the country bordering Paraguay was predominantly used to import cannabis. In recent years, however, the cannabis trafficking routes have been increasingly used to traffic cocaine by land, by small aircrafts or by the Paraguay-Parana waterway. Some of the actors involved in trafficking along these routes had been providing logistics for cannabis trafficking and now use their infrastructure for cocaine trafficking as well.^{m,n}

References:

- ^a Ernesto U. Savona, Rob T. Guerette, and Alberto Aziani, *The Evolution of Illicit Flows: Displacement and Convergence Among Transnational Crime* (Springer, 2022).
- ^b The use of specific types of boats in trafficking activities has led to their prohibition by a royal decree from 26 October 2018. See El Presidente del Gobierno, ‘Real Decreto-ley, por el que se adoptan determinadas medidas de lucha contra el tráfico ilícito de personas y mercancías en relación con las embarcaciones utilizadas’, Pub. L. No. 16/2018, § I. Disposiciones generales, BOE-A-2018-14747 104007 (2018).
- ^c Interview #7, interview by UNODC, 2022; interview #8, interview by UNODC, 2022.
- ^d Fiscalía General del Estado, ‘Fiscalía Especial Antidroga’, in *Memoria 2021*, 2021, 613–46.
- ^e Interview #8. Heroin enters Galicia mostly by land from Turkey via Bulgaria and Netherlands.
- ^f Elisa Lois, ‘Narcos gallegos de la coca se pasan a la heroína’, *El País*, 23 September 2017.
- ^g MAOC (N), official communication.
- ^h ‘CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes’ (CRIMJUST Annual Meeting - Africa, Ghana, 23 November 2021).
- ⁱ UNODC, ‘Drugs Monitoring Platform’, n.d.
- ^j Interview #8, interview by UNODC.
- ^k Interview #2, interview by UNODC, 2022.
- ^l Interview #15, interview by UNODC, 2022.
- ^m ‘Meeting of Strategic Analysts on Cocaine Trafficking and Markets’ (Colombia, 11 November 2021).
- ⁿ Interview #19, interview by UNODC, 2022.

Aircraft models used for drug trafficking flights



Sources: Media reports.

Air trafficking

Cocaine is trafficked by air via two main modalities: scheduled air transport, such as passenger and cargo flights; and general aviation (other commercial and private flights). While seizures of cocaine via air routes are typically more frequent than via maritime routes, the quantities of cocaine per seizure are significantly below those seized at sea.

Use of general aviation on the rise in some regions

General aviation (small light aircraft, jets, and helicopters) used for trafficking cocaine continues to pose a significant threat. The types of aircraft used to transport cocaine include small planes with one or two engines, as well as private jets of different sizes, styles, load capacity and speed. One interviewee suggested that the aircrafts used are becoming larger and more powerful.¹⁴²¹ Traffickers have been improving their capabilities in building airplane “factories”; stolen or purchased light aircraft are retrofitted and improved to be able to fly longer distances, potentially enabling them to even cross the Atlantic.¹⁴²²

Clandestine flights (unidentified aircraft with no flight plan) used to traffic drugs mainly cocaine and cannabis herb – are not a new phenomenon in Latin America. They affect, in different ways, Peru, Bolivia (Plurinational State of), Paraguay, Argentina, Brazil, Uruguay, Colombia, Venezuela (Bolivarian Republic of),¹⁴²³ Suriname, French

Guiana,¹⁴²⁴ and also several countries in Central America and the Caribbean, such as the Dominican Republic, Honduras, Nicaragua, Guatemala, Belize and Mexico.¹⁴²⁵

In recent years, clandestine flights have become more important in moving cocaine along the southern cone route. In particular detections of such flights have increased both in terms of the number of incidents and the quantity of cocaine seized.¹⁴²⁶ Such flights often carry between 350-500 kg of cocaine.

In the air corridor along the Caribbean coast of Central America, through which cocaine reaches the lucrative markets of the United States and Canada, clandestine flights are apparently becoming increasingly regular. According to an international law enforcement source, light planes often depart from countries on the coast of the Caribbean Sea in South America, fly over the Central Caribbean and land in Guatemala, often 3-5km away from the Mexican border, where they unload the drugs and ship them across to Mexico.¹⁴²⁷ Similarly, analysis of incidents recorded in the UNODC Drugs Monitoring Platform suggests that in some countries along the Southern Cone route there has been a tendency for clandestine flights to take off or land closer to borders; this may reflect a strategy by drug traffickers to reduce the risk of detection by using shorter flights and to exploit the difficulties for law enforcement agencies to intervene quickly across jurisdictions.¹⁴²⁸

1421 Interview #24.

1422 ‘CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes’.

1423 Venezuela Investigation Unit, ‘Clandestine Airstrips, Drug Flights Becoming More Frequent Across Venezuela’, *InSight Crime*, 12 March 2020.

1424 Interview #24.

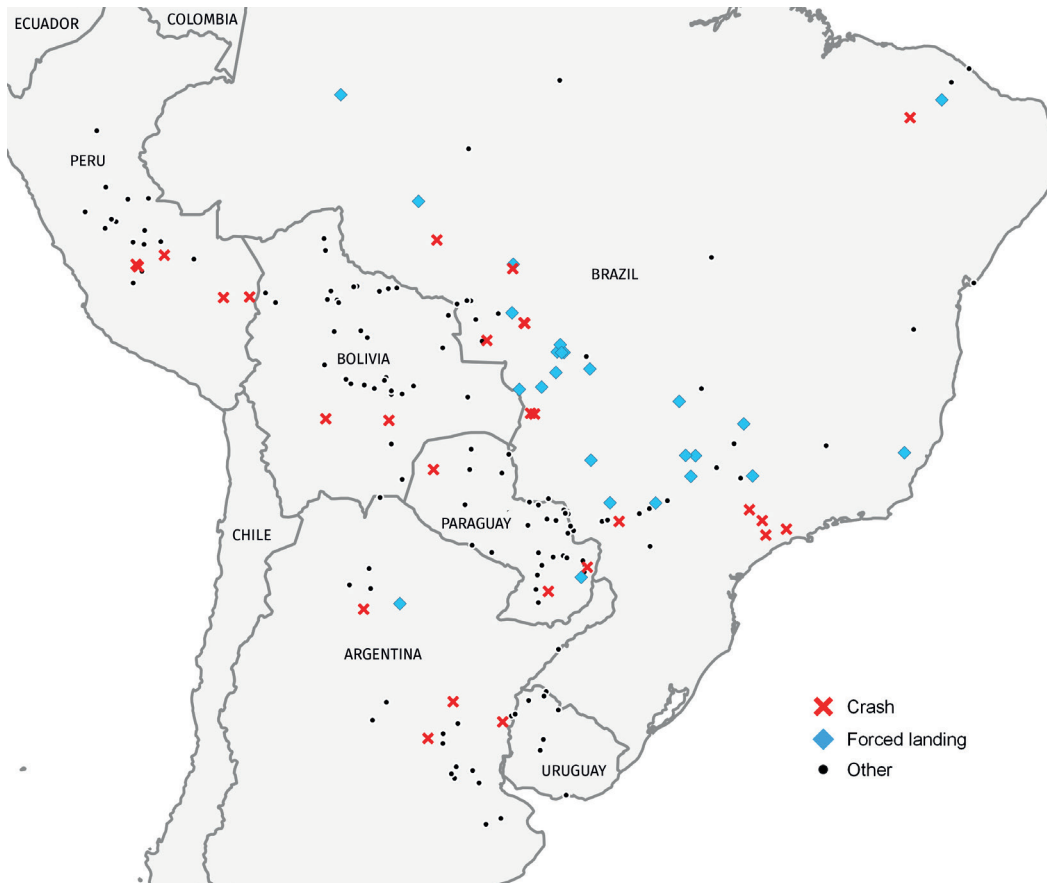
1425 Venezuela Investigation Unit, ‘Clandestine Airstrips, Drug Flights Becoming More Frequent Across Venezuela’.

1426 See Chapter *Established markets*, in this report.

1427 Interview #24.

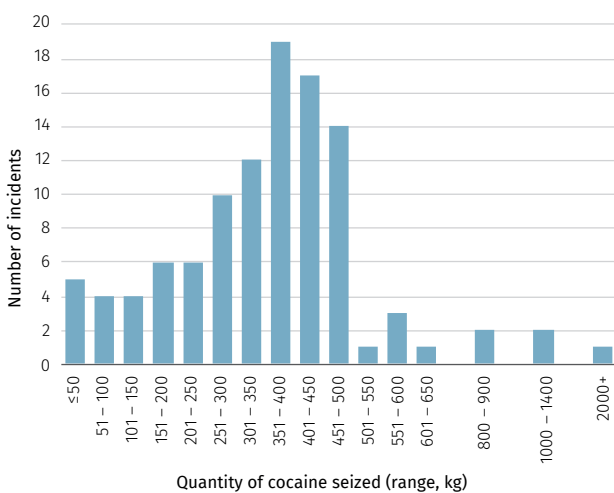
1428 UNODC, Drugs Monitoring Platform.

Known aircraft-related trafficking incidents along the Southern Cone Route and in Brazil, 2011 – September 2022



The boundaries and names shown and the designations used on this map do not imply endorsement or acceptance by the United Nations.
Note: Aircraft-related incidents linked to drug trafficking include episodes where the circumstances suggested that, at the moment of detection, drugs had just been, were about to be, or were being transported on an aeroplane (other than incidents on passenger flights). Not every incident involves the physical detection of an aeroplane.
Source: UNODC Drugs Monitoring Platform.

Frequency distribution of quantities of cocaine seized in aircraft-related trafficking incidents in South America captured in open-source monitoring, 2011 – February 2021



Source: UNODC and CoE Brazil, 'Brazil in the Regional and Transatlantic Cocaine Supply Chain: The Impact of COVID-19', Cocaine Insights 4 (Vienna: UNODC, July 2022)

Over 2013–2021, Costa Rican authorities identified about 300 clandestine airstrips, mainly in the northern areas of the country, where terrain allows for clandestine landing. Airstrips are typically made among crop plantations, sometimes without the owner’s knowledge. It is calculated that approximately 45 unidentified strips might be used by traffickers at any given time.¹⁴²⁹ Typically, private jets entering Costa Rican territory from the north carry cash in order to purchase drugs. In contrast, those that enter through the southern border transport cocaine for storage or distribution within the country. There is no solid evidence of clandestine flights delivering one commodity (drugs or money) and returning with another.¹⁴³⁰ Close to the northern border of Costa Rica, OCGs occasionally use helicopters to collect cocaine, weapons or money from private planes and transport them within the country for further distribution.¹⁴³¹

Mexican traffickers seem to lead in terms of logistics of trafficking by private planes and capacity to alter

1429 Interview #29.
 1430 Ibid.
 1431 Ibid.

light aircraft and jets to traffic drugs.^{1432 1433} Mexican law enforcement identified at least 11 areas of clandestine airstrips across the country, many of which are located in the coastal areas, where cocaine may be transferred from a maritime vessel to a plane.¹⁴³⁴

One interviewee from Guatemala drew a distinction among flights on private planes employed by traffickers between legal and illegal flights. The aircrafts typically leaving the United States, fly empty and legally, but once in Mexico, traffickers carry out illegal flights to countries in South America.¹⁴³⁵ From there, cocaine is loaded onto planes and then unloaded in Guatemala and other countries of Central America or Mexico, from where it is trafficked by sea or by land (on horseback, by foot or by vehicle).^{1436 1437} These aircrafts may be piloted by pilots from the United States; but the pilot who takes the aircraft out of the United States is not necessarily the same pilot who lands in Latin America. International investigations revealed that the crew is typically replaced and modifications are made to the aircraft (the seats and other areas are removed to open up the space for more drugs and additional fuel tanks) after leaving the United States.¹⁴³⁸

General aviation is extensively used by traffickers in the north and northeast of Argentina. As described by one Argentinian prosecutor, in some cases, light aircraft depart from Argentina and fly northward to pick up cocaine. In other cases, the drugs are loaded into a plane in Paraguay and then flown to Argentina. Some flights come to Argentina from the Plurinational State of Bolivia (with Bolivian or Paraguayan pilots), deliver the drugs, and then go back to Bolivia (Plurinational State of).¹⁴³⁹ In 2020, 156 irregular flights were detected in Argentina; the corresponding number for 2021 stood at 143 as of November.¹⁴⁴⁰ According to the interviewee, the pilots and aircrafts often have two flight logs, a regular and unofficial one. The vast majority of drug flights involved are clandestine (not declared). The planes tend not to carry an additional gas tank in order to occupy that space with more drugs. As a result, they often make several stops (4-5) on the way to Argentina; sometimes to refuel, sometimes to make sure the weather conditions are favourable.¹⁴⁴¹

Aircraft used by traffickers may use both real and replaced license plates. Normally, traffickers use a reg-

istered plane with an expired, suspended or cancelled license. That is, they fly illegally, without declaring their itinerary.¹⁴⁴² Due to falsification of licence plates for the planes (for example, an Argentinian plate on a Paraguayan plane), it is sometimes very difficult to determine where the trafficking organization is based. According to a Guatemalan interviewee, most of the licence plates found on clandestine flights in Guatemala are registered in the United States, but some of them are false. Overall, about 65% of clandestine flights in Guatemala use false license plates.¹⁴⁴³ It is very difficult to completely remove the license plate unless the plane is not destroyed. Therefore, once the trip is over, the aircraft is not reused, but rather destroyed.^{1444 1445 1446} Another technique, most common on helicopters, is cloning, when the license plate is replaced by a plate taken from another aircraft.¹⁴⁴⁷

Media reports suggest that airstrips used for clandestine flights are often improvised from an existing clearance, for example in or close to a ranch or other rural establishment.^{1448 1449} Laboratories are also sometimes detected in close proximity to airstrips.¹⁴⁵⁰ In Peru,¹⁴⁵¹ airstrips have been found in mountainous and rugged regions and, more recently, close to rivers. In Paraguay, logistical considerations appear to influence the location of airstrips, with most detected close to (at least one of) the Paraná River, a main highway or a land border.¹⁴⁵²

In Africa, there are numerous legal airstrips in Africa that are potentially used for drug flights. For example, there is a large number of authorized aerodromes in Mali and Côte d'Ivoire, some of them in mining areas.¹⁴⁵³ Law enforcement sources indicate that Nigerian traffickers are actively acquiring private planes to move cocaine around Africa, where regulations on transponders identifying the aircraft location are less stringent than in Europe.¹⁴⁵⁴ Within Europe, according to an international law enforcement source, there have been cases of trafficking by private jets. These are declared flights, but traffickers may change the flight plan to obscure the real itinerary.¹⁴⁵⁵

1432 Interview #16.

1433 Infobae, 'Así son las nuevas avionetas con las que el narco mexicano trafica droga a Estados Unidos', *Infobae*, 18 July 2020.

1434 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

1435 Interview #16.

1436 Ibid.

1437 Julie López, 'Por qué una aeronave con cocaína aterriza en Guatemala cada diez días desde 2019', *Prensa Libre*, 26 April 2021.

1438 Interview #16.

1439 Interview #19, interview by UNODC, 2022.

1440 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

1441 Interview #19.

1442 Interview #36.

1443 Interview #16.

1444 Interview #24.

1445 Interview #16.

1446 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1447 Interview #36.

1448 Globo.com, 'Polícia prende 4 suspeitos que receberiam 480 kg de droga apreendidos em avião em MT', *Globo.com*, 18 October 2017.

1449 Juan Simo, 'Hallan esquema "narco" internacional detrás de la avioneta con marihuana', *La Voz*, 13 May 2014.

1450 UNODC, Drugs Monitoring Platform.

1451 Policía Nacional del Perú, 'Tendencias de las redes criminales del Tráfico Ilícito de Drogas en Perú' (Peru Ministry of Interior, 2020).

1452 'CRIMJUST Annual Meeting - Latin American and Caribbean'.

1453 Airstrips in mining areas are also found in the Amazon region in Brazil which evidences a convergence between illegal mining and drug trafficking. 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1454 Ibid.

1455 Interview #41.

Drugs can also be unloaded by being thrown off a plane in flight (*la tirada*) while a group on the ground pick them up; this allows the traffickers to complete the aerial operation in a short time and thus avoid detection. While Uruguayan authorities have reported the use of this method,^{1456 1457} one Brazilian source indicated it was used in Brazil in the past but now traffickers avoid it because there are likely to be losses when the drug falls.¹⁴⁵⁸ Airdrops are also used when ultralight aircraft and aerial drones are involved. Mexican OCGs are known to conduct airdrops of drugs across the border of the United States with Mexico.¹⁴⁵⁹ Media sources suggest that the use of drones on this border reportedly increased during the COVID pandemic due to restrictions on land movements of people and vehicles.¹⁴⁶⁰

Trafficking cocaine by small planes and helicopters in Brazil

According to one law enforcement expert from Brazil, the choice between a helicopter and a plane is determined by the quantity of drugs transported, the distance to be covered, and the terrain or climatic conditions of the area. Planes can fly for four to five hours with no stops and carry larger weight of cargo than helicopters. In addition, using a plane is less costly for a smuggler than using a helicopter. At the same time, a helicopter might be more efficient as it does not require a landing strip. Thus, traffickers must consider several factors while arranging the logistics of an operation.

For example, when cocaine is trafficked into Brazil from Paraguay, traffickers may opt for a helicopter, as the distance is short, the climate dry, and the terrain is covered by farmlands, where a helicopter can easily land to refuel or to remove the drug from the aircraft.^a On the other hand, when cocaine enters Brazil further north, it is usually trafficked by small planes because the terrain is covered by dense rainforests with clouded skies and no possibility to make frequent stops to refuel.

References:

^a Interview #36, interview by UNODC, 2022.

- 1456 Ministry of Interior (Uruguay), 'Responses to the CRIMJUST Questionnaire', 9 November 2020.
- 1457 Poder Judicial (Uruguay), 'Responses to the CRIMJUST Questionnaire', 7 November 2020.
- 1458 Interview #36.
- 1459 US Drug Enforcement Administration, '2020 National Drug Threat Assessment' (US Department of Justice, March 2021), 69.
- 1460 Steve Fisher and Kirk Semple, 'Más rutas marítimas, túneles y drones: los cárteles mexicanos se adaptaron a la COVID-19', *The New York Times*, 30 December 2020.

Air passengers continue to innovate in trafficking techniques

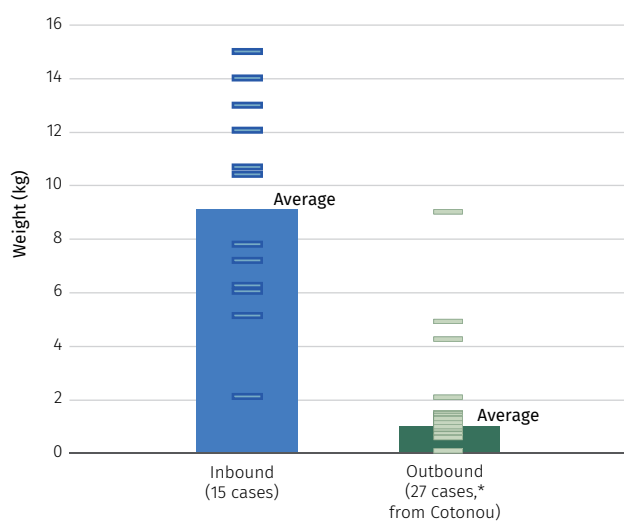
Small quantities of cocaine can be carried on passenger flights by passengers, crew members, or in unsuper-vised luggage. Typically, small quantities of cocaine are trafficked from South America to other continents by drug couriers ("mules")¹⁴⁶¹, who carry the illicit cargo in their luggage among personal belongings, attached to their body or inside their body. Body concealment, or "body packing", includes ingesting (swallowing) and vaginal or rectal insertion (sometimes referred to as "body pushing") of small drug-filled packets.¹⁴⁶² On rare occasions, these modalities may be used simultaneously by one person.¹⁴⁶³ Some assessments by medical professionals,¹⁴⁶⁴ as well as an analysis of drug smuggling techniques in Europe and beyond,¹⁴⁶⁵ suggest that body packing is particularly frequent for cocaine (as opposed to other drugs).^{1466 1467 1468}

Based on preliminary data on drug seizures in Brazilian airports, concealment among personal belongings, rather than ingestion or concealment on the body, is used in the vast majority of cases.¹⁴⁶⁹ Concealment methods used by cocaine couriers globally are innumerable and widely documented in a variety of sources: duty-free whiskey bottles filled with cocaine pellets,¹⁴⁷⁰ impregnated within clothing items, cocaine dissolved in liquids (e.g., wine, juice, coffee).¹⁴⁷¹

Despite a short pause in this modality during COVID-related restrictions on international flights, law enforcement agencies in African countries report a continuing use of the region's major airports to traffic cocaine either to other African states, to Europe or to the Middle East, after movement restrictions were lifted.^{1472 1473}

- 1461 The terms "drug mule" and "drug courier" typically refer to someone who illicitly transports drugs internationally for someone else —usually by land or by air— by concealing the drugs in personal belongings, attaching them to the body or hiding them inside one's body.
- 1462 Stephen J. Traub, Robert S. Hoffman, and Lewis S. Nelson, 'Body Packing — The Internal Concealment of Illicit Drugs', *New England Journal of Medicine* 349, no. 26 (2003): 2519–26.
- 1463 Vishwajit Kishor Wankhade and B.G. Chikhalkar, 'Body Packing and Intra-Vaginal Body Pushing of Cocaine: A Case Report', *Legal Medicine* 31 (2018): 10–13.
- 1464 Jane M. Prosser, 'Internal Concealment of Xenobiotics', in *Goldfrank's Toxicologic Emergencies*, ed. Lewis S. Nelson et al., 11th ed., Book, Section vols (New York, NY: McGraw-Hill Education, 2019), 1103.
- 1465 EMCDDA, 'A Definition of "Drug Mules" for Use in a European Context' (EMCDDA, 2012), 24.
- 1466 Body packers can swallow about 1 kg of tightly-wrapped drug capsules of 5-10 grams each.
- 1467 N. Bulstrode, F. Banks, and S. Shrotria, 'The Outcome of Drug Smuggling by "Body Packers" - the British Experience', *Royal College of Surgeons of England* 84 (2002): 35–38.
- 1468 Annette Hübschle, 'Of Bogus Hunters, Queenpins and Mules: The Varied Roles of Women in Transnational Organized Crime in Southern Africa', *Trends in Organized Crime* 17, no. 1 (2014): 31–51, 43.
- 1469 Data from Federal Police of Brazil for the period from 2013 through September 2020 made available to UNODC.
- 1470 'CRIMJUST Annual Meeting - Latin American and Caribbean'.
- 1471 Elian Peltier, 'Belgian Port City Grapples With a Flood of Cocaine', *The New York Times*, 4 December 2021.
- 1472 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.
- 1473 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.

Quantity of drugs seized in individual instances from passengers on flights into or out of West and Central Africa, comparison of documented inbound and outbound cases during August 2020 – January 2021



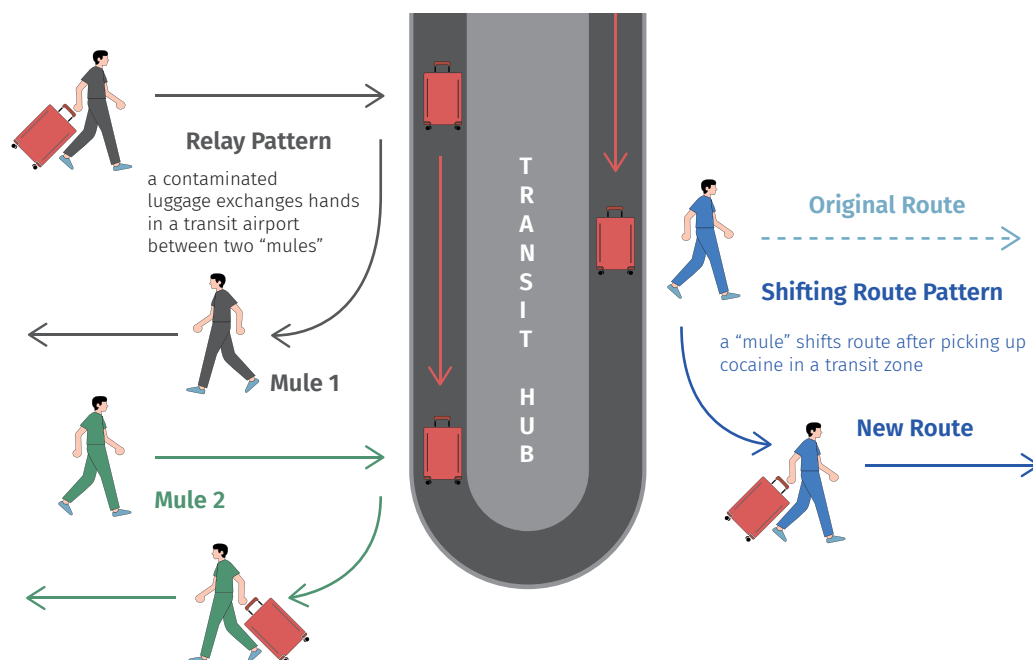
*Among 28 outbound cases, the quantity was unknown in 1 case.
Note: All of the inbound cases involved cocaine, originated in Brazil and involved individuals travelling, or intending to travel to countries in West and Central Africa. Outbound cases involved various drugs.
Source: 'CRIMJUST Interregional Investigative Case Forum' (Ghana, 27 January 2021).

Nigerian authorities reported an increase in air passengers detained for cocaine trafficking in Nigeria and neighbouring countries since 2020. They also point out that quantities might vary on inbound and outbound flights. For example, Nigerian nationals who traffic cocaine from source countries (mainly Brazil) to African airports carry larger quantities than those who leave the continent for Europe.¹⁴⁷⁴ This is likely linked to the choice of modality, as quantities ingested are typically much smaller than those which can be trafficked in a passenger's belongings.

In response to evolving passenger screening practices at international airports, traffickers continue to innovate and diversify their techniques. Two patterns involving major transit hubs on the African continent and in the Middle East for cocaine trafficked by air have been observed. In the first pattern, contaminated luggage exchanges hands in a transit airport between two "mules" ("relay pattern").^{1475 1476} In the second pattern, a passenger on a non-suspicious itinerary changes their ticket after picking up cocaine in a transit zone to travel to a new destination with the drug.¹⁴⁷⁷

As indicated by a prosecutor in Argentina, trafficking of smaller quantities of cocaine from Argentina to Europe by air passengers and mail have been significantly increasing. This represents a challenge for prosecutors as it creates additional workload due to the very high number of cases compared to container trafficking.¹⁴⁷⁸

Mules: Trafficking patterns in a transit zone of an international airport



1474 National Drug Law Enforcement Agency of Nigeria, 'Responses to the CRIMJUST Questionnaire', November 2020.
 1475 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.
 1476 'Meeting of Strategic Analysts on Cocaine Trafficking and Markets'.
 1477 Ibid.
 1478 Interview #19.

Cocaine trafficking by international post and parcel services show steady increase, aided by COVID restrictions

Globally, the use of parcel and courier services increased significantly during the COVID-related lockdown due to restrictions on passenger flights.¹⁴⁷⁹ Some countries in West Africa note a significant increase in the use of well established, globally operating postal services as well as smaller shipping companies to smuggle small quantities of cocaine to Europe and beyond. In Côte d'Ivoire, starting in March 2020, the number of postal seizures at the cargo section in airports grew significantly, reaching a peak in August 2020.¹⁴⁸⁰ According to a Costa Rican interviewee, due to a reduction in the number of commercial international flights during the COVID pandemic, in Costa Rica there was an increase in seizures of smaller quantities of cocaine (that previously might have been transported by human couriers) being mailed through international postal services (concealed in various types of goods, such as books, religious images, vehicle spare parts, etc.) to Asia, Africa and Europe.¹⁴⁸¹

Independently from the pandemic, international mail services have been playing an increasing role in drug trafficking in Europe, often facilitated by the growth in online shopping.¹⁴⁸² In particular, one prosecutor in Madrid, Spain, indicated that law enforcement at Barajas airport in Madrid saw a significant decrease in cocaine trafficking to Spain by passengers (both inside the body and in luggage) even before the pandemic, while there has been an increase in luggage containing larger quantities (about 50 kg) of cocaine sent without a passenger on a passenger flight; and in shipments of cocaine by air cargo. Currently, these are the two main modalities of cocaine entry through Barajas airport.¹⁴⁸³ Similarly, according to an Argentinian interviewee, the number of drug swallows detected in Argentina would appear to have decreased even before the pandemic, and since early 2020, an air “rip-off” method has appeared, where bags with cocaine are placed in air cargo and picked up by complicit airport workers at the destination.¹⁴⁸⁴

Relatively large shipments of cocaine more typical of maritime trafficking can also find their way to air cargo. For example, 661 kg of cocaine were seized in the airport in Ecuador in 2021, concealed in industrial machinery to be mailed to the Philippines.¹⁴⁸⁵

Chemical camouflage and extraction of trafficked cocaine

Some of the most sophisticated techniques to conceal cocaine involve impregnation into a carrier material, which can be textile, animal skins, rubber, or wool. In such cases, a complex process of chemical extraction is required.

Cocaine camouflaged within carrier material is not new. For example, trafficking of cocaine hydrochloride impregnated in clothing was registered as early as in the beginning of the 21st century.^a Recently, carrier materials have come to include beeswax, plastics, herbs, cacao powder, fertilizer, charcoal and similar dark materials, light-coloured materials similar to clay, and various liquids. Moreover, the level of sophistication of this type of concealment observed in Europe has increased, making it very hard to detect.^{b, c}

Once the camouflaged cocaine is delivered to destination, an extraction process is carried out to separate the cocaine from the other substances. Secondary extraction facilities do not require a lot of space, and media coverage illustrates small ones can be set up in a city apartment, garage or a shed.^{d, e} While cocaine extraction is not new in Europe, the detection of large secondary extraction facilities in recent years suggests that this process might be taking place on an increasingly large scale, often with the help of Colombian “chemists” hired by European OCGs.^c

Since in many cases the cocaine extracted from carrier materials is in base form, before it can be sold to consumers as cocaine hydrochloride it must undergo a transformation process, either in the same facility or in a dedicated “base to hydrochloride” illicit laboratory.^c Cocaine in base form is purified and optionally re-oxidized.^{b, c} Media coverage has described how the “washed” cocaine base is then crystallized using hydrochloric acid and acetone to obtain cocaine hydrochloride. The drugs are dried, cut or adulterated, pressed into one-kilo bricks, marked with a logo and dried again.^d

Trafficking of cocaine in large quantities using this modality requires large laboratories and chemical expertise to perform the complex extraction process. For example, according to Dutch police, the Netherlands traditionally dismantled 20 to 30 cocaine extraction sites of small and medium scale per year, but since 2018 registered an increase in large-scale extraction laboratories, with a theoretical output capacity of 100-200 kg of cocaine hydrochloride (uncut).^b

According to Dutch police, the large extraction labs are set up as exact copies of Colombian cocaine production sites. The equipment, chemicals and laboratory

1479 UNODC, 'World Drug Report 2021, Booklet 5' (Vienna: UNODC, 2021).

1480 'CRIMJUST Annual Meeting - Africa: Strengthening Criminal Investigation and Criminal Justice Cooperation along Trafficking Routes'.

1481 Interview #29.

1482 EMCDDA and Europol, '2019 EU Drug Markets Report'.

1483 Interview #9, interview by UNODC, 2022.

1484 Interview #19.

1485 UNODC, 'Drugs Monitoring Platform', n.d.

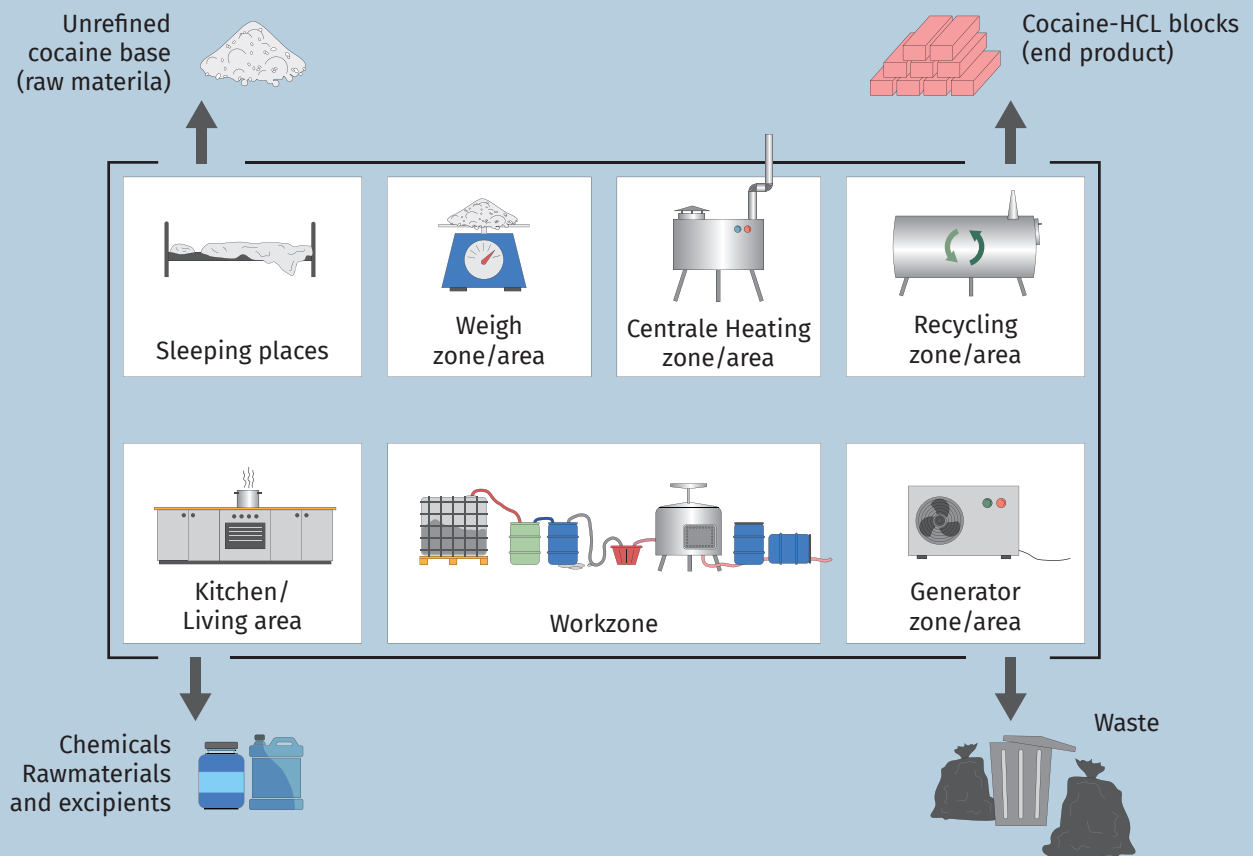
constructions are organized by Dutch OCGs who hire Colombian nationals to provide chemical expertise inside the sites. The equipment in these sites is built by Dutch facilitators, metal constructors who have access to industrial production equipment, based on technical drawings from South America. The same facilitators are normally involved in the manufacturing of equipment for the production of amphetamine or MDMA. As noted by Dutch police, the long-time expertise of professional facilitators results in a high quality of equipment inside the Dutch cocaine laboratories.^b South American nationals, mostly Colombians nationals, typically carry out the extraction process itself. Sometimes, they are accommodated on the premises where the laboratory is constructed.^b

Such secondary extraction sites require large amounts of chemicals, many of which are imported by the Dutch facilitators from such countries as Germany, Spain and Poland. While there is no production of potassium permanganate in the Netherlands, this chemical, essential for obtaining cocaine hydrochloride, is bought in and outside the European Union.^b

References:

^a Sean D. McDermott and John D. Power, 'Drug Smuggling Using Clothing Impregnated with Cocaine', *Journal of Forensic Sciences* 50, no. 6 (2005): 1423-25.
^b 'UNODC Technical Meeting on "Coca/Cocaine Production Sites"', June 17, 2021
^c EMCDDA and Europol, 'EU Drug Market: Cocaine', EU Drug Market: In-Depth Analysis (EMCDDA, 2022).
^d Paul Vugts, 'As the Number of Coke Labs Increases, so Does the Danger', *Het Parool*, 18 November 2019.
^e Reuters, 'Italy Police Raid Mafia Cocaine Lab near Naples', *Reuters*, 17 February 2016.

Layout of a conversion laboratory



Source: UNODC analysis based on Audiencia Provincial, Palma de Mallorca, SAP IB 919/2021, 24 February 2021.

Annex

Methodology

This report relies on various primary and secondary sources. First, it draws on quantitative and qualitative data on drug seizures and routes, and price and purity, available to the UNODC through the Annual Report Questionnaire (ARQ) and the Drug Monitoring Platform (DMP); as well as on national-level data on drug use and treatment. Second, discussions and presentations at UNODC thematic meetings and events within, including those in the framework of the CRIMJUST programme (such as the Annual Expert Meetings of Strategic Analysts the Technical Meetings on Cocaine Production Sites, and the Investigative Fora), have provided a rich source of information to draw on.

Third, the research team conducted qualitative assessments through bilateral consultations and interviews with relevant stakeholders and key informants. A total of 43 remote interviews were conducted during 2021-2022 with key informants from 8 countries in Europe, 7 countries in South America, 4 countries from Central America, 4 countries in Africa, 1 country in Asia, as well as 6 international experts. Between 1 and 4 interviews were held

per country and interviews were conducted from Vienna by the UNODC Drug Research Section in collaboration with UNODC Field Offices. The interviewees were selected through consultations with the UNODC Field Offices and with participants of CRIMJUST events. They included law enforcement officials, prosecutors, public health experts, academics, international experts, business leaders, and journalists. The information obtained through the interviews was triangulated by using secondary sources. Fourth, to deepen the understanding of how criminal networks operate within cocaine markets, the report makes use of sentencing documents obtained through open-access case law databases available in some countries. Several court documents were used as a basis for case studies to illustrate the structure and *modus operandi* of drug trafficking groups.

Finally, primary data was supplemented by secondary sources, such as research literature or assessment reports produced by national authorities, international organizations and academia.

Details of Interviews Conducted

Interviewee	Occupation	Gender	Country
Interview #1	academic	M	Colombia
Interview #2	prosecutor	M & F	Chile
Interview #3	public health professional	M	Ukraine
Interview #4	public health professional	M	Ukraine
Interview #5	prosecutor	M	Portugal
Interview #6	public health professional	M	Ukraine
Interview #7	prosecutor	F	Spain
Interview #8	prosecutor	M	Spain
Interview #9	prosecutor	F	Spain
Interview #10	prosecutor	M	Spain
Interview #11	health expert	M	Uruguay
Interview #12	prosecutor	F	Belgium
Interview #13	health expert	M	Argentina
Interview #14	prosecutor	M & F	Netherlands
Interview #15	prosecutor	M	Brazil
Interview #16	prosecutor	M	Guatemala
Interview #17	prosecutor	M	Brazil
Interview #18	prosecutor	F	Panama
Interview #19	prosecutor	M	Argentina
Interview #20	prosecutor	M	Costa Rica
Interview #21	prosecutor	M	Costa Rica
Interview #22	international expert	F	n/a
Interview #23	international expert	M	n/a
Interview #24	international expert	M	n/a
Interview #25	international expert	M	n/a
Interview #26	journalist	M	Guatemala
Interview #27	journalist	F	Guatemala
Interview #28	business leader	M	Ecuador
Interview #29	law enforcement	M	Costa Rica
Interview #30	law enforcement	M	Japan
Interview #31	law enforcement	M	Ukraine
Interview #32	law enforcement	M	El Salvador
Interview #33	law enforcement	M	El Salvador
Interview #34	law enforcement	M	Paraguay
Interview #35	law enforcement	M	Belarus
Interview #36	law enforcement	M	Brazil
Interview #37	law enforcement	M	The Gambia
Interview #38	law enforcement	M	Brazil
Interview #39	law enforcement	M	Libya
Interview #40	law enforcement	M	Nigeria
Interview #41	international expert	M	n/a
Interview #42	international expert	M	n/a
Interview #43	health expert	M & F	South Africa

Regional groupings

The Global Report on Cocaine uses a number of regional and subregional designations. These are not official designations, and are defined as follows:

Africa

- » East Africa: Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Mauritius, Rwanda, Seychelles, Somalia, South Sudan, Uganda, United Republic of Tanzania and Mayotte
- » North Africa: Algeria, Egypt, Libya, Morocco, Sudan and Tunisia
- » Southern Africa: Angola, Botswana, Eswatini, Lesotho, Malawi, Mozambique, Namibia, South Africa, Zambia, Zimbabwe and Reunion
- » West and Central Africa: Benin, Burkina Faso, Cabo Verde, Cameroon, Central African Republic, Chad, Congo, Côte d'Ivoire, Democratic Republic of the Congo, Equatorial Guinea, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Sao Tome and Principe, Senegal, Sierra Leone, Togo and Saint Helena

Americas

- » Caribbean: Antigua and Barbuda, Bahamas, Barbados, Cuba, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago, Anguilla, Aruba, Bonaire, Netherlands, British Virgin Islands, Cayman Islands, Curaçao, Guadeloupe, Martinique, Montserrat, Puerto Rico, Saba, Netherlands, Sint Eustatius, Netherlands, Sint Maarten, Turks and Caicos Islands and United States Virgin Islands
- » Central America: Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama
- » North America: Canada, Mexico, United States of America, Bermuda, Greenland and Saint-Pierre and Miquelon
- » South America: Argentina, Bolivia (Plurinational State of), Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay, Venezuela (Bolivarian Republic of) and Falkland Islands (Malvinas)

Asia

- » Central Asia and Transcaucasia: Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan
- » East and South-East Asia: Brunei Darussalam, Cambodia, China, Democratic People's Republic of Korea, Indonesia, Japan, Lao People's Democratic Republic, Malaysia, Mongolia, Myanmar, Philippines, Republic of Korea, Singapore, Thailand, Timor-Leste, Viet Nam, Hong Kong, China, Macao, China, and Taiwan Province of China
- » South-West Asia: Afghanistan, Iran (Islamic Republic of) and Pakistan
- » Near and Middle East: Bahrain, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syrian Arab Republic, United Arab Emirates, Yemen and State of Palestine
- » South Asia: Bangladesh, Bhutan, India, Maldives, Nepal and Sri Lanka

Europe

- » Eastern Europe: Belarus, Republic of Moldova, Russian Federation and Ukraine
- » South-Eastern Europe: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, North Macedonia, Romania, Serbia, Türkiye and Kosovo*
- » Western and Central Europe: Andorra, Austria, Belgium, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Monaco, Netherlands, Norway, Poland, Portugal, San Marino, Slovakia, Slovenia, Spain, Sweden, Switzerland, United Kingdom of Great Britain and Northern Ireland, Faroe Islands, Gibraltar and Holy See

Oceania

- » Australia and New Zealand: Australia and New Zealand
- » Polynesia: Cook Islands, Niue, Samoa, Tonga, Tuvalu, French Polynesia, Tokelau and Wallis and Futuna Islands
- » Melanesia: Fiji, Papua New Guinea, Solomon Islands, Vanuatu and New Caledonia
- » Micronesia: Kiribati, Marshall Islands, Micronesia (Federated States of), Nauru, Palau, Guam and Northern Mariana Islands

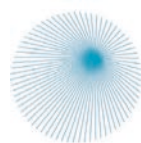
* References to Kosovo shall be understood to be in the context of Security Council resolution 1244 (1999).



UNODC research constitutes the key global authority in the fields of drugs and crime, providing high-quality, essential evidence to inform policy-making and valuable sources of knowledge in drugs and crime domains, including in the framework of the Sustainable Development Agenda.



CRIMJUST is implemented by UNODC in partnership with INTERPOL and Transparency International. CRIMJUST seeks to enhance law enforcement and judicial strategies beyond interdiction activities and to foster transnational responses along drug trafficking routes targeting each stage of the drug supply chain. This includes the production of knowledge on the cocaine market to support evidence-based policy and strategies designed to counter the cocaine threat.



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