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United Nations Office on Drugs and Crime

The Transatlantic Cocaine Market

Research Paper

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Key findings

- Global demand for cocaine has shifted. Demand in the United States was more than four times as high as in Europe in 1998, but just over a decade later, the volume and value of the West and Central European cocaine market (US\$33 billion) is approaching parity with that of the US (US\$37 billion). Two thirds of European cocaine users live in just three countries: the United Kingdom, Spain and Italy. With Germany and France, these countries represent 80% of European cocaine consumption.
- European cocaine seizures increased rapidly between 1998 and 2006, peaking at some 121 tons. They have dropped off sharply since then, to some 53 tons in 2009, while at most, European demand has stabilized. There have been increases in seizures in South America, but the price of pure cocaine has not increased greatly in Europe, suggesting that traffickers have found new ways of evading law enforcement.
- In the last decade, most (about 60%) of the cocaine seized was taken at sea or in ports. The Bolivarian Republic of Venezuela was the most prominent country of origin for direct cocaine shipments to Europe, with the cocaine coming mainly from Colombia.
- It appears that most of Europe's cocaine enters by sea, primarily via Spain. Nearly half the cocaine seized in Europe was taken by Spanish authorities, two-thirds of which was detected in international waters and 11% in containers.
- Excluding what is imported for local consumption, it is estimated that about 21 tons of cocaine were trafficked from West Africa to Europe in 2009. This is down sharply from two years before, when the total could have been as high as 47 tons.
- Much of the trafficking to West Africa used to be carried out by large 'mother ships' that unloaded the drugs on to smaller, local vessels off the West African coasts. Today, large maritime shipments have virtually disappeared, suggesting that traffickers have changed their tactics. There is evidence of shipments in large commercial aircraft purchased second-hand by traffickers for this purpose. There are also indications that containerized shipping is being utilized, but very few of these shipments have been detected.
- Most of the recently reported seizures of cocaine from container consignments from South America to West Africa had Nigeria or Ghana as their destination. Most of these containers originated in Peru or the Plurinational State of Bolivia.
- Commercial air flights used to be the most common vector for trafficking cocaine from West Africa to West and Central Europe (97% of seizure cases over the last decade, or 58% of all cocaine seized). But the number of detections have declined drastically in recent years, suggesting again that traffickers have changed their tactics.
- There appears to be some trafficking of cocaine from West Africa to Europe across the Sahara to countries in northern Africa, although very few seizures have been made. There is some evidence of use of the traditional cannabis resin trafficking routes from Morocco to Spain.
- Although it appears that Colombian organized crime groups still dominate trafficking of cocaine to Europe, domestic markets are often in the hands of traffickers of other nationalities.
- In addition to the health consequences of cocaine use, the impact of cocaine trafficking includes drug-funded violence, political instability and corruption in many areas.
- In line with the principle of shared responsibility and a balanced approach to the drug problem, the expansion of the cocaine market across the Atlantic and, more recently, in South America, highlights the importance of developing strategies on the scale of the cocaine threat. Efforts must be increasingly coordinated and integrated into an international approach that adapts to new developments as quickly as the traffickers. There are many reasons to be optimistic about the capacity of the international community to achieve a significant reduction of the global cocaine market during the present decade.

Key data / estimates

Table 1: Flows of cocaine, purity-adjusted*, to major consumer markets (tons), 2009

Production	1,111	
Less seizures in Andean countries	-254	
Less domestic consumption in the Andean region	-13	
Amounts available for export out of the Andean countries	844	
Less seizures in other South American countries, Caribbean and Central America	-203	
Less domestic consumption in other South American countries, Caribbean and Central America	-83	
Amounts available for export out of South America, Caribbean and Central America	558	
	West and Central Europe	North America
Amounts of cocaine leaving the Andean countries for West and Central Europe and North America	217	378
Less amounts seized in other South American countries, Caribbean and Central America linked to trafficking flows to West and Central Europe and North America	-59	-98
Amounts leaving South America, Caribbean and Central America to West and Central Europe and North America	158 (incl. 21 tons via West Africa)	280
Less amounts seized by consumer countries of West and Central Europe and North America	-35	-101
Less amounts seized in West and Central Africa	-0.4	
Amounts of cocaine consumed in West and Central Europe and in North America	123	179 (incl. 157 tons in USA)

* Purity levels tend to decline along the trafficking chain. All numbers in this table have been adjusted to pure cocaine equivalents. Seizure data were adjusted based on reported wholesale purity data.

Source: UNODC estimates based on *Annual Reports Questionnaire (ARQ)* data reported to UNODC by Member States and other government or scientific sources.

Table 2: Flows of cocaine, purity-adjusted, to West and Central Africa (tons), 2009

Amounts leaving South America for West and Central Africa	35
of which	
for domestic consumption	13
for transit to West and Central Europe	21
amounts seized in West and Central Africa	0.4

Source: UNODC estimates based on *ARQ* data and other government or scientific sources.

Table 3: Distribution of cocaine seizures by region (tons), 2009

	Seizures as reported		Seizures adjusted for purity*	
	in tons	in %	in tons	in %
Americas of which	694	93%	576	94%
South America	463	62%	386	63%
Central America	91	12%	81	13%
Caribbean	8	1%	7	1%
North America	132	18%	101	16%
Europe of which	55	7%	36	6%
West and Central Europe	53	7.1%	35	5.7%
East and South-East Europe	2	0.3%	1	0.2%
Africa of which	1.0	0.1%	0.7	0.1%
West and Central Africa	0.5		0.4	
Southern Africa	0.3		0.3	
North Africa	0.08		0.06	
East Africa	0.02		0.01	
Asia	0.7	0.1%	0.6	0.1%
Oceania	0.3	0.04%	0.2	0.03%
Total	750	100%	613	100%

* adjusted by wholesale purity

Source: ARQ data

Table 4: Estimates of the distribution of the cocaine consumer markets by region, adjusted for purity (tons), 2009

	Consumption in tons	In %
Americas of which	275	63%
South America	85	19%
Central America	10	2%
Caribbean	6	1%
North America	179 (USA: 157 tons)	41% (USA: 36%)
Europe of which	129	29%
West and Central Europe	123	28%
East and South-East Europe	6	1%
Africa of which	21	5%
West and Central Africa	13	3%
Southern Africa	4	1%
North Africa	1	0.2%
East Africa	3	0.7%
Asia	14	3%
Oceania	2	0.5%
Total	440	100%

Sources: UNODC estimates based on ARQ data and other government or scientific sources.

Table 5: Estimates of the value of the cocaine consumed at retail level, by region in billion US\$, 2009

	Value in billion US\$	In %
Americas	44	51%
of which		
South America	3.4	4%
Central America	0.2	0.2%
Caribbean	0.2	0.2%
North America	40	47%
	(USA: 37)	(USA: 44%)
Europe	36	42%
of which		
West and Central Europe	33.4	39%
East and South-East Europe	2.3	3%
Africa	1.8	2%
of which		
West and Central Africa	0.8	0.9%
Southern Africa	0.5	0.6%
North Africa	0.1	0.1%
East Africa	0.5	0.6%
Asia	2.4	2%
Oceania	1.7	2%
Total	85	100%

Sources: UNODC estimates based on Annual Reports Questionnaire data and other government or scientific sources.

Table 6: Estimates of gross profits in billion US\$, made by cocaine traffickers, by region, 2009

	in billion US\$	In % of GDP
South America, Central America, Caribbean	18	0.6%
of which		
local market	3	0.1%
export to North America*	6	0.2%
export to Europe**	9	0.3%
North America (USA, Mexico, Canada)	34	0.2%
West and Central Europe (EU-25 and EFTA)	23	0.1%
West and Central Africa (local demand and export to Europe)	0.8	0.2%
Other	8	0.04%
Total trafficking profits	84***	0.1%

* trafficking from producing areas in the Andean region to Mexico.

** all trafficking to transit countries (US\$4.9 bn) and from transit countries to Europe (US\$6.1 bn) of which 70% (US\$4.3bn) is assumed to be generated by trafficking groups from South America and the Caribbean; gross profits for trafficking to Europe are higher as prices in Spain (main entry point into Europe) are much higher than prices in Mexico (main entry point into North America).

*** The difference between the total size of the global cocaine market (US\$85 bn) and gross trafficking profits (US\$84 bn) is income of farmers; farmers are estimated to gain less than US\$1 bn.

Sources: UNODC estimates based on ARQ data and other government or scientific sources.

Introduction

Transnational cocaine trafficking has been affecting the Americas for the last 40 years. Although the value of the global market has declined greatly since the mid-1980s, the flow of cocaine in that region continues to have an impact on public health and to generate large revenues that fuel violence and corruption in many countries. While the size of the United States market was shrinking, new destination markets have appeared, affecting a new set of nations caught in the transit flow.

This report is about the biggest of these new flows: the trafficking of cocaine to meet growing European demand. The volume of cocaine consumed in Europe has doubled in the last decade. While European law enforcement agencies have hardened their defences, traffickers continue to innovate, seeking novel ways of getting their product to the consumer. Around 2004, South American traffickers began to experiment with a way-station that had rarely seen large volume shipments of cocaine: West Africa. In a few years, they had managed to undermine security and sow high-level corruption in a number of West African states.

Recognizing the threat, the international community quickly undertook a variety of interventions to address this flow. The novelty aspect was lost, the political instability proved self-defeating, and some very large seizures were made. By 2008, there was a remarkable decline in the number of both large maritime seizures and the number of cocaine couriers detected flying from West Africa to Europe.

But there were indications that the flow still continued, raising the possibility that traffickers had simply modified their technique, finding new methods for bringing cocaine to Europe, including through West Africa, without detection. There are statistical data to support this scenario: European cocaine seizures decreased from 121 tons in 2006 to 53 tons in 2009. Demand, in contrast, has not dropped by half during this period. Despite growing seizures in South America, prices have actually declined in much of Europe. Purity has also declined in a number of countries, such as the United Kingdom, resulting in some increase in real prices. But overall, it does not appear that supply has been drastically constrained, suggesting that the traffickers have found new ways of getting their product to market.

The expansion of the cocaine market across the Atlantic and, more recently, in South America, highlights the importance of treating cocaine as a global problem, and of developing strategies on the scale of the threat. Efforts must be increasingly coordinated and integrated into an international approach that adapts to new developments as quickly as the traffickers. There are many reasons to be optimistic about the capacity of the international community to achieve a significant reduction of the global cocaine market during the present decade. As clever, well-resourced and adaptable as traffickers may be, they are no match for the world's nations working together.

1. The evolution of the global cocaine market

a) Shifts in supply and demand

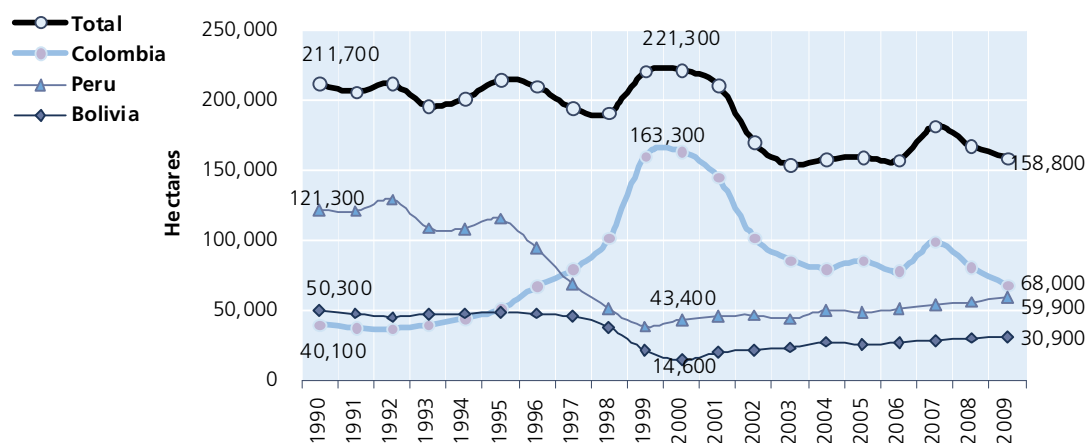
The nature and extent of cocaine trafficking is dependent on both the supply of cocaine and the demand for it. While almost all of the cocaine produced globally comes from the Andean region (Colombia, Peru and the Plurinational State of Bolivia), the location of demand has shifted drastically in the last decade. The following section discusses these dynamics.

Production

From the end of World War II until the late 1990s, almost all the world's coca bush (the raw material for the manufacture of cocaine) was grown in Peru and the Plurinational State of Bolivia. Most of this output had been refined into cocaine in clandestine laboratories, located in Colombia, since the 1970s. In the first half of the 1990s, the large Colombian drug cartels were dismantled and international efforts to stem the trafficking of coca paste from Peru to Colombia proved successful. As a consequence of low demand, coca prices declined strongly in Peru, resulting in strong declines of coca leaf production there. An unintended side-effect of this was, however, increased cultivation of coca in Colombia. By 1997, coca cultivation in Colombia exceeded that of the traditional growers for the first time, and by the year 2000, almost three quarters of the total area under coca cultivation was in Colombia.

In the twenty-first century, the pendulum has swung back again. Coca cultivation in Colombia decreased by 58% between 2000 and 2009, mainly due to large-scale eradication. At the same time, it increased by 38% in Peru and more than doubled in the Plurinational State of Bolivia. In addition, traffickers in both of these countries are now able to produce their own refined cocaine. Despite the increases in Peru and the Plurinational State of Bolivia, the global area under coca cultivation fell by 28% between 2000 and 2009, due to the strong declines in Colombia.

Figure 1: Global coca bush cultivation (ha), 1990-2009



Source: UNODC.

In 2008, Colombia was responsible for about half of global production, with Peru contributing over one third and the Plurinational State of Bolivia making up the balance. The trend of falling coca leaf production in Colombia and rising levels in Peru and

Bolivia continued in 2009 (also in 2010, according to early indications). Today, it is possible that Colombia and Peru have similar output levels.

Once purity is accounted for and seizures deducted, it is estimated that the amount of cocaine available for consumption fell from over 700 tons in the mid-1990s to less than 500 tons in 2009.

Origin of cocaine in main markets

According to US authorities, some 90% of the cocaine consumed in North America comes from Colombia.¹ In 2009, the US Cocaine Signature Program chemically analysed approximately 3,000 cocaine samples and found that 95.5% had originated in Colombia² (down from 99% in 2002³), with less than 2% coming from Peru, and the rest of indeterminate origin.

No similar profiling program exists in Europe, but seizures indicate a more heterogeneous profile. Between 2008 and 2010, about 25% of the volume of cocaine seized in Europe could be traced back to Colombia, with 6% traceable to Peru and 2% to the Plurinational State of Bolivia.⁴ In the rest of the cases, only the transit countries could be identified. If cocaine that could be traced back to the Bolivarian Republic of Venezuela, Ecuador and Panama were added to the cocaine from Colombia, the 'Colombia-linked' cocaine seizures in Europe would rise to 69% of the total (2008-2010 period).⁵

Cocaine produced in Colombia is mainly destined for consumption in overseas markets. Cocaine produced in Peru and the Plurinational State of Bolivia, in contrast, are used more within South America, notably in countries of the Southern Cone. Even though cocaine produced in Peru seems to be playing a growing role in Europe, the criminal groups organizing the trafficking of cocaine from South America to Europe are still primarily Colombian. Unlike in the United States, the Mexican cartels seem to have limited involvement in the European market.

Consumption

Although coca cultivation has been reduced, it does not appear that cocaine use has similarly declined. Based on the data available, the share of the global population that uses cocaine seems to have stabilised, but the global population has grown, resulting in a larger number of consumers. In 2009, between 14 million and 21 million people used cocaine at least once in the previous year.

¹ US Department of State, *2011 International Narcotics Control Strategy Report*, Washington D.C., 2011.

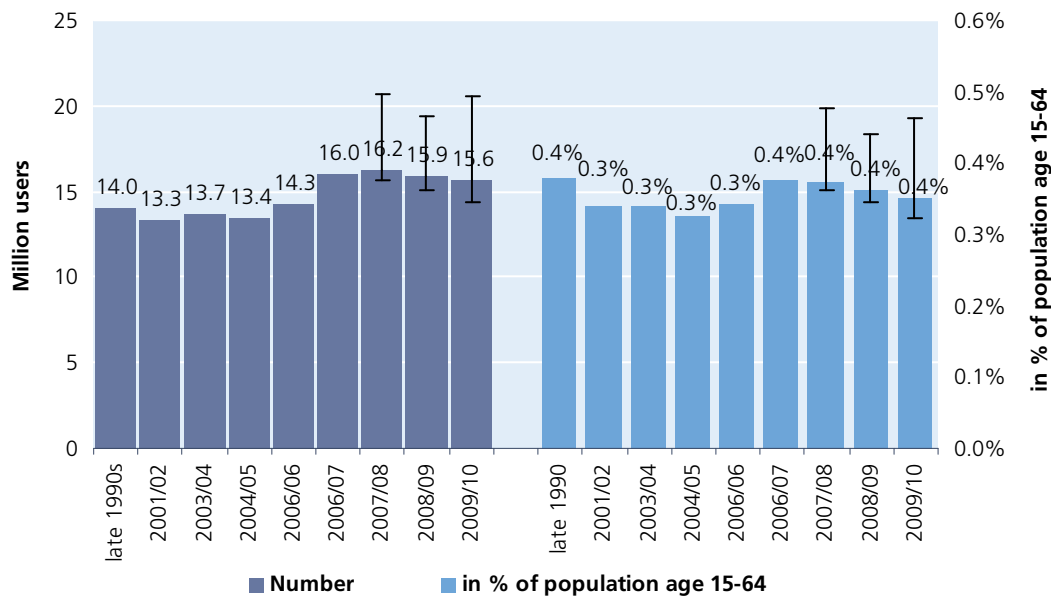
² US Department of Justice, Drug Enforcement Administration, Special Testing and Research Laboratory, *Cocaine Signature Program Report*, January 2010, quoted in Inter-American Drug Abuse Control Commission (CICAD), DEA Special Testing and Research Laboratory and DEA Intelligence Division Briefing, OEA/Ser.L/XIV.2.47, CICAD/doc.1802/10, 3 May 2010.

³ US Drug Enforcement Administration, Selected Intelligence Brief, 'Cocaine Signature Program Report,' January 2003, in *Microgram Bulletin*, Vol. XXXVI., February 2003.

⁴ Based on information from 13 European countries: Austria, Belgium, Bulgaria, France, Germany, Ireland, Poland, Portugal, Romania, Spain, Switzerland, Turkey and the United Kingdom.

⁵ UNODC, Individual Drug Seizures database.

Figure 2: Global cocaine use (annual prevalence) from the late 1990s to 2009/2010



Source: UNODC, 2010 World Drug Report and preliminary updates for 2009/2010.

There are at least two possible ways of explaining the simultaneous decrease in coca cultivation and the increase in the number of cocaine users over the last decade:

- Due to improvements in both cultivation and processing technology, it seems cocaine producers are squeezing more drugs out of every hectare they sow.
- The cocaine users of today are not using as much cocaine as those in the past.

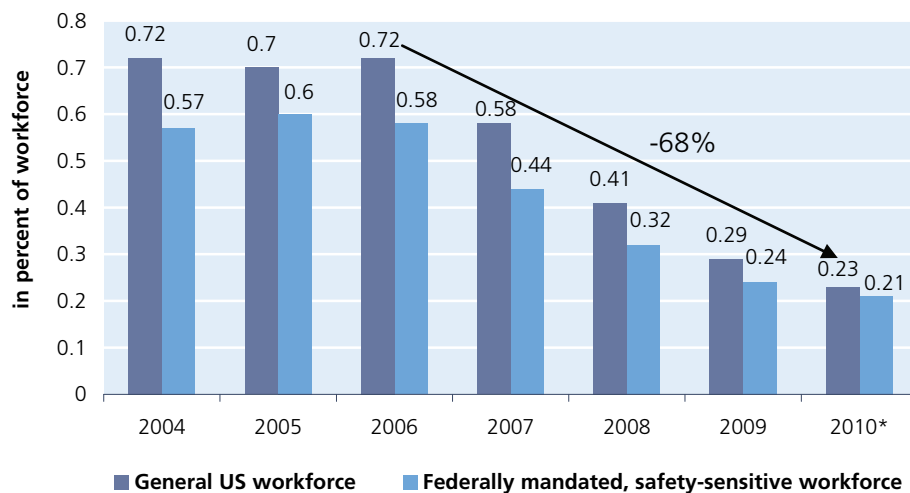
This second point needs some explaining. Global cocaine consumption peaked during the crack epidemic in the United States during the 1980s and early 1990s. In 1988, it is estimated that there were 3.6 million cocaine addicts and 6 million casual users in the US, consuming nearly 400 tons of cocaine at a cost of over US\$60 billion.⁶ In contrast, there is very little crack in the European market. Many of the emerging cocaine markets are in relatively poor countries, where users are unable to afford much of the drug.

The drastic reduction in the size of the US cocaine market has had global repercussions. Cocaine use in the United States has been in long-term decline since the late 1980s, with a dramatic downward shift since 2006, related to disruption of the supply chain from Mexico. A combination of factors - including increased law enforcement efforts in Mexico and the transit zones, decreased cocaine production in Colombia, high levels of cartel violence, and cocaine flows to non-US markets - appear to have contributed to the reduced cocaine availability in the United States.⁷ As a consequence, purity-adjusted cocaine prices in the United States rose by more than 80% between 2006 and 2009. The impact this has had on cocaine use is clear from the national employee drug testing results. Cocaine-positive urine tests (reflecting use in the past few days) showed a decline of 68% between 2006 and the first two quarters of 2010. Similarly, positive hair tests (reflecting cocaine use over the past three months) fell from 5.3% in 2007 to 2.3% over the first two quarters of 2010 (-57%).

⁶ United States Office of National Drug Control Policy, What America's Users Spend on Illegal Drugs, 1988-1995. Washington, D.C: ONDCP, 1997.

⁷ US Department of Justice, National Drug Intelligence Center, *National Drug Threat Assessment 2010*, February 2010.

Figure 3: Positive urine tests for cocaine use among the US workforce, 2004-2010*

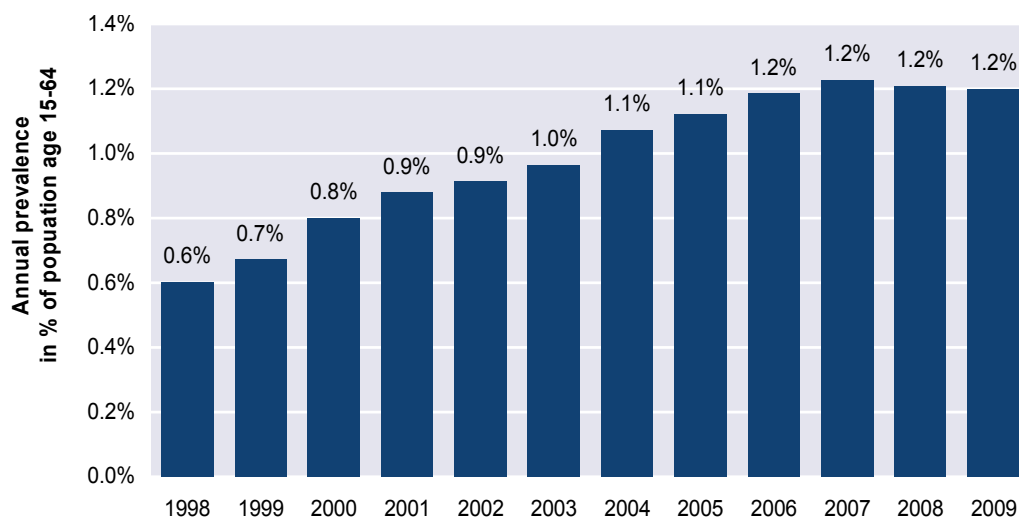


*Positive tests for cocaine use among the general US workforce (4.2 million tests in 2009) and among the federally mandated, safety-sensitive workforce (1.3 million tests in 2009). Data for 2010 refer to the first two quarters.

Source: Quest Diagnostics, Drug Testing Index.

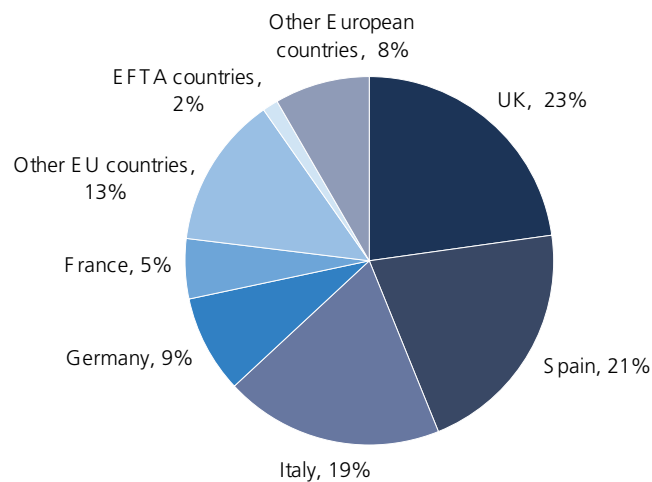
The opposite trend has been observed in West and Central Europe (EU-25 and EFTA countries) over the last decade. The volumes of cocaine used in Europe have doubled during this period, even though consumption stabilized from 2006 to 2009. Despite the increase in Europe and the decline in North America, overall cocaine use levels in the EU/EFTA region (annual prevalence of 1.2% among the population aged 15-64 in 2009) are still only half as high in the USA (2.4% of the population aged 15-64 in 2009).

Figure 4: Annual prevalence of cocaine use among EU and EFTA countries



Sources: Annual Reports Questionnaire data; Government reports; UNODC, World Drug Report 2009; EMCDDA, Statistical Bulletin 2009.

In Europe, most of the cocaine is consumed in the United Kingdom, Spain and Italy, which between them contain some 60% of the cocaine users on the continent.

Figure 5: National shares of the cocaine-using population in Europe, 2008

Sources: Annual Reports Questionnaire data; EMCDDA, Statistical Bulletin.

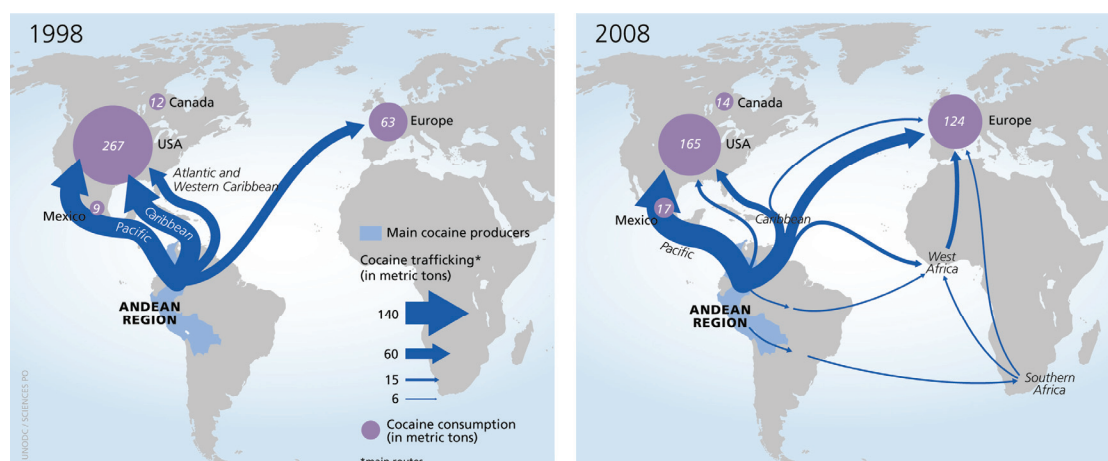
In addition, there has been a large, but largely uncharted, growth in demand for cocaine base products in the Southern Cone of South America.

b) Evolution of trafficking routes

The shifts in demand have clearly informed transnational cocaine trafficking. In the late 1990s, the bulk of the world's cocaine was still shipped to the United States. Over time, this route came to be dominated by Mexican groups. The Caribbean, which was the preferred transit zone when the Colombian cartels dominated the market, saw decreased trafficking as a growing share was moved via the Pacific through Mexico into the United States. The displaced Colombian traffickers increasingly focused on the growing European market.

Traditionally, there have been several parallel streams of cocaine flowing into Europe. Commercial air couriers, sometimes directed by West African groups, have flown to Europe from various intermediate countries in the Caribbean. Colombian groups also made use of commercial air carriers, often in cooperation with groups from the Dominican Republic, with whom they have a longstanding relationship. Larger maritime consignments were often stored on board 'mother ships' and transported to shore by smaller vessels from the coast. The primary maritime points of entry were Spain (due to proximity and cultural links) and the Netherlands (due to the large ports). These vessels typically transited the Caribbean.

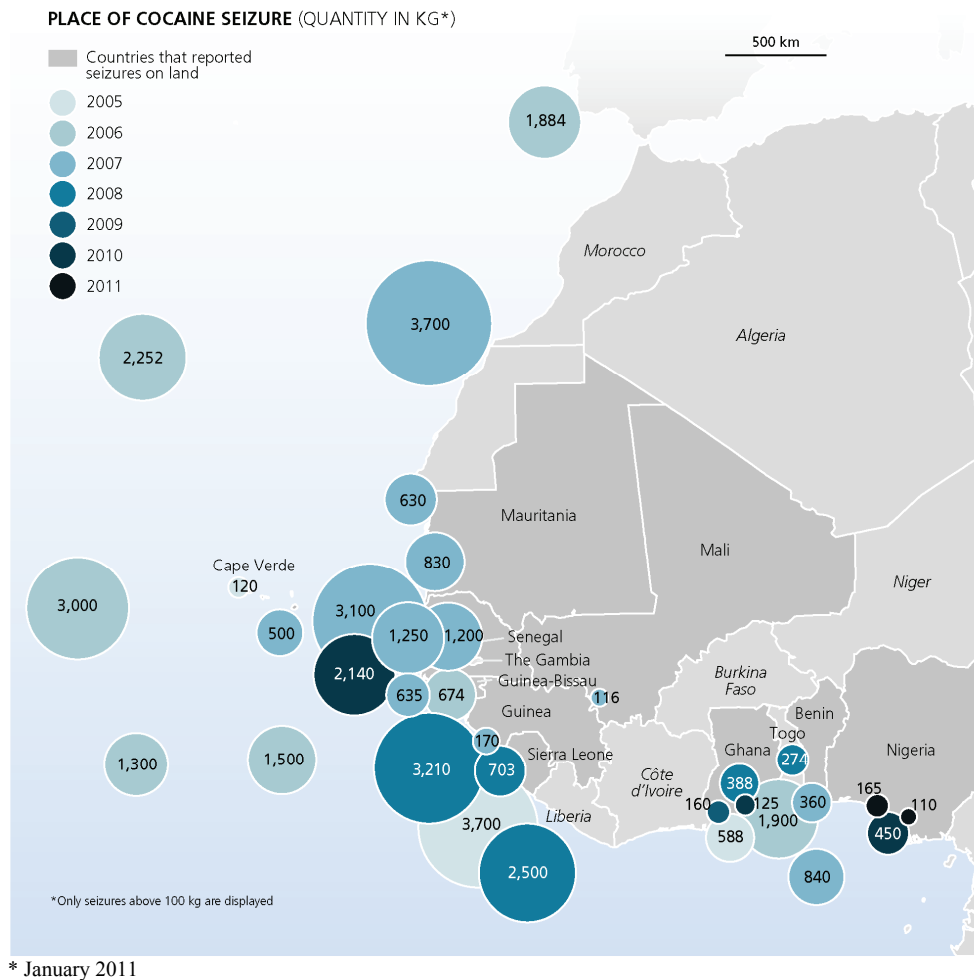
Figure 6: Global cocaine flows, 1998 and 2008



Source: UNODC World Drug Report 2009 and UNODC calculations informed by US ONDCP, Cocaine Consumption Estimates Methodology, September 2008 (internal paper).

Some time around 2004, Colombian groups began experimenting with routing their cocaine shipments through West Africa. From 2005 to 2008, there was a dramatic series of very large cocaine seizures in or near West Africa. Many of these involved ‘mother ships’ intercepted by European navies. There were also incidents where modified small aircraft were used. High-level officials were involved in some countries. There was also a sharp increase in the number of cocaine couriers found on flights from West Africa to Europe.

Around 2008, international attention to the issue, coupled with local political events, resulted in a dramatic reduction in the number and volume of seizures, including both maritime shipments and commercial air couriers. In 2008, only four large (over 100 kg) seizures were made, and in 2009, only one. According to IDEAS, an air courier database, in the second quarter of 2007, 59% of cocaine couriers detected were from West Africa. In the third quarter of 2009, none were. Since then, some increases have again been reported, to 5% in the fourth quarter of 2009 and, on average, 11% in 2010.

Figure 7: Significant cocaine seizures affecting West Africa, 2005-2011*

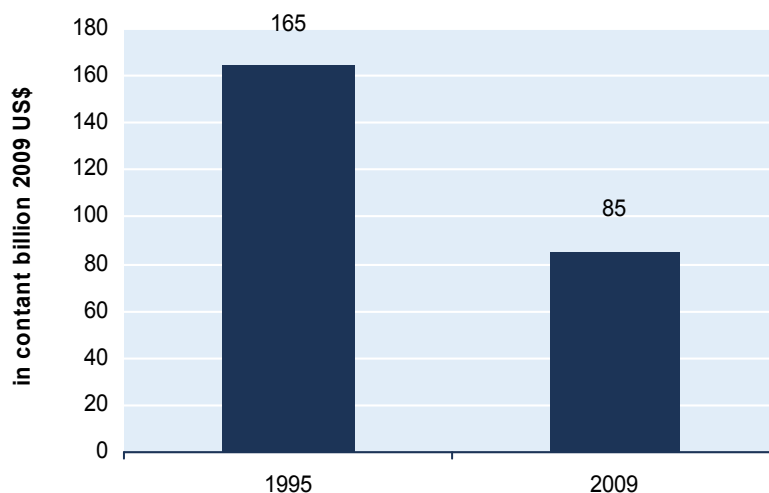
Source: UNODC individual drug seizure database and government sources

Despite this disruption, informal reports indicated that the trafficking continued. The use of jet aircraft, which can fly deeper inland and land in remote areas, was detected, and some analysts suggested this had become the dominant vector to Africa. There was less clarity on how this cocaine was shipped to the European mainland once in Africa.

c) Current value and money flows

The value of the global cocaine market is most certainly lower than it was in the mid-1990s, when prices were much higher and the US market was strong. In 2009 dollars, the global market was worth some US\$165 billion in 1995, and just over half of this in 2009 (US\$85 billion).

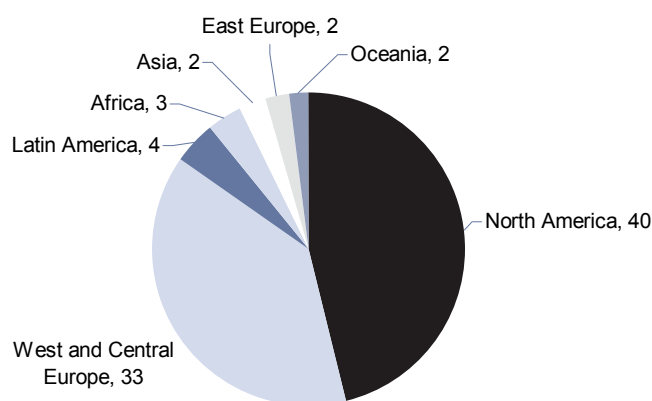
Figure 8: Value of global cocaine retail market in billion constant 2009 US\$, 1995 and 2009



Sources: UNDCP, *Economic and Social Consequences of Drug Abuse and Illicit Trafficking*, Vienna 1997 (re-valued based on US consumer price index) and UNODC estimates on the size of the global cocaine market for 2009, based on Annual Reports Questionnaire data and other government sources.

North America and West and Central Europe accounted for 86% of the global cocaine market in economic terms in 2009. North America accounted for 47% and West and Central Europe 39% of the total.

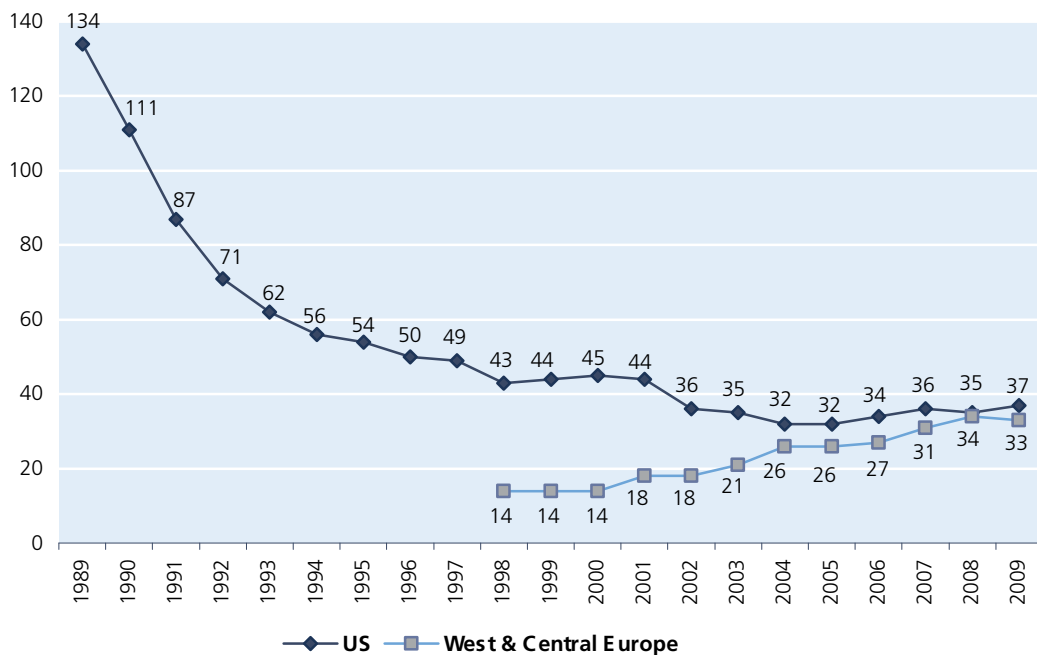
Figure 9: Regional breakdown of the value of the global cocaine market in 2009 in US\$ billions (N = US\$85 bn)



Source: UNODC estimates on the size of the global cocaine market for 2009, based on Annual Reports Questionnaire data and other government sources.

While the North American market shrank over the last two decades – due to both lower volumes and lower prices - the European market expanded. The US market remains, nonetheless, the largest market globally, but the market of the EU and EFTA countries (US\$33 bn at retail level in 2009) is – in economic terms – now nearly as large as the US market (US\$37 bn in 2009).

Figure 10: Value of US and West and Central European cocaine markets, 1989-2009 (constant 2008 US\$ billions)



Source: UNODC, World Drug Report 2010 and updates for 2009.

UNODC estimates that between 9% and 15% of Europe's cocaine supply transited West Africa in 2010, down from around 25% in 2007. This is not to imply that as much as 15% of the retail value of this flow remained in West Africa, of course. The drugs are worth much less in West Africa than at retail level in their destination markets, and the ownership of these drugs may remain in foreign hands, with locals receiving only a portion for their logistic assistance.

Informal reports have indicated that up to one third of the shipment is paid in kind to service providers in West Africa, who then traffic most of this to Europe on their own behalf. In addition, profits are made in supplying the West African cocaine market. The potential wholesale profits affecting West Africa in 2009 would be in the neighbourhood of US\$800 million, equivalent to 0.2% of GDP in West and Central Africa. This is – in relative terms – comparable to the cocaine-related profits made in the USA expressed as a proportion of GDP (US\$31.6 billion or 0.2% of GDP) and higher than the corresponding proportion in West and Central Europe (US\$23.1 billion or 0.1% of GDP).

These figures do not include profits made by West African citizens engaged in European cocaine retail sales (mostly as European residents, illegal immigrants or asylum seekers). European retail profits amount to some US\$20 billion. West African groups play an important role in cocaine street sales in several (mainly continental) European countries. Assuming that the West African groups reap, on average, between 5% and 10% of the European cocaine retail profits, this would amount to as much as US\$2 billion in potential cocaine-related income.

2. Current transatlantic trafficking routes

a) Overview

The global shift in demand has clearly affected trafficking routes, with much greater volumes crossing the Atlantic by air and sea. It is estimated that close to 220 tons of cocaine (26% of total cocaine exports) left the Andean countries for West and Central Europe in 2009. Out of this amount, close to 60 tons (purity-adjusted) were seized in other South American countries or in the Caribbean. Thus, close to 160 tons left South America for West and Central Europe in 2009.

Table 7: Flows of cocaine, purity-adjusted*, to major consumer markets (tons), 2009

Production	1,111	
Less seizures in Andean countries	-254	
Less domestic consumption in Andean region	-13	
Amounts available for export out of the Andean countries	844	
Less seizures in other South American countries, Caribbean and Central America	-203	
Less domestic consumption in other South American countries, Caribbean and Central America	-83	
Amounts available for export out of South America, Caribbean and Central America	558	
	West and Central Europe	North America
Amounts of cocaine leaving the Andean countries for West and Central Europe and North America	217	378
Less amounts seized in South America, Caribbean and Central America linked to trafficking flows to West and Central Europe and North America	-59	-98
Amounts leaving South America (incl. Caribbean and Central America) to West and Central Europe and North America	158 (incl. 21 tons via West Africa)	280
Less amounts seized by consumer countries of West and Central Europe and North America	-35	-101
Less amounts seized in West and Central Africa	0.4	
Amounts of cocaine consumed in West and Central Europe and in North America	123	179 (incl. 159 in the USA)

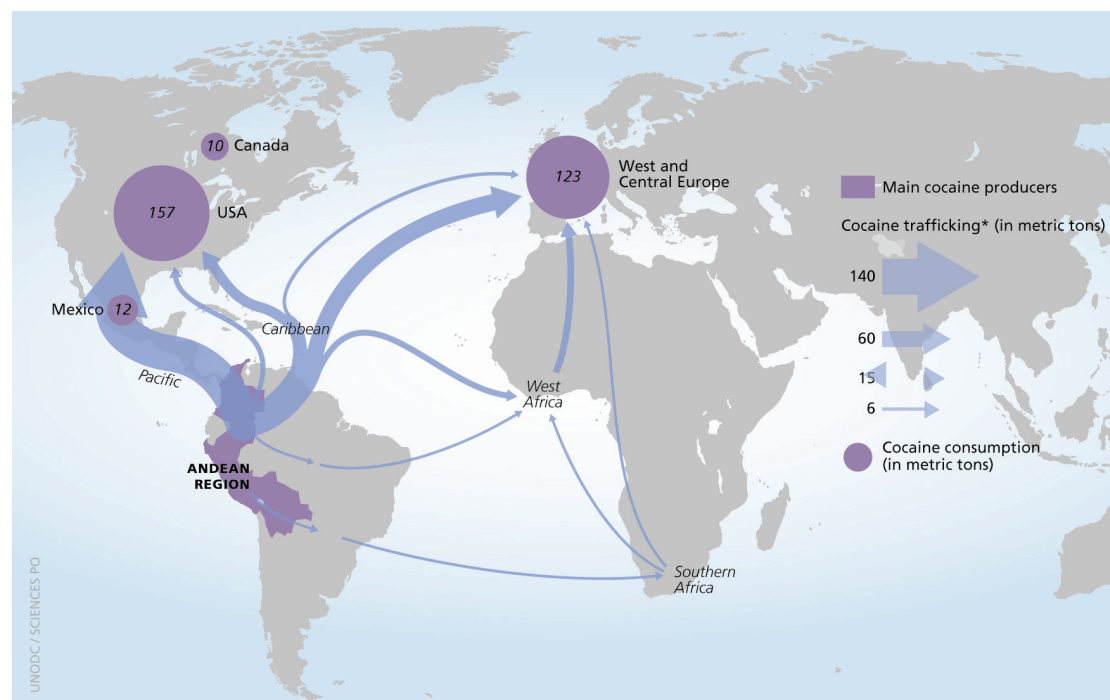
*Purity levels tend to decline along the trafficking chain. All numbers in this table have been adjusted to pure cocaine equivalents. Seizure data were adjusted based on reported wholesale purity data.

Source: UNODC estimates based on Annual Reports Questionnaire data and other government or scientific sources.

The seizures in West and Central Europe (including seizures on the open sea off the shores of Europe) amounted to some 35 tons (purity-adjusted), leaving 123 tons for consumption in this region (range: 100 – 138 tons).⁸

An analysis of individual drug seizures reported in Europe suggests that more than 86% of the drugs were trafficked directly, while around 13% were trafficked via West Africa. This implies that the volume of cocaine transiting West Africa for Europe would be around 21 tons.⁹ In addition, cocaine is trafficked to West and Central Africa – an area with a population of more than 400 million people – for local demand, which could amount to as much as 13 tons.¹⁰ Trafficking flows to West Africa could have amounted to some 35 tons in 2009 (range: 21-55 tons), equivalent to 4% (2%-6%) of total cocaine exports out of the three Andean countries. Of this, almost two thirds was for subsequent onward transit traffic to countries in West and Central Europe.

Figure 11: Main global cocaine flows, 2009



Source: UNODC, *World Drug Report 2010, updates for 2009*.

⁸ The amounts of cocaine trafficked via the Atlantic to Europe are still relatively modest compared to the large amounts trafficked to North America, a region with a population of 460 million people. UNODC estimates suggest that almost 380 tons of cocaine (or 45% of total cocaine exports) leave the Andean countries towards North America. Seizures made in other South American countries, in Central America and the Caribbean in relation to shipments towards North America are estimated at slightly less than 100 tons (purity-adjusted). A further 100 tons of purity-adjusted cocaine seizures are made in North America. Thus, out of 380 tons exported to North America only some 180 are available for consumption, of which the bulk (87%) is consumed in the United States.

⁹ $158 \text{ tons} \times 13.4\% = 21 \text{ tons}$; range: $158 \times 10.7\%$ to $158 \times 16\% = 17-26 \text{ tons}$.

¹⁰ Consumption figures for West and Central Africa are only rough estimates. They are based on a limited number of surveys in three West African countries and assumptions about (lower) cocaine consumption in countries which do not border the sea, resulting in an average annual prevalence rate of 0.5% of the population aged 15-64. This is far lower than the reported prevalence rate for the United States (2.4% of the population aged 15-64) or for West and Central Europe (0.8%) and assumptions about per capita use levels in the region (12 grams per person per year) is less than half the levels reported from North America or West and Central Europe (around 30 grams).

b) Seizures in Europe

Overall cocaine seizure data for West and Central Europe showed a strong increase over the 1998-2006 period, from 32 to 121 tons, followed by a significant decline over the 2006-2009 period, from 121 to 53 tons. When adjusted for purity, this was equivalent to a decline from 87 tons in 2006 to 35 tons in 2009.

Table 8: Cocaine seizures in West and Central Europe (tons), 2006-2009

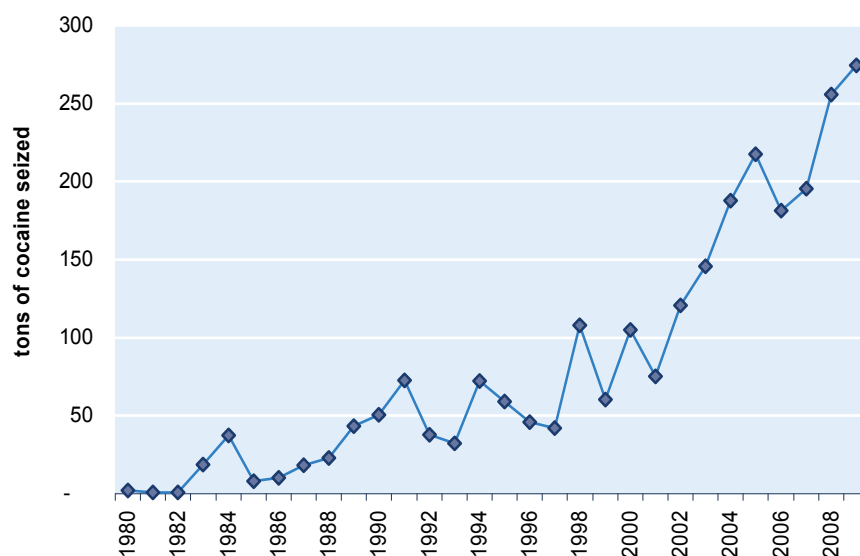
	2006	2007	2008	2009
Spain	49.7	37.8	28.0	25.4
France	10.2	6.6	8.2	5.2
Netherlands	10.6	10.5	6.8	4.9
Belgium	3.9	2.5	3.9	4.6
Italy	4.6	3.9	4.1	4.1
United Kingdom	3.4	3.6	3.1	2.8
Portugal	34.5	7.4	4.9	2.7
Germany	1.7	1.9	1.1	1.7
Other	2.3	4.7	2.3	1.8
Total	120.9	78.9	62.4	53.2
Purity-adjusted*	87	55	42	35

* based on wholesale-purities

Source: UNODC ARQ.

This remarkable decline in seizures is more than offset by an increase in seizures in South American countries, however, including strong performances in Argentina, Brazil, the Plurinational State of Bolivia, Colombia, Ecuador and Uruguay. Several of these countries showed a doubling of the volumes seized between 2006 and 2009, but the vast bulk of the total increase is due to the remarkable growth in seizures in Colombia. In 2009, Colombia reported seizing nearly 275 tons of cocaine, an all-time world record. This was almost 100 tons more than in 2006, more than compensating for the decline in European seizures (down about 68 tons).

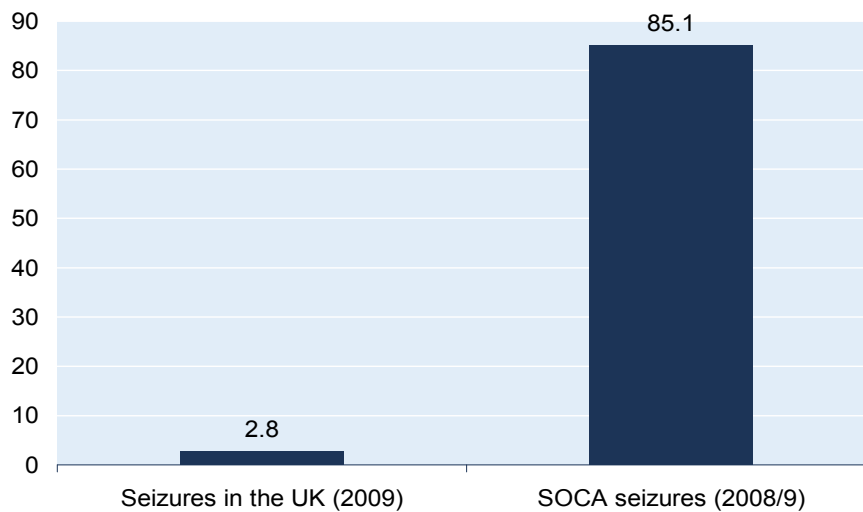
Figure 12: Cocaine seizures in Colombia, 1980-2009



Source: UNODC DELTA.

There may be several reasons for this increase, aside from strong performance by Colombian law enforcement officials. There is growing evidence that cocaine is being cut with adulterants in the production countries, so it is unclear what share of these seizures is pure cocaine. Some European law enforcement agencies have also been engaged in ‘upstream’ work, helping their South American counterparts to stop cocaine seizures before they depart the continent.¹¹ Consequently, the decline in seizures in Europe is not necessarily an indicator of a decline in European law enforcement performance.

Figure 13: Tons of cocaine seized in the United Kingdom versus drug interdictions in which the Serious Organized Crime Agency (SOCA) participated

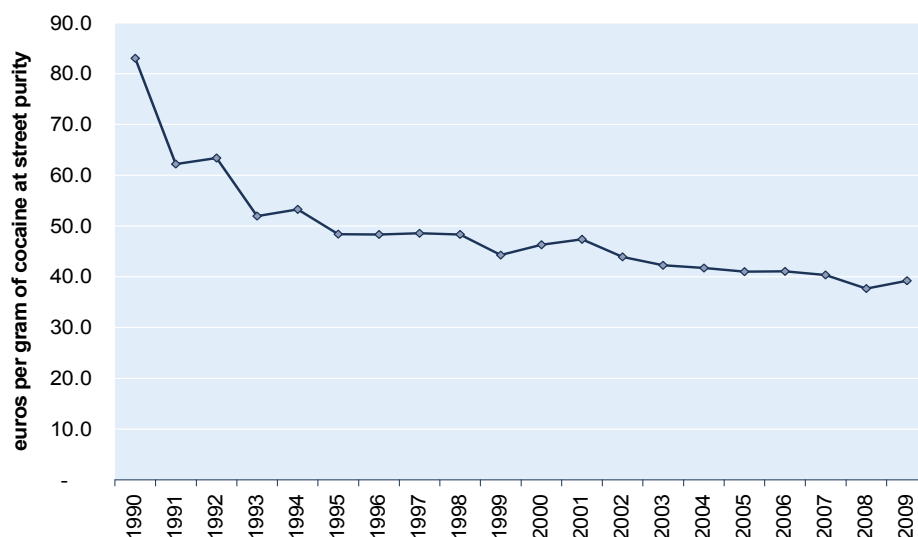


Source: ARQ and SOCA Annual Report 2008/9

So has the supply of cocaine to Europe increased or decreased? If supply were under pressure, an increase in price and/or a decrease in purity would be expected. Prices have increased in a number of European countries, while declining in others. Adjusting for inflation and weighting by population, the average retail price of a gram of cocaine in West and Central Europe declined from 44 euros per gram in 1999 and 40 in 2006 to 39 euros in 2009 (constant 2009 euros).

¹¹ See, for example, the Annual Report of the British Serious Organized Crime Agency (SOCA) for the year 2009/10, p 14.

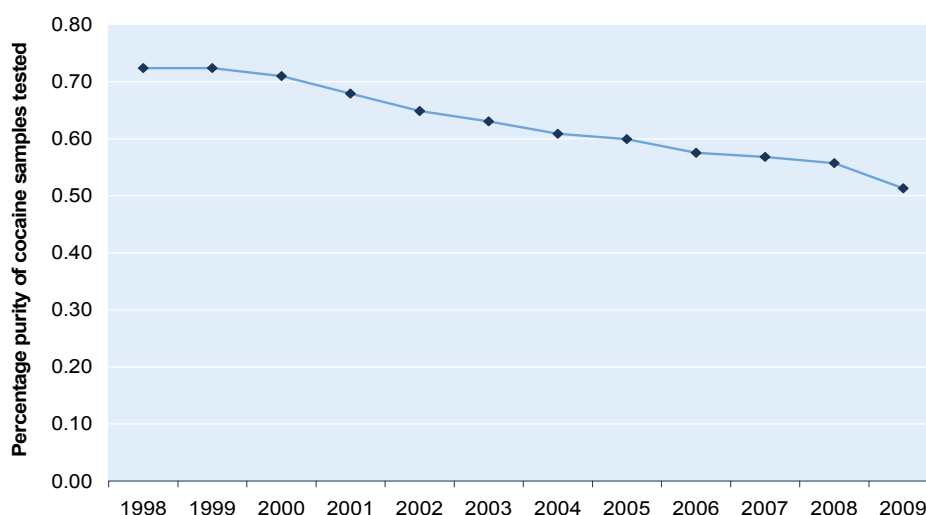
Figure 14: Population-weighted average price of a gram of cocaine at street purity in constant 2009 euros



Source: UNODC ARQ.

There are, however, indications that purity has significantly declined in a number of key markets. In the United Kingdom, average purity was tested at 75% in 1998; by 2009, it was only 63%. Other countries show different trends, and a number have very little data to assess. Based on unweighted averages, however, it appears that European cocaine purity has declined from around 74% in 1998 and 72% in 2006 to 65% in 2009. This decline offsets the price decline. The overall effect suggests a small decline in cocaine availability. Cocaine is still reaching the market in Europe, however, and much less is being seized on the continent.

Figure 15: Unweighted purity levels of cocaine seized in Europe, 1998-2009

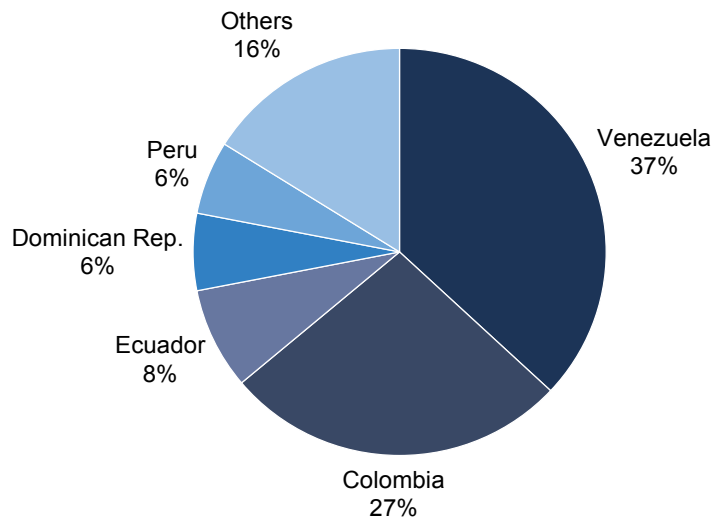


Source: UNODC ARQ.

Trends can also be detected in national annual seizures. For decades, the main entry point for cocaine into Europe has been Spain, reflecting the close cultural ties with Latin America. Spain accounted for 45% of all European cocaine seizures made over the 1998-2008 period. Despite a decline in the volumes seized, this increased to 48% in 2009.

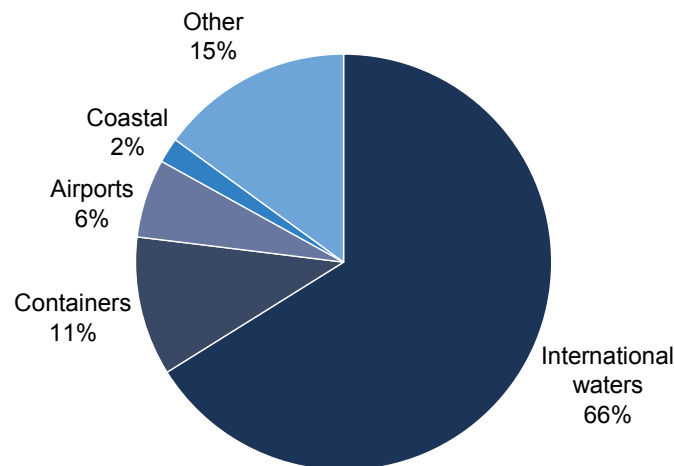
Cocaine seizures in Spain rose from 12 tons in 1998 to 50 tons in 2006 before falling back to 25 tons by 2009, the lowest figure since 2002. Most of these seizures appear to have originated in the Bolivarian Republic of Venezuela and Colombia, and most were seized in international waters.

Figure 16: Countries from which individual cocaine seizures reported in Spain were shipped, 2008-2010



Source: UNODC ARQ.

Figure 17: Location of Spanish seizures, 2008-2010



Source: UNODC ARQ.

Seizures made by the Portuguese authorities reflect the patterns seen in Spain. There was a strong increase in seizures from 1998 (0.6 tons) to 2006 (34 tons) and a decline to 3 tons in 2009. This reflects the growth and decline of West Africa as a transit zone, particularly the use of the Lusophone countries (Guinea-Bissau and Cape Verde). While in 2005 and 2006 Portugal reported the second largest cocaine seizures in Europe after Spain, its importance dropped, and by 2009, it ranked 7th. A number of additional potential explanations have been put forward for the decline in seizures, including more direct shipments from West Africa to final destinations in Europe, the use of containers or high-speed boats to smuggle drugs into the country, and the use of the Azores islands instead of mainland Portugal as a transit zone. In 2009, the most commonly cited sources of cocaine

shipments were Brazil (33% of all seizures by volume) and the Bolivarian Republic of Venezuela (13%).

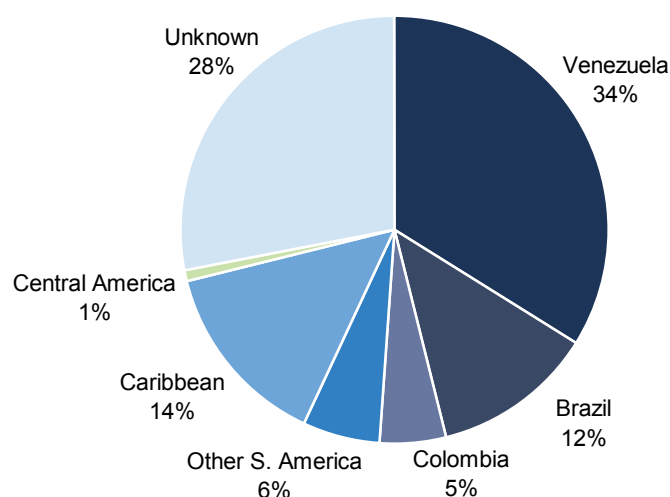
For many years, the Netherlands was Europe's second largest entry point of cocaine after Spain, reflecting inter alia the importance of Rotterdam as Europe's largest port as well as cultural ties with a number of islands in the Caribbean. Seizures in the Netherlands have, however, declined sharply in recent years, from 15 tons in 2005 to 5 tons in 2009. Although this was still the third largest cocaine seizure total in Europe (after Spain and France), it was the lowest Dutch cocaine seizure total since 1995.

The decline seems to have been at least partly due to growing efforts to stop shipments before they leave their 'origin.' For example, in 2008 the National Crime Squad arrested several people suspected of planning to transport 2.6 tons of cocaine from a warehouse in Sao Paulo to the Netherlands, before the shipment actually took place. In addition, the '100% control' strategy in the Antilles and Schiphol airports appears to have deterred the use of air couriers.

Large amounts of cocaine continue to be seized by the coastguards of the Dutch Antilles and Aruba. Out of 6.8 tons seized in 2008, 4.2 were taken by the Dutch navy from a cargo vessel sailing under a Panamanian flag from the Bolivarian Republic of Venezuela to Europe. Another factor may be diversions to Belgium, notably the port of Antwerp. Thus cocaine seizures reported by Belgium – in contrast to the overall trend in Europe – increased from 2.5 tons in 2007 to 4.6 tons 2009, giving Belgium the fourth largest cocaine seizure total in Europe in 2009.

In 2008 and in 2009, the second largest annual cocaine seizure total in Europe was reported by France, even though French cocaine seizures fell from 10 tons in 2006 to 6 tons in 2009. The bulk of French cocaine seizures was made at sea, mostly close to West Africa or close to the French overseas territories in the Caribbean. In 2009, the largest source country for cocaine shipments to France was the Bolivarian Republic of Venezuela (35% of the total).

Figure 18: Departure location of cocaine seizures in France, 2003-2008



Source: OCTRIS.

Some 21% of the cocaine entered France via the Iberian Peninsula in 2009, with the Netherlands also being an important transit country, but direct shipments from the French

Caribbean are gaining in importance. Maritime shipments are of less importance to France than to Spain, however, with just over a third of the seizures occurring at sea. Less than half (44%) of the cocaine seized in France in 2009 was destined for the local market, with the UK being the destination of 20% of all the seizures made.

Cocaine seizures in the United Kingdom have also seen a downward trend over the 2006-2009 period, from 3.4 to 2.8 tons. This downward trend was, however, less pronounced than in several other European countries. The UK ranked sixth in terms of seizures made in Europe in 2009. These figures may be misleading, however, as many large seizures are nowadays made ‘upstream’, that is, in the transit countries or countries of origin, based on intelligence gathered by UK authorities and shared with the respective local authorities in order to prevent such shipments to the UK. Thus, the UK’s Serious Organised Crime Agency (SOCA) reported the worldwide interdiction of 73 tons of cocaine in 2006/2007, 84 tons in 2007/2008 and 85 tons in 2008/2009 that would otherwise have landed in the UK.¹²

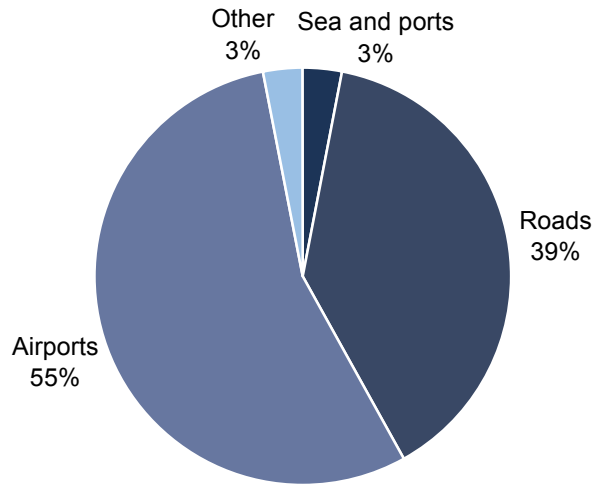
Cocaine trafficking to the UK – Europe’s largest cocaine market – is dominated by shipments of cocaine from the Iberian peninsula, which subsequently transit France for final destinations in the British Isles, and, to a lesser extent, by shipments from the Netherlands and Belgium. UK authorities estimate that some 75% of the cocaine transits continental Europe before reaching the UK. Main entry points for cocaine into the UK are the Channel Tunnel, Dover, Felixstowe, Folkestone and Harwich. The UK authorities estimate that between 65% and 70% of the cocaine originated in Colombia, most of the rest (30%-35%) in Peru and the balance from the Plurinational State of Bolivia. The Bolivarian Republic of Venezuela was identified as the main cocaine transit country in the Americas in 2009.

The UK authorities also reported the emergence of cocaine shipments through the Balkans. Serbian and Montenegrin crime groups have been involved in these trafficking activities, exploiting links and associations with Southern Cone countries in South America. This cocaine is mainly of Peruvian or Bolivian origin. In addition, cocaine is being shipped from West Africa into the UK. Direct shipments of cocaine from the Andean region into the UK also exist, but are still exceptions. However, the UK authorities also report an increasing use of sea containers to transport cocaine, either directly to the UK or to mainland Europe, with Spain, the Netherlands and Belgium being favoured destinations. Examples include container shipments from Costa Rica to the UK and the Netherlands, and from Chile to Spain.

The fifth largest European cocaine seizures in 2009 were reported by Italy. Seizures in Italy declined slightly, from 4.6 tons in 2006 to 4.1 tons in 2009. Surprisingly, Mexico has traditionally been identified as the largest ‘country of origin’ of cocaine shipments, alleged to be the proximate source of 24% in 2008, ahead of Spain (21%). In 2009, Mexico dropped from this position, to be replaced by the Bolivarian Republic of Venezuela, Spain and the Netherlands. In addition, the Italian authorities have reported increasing trafficking of cocaine via the Balkan countries to Italy. In contrast to other countries with direct access to the sea (such as Spain, Portugal, the Netherlands or Belgium) just 3% of the cocaine seizures in 2009 were reported to have been made at sea or at seaports in Italy.

Figure 19: Location of Italian seizure cases, 2009

¹² Serious Organised Crime Agency, *Annual Report, 2008/09*, London 2009, p. 42.

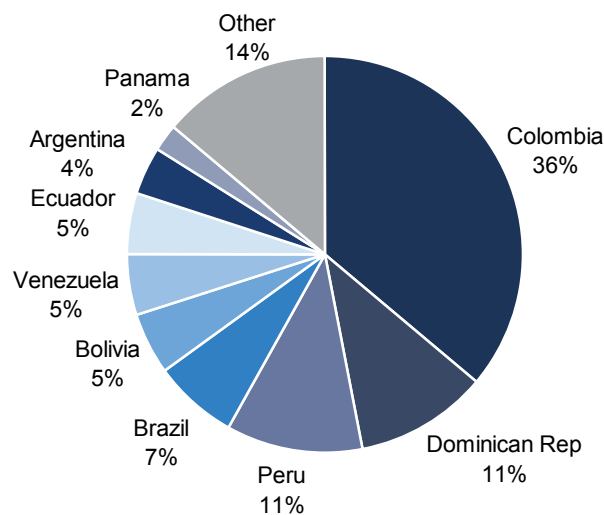


Source: UNODC Individual Drug Seizures database.

c) Commercial air couriers to Europe

While the bulk of the cocaine enters Europe by sea, commercial air couriers remain an important vector for trafficking. Based on information collected from Member States in the Annual Reports Questionnaire, about 21% of Europe's cocaine supply comes by air.¹³ This includes shipments that may have originally been maritime, but which entered Europe through the airports. The amounts trafficked by air into Spain, Europe's main cocaine entry point, were equivalent to just 6% of the total, but far higher proportions were reported from Austria (90%), Germany (62%), Italy (55%), Switzerland (50%) and the UK (50%). Most of these countries report other European countries as the proximate source of their cocaine.

Figure 20: Breakdown of national source of cocaine seized from commercial air couriers in Europe



Source: UNODC Individual Drug Seizure database.

¹³ This share is supported by information collected in UNODC's individual drug seizure database, where air-related cocaine seizures comprised 20% of the total volume seized in West and Central Europe over the 2008-2010 period. Sea-related seizures, in comparison, amounted to 77%.

While air couriers were responsible for a small share of the volume imported, they made up the majority of cocaine trafficking cases: each courier carries only a small amount of the drug, but a large number of them make the attempt. Due to its value to volume ratio, cocaine is a particularly attractive drug for air couriering. Cocaine accounted for 83% of all air-related drug seizure cases capture in UNODC's database for the 2008-2010 period in West and Central Europe.

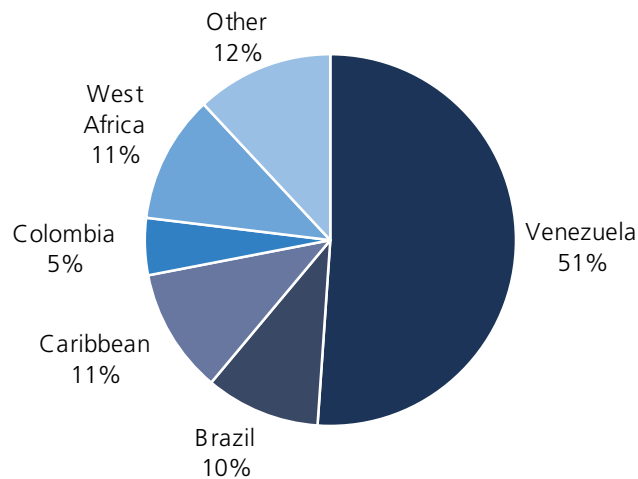
d) Maritime trafficking

Data reported to UNODC by Member States suggest that 59% of the cocaine seized in West and Central Europe in 2009 was seized while still at sea or at ports. Above-average proportions were reported from Greece (83%), Belgium (80%), Spain (77%), Portugal (75%) and Ireland (70%). Based on individual drug seizures, sea-related cocaine seizures comprised 77% of the total amounts of cocaine seized in West and Central Europe over the 2008-2010 period.

e) Maritime trafficking routes through the Caribbean

The Bolivarian Republic of Venezuela has emerged as a key transit country for shipments to Europe, particularly for large maritime shipments. The largest cocaine seizure in 2008 was 4.1 tons of cocaine seized from a commercial vessel coming from the Bolivarian Republic of Venezuela, and 2.5 tons were also seized on a fishing boat from that country. According to the Maritime Analysis Operation Centre (MAOC-N), more than half (51%) of all intercepted shipments in the Atlantic during the 2006-2008 period started their maritime journey in the Bolivarian Republic of Venezuela. A further 11% of the shipments could be traced back to various Caribbean countries.

Figure 21: Departure locations of identified drug trafficking shipments by sea from South America to Europe, 2006-2008



Source: Maritime Analysis Operation Centre.

Data from the UNODC individual drug seizures database (IDS) confirm the key role played by the Bolivarian Republic of Venezuela as a transit country for cocaine shipments to Europe by sea.¹⁴ In the IDS database, the Bolivarian Republic of Venezuela is followed by Colombia (25% of the total over the 2008-2010 period), Ecuador (10%) and the Caribbean region (7%), of which the Dominican Republic alone accounts for 5%.

¹⁴ 46% of the total over the 2006-2008 period; 44% over the 2008-2010 period.

MAOC-N reports that sailing vessels travelling from the Caribbean to Europe are the most common source of seizures, followed by freight vessels, and other motor vessels. In contrast, semi-submersibles, which have gained strongly in importance in trafficking cocaine from Colombia to Mexico in recent years, do not as yet play any significant role in Europe. Only one has been sighted, in Galicia, northern Spain in 2006, and this craft was not used for any cross-Atlantic journeys but to ship cocaine from ‘mother-ships’ arriving off the coast of Spain to hidden locations along the coast.

f) Maritime routes to West Africa

In the past few years, the most innovative element in trafficking cocaine to Europe has been the emergence of trafficking routes via West Africa. These routes gained strongly in importance over the 2004-2007 period, before appearing to lose some of their importance in 2008 and 2009. Based on estimates of cocaine demand and information on the origin of seized cocaine in Europe, the amounts trafficked via West Africa increased from just 3 tons in 2004 to around 47 tons in 2007, before falling back to some 21 tons in 2009.

Adding the amounts estimated to be consumed locally in West and Central Africa (some 13 tons in 2009) and the purity-adjusted seizures made in recent years suggest that cocaine flows to West and Central Africa rose from 15 tons in 2004 to 62 tons in 2007 before falling back to some 35 tons in 2009 (range: 21–55 tons). Contrasting these cocaine trafficking flow figures with (purity-adjusted) seizures reported in the countries of West and Central Africa, just 3% of the amounts trafficked to or via West Africa were seized by countries in this subregion over the 2004-2009 period, far less than in other regions. With cocaine seizures of just 0.5 tons reported from the countries of West and Central Africa in 2009 (down from 2.3 tons in 2008 and 4.6 tons in 2007), the proportion of seizures made out of the amounts trafficked to or via West Africa fell to just 1% in 2009.

Table 9: Tentative estimates of the amounts of cocaine trafficked (in tons) to West Africa and via West and Central Africa to West and Central Europe, 2004-2009

	2004	2005	2006	2007	2008	2009
Amounts consumed in West and Central Europe (best estimate)	114	119	126	131	126	123
Seizures in West and Central Europe	72	106	121	79	62	53
Average weighted wholesale purity	72.2%	72.6%	71.7%	70.2%	67.3%	65.1%
Purity-adjusted seizures in West and Central Europe	52	77	87	55	42	35
Amounts trafficked to West and Central Europe	166	196	213	186	168	158
Proportion West and Central Africa	2.0%	8.7%	14.9%	25.4%	13.7%	13.4%
via West Africa to West & Central Europe in tons	3.3	17.1	31.7	47.2	23.0	21.2
Domestic demand	10.0	10.6	11.2	11.8	12.5	13.2
Seizures in West & Central Africa	1.9	1.4	0.4	4.6	2.3	0.5
Purity	75%	75%	75%	75%	75%	75%
Purity-adjusted seizures	1.4	1.0	0.3	3.4	1.8	0.4
Total amounts of cocaine trafficked to West & Central Africa	15	29	43	62	37	35

Sources: UNODC estimates based on UNODC, Annual Report Questionnaire and UNODC, Individual Drug Seizure database.

In the past, most West African states reported that a large share of the cocaine was arriving by sea.¹⁵ Of individual drug seizures reported to UNODC between 2000 and 2010, 36% of the cocaine seized was taken at sea or at seaports.¹⁶ This is more than what was taken at airports (14%), but less than inland seizures. If only incoming shipments are considered, the proportion of seizures made at sea or at ports would rise to some 83%.¹⁷

According to Europol, cocaine finds its way to Europe along three main routes:

- the Northern route, from the Caribbean via the Azores to Portugal and Spain;
- the Central route from South America via Cape Verde or Madeira and the Canary Islands to Europe; and
- more recently, the African route from South America to West Africa and from there to Spain and Portugal.¹⁸

¹⁵ In 2005, Guinea reported that 40% of the cocaine came by sea into the country. The proportions given by Togo varied between 20% and 85% over the 2004-2006 period. Nigeria reported that between 10% and 93% of the cocaine was shipped by boat into the country between 2006 and 2009. Ghana reported for both 2007 and 2008 that 80% of the cocaine was shipped from South America by sea to Ghana. In 2006, Liberia informed UNODC that 90% of the cocaine arrived by ship in the country.

¹⁶ Based on sporadic reports from Benin, Cape Verde, Côte d'Ivoire, Gambia, Ghana, Guinea, Mali, Nigeria, Senegal, Sierra Leone and Togo.

¹⁷ The individual drug seizure database does not distinguish between incoming and outgoing traffic; however, one can assume that seizures where the origin can be identified are more likely to be seizures from an incoming shipment.

¹⁸ EMCDDA and Europol, *Cocaine: A European Union perspective in the global context*, Luxembourg, 2010, p. 20.

Shipments to Africa, mostly West Africa, gained in importance between 2004 and 2007, resulting in the emergence of a new key trans-shipment hub: centred on Guinea-Bissau and Guinea, stretching to Cape Verde, The Gambia and Senegal, thus complementing the already existing trafficking hub of the Bight of Benin, which spans from Ghana to Nigeria.

The case of Guinea-Bissau

Almost all countries in West and Central Africa face serious challenges in combating drug trafficking, and these weaknesses are being exploited by drug trafficking groups. One of the best known examples is Guinea-Bissau, one of the smallest (1.8 million inhabitants) and poorest countries (164 out of 169 countries evaluated in UNDP's 2010 Human Development Index) in a generally poor region. The vulnerabilities can be linked to large-scale poverty (a facilitator for widespread corruption); cultural ties with the Lusophone world; and a geography and a political context which facilitated drug trafficking. There can be no doubt that language and cultural ties are important factors for the traffickers' choice of transit countries. Guinea-Bissau shares a language and cultural links with Brazil, Cape Verde and Portugal – all key locations in the trafficking chain from South America to Europe. Geography also plays a role. Guinea-Bissau has direct access to the sea. The capital city, Bissau, is a port town. The country has 87 coastal islands - of which 21 are inhabited - and the coastal areas include large mangrove swamps. All of this renders the country interesting for drug trafficking operations. Guinea-Bissau also has a history of conflict and military rule, with some of the conflicting parties taking recourse to drug trafficking for financing their operations. Some observers have linked the murder of the president João Vieira in March 2009 and the coup d'état of the military in April 2010 to such conflicts that were, at least partly, financed out of drug trafficking.

In its heyday, the African route involved large commercial fishing or freight 'mother ships', often specially modified for cocaine storage. These ships were met at sea by African vessels with African crews, often with a Latin American 'controller'. Then the 'mother ships' would unload cargoes to these smaller vessels, and the cocaine could be stored, repackaged and redirected to European buyers. The ownership of the bulk of the drugs was generally not transferred, however, and remained in hands of the Latin American groups until the drugs reached Europe.

The West Africans, of course, did not work for free. In exchange for their services, they were often paid in kind. The amounts which they were able to reap were quite substantial: up to one third of the shipment. This 'commission in kind' was used to feed West African distribution networks in Europe, and also fed the domestic market.¹⁹

By 2008, these patterns began to change. Heightened international awareness of the threat of trafficking cocaine via West Africa rendered trafficking via West Africa more difficult. In addition, a series of changes to the countries' law enforcement, military and/or political leadership seem to have changed the context for cocaine trafficking in the northern hub (Guinea, Guinea-Bissau and The Gambia). As a consequence, both maritime seizures and detection of air couriers from West Africa decreased sharply from 2008.

There are indications that the flow of cocaine continues, but there are few seizures in West Africa or in Europe to document the means by which this is occurring. One possibility is containerized shipment, a method that might be effective given limited capacity for container inspection in West Africa. Only two countries in the region have

¹⁹ UNODC, *Transnational trafficking and the rule of law in West Africa: a threat assessment*, July 2009, p. 15.

seized cocaine from containers: Nigeria and Ghana. From 2005 to 2011, only 20 seizures of cocaine have been made from containers travelling from Latin America via Africa to Europe, including six seizures in 2008, two in 2009 and two in 2010. The volumes have been impressive, though: some 2.5 tons in all, a significant share of the seizures made in West Africa during this period.

The largest seizure claimed to date was 14 tons, seized by Nigerian authorities in 2006 from a container containing cement from Peru. A quick drug test undertaken by the Nigerian authorities suggested the existence of cocaine in this shipment. Subsequent detailed tests of the seized material by the US Drug Enforcement Agency, however, failed to confirm the existence of any cocaine.

But there has been a recent up-tick in container seizures made in the region, due to tip-offs from outside authorities. Based on a tip-off from the US Drug Enforcement Agency, the Nigerian authorities were able to seize some 450 kg of cocaine in the port of Tin Can Island, Lagos, on a vessel originating in Chile in July 2010. Cooperation between Nigerian and American counter-narcotics agencies resulted in two further seizures on the same island, both in January 2011, totaling 275 kg of cocaine.

In Ghana, 125 kg of cocaine were seized in October 2010 in a container originating in the USA, passing through Panama, where the drugs were apparently implanted without the knowledge of the container owner. The overall container seizures made in trafficking cocaine from South America to Nigeria and Ghana amounted to around 1 ton between 2009 and January 2011.

With regard to the concealment methods within containers, law enforcement nowadays distinguishes drugs being smuggled ‘in freight consignments’ (that is, shipping the drugs as part of normal freight), ‘in transport’ (that is, by concealing it in the structure or the refrigerating unit of a container) or as ‘rip-off’ which means that the drugs are easily accessible in the container in order to be quickly removed in the port of destination. In the latter cases, drugs are often hidden in repositories such as sports bags. Five seizures with Nigeria as destination were made in ‘freight consignments’ and one shipment seized in Ghana used the ‘rip-off’ consignment method.



Bags of cocaine found at entrance of container destined to Ghana

While most of the big maritime shipments made today are of Colombian cocaine trans-shipped via the Bolivarian Republic of Venezuela, the container shipments appear to be

linked to cocaine produced in Peru and the Plurinational State of Bolivia, countries where cocaine production has been rising in recent years. In terms of the number of shipments, the Plurinational State of Bolivia is the most commonly detected source, in terms of volume, 59% of the volume of cocaine seized came from Peru.

But there are indications that some of the traditional maritime trafficking continues, though likely at a much reduced pace. In May 2010, in close cooperation with the UK's Serious Organized Crime Agency (SOCA), the Gambian authorities seized over 2 tons of very pure cocaine behind a false wall of a warehouse basement, an hour's drive from the capital Banjul. The operation started following reports that the concerned import/export fishing company may have been involved in money-laundering activities. Fifteen people - five Nigerians, three Ghanaians, two Gambians, two Venezuelans and three Dutch nationals - working under the cover of the fishing company were arrested following raids at Bonto on a tiny island near the capital Banjul. All traffickers had resident cards and/or driving licenses from either The Gambia or Guinea-Bissau. The Venezuelans were residing in West Africa at the time. Their movements, as shown in their passports, revealed that they did not fear arrest while travelling across the region. The case supported claims made by some agencies that some fish-related enterprises are used as a cover for cocaine imports and exports, and it also bore out long-held suspicions that significant quantities of cocaine are being stockpiled in West Africa for subsequent shipments to Europe.

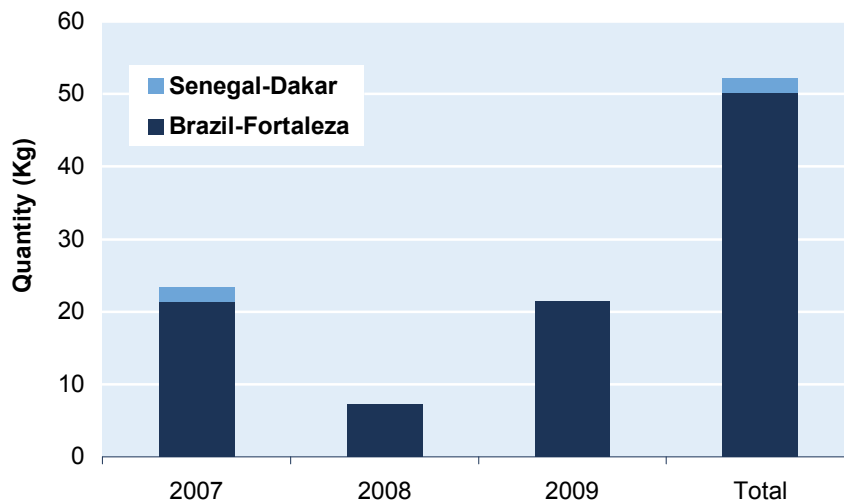
Transatlantic yachts are another possible vector, but seizures have been few. From early 2010 to March 2011, there was only one. On 3 September 2010, some 30 kg of cocaine were seized from a compartment inside the rudder of a yacht called 'the Tortuga' in the waters of Cape Verde.

g) Air routes to West Africa

As discussed above, air couriers are more commonly detected than maritime shippers, but carry far smaller loads of cocaine. As a result, 68% of the individual drug seizure cases reported to UNODC between 2000 and 2009 were air courier cases, but they were responsible for only 14% of the cocaine seized. Excluding seizures made on land (which could have entered by air or sea), the share of total volume seized in these cases would be 28%.

It is difficult to traffic cocaine from South America on commercial air flights to West Africa. Direct flights from South America to countries in West Africa are limited. In March 2010, Turkish Airlines stopped its direct flight from Sao Paulo to Dakar, leaving only the Cape Verdean air transporter, TACV, with direct flights from Fortaleza (Brazil) to Praia (Cape Verde). Seizures along this route have been limited, however. Data provided to UNODC indicate that between 2007 and 2009, the majority of couriers seized in Praia airport departed from Fortaleza and only one from Dakar international airport (Senegal).

Figure 22: Origin and quantity of cocaine seized at Praia airport, 2007-2009

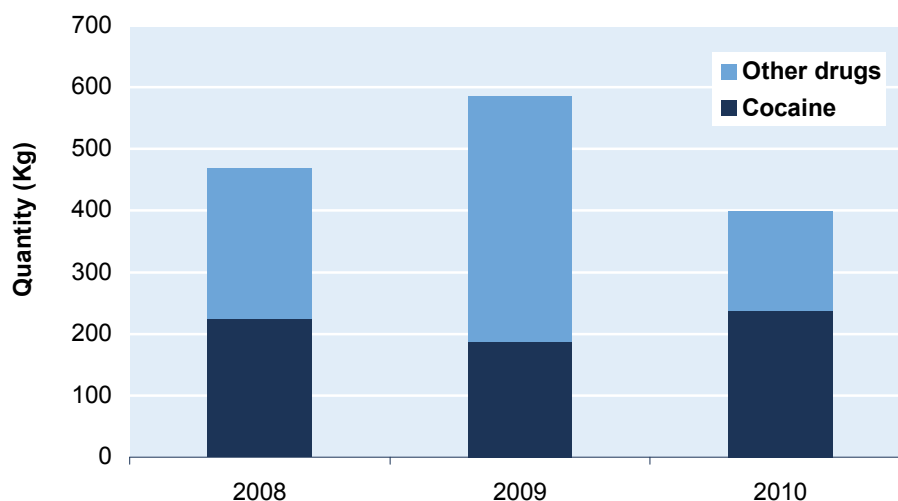


Source : Aircop assessment report March-April 2010.

The majority of cocaine couriers arrested in Praia are Cape Verdean passport holders, followed by Nigerians. In 2009, 10 out of 13 couriers arrested in this airport for carrying cocaine were Cape Verdean nationals followed by two Guineans and one Nigerian.

Most of the flights between South America and West Africa transit Europe. There is a small risk of detection while passing through the European airports, and the time involved may exceed the limits for body couriers (those who carry packets of cocaine in their intestines). Nonetheless, of 155 cocaine seizures made at the International Airport in Lagos in 2010, 31 were on inbound flights, 29 of which were connected to Brazil.

Figure 23: Cocaine and other drug seizures in Lagos international airport, 2008-2010



Source : National Drug Law Enforcement Agency-AIRCOP assessment mission, 2010.

Those with access to airplanes and runways can easily transport cocaine from a number of regional airports in South America to various landing strips in West Africa. Such transport patterns appear to have gained in importance in recent years. The potential is almost unlimited for those willing to use less formal landing strips. Many West African

countries lack the capacity to detect or pursue unauthorized aircraft entering their airspace. Inland, much of West Africa is sparsely populated, including vast desolate areas in northern Mali and Mauritania. The islands off the coast of Guinea-Bissau have also been used as landing sites in a number of cases. Even with substantial notice, authorities in several West African countries have faced trouble in reaching the more inaccessible parts of their own territories.

According to recent data provided to UNODC, in 2010, there were increasing numbers of modified light aircraft departing from the Bolivarian Republic of Venezuela on transatlantic flights to Mauritania, Sierra Leone or Guinea-Bissau. There is also evidence that modified twin turboprop aircraft have been flown from the coast of the Bolivarian Republic of Venezuela to a number of destinations in West Africa, including Mauritania, Mali, Sierra Leone, Guinea, Guinea-Bissau and Cape Verde. For example, on 25 January 2010, a Beech Craft BE 300 from the Bolivarian Republic of Venezuela landed in Mali, near the Mauritanian border. The cargo was unloaded and moved by 4x4 vehicles in the direction of Timbuktu before authorities lost track of the convoy.

In addition, there have been several recent cases where old jet aircraft have been purchased and refitted for trafficking cocaine along this route. The best known example was a Boeing 727 jet, which authorities found alight in Central Mali in November 2009, apparently emptied of its cargo of cocaine. In March 2011, the Malian authorities arrested four suspects in relation with this case, including a French pilot, owner of Africa Air Assistance, a company that chartered the so-called 'Air Cocaine.'

There have also been various cases prosecuted in US courts where old jet aircraft have been purchased to traffic cocaine from South America to West Africa. For example, in June 2009, an individual was arrested in Bucharest, Romania, and later extradited to the United States to face charges related to the purchase of a US\$2 million cargo plane. This should have been added to the six aircraft already flying for the purpose of running monthly cocaine flights between the Bolivarian Republic Venezuela and Guinea²⁰ where they had access to a private airfield. According to the DEA, a plane seized in Sierra Leone in July 2008 with 600 kg of cocaine belonged to the group.

Similarly, in 2010, another individual was indicted for using 'large commercial aircraft' to ship cocaine to West Africa.²¹

Another prominent case related to Liberia revealed traffickers' interest in an air route from South America (the Bolivarian Republic of Venezuela) to Monrovia. On May 28 and 29 2010, several suspects were arrested in Monrovia. The traffickers were trying to bribe the Director of the Republic of Liberia National Security Agency and his deputy in order to 'protect' shipments of cocaine by air to the country. The traffickers were preparing to dispatch at least 4 tons of cocaine from the Bolivarian Republic of Venezuela to Monrovia, for subsequent shipment, in another aircraft, to Ghana.²²

²⁰ <http://www.justice.gov/usao/nys/pressreleases/July10/valenciaarbelaezjesuseduardosentencingpr.pdf>

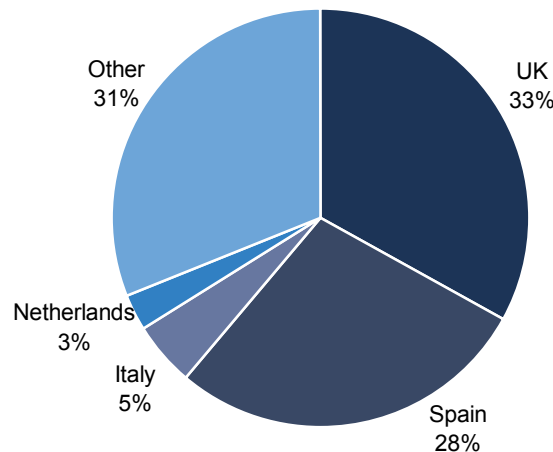
²¹ <http://www.justice.gov/usao/nys/pressreleases/June10/operationrelentlessliberiapr.pdf>

²² Ibid.

3. Trafficking from West Africa to Europe

UNODC estimates that some 21 tons of cocaine were shipped from West and Central Africa to Europe in 2009, down from 47 tons in 2007. Almost all of the cocaine transiting West Africa is destined for Europe, notably West and Central Europe. In terms of volume, the United Kingdom and Spain were the destinations of most (61%) of the cocaine documented in the individual seizures reported to UNODC, although many countries were implicated in a significant number of seizures.

Figure 24: Destination of cocaine seized in West and Central Africa



Source: UNODC Individual Drug Seizure Database.

Cocaine is trafficked from West Africa to Europe by air; by land and air; by land and sea; as well as by sea only. Trafficking by air is the most common mode of transport. Individual cocaine seizures made between 2000 and 2010 in West and Central Europe suggest that 58% of the cocaine seized transiting West and Central Africa came by air and 35% by sea.²³

Current cocaine prices are lowest in the trafficking hubs of Guinea-Bissau, Guinea and The Gambia and gradually rise the closer the cocaine gets to Europe. Thus, in June 2010, a kilogram of cocaine cost 7,000 euro in Guinea-Bissau, 8,000 euro in Guinea and 10,000 euro in The Gambia, rising to 16,000 euro in Senegal, 15,000 euro in Mali, 16,000 euro in Mauritania and 27,000 euro in Morocco.

a) Maritime routes from West Africa to Europe

Compared to the importance of sea transport from South America to Europe, the maritime flow of cocaine from West Africa to Europe is small, but still significant. Fishing boats and freighters leaving African ports can easily make their trip unnoticed among the heavy maritime traffic off the coasts of West Africa.

Traffickers have been caught using powerful go-fast boats to make the quick dash from the North African coast to southern Europe, and even for points further to the north. In December 2006, the Spanish Navy intercepted a go-fast boat off the coast of Galicia. The boat had left Casablanca (Morocco) a few days earlier and rallied with a boat coming from Latin America. About 3 tons of cocaine were transferred to the go-fast boat, but much was dumped into the sea when the boat was spotted by the Spanish authorities.

²³ Based on information from 16 countries: Austria, Belgium, Denmark, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland and the United Kingdom.

Eventually, the operation led to the seizure of 1.8 tons of cocaine and the arrests of 28 people in Galicia. During the investigation, the Spanish Police established that Moroccan traffickers, specialized in smuggling by sea, were also involved. The use of go-fast boats for cocaine trafficking operations has also been mentioned, though not confirmed, for Mauritania.²⁴

Another significant seizure (500 kg) was reported by the authorities of Cape Verde in 2007. This shipment had Portugal as its destination. A few years earlier, the authorities of Togo (2004) intercepted a shipment of cocaine (410 kg), originating in the Bolivarian Republic of Venezuela and bound for Spain. Smaller amounts of cocaine on boats were also reported by the authorities in a number of other West African countries. The authorities in Ghana, for instance, intercepted a shipment of 30 kg of cocaine bound for the UK in 2006 - though prior intelligence information suggested that up to 2.3 tons of cocaine might have been on that boat. Guinea reported a seizure of 6 kg in 2007 on a boat going from Nigeria to Spain.

Since 2005, there have been eight cases of containerized shipment of cocaine from West Africa to Europe. The largest was 563 kg seized in Guinea-Bissau destined for Portugal in 2005. The most recent was a seizure of 508 kg made in Lisbon in 2008, where cocaine was found stuffed in and around containers of soft paper tissues departing from The Gambia. Cape Verde has reported two seizures (172 kg and 103 kg), with Portugal as the final destination country.

The low number of detections must be placed in the context of the volume of container traffic between West Africa and Europe. In the Netherlands alone, there were more than 178,000 container consignments whose port of loading or port of origin was in Africa, in 2008 and 2009.²⁵ Checking all these containers is not feasible, given existing resources, and it does not appear that containers from Africa are given any special scrutiny. A report by the Maritime Analysis and Operation Centre – Narcotics (MAOC-N) suggested that containers from Africa were not considered a priority, and were thus not included as a special risk factor in the ‘atomized risk indicator based selection systems’ (SIRENAC²⁶), which is now widely used.

b) Air routes from West Africa to Europe

It appears that most of the cocaine trafficked from West Africa to Europe proceeds by air. In particular, couriers are employed to carry drugs on commercial air flights. Human couriers either swallow their shipments or transport them on their persons or in their luggage. This modus operandi is a speciality of Nigerian groups, who often send many couriers with small quantities in the same flight.²⁷

One such case occurred in December 2006, when the Dutch authorities arrested 32 couriers from the same plane. The couriers had left Guinea-Bissau, transited Casablanca and landed at Schiphol airport. Out of the 32 couriers, 28 were Nigerians. In July 2007,

²⁴ UNODC, *Cocaine trafficking in Western Africa*, October 2007.

²⁵ Ibid.

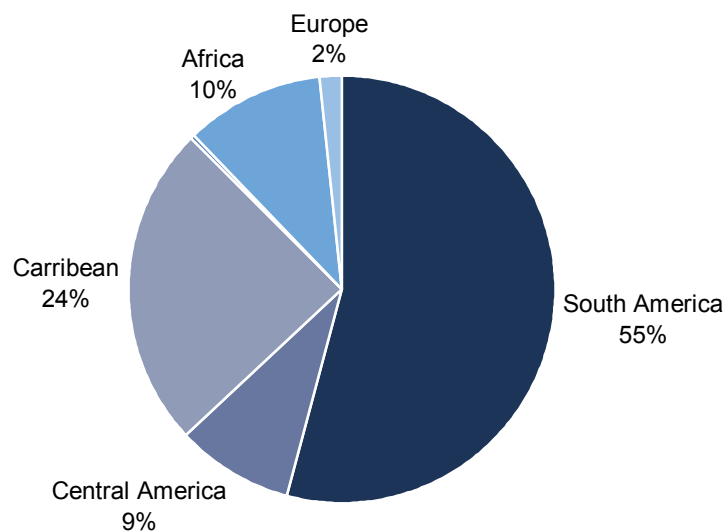
²⁶ The SIRENAC information system (Ship Inspection Report Exchange) was established under the Paris Memorandum of Understanding on Port State Control, one of the first maritime regional initiatives, created in 1978. Each State Member of this organization must inspect at least 25% of foreign vessels calling in its ports. These ships may get a notification of deficiency. If deficiencies are serious and numerous, the ship will be forbidden from leaving the port. The results of these controls (about 14,600 controls per year are shared by 18 States (EU and non-EU members) belonging to the Paris MOU. The database is updated on a daily basis, supplied with information from the inspections. This information allows profiling for future inspections. <http://www.emsa.europa.eu/end645d002.html#parismou>; http://www.maritime.gov.pf/IMG/pdf/Etat_du_port_.pdf

²⁷ The IDEAS database indicates that, in 2010, the average quantity of cocaine seized per courier was about 1.5 kg.

16 couriers were arrested on the weekly flight between The Gambia and the Netherlands. Eight couriers were arrested at Banjul airport before departure and eight others were at Schiphol on arrival. The couriers were mostly Nigerians with residency in Europe. On 23 October 2007, another 22 ‘swallowers’ were arrested on the flight from Bamako via Tripoli to Schiphol, of which 19 were Nigerian, two from Mali and one Liberian. Of these, 18 were resident in Spain, two in Greece, one in Nigeria and one in Italy.

The detection of air couriers in Europe declined at about the same time as the maritime seizures disappeared, from 2008 onward. In the second quarter of 2007, 59% of cocaine couriers recorded in one European airport database (the IDEAS database)²⁸ were on flights from West Africa. The proportion declined to 1% in the second quarter of 2009. Although it rose to 11% in 2010, couriers from West Africa were far less commonly detected than those from South America (55%) or the Caribbean (24%). That same year, Nigerian nationals made up 84% of the couriers coming from West Africa recorded in this database. In terms of quantities seized, data for 2010 show that 6% of the total volume of cocaine seized in European airports had transited West Africa while 93% came from the Americas.

Figure 25: Origin of flight of cocaine couriers detected in European airports, 2010

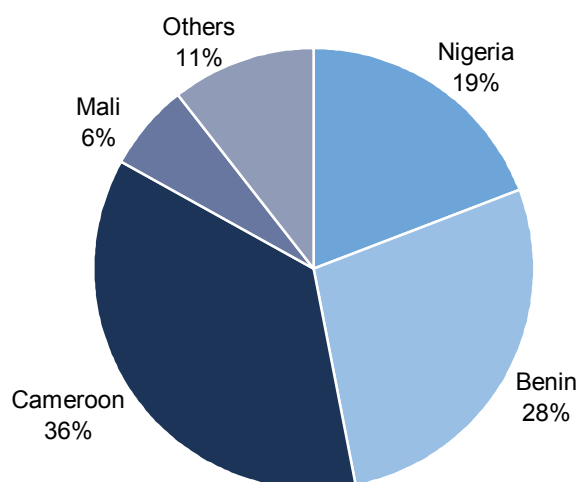


Source: IDEAS, 2011.

While the bulk of the couriers remain Nigerian nationals, the preferred country of departure has varied greatly over time. In 2010, based on the IDEAS cases, it appears that the airport in Cameroon’s capital Yaoundé has been the main hub for cocaine in transit to Europe. Based on the cases recorded that year, 36% of couriers departing from Africa and arrested in European airports arrived from Cameroon, with an additional 28% coming from Benin. During the same year, 73% of cocaine couriers departing from Cameroon and Benin were Nigerians.

²⁸ The IDEAS database is a product of voluntary information sharing between a number of European airports. It is not a representative sampling of all European airports and, aside from noting dramatic shifts in the activity detected, it is difficult to generalize from this information.

Figure 26: Country of departure of cocaine traffickers detected coming from West Africa, 2010



Source: IDEAS, 2011.

The most common method used by the couriers to transport cocaine from Africa to Europe has been ingestion. In 2010, 34 out of 45 cases captured in the IDEAS database ingested cocaine (72%) whereas 11 hid the drug in their luggage or on their persons.

One of the main airports in West Africa is the Murtala Muhammad International Airport (MMIA) in Lagos. According to the annual report for the year 2010, there were 200 drug seizures at MMIA, of which 155 involved cocaine, for a total of 237 kg of cocaine seized. Some were on in-bound flights, but the majority were not. The Nigerian official data on seizures in the MMIA indicates a decrease in seizures of cocaine and increasing seizures of other drugs, notably heroin, during the 2008-2009 period. In 2010, in contrast, the airport recorded again larger quantities of cocaine seized, while seizures of other drugs declined. The three main European destinations of couriers arrested in the MMIA in 2010 were Italy, Spain and the United Kingdom.

Another possible vector is air freight. In 2010, there were only three seizures of cocaine in air cargo departing from West Africa with destination European airports. The most significant seizure occurred in Belgium, when a cargo flight originating from Togo landed in Brussels airport with 65 kg of cocaine. Other West African countries of departure in 2010 were Côte d'Ivoire and Cape Verde.

c) Land routes from West Africa to Europe

There are persistent allegations that cocaine is trafficked by land across the Sahara desert, from Mali and Mauritania to Morocco. To date, there have been few seizures to support this claim, however. Aside from the hostile terrain, limited roads and limited cover, this region has been contested by armed groups. It has often been posited that these groups are receiving funds by participating in drug trafficking, but again, evidence to support this claim has been limited.

The Tuareg people are dominant in the remote regions of Mali, Burkina Faso, Algeria, the Libyan Arab Jamahiriya and Niger. The population of this nomadic pastoralist ethnic group is estimated at around 5.2 million, and some have rebelled against national rule in the recent past. The Tuareg have long controlled trade in the region, including, allegedly, the black market.

Another armed group active in the region is Al Qaeda in the Islamic Maghreb (AQIM). This group originated in the Algerian civil war but today seems most active in northern Mali. It is best known for kidnapping Europeans: between February 2003 and February 2011, 78 foreigners – including aid workers, diplomats and tourists – were abducted by AQIM.²⁹ It is also alleged that this group has been involved somehow in the drug flow.

Traders who regularly use the roads of the Sahel have reported that the cell of AQIM active in the region is the Katibat al-Mulathamine. At least until recently, this group was led by the Algerian Mukhtar Bel-Mukhtar³⁰ and had an estimated 60 fighters.³¹ This cell was reportedly involved in informal taxation of all kinds of smuggled goods.³²

Situated between West Africa and Europe, Morocco is frequently used by traffickers on their way to Europe, as evidenced by the surge of cocaine seizures in Morocco in recent years. In April 2006, 253 kg of cocaine were seized in a controlled delivery involving Peru, the Netherlands and Morocco (Operation Honey). In May 2006, 28 kg of cocaine were seized in Morocco from a French citizen. The drugs were concealed in a four-wheel drive vehicle, which the trafficker had driven from Senegal via Mauritania to Morocco. In July 2007, the Moroccan Narcotic Control Board reported the seizures of cocaine bricks believed to be identical to those seized by the Mauritanian police in May 2007 on board a Cessna aircraft from the Bolivarian Republic of Venezuela. One seizure took place in Agadir in south-west Morocco and another in Laayoune in the Western Sahara.³³

More recently, in October 2010, 34 people were arrested in Morocco in connection with an alleged cocaine smuggling ring, believed to have made eight trips from Mali to Tangier, transporting 600 kg of cocaine. From Tangier, the drugs were allegedly flown to Europe. According to the Moroccan authorities, the cocaine was brought from Colombia and the Bolivarian Republic of Venezuela to Africa, stored in northern Mali, and then taken through the desert to markets in Morocco and Europe.³⁴

Morocco has also been – for decades – the main source of cannabis resin found in Europe. This has already led to cooperation between Colombian and Moroccan drug traffickers, after having met in Spanish prisons during the last decade. Thus, some of the cocaine trafficked from Morocco to Spain already follows the ‘classic’ cannabis resin trafficking routes.

²⁹ <http://www.sahara-overland.com/routes/kidnappings.htm>

³⁰ <http://www.un.org/sc/committees/1267/NSQ113603E.shtml> According to the United Nations Security Council, Mukhtar Bel Mukhtar is a former Algerian soldier with experience in training camps in Afghanistan. He is the longest serving active group leader and is the head of the southern zone for Katibat el Moulathamoune, a part of the Organization of al-Qaida in the Islamic Maghreb. His family connections with local tribes allow the group to capitalize on criminal opportunities in the southern Maghreb, such as smuggling to finance his activities. Mukhtar Bel Mukhtar, together with Saifi Ammari, masterminded the exploitation of the Sahara’s permissive operating environment by GSPC (Salafist Group for Call and Combat), now listed as the Organization of al-Qaida in the Islamic Maghreb (AQIM). Mukhtar Bel Mukhtar is the subject of international arrest warrant for establishing and belonging to the international terrorist group AQIM. In June 2004, a tribunal in Illizi, Algeria, sentenced Bel Mukhtar in absentia to lifetime imprisonment for forming terrorist groups, robbery, detention and use of illegal weapons. In March 2007, Bel Mukhtar was sentenced in absentia by a criminal court in Algeria to 20 years imprisonment for forming terrorist groups, kidnapping foreigners, importing and trafficking in illegal weapons. In March 2008, the court of Ghardaïa, Algeria, sentenced Bel Mukhtar in absentia to lifetime imprisonment for the murder of 13 customs officers. Mukhtar Bel Mukhtar is active in northern Mali and, among other crimes, was involved in the kidnap of two Canadian diplomats working for the United Nations who were abducted in December 2008.³¹

³¹ ‘Contre-terrorisme au Sahel,’ UE/CIVIPOL, Compte rendu du premier séminaire régional tenu à Nouakchott le 7 et 8 décembre 2010.

³² Interview with three traders (two Malians and one Mauritanian) taking the route of Mauritania to Morocco and Mali to Algeria.

³³ Cocaine trafficking in Western Africa, UNODC, October 2007.

³⁴ http://www.africanews.com/site/list_message/31114

4. Distribution within Europe

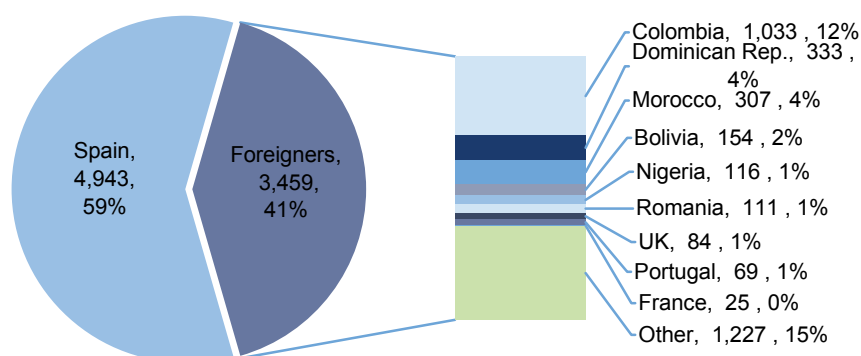
Trafficking of cocaine to Europe is largely organized by Colombian organized crime groups. Colombian groups act as importers and wholesalers; their involvement in retail markets is limited to Spain. But the European markets are more complex and diverse than the North American ones, and a variety of groups are involved.

Caribbean groups are important in a number of countries, including Dominicans in Spain, Jamaicans in the United Kingdom and Antilleans in the Netherlands. Other South Americans are also prominent, especially on the Iberian peninsula. West Africans are active retailers (as well as small-scale importers) in a number of countries in continental Europe, including France, Switzerland, Austria, Italy and Germany. North Africans are prominent in countries with a Mediterranean coastline or a large North African diaspora, including Spain, Italy, France and the Netherlands. In addition, a few groups from the Balkan region (notably from Romania, the countries of the former Yugoslavia, Albania and Turkey) have emerged as players in recent years.

While there have been rumours of Mexican interest in the European market, there is little concrete evidence to suggest an active role by these groups so far. The bulk of the trafficking towards Europe still seems to be in the hands of Colombian organized crime groups, forging alliances with various criminal groups operating in Europe.

Data for Spain, Europe's main entry point for cocaine, show that over the 2004-2007 period, between 21% and 26% of all foreigners arrested in Spain for cocaine trafficking were Colombian nationals. In 2008, the proportion rose to 29% (970 individuals, 11% of the total) and in 2009 to 30% (1,033 individuals, 12% of the total). The Colombian groups have traditionally cooperated closely with local organized crime groups in Galicia (northern Spain)

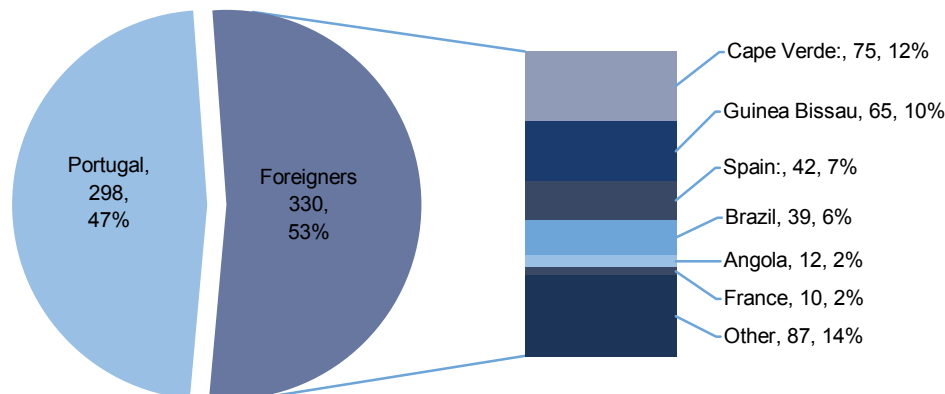
Figure 27: Country of nationality of persons arrested in Spain for cocaine trafficking, 2009



Source: UNODC ARQ.

Cocaine-related arrest data for neighbouring Portugal show a somewhat different picture, though it also reflects the historical and cultural ties with the former colonies. Colombian traffickers do not seem to play any significant role there. The largest proportion of non-Portuguese cocaine traffickers arrested in 2008 were from Cape Verde (27%) and Guinea-Bissau (19%); 14% and 9% of the total number or arrestees, respectively. The recent sharp decline in seizures in Portugal may be reflective of the decline in the use of these West African countries as transit areas.

Figure 28: Country of nationality of persons arrested in Portugal for cocaine trafficking, 2009



Source: UNODC ARQ.

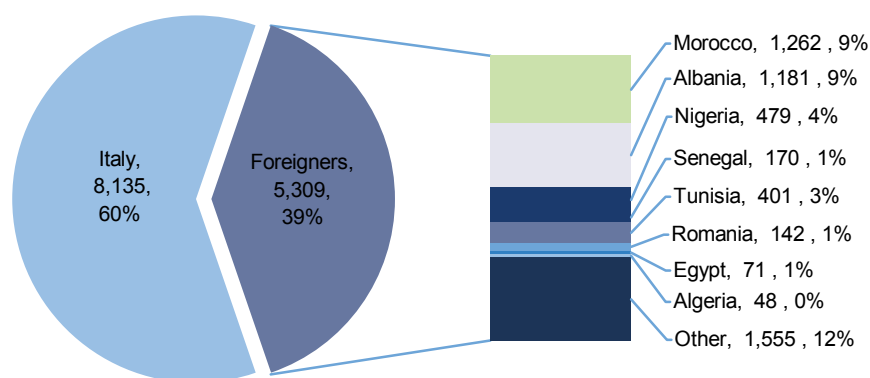
In the Netherlands, people from the ‘Dutch Caribbean’ (Aruba, Netherlands Antilles and Suriname) have long been active alongside Colombian groups. The Colombian expatriate community in the Netherlands is largely from the areas around Cali and from the Antioquia region around Medellin, and in the late 1990s, was incarcerated at a rate 20 times higher than Dutch citizens. More recently, Nigerian groups have expanded in Amsterdam, largely working through air couriers flying from the Netherlands Antilles and Suriname. With improved controls on direct flights, they are increasingly using other transit countries such as the Dominican Republic, Peru and Mexico. Improved controls in the port of Rotterdam have also displaced some of the traffic to the neighbouring port of Antwerp (Belgium). In contrast to cocaine trafficking to Spain, where the ‘mother ship’ approach is used to unload shipments onto smaller local craft at sea, the cocaine destined for the Netherlands is typically transported alongside legal merchandise.

Cocaine trafficking operations in the UK – Europe’s largest cocaine market - are dominated by local British criminals, importing from the Iberian peninsula and, to a lesser extent, from the Netherlands. About three quarters of the cocaine consumed in the UK appears to enter the UK in this ‘traditional’ way. Most of these British groups have members in Spain or in the Netherlands organizing the shipments into the UK. Some of the shipments also go – within the same crime group (by road) – from Spain to the Netherlands and then to the UK. In addition, some British traffickers have started to deal directly with Colombian criminal groups ‘upstream’ to source cheaper cocaine and get more control over shipments and profits. Direct shipments of cocaine by organized Colombian groups to the UK, in contrast, are rather the exception. In contrast, Serbian and Montenegrin crime groups have started to emerge, importing cocaine from the Southern Cone countries in South America to the Balkan region and from there via continental Europe to the UK. In addition, West African groups (mainly Nigerians, Ghanaians and British nationals of West African descent) are involved in shipping cocaine via West Africa to the UK. A small proportion of the cocaine is also being shipped directly by West African groups, notably Nigerian groups operating in Brazil, to the UK. The UK is also one of a few EU countries that has a problem with crack cocaine, with the trafficking activities frequently related to British nationals of West Indian descent. Most of the cocaine from the Caribbean (notably from Jamaica) is trafficked by air into the UK, often by using female mules, though this has declined in recent years.

The Italian cocaine market involves Colombian, Dominican and other Latin American trafficking groups working with domestic Italian organized crime groups, in particular the

Calabrian ‘Ndrangheta, using – inter alia - containerized shipments. As of 2007, the Camorra, located in Naples, was reported to have begun trafficking cocaine to Italy from Spain, as well as directly from South America. These two organizations are most heavily involved in the Italian cocaine trade. More recently, the Sicilian Mafia has also got involved, getting support from the ‘Ndrangheta and the Camorra to bring cocaine into the areas it controls. West African and North African groups are also active in retailing and small-scale import, as well as groups from the Balkans, in particular Albanians and Serbs. In fact, the Italian authorities noted the growing importance of Serbian criminal groups in trafficking cocaine into Italy in 2009-2010. A number of investigations in 2010 also revealed Italy’s importance as a transit point for the repatriation of drug proceeds via bulk currency shipments to Colombia and Mexico, thus providing additional evidence of the links of organized crime in Italy, not only to Colombia, but also to Mexico.

Figure 29: Country of nationality of persons arrested in Italy for cocaine trafficking, 2009



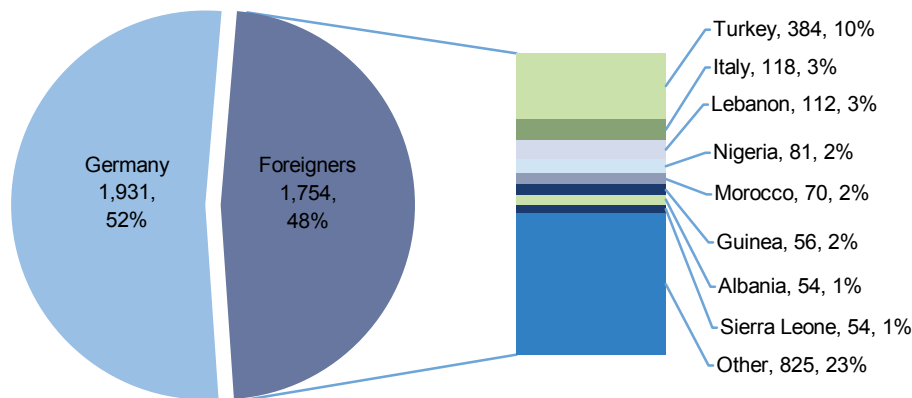
Source: UNODC ARQ.

France has not had a large cocaine problem in the past, though this has started to change in recent years, partly due to the growing importance of West Africa as a cocaine transit location. When West Africa became a more prominent transit area after 2004, West African traffickers also became more prominent in France. Nigerian nationals became the top nationality among foreign cocaine traffickers arrested, comprising a third of all arrests among foreign traffickers in 2006. Other important players came from Europe and North Africa. In 2009, arrested foreign cocaine traffickers were mainly from other West European countries (Netherlands, Spain, Italy, the United Kingdom and Portugal) and from North Africa (Morocco, Algeria and Tunisia). At the same time, body couriers, using both internal and luggage transportation, are frequently arrested bringing drugs into France from several West African countries, such as Nigeria, Benin, Togo, Senegal, Guinea and Guinea-Bissau. Smaller quantities of cocaine constitute the majority of the drugs transported via this method.

German statistics divide trafficking into ‘sales’ and ‘import’ offences. In 2009, the German authorities arrested 3,685 people for cocaine sales and 642 people for cocaine import. The proportion of non-German citizens in cocaine sales was 48%, compared to 69% for cocaine import offences; far higher than the proportion of foreigners in overall drug-related offences (20%). Analyses of participants in organized crime groups revealed that more than one fifth of German passport holders in organized crime groups were not born in Germany, suggesting that cocaine trafficking in Germany is primarily conducted by persons not born there. The single largest group of foreigners arrested for cocaine sales were Turkish (22% of all foreign cocaine traffickers). The proportion was smaller than for

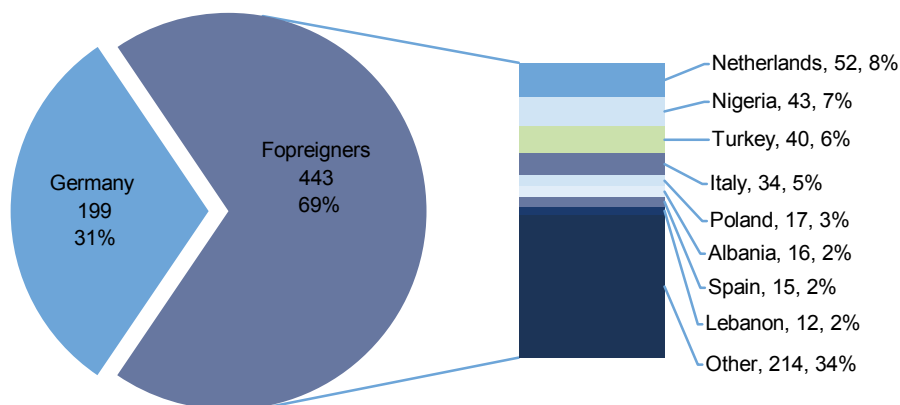
heroin, but surprising, given the fact that dealing in cocaine is a relatively new activity for these groups. The second most common nationality was Italian (7% of all foreign cocaine traffickers). Some of these have been associated with the ‘Ndrangheta and other Italian mafia groups. Those arrested for cocaine import comprise a smaller and more varied group, with the top foreign nationalities being Dutch (12% of all foreign importers), Nigerian (10%), Turkish (9%, typically acquiring the cocaine in the Netherlands, though in a few cases they also got involved in shipping cocaine from South America to Germany) and Italian (8%). The single largest cocaine seizure made in Germany to date took place in April 2010 (1.3 tons) when German customs officers discovered the drugs in a container shipment of wood briquettes, going from Paraguay to Brazil and then to Hamburg. Except for the group leader (who was from Paraguay), most of the German group members were of Turkish origin.

Figure 30: Country of nationality of persons arrested in Germany for illegal cocaine sales, 2009



Source: UNODC ARQ.

Figure 31: Country of nationality of persons arrested in Germany for illegal cocaine imports, 2009



Source: UNODC ARQ.

5. The impact of cocaine trafficking to Europe

Transnational cocaine trafficking has a devastating impact in each of the regions it touches: the Andean production countries, the transit countries in the Americas, West Africa and Europe. The impact in each instance can be assessed under two headings: health and governance. The impact on health is primarily about drug use, addiction and their consequences. The governance impact can be assessed under two headings: the promotion of violence (including the empowerment of non-state armed groups) and the fostering of corruption. The following discussion considers each region in turn, following the drug trafficking chain.

a) In the Andean production countries

Like many other countries, the Andean countries have faced governance challenges, and these have been aggravated by drug production and trafficking. On the whole, the situation has much improved in recent years, but the global demand for cocaine remains a source of many troubles in the region.

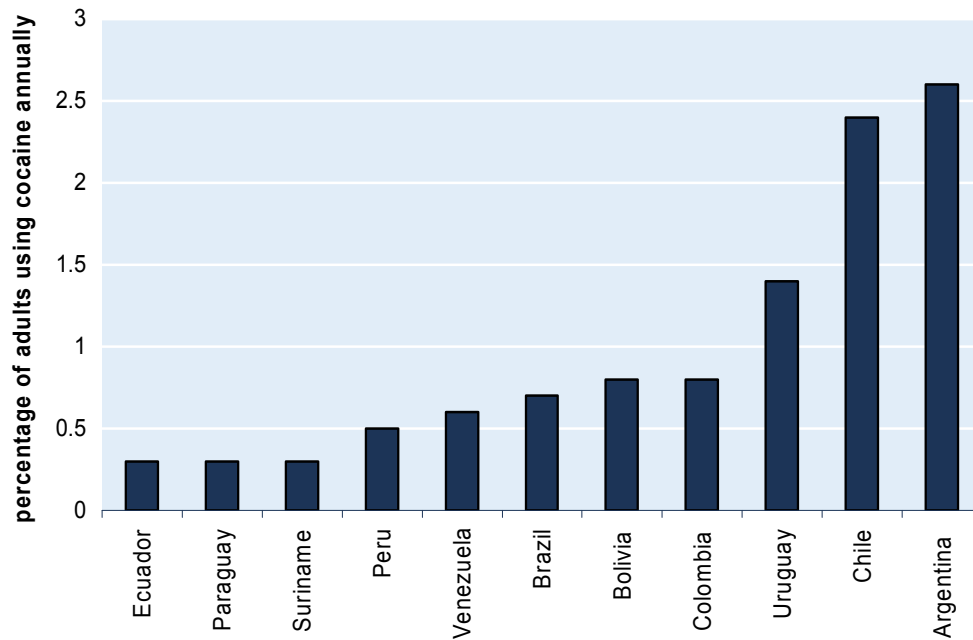
Remarkably, cocaine use has been low in these countries in the past. As is the case with many agricultural producers, the crop is too valuable as an export commodity to sell on the local market. Even if a large share of exports were lost, it still made financial sense to sell abroad rather than cultivate the relatively small returns available in countries with high poverty levels, and demand from overseas remained high. With the decline in the US market and strong regional economic growth, this tendency appears to be changing in many parts of South America, but not in the production countries.

The impact on governance has long been an issue, but one on which progress has been made. Both Colombia and Peru have struggled with drug-funded illegal armed groups, and drug trafficking has fuelled corruption in the region.

Health

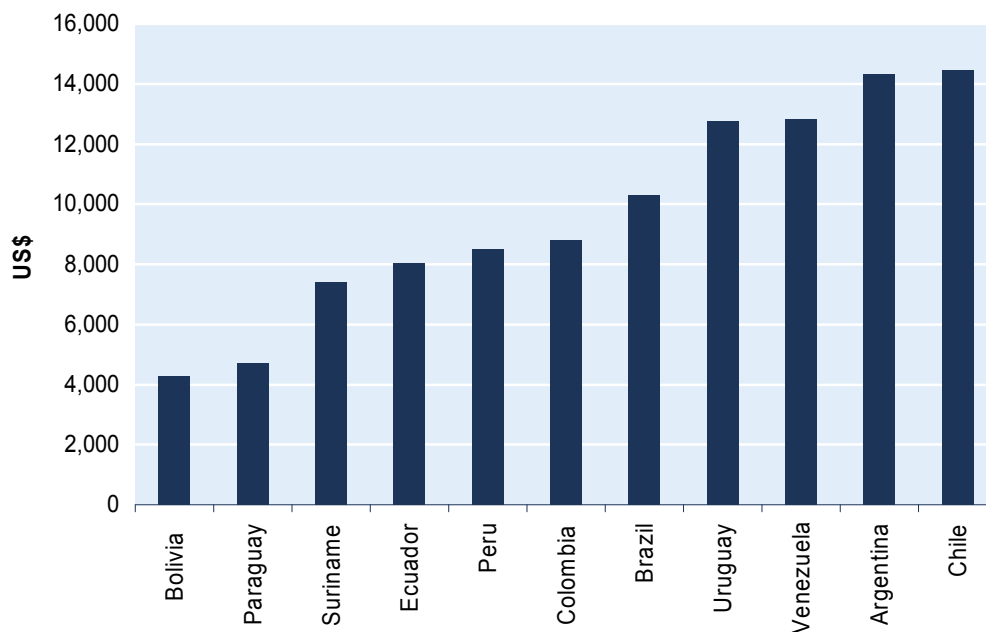
As noted above, the countries that actually produce cocaine in South America do not have particularly high cocaine use levels, even when compared to other South American countries. Cocaine use prevalence in South America corresponds fairly well with GDP per capita, with the poorest countries (Ecuador, Paraguay and Suriname) having low prevalence and the richer countries (Chile, Argentina and Uruguay) having higher levels. In this respect, the Plurinational State of Bolivia is anomalously high in its prevalence and the Bolivarian Republic of Venezuela is anomalously low, but not to such an extent as to invalidate the link between drug consumption and income in the region.

Figure 32: Annual cocaine use prevalence in South America (most recent data)



Source: UNODC DELTA.

Figure 33: GDP per capita in 2008

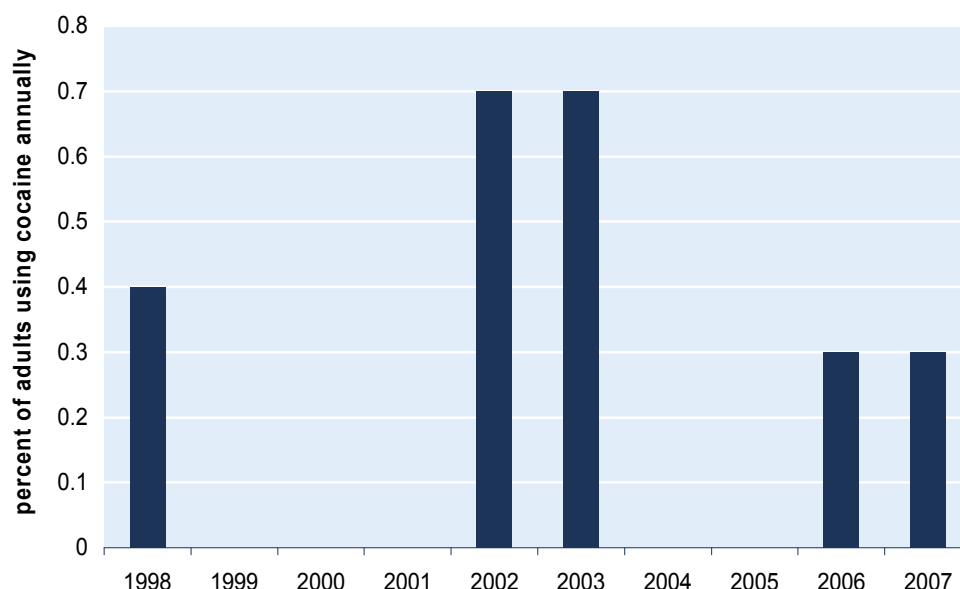


Source: UNDP.

In other words, it takes more than just drug availability to create a cocaine problem. Until recently, the adjacent countries were spared because demand from other parts of the world, principally the United States, promised greater returns. This has changed for many of the higher-income countries since the US market began to decline, but not, apparently,

for the production countries. Time-series data on drug use in the Andean countries is sparse, but the studies that do exist show no trend toward greater drug use. It is possible, however, that use has increased since the most recent surveys.

Figure 34: Adult cocaine use prevalence in Peru



Source: UNODC DELTA.

Governance

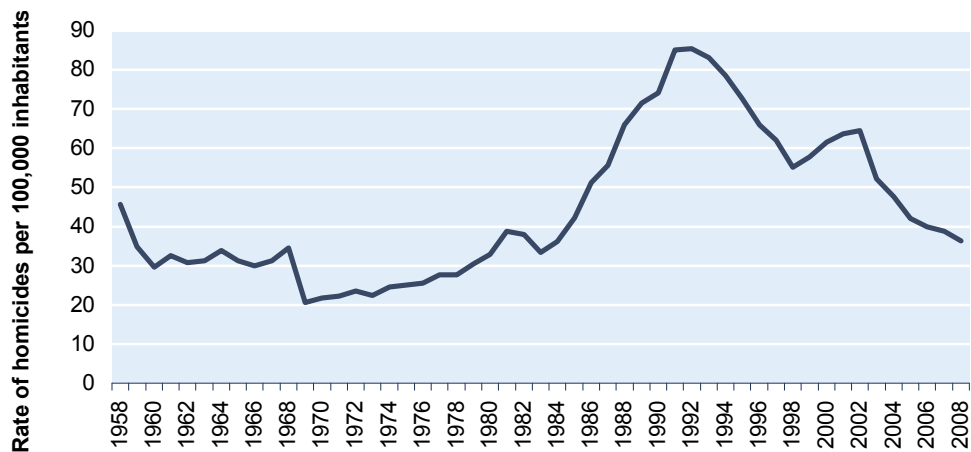
The primary way cocaine undermines governance in the Andes is through the funding of illegal armed groups, particularly in Colombia. Colombia's insurgency and the cocaine trade developed independently, however. Coincidentally, the large-scale involvement of Colombian traffickers in the international drug trade started about the same time as the activities of illegal armed groups, in the 1960s and 1970s.

The 1980s saw the emergence of the Medellin and Cali "cartels": large, structured organizations that controlled most of the market. Prices for cocaine were high at the time, as was consumption, and very shortly a huge amount of wealth was concentrated in a small number of hands, offering cartels tremendous corrupting power and influence.

The relationship between the cartels and illegal armed groups at this time was largely antagonistic. Drug traffickers formed one of the first of many 'self-defence' paramilitary groups, which quickly morphed into vigilantes, protection rackets and predatory gangs.

With international assistance, the Colombian government cracked down on the highly organized large cartels in the early 1990s. The conflict became multilateral, with the antagonists including the rival drug trafficking cartels, paramilitary groups, illegal armed groups and the state. Murder rates spiked, peaking in 1992 at some 85 murders per 100,000, the highest national murder rate on record.

Colombia could not continue to function with such powerful criminal players at large, however. The leader of the Medellin cartel was killed in 1993, and most of the Cali cartel's leadership was arrested in 1995. The big cartels soon crumbled, and the murder rate dropped.

Figure 35: Murder rates in Colombia, 1958-2008

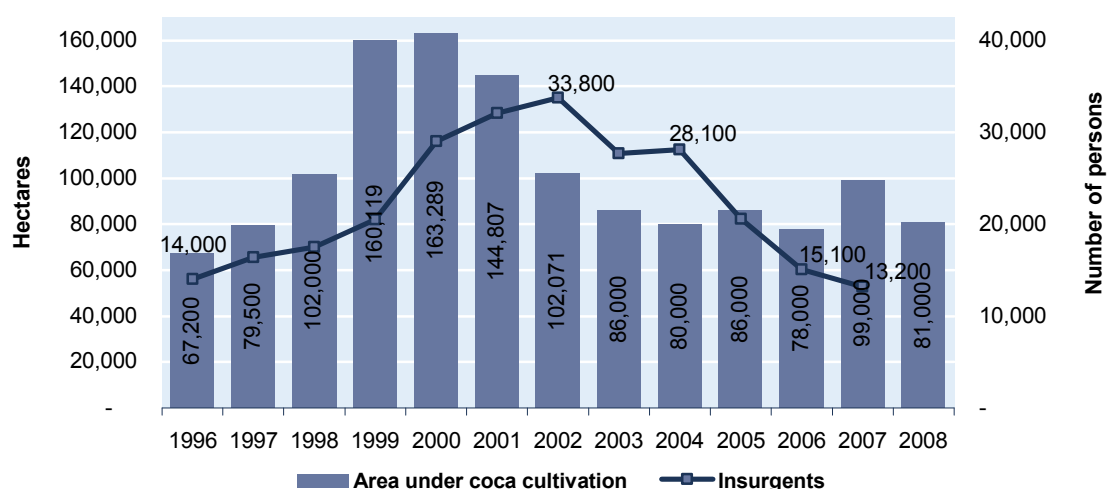
Sources: Multiple sources.³⁵

While this did not stop the drug trafficking, it significantly reduced its corrupting influence. The cocaine trade was pushed into the hands of the illegal armed groups that controlled rural territory, also because of measures taken to prevent transportation of cocaine base from Peru and Bolivia for processing. This expanded the market for coca cultivated in Colombia, and key cultivation areas emerged in rebel territory. By 1997, Colombia had become the world's leading source not only of refined cocaine, but of coca leaf as well.

Growing involvement in the cocaine trade meant a massive influx of funds to the illegal armed groups, particularly the FARC. This gave the organization, for the first time in its history, the capacity to take on the armed forces of Colombia directly, a power that peaked in the late 1990s.

³⁵ Restrepo, J. 'Cincuenta años de criminalidad registrada por la Policía Nacional,' *Revista Criminalidad*, Vol 50, No 1, pp. 27-36; 'El Homicidio: Análisis Criminológico,' *Revista Criminalidad*. UNODC, United Nations Survey on Crime Trends and the Operations of Criminal Justice Systems, various years.

Figure 36: Coca cultivation and size of insurgent groups in Colombia, 1996-2008



Sources: UNODC, Colombia Coca Cultivation Survey, June 2009 and previous years.

The illegal armed groups' resurgence was met with a strong response by the state and international supporters. When the Colombian Government began to regain control over territory lost to the illegal armed groups, the homicide rate started to decline again. Important areas controlled by the FARC were recovered, and the FARC declined from around 18,000 troops in 2000 to about 10,000 in 2009. The government also began to demobilize the paramilitaries in 2003.

As the security situation improved, the Colombian economy grew: on average, 4.4% per year over the 2000-2008 period, above the average for the region. In parallel, corruption appeared to decline.³⁶

In addition to the efforts made at combating illegal armed groups, the Colombian cocaine trade itself faced two serious challenges from the late 1990s. For one, the government intensified its eradication efforts. The area under coca cultivation fell from 163,300 ha in 2000 to 81,800 ha in 2008 and to 68,000 ha in 2009, mainly due to eradication.³⁷ Secondly, Colombian traffickers lost control over their primary destination market, the United States, to Mexican traffickers.

This left the Colombian traffickers looking for new markets, and they found a ready one in Europe. The size of the European cocaine market doubled between 1998 and 2008. Thus, while progress has been made, the cocaine industry remains a serious challenge for Colombia, and the links between traffickers and illegal armed groups persist.

As in Colombia, drug trafficking and illegal armed groups had distinct origins in Peru. The relationship between the two has never been as strong as in Colombia, partly because, until recently, Peru was mainly a source of raw materials, rather than a base for rival trafficking gangs. This could change, however, as more cocaine is now produced in and exported from Peru. Today, many have questioned whether illegal armed groups have any real political motives, or whether it is all just a cover for criminal enterprise.

³⁶ For example, in 1999, Transparency International rated Colombia the country most affected by corruption in South America. By 2009, it had the second best rating, second only to Chile. (Source: Transparency International, *Corruption Perception Index*, 2009).

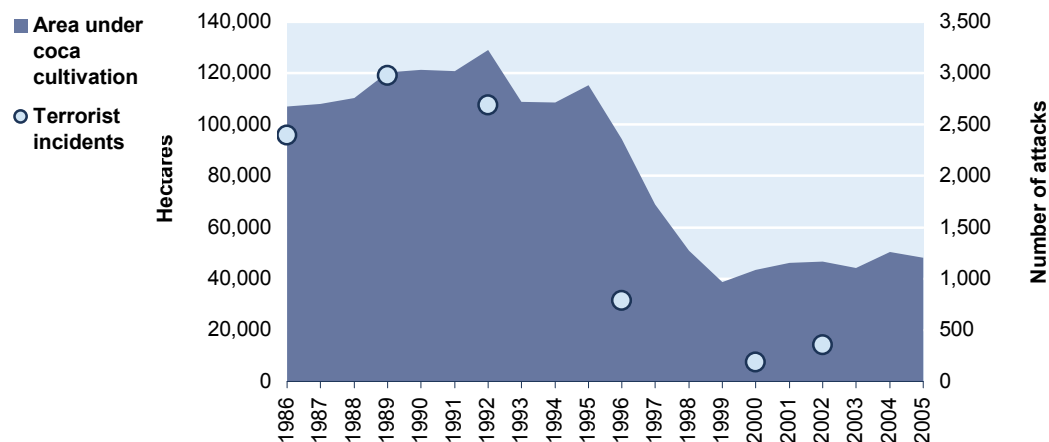
³⁷ During the same time period, however, yields increased, due to the introduction of more efficient farming and processing techniques, before declining again in recent years.

Peru suffered greatly with illegal armed groups during the 1980s and early 1990s, and it is estimated that as many as 70,000 people died in the struggle. Most of the groups were dismantled by the late 1990s, but one group – the Sendero Luminoso (Shining Path) – has recently reasserted itself in the drug-producing areas of the country. The Shining Path is a putatively Maoist group founded by philosophy professor Abimael Guzman in the 1980s. Guzman dominated the group until his arrest in 1992, becoming increasingly erratic over time.

The Shining Path has always been physically proximate to the drug trade. Over time, it moved its operations between the regions of Ayacucho, Vilcabamba and the Huallaga valley. These centres happen to be close to Apurimac-Ene and Alto Huallaga, two of the primary coca cultivation areas in the country. Coca farming and transport were taxed, providing funds for militants. Some of these funds were skimmed by individuals, but some went to promote the cause, and violence surged in the mid-1980s.

In 1992, Guzman was arrested, and without his strong central leadership, the movement fell apart. Around the same time, efforts to stop the transportation of coca paste from Peru to Colombia and the supply of kerosene in coca-producing areas began to be successful, greatly reducing demand for coca in Peru. The sharp decline in cultivation correlated with a sharp reduction in the number of attacks, but the relationship between the two remains unclear. The loss of a key source of funding must have had some effect on the illegal armed groups, and the recent resurgence of the cocaine trade may be tied to their return.

Figure 37: Area under coca cultivation and “terrorist incidents” in Peru, 1986-2005



Source: DEVIDA, *Cocaine production Monitoring in the Andean region*, Lima, July 2004; UNODC cultivation data.

Around 2005, the Shining Path began to make a comeback, initiating a series of attacks on the police, the military, eradication workers and civilians. In 2009, the group was blamed for killing 25 police officers and 51 soldiers,³⁸ although it can be difficult to distinguish between the actions of illegal armed groups and traffickers. They were also said to have conducted 136 ‘terrorist acts,’ mostly in remote coca-growing areas. Women and children were allegedly used in some of these operations, as well as for forced labour in coca cultivation.³⁹

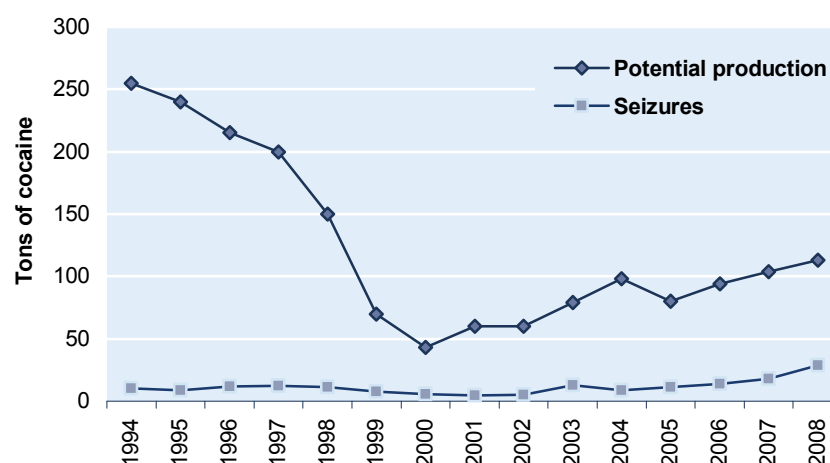
³⁸ United States Department of State, *2009 Country Reports on Human Rights Practices: Peru*, and previous years’ reports.

³⁹ Ibid.

In general, illegal armed groups have been less of an issue for the Plurinational State of Bolivia than for Colombia and Peru. The groups that have emerged - many of them indigenous - have been small and short-lived. The rapid turnovers in government that prevailed for many years presented a moving target to dissidents. But the cocaine trade did have an impact on governance. Rather than directly opposing the state, drug traffickers have sought to corrupt it. Perhaps the most dramatic example came when, in 1980, the newly elected civilian government was overthrown by General Luis García Meza Tejada in what has become known as ‘the cocaine coup,’ ushering in a short-lived dictatorship still notorious for its brutality.

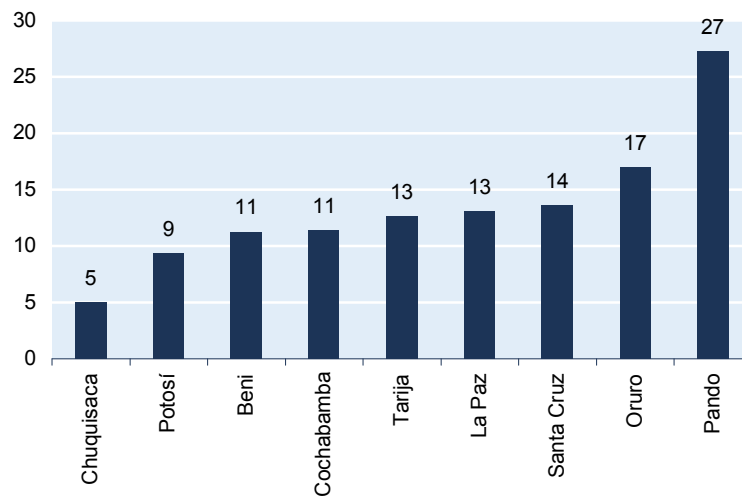
But, as in Peru, the full economic value of the cocaine market only began to be realized more recently, after the air bridge funnelling coca base to Colombia was closed in the mid-1990s. After a period of sharp contractions in production, Bolivian producers began to export cocaine base to Brazil, Argentina and Uruguay, where it was either to be further refined or used directly as ‘paco’ (Argentina) or ‘merla’ (Brazil). Over time, the Bolivian traffickers learned to make their own cocaine hydrochloride, exporting this product to the Southern Cone and Europe.

Figure 38: Potential illicit cocaine production and seizures in the Plurinational State of Bolivia, 1994-2008



Source: UNODC.

Violence levels remain relatively low on aggregate in the Plurinational State of Bolivia (about 12 murders per 100,000 inhabitants in 2008). The Government has taken a softer line on coca cultivators since 2006, and the eradication is mostly negotiated. In any case, the farmers themselves are rarely the cause of the violence. Areas of the country affected by transnational cocaine trafficking, however, show much higher rates. Pando, a tiny province in the northern part of the country, has become a trans-shipment point for Peruvian cocaine destined for Brazil, particularly its capital of Cobija. In 2007, the narcotics arrest rate in Pando was 128 per 100,000, three times the national average. This shows in its murder rate, by far the highest in the country.

Figure 39: Murder rates in Bolivian departments, 2008

Source: Bolivian National Institute of Statistics.⁴⁰

b) In transit countries in the Americas

Virtually every country in the Americas has been affected by cocaine demand in the United States. For decades, this demand was so large that it made little sense to cultivate domestic markets anywhere south of the US, because the value of the drug increased the closer it got to the US consumer. Even in Mexico, cocaine use remained very low, as crossing one more border could more than double the value of the drug.

As cocaine use in the US has declined, it appears that markets are being cultivated in the richer transit countries, but not, for the most part, in the poorer ones.

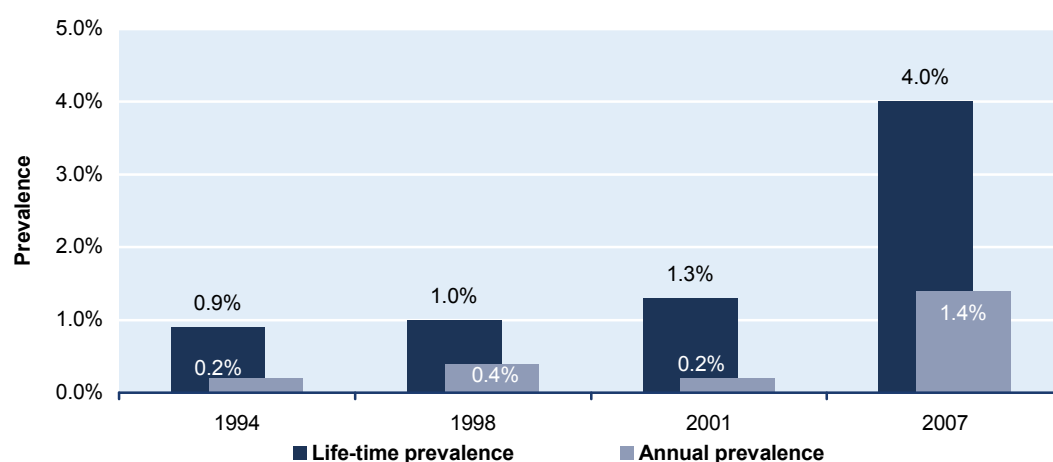
Health

Today, cocaine use rates in Chile and Argentina are higher than in the United States. Increases in cocaine use in recent years have been reported by the Bolivarian Republic of Venezuela, Brazil, Argentina and Uruguay. There was also an increase in Ecuador, but it remains the country with the lowest levels of cocaine use in South America. This supports the general notion that the richer South American countries have become destinations, not just transit zones.

⁴⁰ Instituto Nacional de Estadística de Bolivia, Comportamiento delictivo de la población penal, según departamento, 2000 - 2008 (see: <http://www.ine.gov.bo/indice/visualizador.aspx?ah=PC3090405.HTM>).

Figure 40: Uruguay: cocaine use among the population aged 12-65*, 1998-2007

* Age group 15-65 for survey in 1994; age group 12-64 in 2001; and age group 12-65 in 2007.



Sources: Observatorio Uruguay de Drogas, Encuesta Nacional en Hogares sobre Consumo de Drogas, 2007, and Secretaria Nacional de Drogas y Junta Nacional de Drogas, Encuesta Nacional de Prevalencia del Consumo de Drogas 2001.

Recent use data show the relationship between income and use. In Chile, there was an increase in the annual prevalence among the adult population from 1.7% in 2006 to 2.4% in 2008. In Suriname, in contrast, there was a decrease, from 0.5% in 2002 to 0.3% in 2007.

Governance

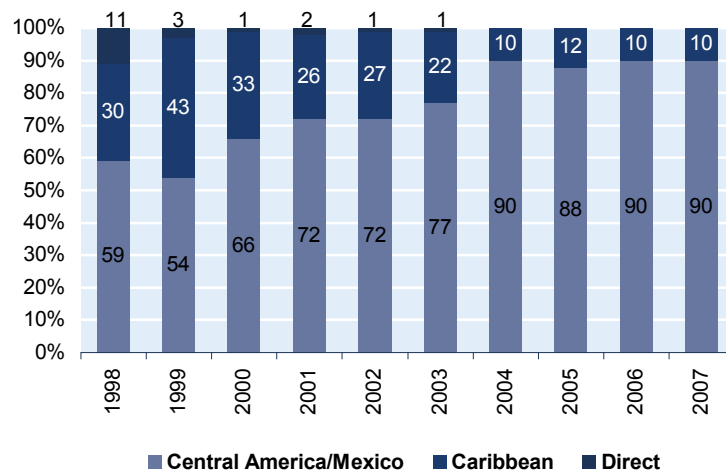
Traditionally, most of the cocaine departing Colombia left the country directly, by sea or air, through the Gulf of Mexico or the Pacific. But increased interdiction, combined with changes in market demand and pressure on the FARC, has increased the use of Colombia's neighbours as transit countries, particularly the Bolivarian Republic of Venezuela, Ecuador and Brazil. This may leave these countries vulnerable to the challenges that high-value drug trafficking create for the rule of law.

The Caribbean has greatly diminished in importance as a conduit for cocaine destined for the United States over the past 15 years. During the early days of the trade, Colombian traffickers and their Cuban and Dominican allies preferred the Caribbean corridor and it was used preferentially from the late 1970s.⁴¹ In the 1980s, most of the cocaine entering the United States came through the Caribbean into the southern part of the state of Florida.⁴² But interdiction successes, tied to the use of radars, caused the traffickers to reassess their routes. As a growing share of cocaine transited the south-west border of the United States, Mexican groups wrested control from their Colombian suppliers, further directing the flow through Central America and Mexico.

⁴¹ Statement of James Milford, Acting Deputy Administrator, United States Drug Enforcement Administration, before the Senate Subcommittee on National Security, International Affairs, and Criminal Justice, 17 July 1997.

⁴² Statement of Thomas A. Constantine, head of the United States Drug Enforcement Administration, before the House of Representatives Judiciary Committee, Subcommittee on Crime, 3 April 1997.

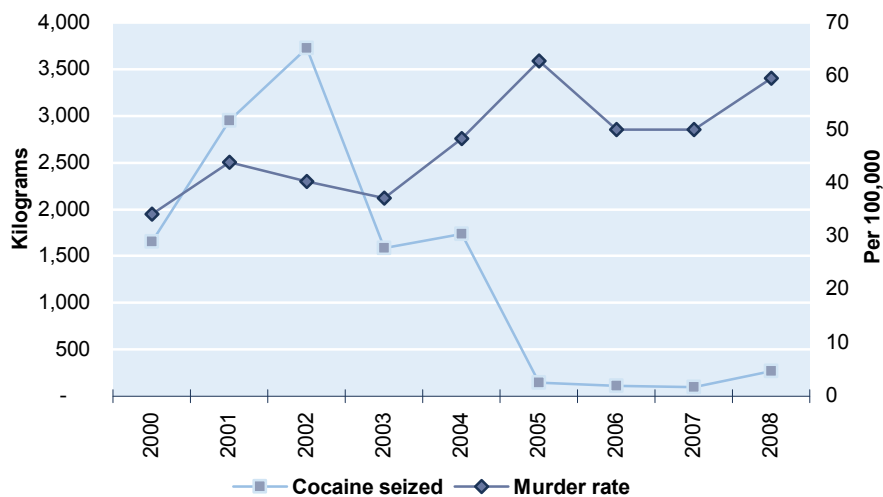
Figure 41: Distribution of cocaine flows to the US market, 1998-2007



Source: National Drug Intelligence Center.

Unfortunately, this decline has not necessarily led to increased stability or lowered violence in the transit countries. On the contrary, it seems that once the drug is introduced, instability in the market can drive violence. Jamaica is a case in point. Estimates of the cocaine flow through Jamaica dropped from 11% of the US supply in 2000⁴³ to 2% in 2005⁴⁴ and 1% in 2007.⁴⁵ This is reflected in declining seizures in Jamaica and declining arrests and convictions of Jamaican drug traffickers in the United States.⁴⁶ It is also negatively reflected in the murder rate, which rose from 34 per 100,000 in 2000 to 59 per 100,000 in 2008.

Figure 42: Cocaine seizures and murder rates in Jamaica, 2000-2008



Source: UNODC.

⁴³ Statement of the Donnie Marshall, Administrator, US Drug Enforcement Administration before the United States Senate Caucus on International Narcotics Control, 15 May 2001.

⁴⁴ National Drug Intelligence Centre, *National Drug Threat Assessment 2006*. Washington, D.C.: Department of Justice, 2006. National Drug Intelligence Centre, *National Drug Threat Assessment 2007*. Washington, D.C.: Department of Justice, 2007.

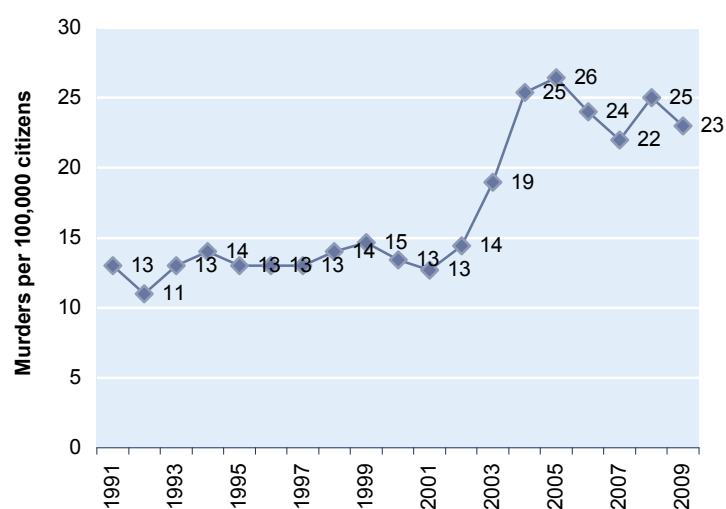
⁴⁵ National Drug Intelligence Centre, *National Drug Threat Assessment 2009*. Washington, D.C.: Department of Justice, 2009.

⁴⁶ In 2000, the US federal authorities convicted 79 Jamaicans for cocaine trafficking. In 2008, they arrested just 35.

There are historical reasons for this paradoxical effect. The importance of Jamaica as a transit country in the cocaine trade rose markedly after the violent 1980 elections in that country. A large number of important crime figures left Jamaica for New York, where they became key suppliers in the crack cocaine boom. This period of growing criminal opportunities represented a time of relative calm in Jamaica. When this market died out and cocaine flows began to shift westward, these men returned to Jamaica to find a much less well organized crime scene, where ‘neighbourhood dons’ had turned to more direct means of income generation: violent acquisitive crime, including extortion and robbery. The Jamaican cocaine trade suffered another blow when cooperative efforts between Jamaican law enforcement and the United Kingdom sharply reduced the air courier traffic to Europe around 2002. Street-level competition for diminishing returns has fuelled growing homicide rates; the highest in the Caribbean and among the highest in the world.

A similar, but more compressed, effect could also have occurred in the Dominican Republic. The share of the US cocaine supply that transited Hispaniola dropped from 8% in 2000⁴⁷ to 2% in 2004, before rising again to 4% in 2005 and 9% in 2007.⁴⁸ Around this time, the murder rate in the Dominican Republic doubled, from 13 per 100,000 in 2001 to 26 per 100,000 in 2005. It has remained at high levels, and the drug trade in the Dominican Republic is still volatile. Dominican traffickers have grown in importance in Europe since about 2005, and today are second only to Colombians among foreign cocaine traffickers arrested in Spain, the primary point of entry.

Figure 43: Murder rates in the Dominican Republic, 1991-2009



Source: UNODC multisource database.

Another shift that may have affected local stability is the reduction in air courier traffic through the Netherlands Antilles. In 2000, 4.3 tons of cocaine were seized at Schiphol airport in the Netherlands,⁴⁹ much of it originating from the Bolivarian Republic of Venezuela, via the Netherlands Antilles. A ‘100% control’ strategy was introduced at the

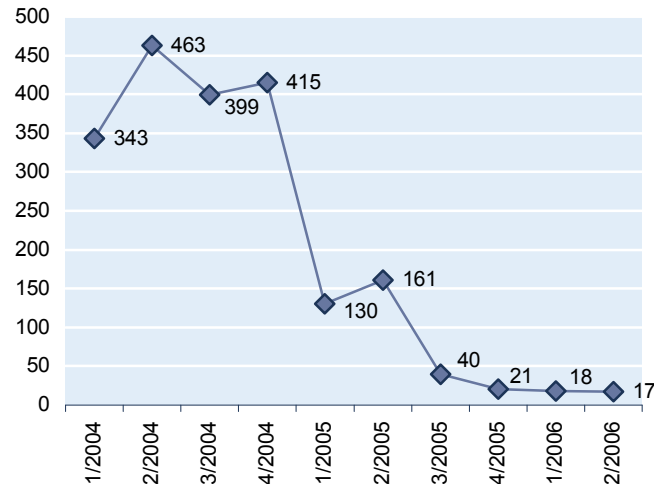
⁴⁷ International Crisis Group, *Spoiling security in Haiti*, Latin America/Caribbean Report No 13. Brussels, 2005.

⁴⁸ National Drug Intelligence Centre, *National Drug Threat Assessment 2006*. Washington, D.C.: Department of Justice, 2006. National Drug Intelligence Centre, *National Drug Threat Assessment 2007* Washington, D.C.: Department of Justice, 2007.

⁴⁹ INCB, *Annual Report of the International Narcotics Control Board*, Vienna, 2001.

end of 2003,⁵⁰ targeting the drugs rather than the couriers.⁵¹ As a result, this flow was almost entirely eliminated by 2006.

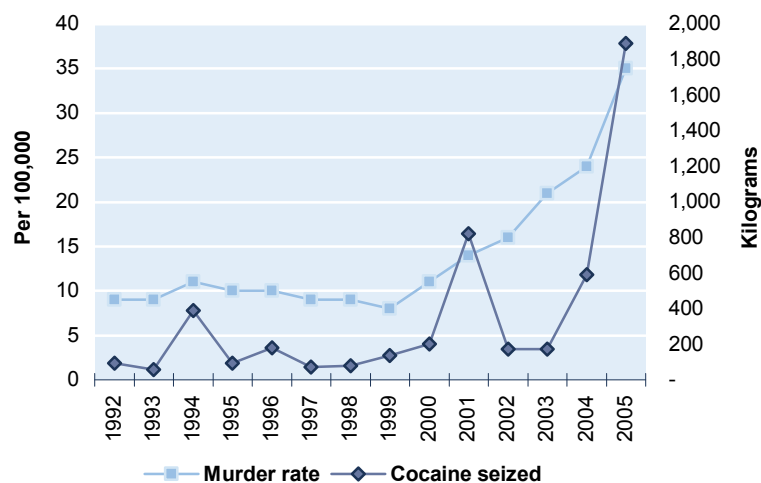
Figure 44: Couriers detected arriving at Schiphol from Curaçao, by quarter, 2004-mid-2006⁵²



Source: Netherlands Ministry of Justice.

These interventions may have displaced some of the flow coming from the Bolivarian Republic of Venezuela through the Caribbean to Trinidad and Tobago, which saw a remarkable surge in seizures from 2000 to 2005. At the same time, that country's murder rate tripled. Seizures have declined today, but the murder rate has remained high: 40 per 100,000 in 2008.

Figure 45: Murders and cocaine seizures in Trinidad and Tobago, 1992-2005



Source: UNODC multisource database and DELTA.

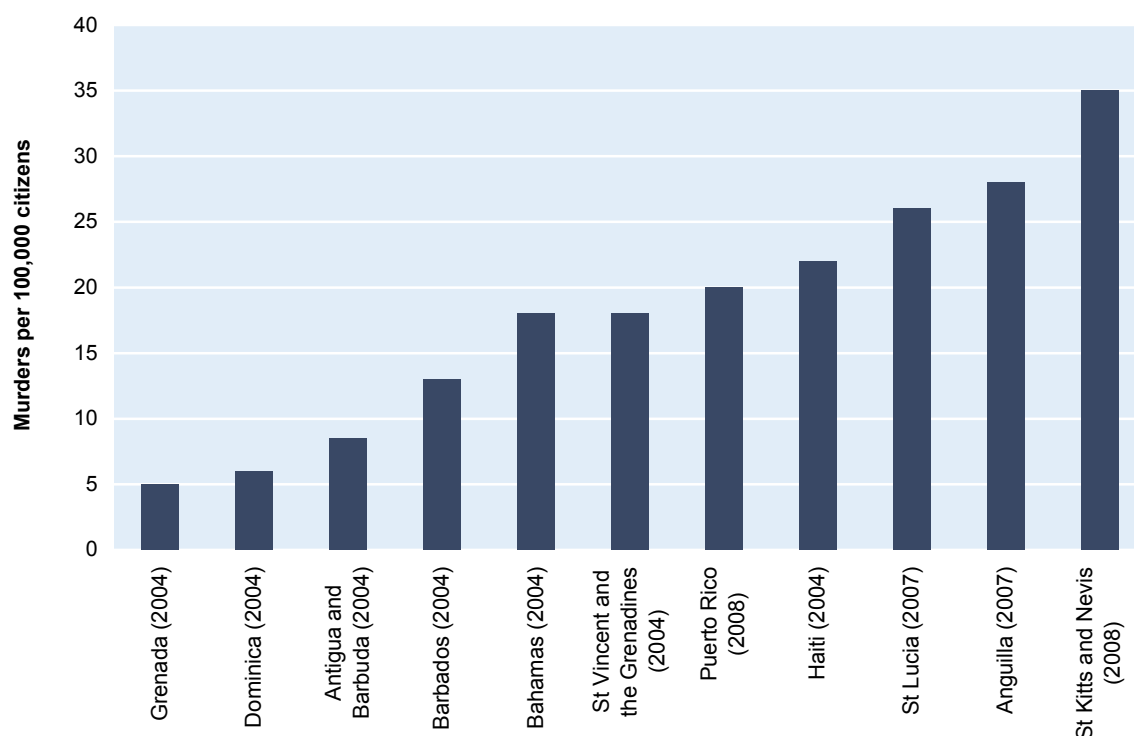
⁵⁰ National Ombudsman, *100%-controles op Schiphol: Over bolletjesslikkers en onschuldige slijkverdachten*, The Hague, 27 June 2006.

⁵¹ Europol, *European Union Situation Report on Drug Production and Drug Trafficking 2003 – 2004*, The Hague, 2005, p. 4.

⁵² The final quarter (2/2006) is short by two weeks, as current data only extends to week 24 of 2006.

In addition, a number of other Caribbean countries have very high murder rates that are difficult to explain except in terms of the drug trade, particularly given relatively low rates in neighbouring countries.⁵³

Figure 46: Caribbean murder rates (most recent data available)



Source: UNODC multisource database.

c) In West Africa

Health

Unfortunately, there are no current, reliable studies on the levels of drug use in West African countries. There are, however, many anecdotal sources claiming cocaine use has soared since the region began to be used as a trafficking zone.

Governance

West Africa is one of the poorest and least stable regions on earth. All but three of the 16 countries in this region⁵⁴ are on the United Nations list of ‘least developed countries,’ including the five countries with the very lowest levels of human development. West Africa has experienced at least 58 coups and attempted coups, including in recent years. There remain many active rebel groups in the region.

At present, of the 15 nations of the Economic Community of West African States (ECOWAS), about half are experiencing some form of instability. Long-standing insurgencies are found in Côte d'Ivoire, Senegal, Mali, Niger and, arguably, Nigeria. Both

⁵³ Due to their small population size, murder rates in the smaller islands tend to be highly volatile, so trend data are not presented. Some of these rates were higher in the recent past.

⁵⁴ For the purposes of this discussion, ECOWAS plus Mauritania, a former ECOWAS member.

Sierra Leone and Liberia are recovering from brutal civil wars. According to one recent rating of the 25 countries with the highest risks of instability globally, nine were in West Africa: Niger, Mali, Sierra Leone, Liberia, Mauritania, Guinea-Bissau, Côte d'Ivoire and Benin.⁵⁵

The greatest danger posed by cocaine is its enormous value in the context of local economies. This allows traffickers to penetrate to the very highest levels of government and the military. Law enforcement officials can be offered more than they could earn in a lifetime simply to look the other way. This extreme leverage has allowed traffickers to operate with very little resistance from the state, and therefore, there is little need to resort to violence. There appears to have been some violence in elite circles as rivals compete for access to these profits, however.

Guinea-Bissau provides an example. The country was one of the first to be affected by the cocaine trade in the region, and, due to the small size of its economy (its GDP was US\$400 million in 2008), one of the worst affected. The drug trade seemed to be quickly monopolized by the military, controlled by top-ranking military officials. These officials have threatened all who dare to discuss their involvement.

From 2007 onwards, high-level officials have accused the military of running the drug trade, including the Interior Minister and the head of the Judicial Police. Drugs have been detected arriving on military air strips, military officers have been arrested in possession of hundreds of kilograms of cocaine, and there have been several armed stand-offs between police and military forces concerning drug shipments. Drugs seized by the police were confiscated by the military and then disappeared. Accused soldiers, as well as foreign traffickers, were simply released from custody. In July 2008, both the Attorney General and the Minister of Justice said they had received death threats related to investigations into a cocaine seizure.⁵⁶ Several journalists and activists have had to flee the country or go into hiding after they received death threats for reporting on military involvement in drug trafficking.

The head of the army, Tagme na Wai, was killed in March 2009 by an attack that his men blamed on the serving president, João Vieira. In apparent retaliation, they attacked the presidential palace and killed the president. Tagme na Wai had accused Vieira of involvement in drug trafficking prior to the 2008 elections, but the attacks appear to be the product of a long-standing rivalry between the two men.

Guinea-Bissau is not unique in this respect. In Guinea, the presidential guard, commanded by one of the president's sons, appears to have been involved in drug trafficking, alongside a number of high-ranking public security officials, making use of diplomatic pouches and passports to move drugs. Another of his sons has also been accused of involvement: both were arrested when their father died in late 2009. The leader of the coup, Moussa Dadis Camara, was later shot by his aide-de-camp, Lieutenant Aboubacar (Toumba) Diakete.

After the disruptions in Guinea-Bissau and Guinea, it appears this hub relocated to The Gambia. In The Gambia in March 2010, the president ordered the arrest of 11 top-level law enforcement officials in the country in connection with drug trafficking, including the Director of the National Drug Enforcement Agency, his deputy and his head of operations, the National Police Chief and his deputy, the chief of the navy, the deputy chief of the army, and the Minister of Fisheries. In Sierra Leone, the Minister of

⁵⁵ Hewitt, J., J. Wilkenfeld and T. Gurr, *Peace and Conflict 2010*, Center for International Development and Conflict Management, University of Maryland, 2010.

⁵⁶ BBC News, *Fear after Bissau death threats*, 1 August 2008.

Transportation resigned after his brother was implicated in the country's largest cocaine seizure.

Aside from a few high level killings, it is difficult to measure the impact of the drug trade on local violence levels, because reliable current data on homicide in West Africa is hard to come by. Given that the drug trade is known to have penetrated to the very highest levels of government in some places, however, it is unlikely that there is widespread conflict over the cocaine markets, because few would dare challenge the reigning authorities. Rather, the violence is likely to be episodic, in response to power shifts within the structures responsible. There is no need for violence when corruption will do.

Similarly, with the involvement of state authorities in the trade in some countries, it is perhaps not surprising that there is little evidence of insurgents dealing in the drug. There have been allegations that rebels in the north of Mali and Niger, as well as political militants in Algeria, have been involved in trans-Saharan trafficking, but limited evidence is currently available on this flow. There remains a risk that some of the dormant militant groups in West Africa will somehow be revived by the trade.

d) In Europe

Health

The proportion of people in need of treatment in Europe for cocaine abuse has more than tripled over the last decade (from 3% of total drug treatment demand in 1997/1998 to 10% in 2007/2008). Generally, the social and economic impact of the flow of cocaine to Europe has been – so far at least – less severe than for North America. Though, it is still far lower than in North America (31% in 2007/2008).

According to the latest national data, 635 people in the EU/EFTA countries died due to cocaine use, which is 8% of all drug-related deaths. As in North America, deaths from poly-drug use are common in Europe. German data show, for example, that in only 14% of all 'cocaine-related' death cases was cocaine the only substance involved. Cocaine use in Europe is less associated with violence than in North America. This is most likely because powder cocaine is still dominant in Europe, and it is crack that is most associated with violent crime.

Table 10: Reported cocaine-related deaths in EU/EFTA countries in 2008 or latest year available*

Country	Year	Cocaine-related deaths	Drug deaths	Cocaine in % of drug deaths	Cocaine deaths per 100,000 inhabitants	Source	Comments
Spain	2006	257	428	60.0%	0.58	EMCDDA	overdose
United Kingdom	2007	246	3,359	7.3%	0.40	ARQ	all deaths
Germany	2008	126	1,449	8.7%	0.15	Govt	all deaths
Portugal	2007	103	314	32.8%	0.96	EMCDDA	all deaths
France	2008	51	233	21.9%	0.08	ARQ	all deaths
Italy	2008	37	502	7.4%	0.06	ARQ	overdose
Ireland	2005	34	159	21.4%	0.77	ARQ	overdose
Netherlands	2008	22	129	17.1%	0.13	ARQ	overdose
Denmark	2007	5	205	2.4%	0.09	ARQ	all deaths
Malta	2008	3	8	37.5%	0.74	ARQ	all deaths
Finland	2007	3	229	1.3%	0.06	ARQ	all deaths
Poland	2006	2	241	0.8%	0.01	ARQ	all deaths
Slovenia	2005	1	85	1.2%	0.05	ARQ	all deaths
Luxembourg	2002	1	35	2.9%	0.21	ARQ	all deaths
Czech Republic	2006	1	212	0.5%	0.01	ARQ	overdose
Sweden	2006	0	125	0.0%	-	ARQ	all deaths
Romania	2007	0	23	0.0%	-	EMCDDA	all deaths
Liechtenstein	2008	0	1	0.0%	-	ARQ	all deaths
Hungary	2008	0	194	0.0%	-	ARQ	all deaths
Bulgaria	2006	0	48	0.0%	-	EMCDDA	All deaths
Iceland	2007	0	38	0.0%	-	ARQ	all deaths
Cyprus	2007	0	22	0.0%	-	ARQ	overdose
Total		635	7,611	8.3%	0.14		

*EU/EFTA countries which provide a breakdown of drug-related mortality by drug type.

Sources: UNODC ARQ; EMCDDA, Statistical Bulletin 2009; EMCDDA, National Reports.

Governance

There does appear to be a link between cocaine use and acquisitive property crime. England and Wales conduct arrestee drug testing. These studies found that 13% of the arrestees in 2005/2006 had used cocaine powder and 11% crack-cocaine in the previous month. This is less than in the United States but much more than in the general population: household surveys during the same period indicate that only 1.2% of the population had used cocaine powder and 0.1% had used crack-cocaine in the previous month. A previous arrestee survey for England and Wales (2003/2004) found that 68% of those arrested for shoplifting, 63% for burglary, 41% for 'other theft' and 23% for assault had consumed either crack-cocaine, cocaine powder or heroin within the previous 12 months. The consequences of trafficking and cocaine consumption in Europe are dwarfed by the serious repercussions for the cocaine-producing countries (in terms of cocaine-generated violence and illegal armed activities) and for many of the transit countries in South America, Central America, the Caribbean and Africa - notably West Africa - where some of the smaller countries are easy targets for cocaine trafficking organizations that operate internationally.

6. Implications for policy

Transatlantic cocaine trafficking is one element of the complex and dynamic interactions that comprise the cocaine market as a whole. Over the years, illicit cocaine demand and supply have created a large transnational criminal market, linking four continents on both sides of the Atlantic Ocean. The impact of this market on public health and governance in the many regions it touches requires a response on the scale of the threat. This response is grounded in the principle of shared responsibility between all countries concerned, and a balanced approach between demand and supply reduction measures. Efforts made by governments and results achieved over time in various areas have shown that the problem can be solved.

US demand has declined considerably since its peak in the mid-1980s and Europe's growing appetite for cocaine may be showing signs of stabilization. These two regions represent 70% of the demand pull in terms of cocaine consumed, and close to 90% of the money injected in the global cocaine economy. Together, they will largely continue to define the demand side of the global market equation during the current decade. Signs of increasing demand in South America, which already absorbs almost 20% of the cocaine consumed in the world, need to be watched very carefully, but with only 4% of the current market value, that region does not yet create a pull-effect as strong as the one coming from Europe and North America.

On the supply side, Colombia has managed to more than halve the area under coca cultivation since 2000 and to considerably reduce the influence of the illegal armed groups involved in the cocaine trade. Peru and the Plurinational State of Bolivia have suffered some setbacks, but have shown in the past that they have the capacity to tackle the recent rebound of cultivation within their national borders.

In transit regions, during the last few years, drug traffickers have been losing ground in Mexico despite fierce resistance. International reaction against the use of West Africa as a stage-post by traffickers seems to have contributed to a significant reduction of the flow of cocaine through that region.

After years of overall stability, the global cocaine market could thus well be nearing a tipping point. The international community has decided to achieve at least a significant reduction of the drug problem by 2019, and this objective may thus be within reach as regards cocaine. This will require consolidating the results obtained so far and preventing the 'balloon-effect'⁵⁷ from offsetting progress in one region by setbacks in another. The efforts of Member States, regional and international organizations, must be vigorously pursued in the framework of a comprehensive strategy aiming at dismantling a large part of the transnational cocaine market within the current decade. Within that strategy, some of the priorities at this stage would include:

- Maintaining the downward consumption trend in the US.
- Curbing cocaine demand in Europe. This would involve an effort to better identify and monitor key variables of the European cocaine market; intensifying demand reduction efforts directed at core users, particularly in the five dominant national markets of the UK, Spain, Italy, Germany and France which, together, represent more than 80% of European cocaine consumption; as well as interdiction efforts against intraregional distribution networks.
- Maintaining the downward cultivation trend in Colombia

⁵⁷ Like air in a balloon, which, when squeezed on one side, will move to the other, production or trafficking can react to pressure in one area by moving to another. Preventing this displacement from happening requires good coordination of interventions.

- Stopping the resurgence of coca cultivation in Peru and the Plurinational State of Bolivia.
- Continuing to loosen the grip of cocaine traffickers on transit routes through Mexico and Central America and build up the resistance of the most vulnerable states to organized crime.
- Monitoring the situation in the Caribbean to prevent a potential resurgence of that route to the North American market, while progress is made on the Pacific/Central America/Mexico route.
- Intensifying transatlantic cooperation to intercept cocaine shipments by air and sea.
- Reacting against signs of increasing cocaine trafficking to, and demand, in Brazil and other countries in the Southern Cone.
- Sustaining the downward trend of cocaine trafficking through West Africa and preventing changes in trafficking modes and routes through that region, by strengthening the capacity of West African countries to resist the incursion of drug traffickers and by intercepting upstream as much of the transatlantic flow as possible, before it reaches the shores of West Africa.
- Monitoring closely the evolution of the transnational cocaine market and the way it reacts to market forces and interventions, by intensifying cocaine threat and risk analysis efforts at the regional and global levels.

Initiatives supported by UNODC

In West Africa

The fragile nature of many state structures in West Africa coupled with the complex dynamics of the cocaine trade demand a bi-pronged response of the international community. In the first instance, there is a need to support and sustain a regional and cross-regional political process to generate common positions to common threats. Not only is political consensus a required foundation for capacity-building assistance, it also helps generate an enabling environment to combat the issue of high-level involvement in the cocaine trade.

At the political level, UNODC has been **supporting the ‘Praia Process.’** In October 2008, the Economic Community of West African States (ECOWAS), supported by UNODC and the United Nations Office for West Africa (UNOWA), and in partnership with the European Union, held a Ministerial Conference in Praia, Cape Verde, to address the serious security threat posed by drug trafficking in the region. The *Political Declaration* and *Regional Action Plan* that resulted from this conference were subsequently endorsed by the Heads of State and Government of ECOWAS in Abuja on 19 December 2008.

The *Praia Declaration* reflects a strong political commitment and establishes the basis for a detailed cooperation framework to combat drug trafficking and organized crime in West Africa. UNODC was entrusted with leading the process of translating the *Political Declaration* and *Regional Action Plan* into concrete programmes to be carried out by ECOWAS Member States in close partnership with UN Department of Political Affairs (DPA), UNOWA, UN Department of Peacekeeping Operations (DPKO), the International Criminal Police Organization (INTERPOL) and the European Union. An *ECOWAS Operational Plan* and a *Monitoring and Evaluation Mechanism* were formulated,

specifying the operational role of the ECOWAS Commission in supporting Member States in the implementation of the Regional Action Plan. The ECOWAS role in securing the regional dimension is key, complementing initiatives by Member States. ECOWAS being the regional leader will thus secure regional ownership and sustainability of reforms complementing those undertaken at the national level.

The United Nations **Security Council** has officially recognized the serious threat posed by transnational organized crime and illicit trafficking undermining the development, stability and security in West Africa, and a number of **Special Sessions** have been convened to particularly discuss this threat in the region and its global dimension. The UNSC has called upon Member States to increase “their cooperation with the United Nations Office on Drugs and Crime,” and requested the UN Secretary-General to consider the threat as a factor in conflict prevention strategies.⁵⁸ In December 2010, the Secretary-General reiterated his appeal to the international community to “step up its support for regional endeavours on combating the threats to peace and security as a result of the illicit trafficking in drugs and cross-border crimes,” while highlighting that “more focus should be placed on enhancing national capacities to collect, analyse and exchange information related to illicit activities and transnational organized crime on a regular basis.”⁵⁹

At the operational level, UNODC launched its **Regional Programme for West Africa 2010-2014** in December 2010. This cross-cutting, comprehensive framework is based on the principle of shared responsibility. The overall objective of the Regional Programme is to support the efforts of the West African states, and those of regional organizations and civil society, to respond to the evolving security threats, such as drug trafficking, and to promote human rights, the rule of law and good governance. The Regional Programme will be operationalized through a series of thematic sub-programmes (on organized crime, illicit trafficking and terrorism, justice and integrity, drug prevention and health and awareness, and research) as well as **National Integrated Programmes (NIPs)**. It also attempts to foster a coordinated response through transatlantic initiatives promoting dialogue, exchange of information, cooperation and coordination at all levels across the continents.

NIPs reflect each country’s particularities and needs and are governmental development frameworks, elaborated through an inclusive and participative approach, which aim at placing the fight against drugs and organized crime within the context of overall national development strategies. The *ECOWAS Regional Action Plan* requests all ECOWAS Member States to develop a NIP. While some NIPs, such as the NIP for Cape Verde, Guinea-Bissau, Ghana, Mali, Nigeria and Togo, are already ongoing or about to be launched such as the NIP for Burkina Faso, others are in the pipeline.

Another initiative being supported by UNODC is the **West Africa Coast Initiative (WACI)**, a comprehensive and multi-stakeholder approach to strengthen human and institutional capacity of law enforcement officials, initially in four post-conflict countries: Côte d’Ivoire, Sierra Leone, Liberia and Guinea-Bissau. UNODC, DPA/UNOWA, DPKO and INTERPOL are working together to support the implementation of the ECOWAS Regional Action Plan. This joint programme is the first interagency initiative to get off the ground, and it comprises a comprehensive set of activities for capacity-building at national and regional levels. The focus areas are law enforcement, forensics, border management, anti-money-laundering and the strengthening of criminal justice institutions, contributing to peacebuilding initiatives and security sector reforms. WACI’s core

⁵⁸ See United Nations Security Council, meetings on 8 December 2009: “Peace and security in Africa: drug trafficking”, and on 24 February 2010: “Threats to international peace and security.”

⁵⁹ UN Security Council, *Report of the Secretary-General on the activities of the United Nations Office for West Africa*, 3 December 2010.

component is the establishment of Transnational Crime Units (TCU) in each of the four countries. A TCU is an interagency unit responsible for information gathering, analysis, and the development of operational intelligence to support its lead investigative role in the most complex crime cases. TCUs will also be responsible for international collaboration to conduct cross-border investigations, in close cooperation with INTERPOL's National Central Bureaus network. The programme promotes, inter alia, cooperation and exchange of information between the coast of West Africa and Latin America, aiming at undertaking joint investigation and exchange of intelligence through the TCUs.

While putting emphasis on building capacities to develop operational intelligence, UNODC is engaged in enhancing border management across the region at strategic locations. UNODC's **Container Control** Programme is another example of an intelligence-led inter-agency response. The initiative is ongoing in Cape Verde, Ghana and Senegal, and to soon be launched in Mali, Togo and Benin. It is foreseen that, if relevant to the country concerned, each NIP will have a component addressing ports or container terminals. Within the Container Control Programme, UNODC works to establish joint interdiction teams, improve law enforcement coordination and enhance border management through the pooling of professional skills and agencies' resources. The project has reported a number of important seizures including cocaine.

UNODC is supporting the **Sahel** countries in developing NIPs, such as the one already ongoing in Mali, to be followed by Mauritania and Niger. In the context of also assisting states in counter-terrorism and transnational organized crime, UNODC is implementing a regional project including Burkina Faso, Mali, Mauritania, Niger, through which a Judicial Regional Platform for the Sahel countries has been established, aiming at strengthening judicial cooperation and legal capacities and prosecution.

In addition, UNODC seeks to assist Member States in pursuing a **Regional Competence on the Prosecution of (drug) Traffickers in West Africa**. UNODC will support and advocate for the development of an appropriate regional cooperation mechanism to facilitate the prosecution of international drug traffickers in order to prevent West African countries from being used as safe havens, in line with international drug conventions which include international cooperation and assistance mechanisms.

In the Americas

On the other side of the Atlantic, UNODC is following a similar approach in Central America and the Caribbean by **facilitating policy dialogue through the Santo Domingo Pact/Managua Mechanism** with a view to enhancing policy coordination in the field of drug trafficking and organized crime. The objectives are to (i) facilitate the coordination of regional and national policies in the field of organized crime and drug trafficking, (ii) develop an analysis capacity on organized crime and drug trafficking trends in the two regions, (iii) ensure an exchange of information amongst the partners of the mechanism and avoid duplication between technical assistance projects, (iv) assist countries in implementing the UN conventions on transnational organized crime (UNTOC), corruption (UNCAC) and the three drug conventions, and implement effective anti-organized crime policies.

In order to promote a holistic approach to drug trafficking and organized crime, UNODC has engaged in the development of **regional and national integrated programmes** which are the results of an extensive consultation process with national governments and regional organizations. UNODC has designed a Regional Programme for Central America which is based on the "Programa de UNODC para el reforzamiento del plan de acción de

la estrategia de seguridad en Centroamérica y México” that was adopted in a ministerial conference of the Central American Integration System (SICA) Member States on 23-24 June 2009 in Managua, Nicaragua. The Regional Programme puts forward three main tracks of operations in order to address the challenges of (i) organized crime, illicit trafficking and terrorism, (ii) corruption, justice and integrity and (iii) health and human development. The National Integrated Programme for the Plurinational State of Bolivia (2010-2015) was developed in close consultation with recipient institutions. Presented to a donors’ meeting sponsored by the European Union in October 2010, the programme consists of the following thematic areas: i) Integral alternative development to coca farming ii) Drug abuse prevention iii) Anti-organized crime iv) Anti-corruption v) Justice reform and, vi) Research and information analysis. Following the same approach, UNODC has developed a national integrated programme for Paraguay (2011). Further expansion of integrated programming in other subregions or countries is foreseen in the course of 2011/2012.

The offences connected with drug trafficking depend on the availability of chemical precursors, without which the illicit manufacture of cocaine, heroin and amphetamine-type stimulants would not be possible. Drug manufacturers obtain precursors either through trafficking and smuggling or through diversion from the licit trade. Through the **PRELAC initiative**, UNODC aims at strengthening the capacities of national administrative control authorities of selected countries within the region to prevent the **diversion of precursors**. In order to reach this goal, the initiative allows the beneficiaries' rapid communication on exports/imports of precursors through a web-based computer programme. Furthermore, the objective is to enhance the cooperation between national administrative control authorities of these countries thanks to better knowledge of their respective systems and of the overall trends in precursor diversion in the region through enhanced exchange of information. Finally the programme facilitates cooperation between administrative control authorities and representatives of industrial associations in order to promote a common code of conduct as well as a voluntary collaboration from the industrial chemical operators.

One key element of UNODC’s strategies is to strengthen national law enforcement and prosecution authorities responsible for the fight against drug trafficking and organized crime. UNODC is also very involved in the expansion of regional cooperation between national authorities in order to support the exchange of good practices through, for instance, the annual meeting of Heads of National Drugs Law Enforcement Agencies of Latin America and the Caribbean. At an operational level and in order to enable co-operation on concrete cases, recently, a network of specialized anti-organized crime and drug trafficking prosecution units was created in Central America.

Following previous threat assessment work, UNODC is developing a new **regional transnational organized crime threat assessment**. With a view to better capturing the various facets and implications of organized crime, UNODC has recently finalized a publication on the cost of organized crime in Peru. UNODC also cooperates with national authorities to carry out annual coca cultivation surveys in the Plurinational State of Bolivia, Colombia, Ecuador and Peru.

Centres of Excellence (CoEs) constitute the backbone of the new integrated programming approach for Central America. The objective of the CoEs is to assist governments in the region to build national and regional capacity in dealing with threats and risks stemming from illicit trafficking, drug abuse, organized crime and related violence. The areas of intervention of the CoEs are (i) capacity-building through training and provision of technical equipment, (ii) research and support to regional expertise, and (iii) information sharing and cooperation.

With an objective of supporting **South-South** cooperation, Centers of Excellence are being established in countries where expertise already exists or where there is a strong need to build expertise in a given technical area. They aim to develop Good Practices that can serve as benchmarks for the development of policies and guide capacity building of professionals. CoEs use the best expertise available in the region in order to ensure the delivery of high quality products, whether these are applied research reports, training sessions or policy advice.

UNODC has already established Centres of Excellence on Maritime Security (Panama) and Crime Statistics (Mexico). Others are currently under discussion in the Dominican Republic (Prison Reform) or Peru (Precursors Control).

The **Container Control programme** is designed to ensure a better control of containers and fight against the smuggling of illicit goods through the establishment of inter-agency units in the ports of the pilot countries of this initiative. The programme is currently operational in Costa Rica, Ecuador, Guatemala and Panama.

The fight against money-laundering and the **strengthening of Financial Intelligence Units** is central to UNODC's strategies in Latin America and the Caribbean. These programs contribute to the enhancement of the Financial Intelligence Units of countries of the region through the improvement of their computer systems to monitor suspicious financial transactions, the institutional development of these units as well as the development of their staff.

With regard to **alternative development**, UNODC is strongly involved in the design and implementation of alternative developments programmes and projects so as to generate employment opportunities and sources of incomes for rural population and therefore facilitate the substitution of illicit coca cultivation by licit activities.

Moreover, UNODC is strongly committed to the development of **drug demand reduction** programmes in Latin America and the Caribbean particularly through life-skills education in schools and family skills training. The UNODC programme for prevention of drug abuse in the workplace has been successful in reducing substance use among employees and has brought substantial gains to companies in terms of reduced absenteeism and accidents. This programme has been successfully implemented in Brazil, where firms have agreed to cover 90% of the cost.

UNODC also aims at facilitating quality drug treatment and rehabilitation services in order to contribute to the reduction of the demand for illicit drugs, HIV transmission amongst drug users, drug related crime, incarceration and recidivism.

Transatlantic initiatives

UNODC has directed considerable effort to **setting up communication channels between law enforcement agencies in Latin American, Caribbean and West African countries**. This has translated into the adoption of bilateral agreements on joint investigations between Latin American and West African countries.⁶⁰ In particular, the project *Law Enforcement and Intelligence Cooperation against Cocaine Trafficking from Latin America to West Africa* has fostered intelligence coordination and information

⁶⁰ A total of 24 bilateral agreements on joint investigations were signed on 27 January 2010, namely between Cape Verde, The Gambia, Ghana, Guinea-Bissau, Sierra Leone, Togo, Colombia, Dominican Republic, Jamaica and Peru.

sharing among countries in West Africa and Latin America and the Caribbean,⁶¹ supported by the European Commission. This initiative was successful in forging a dialogue across the Atlantic, strengthening coordination across the three continents and building exchange capacities. Through the project, bilateral agreements were signed to facilitate joint investigations and rapid exchange of operational information between law enforcement agencies to promote intelligence-led investigations for intercepting drugs in Latin America, West Africa and Europe. Based on these achievements, UNODC and its partners have developed an extension to the project, foreseeing the deployment of Liaison Officers and the interlinking of national law enforcement agencies in Europe, West Africa and South America through the I-24/7⁶² communication system in close cooperation with INTERPOL.

At the policy level, UNODC has been promoting interregional cooperation and exchange of information between law enforcement agencies in West Africa and Latin America. The recent **meetings of the Heads of National Law Enforcement Agencies (HONLEA)** has included representatives from both continents.

As mentioned in the preceding analysis, trafficking of cocaine by air is an important vector, accordingly UNODC is implementing an **airport communication project (AIRCOP)** entitled *Establishment of realtime operational communication between selected airports in West Africa, Latin America, North Africa and Europe*. AIRCOP is a joint initiative between UNODC, INTERPOL and the World Customs Organization (WCO), supported by the European Commission. The aim is to establish Joint Airport Interdiction Task Forces (JAITF) at a number of airports along drug trafficking routes in West Africa, as well as one in Brazil and Morocco. JAITFs will be connected to INTERPOL's I-24/7 and WCO's CENcomm communication systems. The advantage for governments is a focus not only on drug trafficking but also on other types of illicit trafficking. The initiative is expanding its geographical scope extending to South and East Africa. The issue of trafficking from air strips inland needs more attention and appropriate initiatives are being designed to plug this mode of trafficking.

Within the framework of **South-South** cooperation, UNODC in partnership with Brazil is supporting Guinea-Bissau in different initiatives under the framework of the implementation of the National Operational Plan to combat drugs and crime. One of the important projects is the establishment of a Training Center for Security Forces, aiming at law enforcement capacity building. The immediate objective is to serve the national needs and improve security forces capacities to counter narcotics and organized crime with a long term aim for the Training Center to become a Regional Training Academy for Portuguese-speaking countries in Africa.

UNODC will continue to **monitor and report on the evolution of the cocaine market** and the way it reacts to market forces and interventions. In that context, and as requested by Member States⁶³ UNODC will further develop threat and risk analysis efforts at the regional and global levels, including through a new **threat and risk analysis project dedicated to the transnational cocaine market**.

⁶¹ Countries in West Africa: Cape Verde, Ghana, Gambia, Guinea - Bissau, Senegal, Sierra Leone and Togo. Countries in Latin America: Brazil, Bolivia (Plurinational State of), Colombia, Dominican Republic, Ecuador, Jamaica, Peru and Venezuela (Bolivarian Republic of).

⁶² The INTERPOL global police communications system (I - 24/7) enables drug law enforcement agencies/departments/units to securely transmit/share information 24 hours a day and facilitates joint operations.

⁶³ E/CN.15/2011/L.14 ("requests the United Nations Office on Drugs and Crime, in consultation with Member States and relevant regional and international organizations, to continue to develop global analyses of the threats and modalities of transnational organized crime, to study new forms and dimensions of transnational organized crime and to analyse new and emerging challenges, in order to support evidence-based policy guidance;)