Opiate trafficking along the early stages of the Balkan route
About the Afghan Opiate Trade Project

The opiates produced in Afghanistan continue to pose a threat to public health, governance and security in the region and beyond at global level. Trafficked to almost every continent worldwide, in 2018 the opiate economy in Afghanistan was valued at between $1.2 and US$2.2 billion and was worth between 6 and 11 per cent of Afghanistan’s GDP, exceeding the value of the country’s officially recorded licit exports of goods and services. To address the need for systematic monitoring, comprehensive and consolidated analytical information about the multidimensional threat of the global illicit trade in Afghan opiates, the UNODC Afghan Opiate Trade Project (AOTP) was established in 2008. The project has produced a number of regional and global threat assessment reports and has been collaborating extensively with numerous national and regional policy making bodies and law enforcement agencies to provide the international community with a better understanding of the threat posed by the opiates produced in Afghanistan.

About the AOTP Update

The AOTP Update series is designed to provide brief, regular reporting on emerging patterns and trends of the global situation pertaining to Afghan opiates. Given the speed at which changes in the illicit opiate markets occur, it is important to have a simple sustainable mechanism for regular information sharing.

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AOTP values feedback on this publication. If you have comments or would like to contribute information that could be considered for future publications, please contact:
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Introduction
Afghanistan continues to be the major global source of opium production. While heroin is primarily produced in Afghanistan, it is possible that heroin production also takes place outside Afghanistan\(^1\). The opiates produced in Afghanistan are trafficked to every region of the world except Latin America. The Balkan route continues to play a major role in supplying opiates to the markets in Islamic Republic of Iran, Turkey, Caucasus region, part of the Middle East and Europe.

This Short Update is intended to provide an update on the latest developments in the early stages of the Balkan route from Afghanistan to Turkey, including latest developments in Iraq, Syria and selected countries in Europe related to the Afghan opiate trade.

Methodology
The data and information used in this report come from primary and secondary sources. Meetings were held with relevant law enforcement officials in the field. The information from primary sources is supplemented by secondary sources such as the Annual Report Questionnaires (ARQ), Individual Drug Seizures (IDS), the UNODC Drug Monitoring Platform (DMP), reports published by national and international organizations, the UNODC World Drug Report and other relevant reports.

Historical context
The Balkan route via Turkey and the Islamic Republic of Iran, the dominant heroin trafficking route to Europe, has been used for decades\(^2\). However, the sources of heroin for the Balkan route have changed over the past 40 years.\(^3\) During the 1980s, most of the heroin consumed in Europe appears to have been trafficked from South East Asia (mainly Myanmar and Lao PDR), with the share of Afghan opium in global opium production standing at around 30 percent in the mid-1980s. During the early 1990s, with an increase in the production of opium, Afghanistan started to emerge as the main source of illicit opium and heroin in the world. In 2003, most of the European countries reported that between 80 to 90 percent of the opiate that entered their territory could be traced back to Afghanistan\(^4\). The increases in Afghan opium production coincided with unrest and civil war in Afghanistan and research shows that the opium trade was used as a funding source for several groups involved in the civil war\(^5,6\). In 2001, the Taliban regime banned opium cultivation, but subsequently opium production in Afghanistan gradually increased to reach 82 percent of global opium production in 2018\(^7\).

At the beginning of the 1990s, parallel to the civil war in Afghanistan, the Yugoslav wars started in South East Europe, lasting for about a decade. Conditions of political instability, social disorder, and economic chaos created a favourable environment for the expansion and development of corrupt and criminal practices and the emergence of criminal groups involved in a range of illicit trades, including drug trafficking. By the end of 2001, the wars in the Balkans had ended but organized crime remained a profitable business for well-connected Balkan criminal networks, which were partly also built on the large diasporas in other parts of Europe\(^8,9\). In parallel to the civil wars and instability in both South East Europe and Afghanistan, the Balkan route increased in importance for drug traffickers. The final destination of the majority of the heroin trafficked via the Balkan route is Europe (excluding Russian Federation).

The last (2009-2012) UNODC

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estimates of the volume of heroin trafficked via the Balkan route used a demand-based approach, based on the estimated heroin consumption in West and Central Europe. While these estimates do not account for the recent increased production in Afghanistan, they provide the order of magnitude of the quantities that may transit in the Balkan route. They suggest that between 2009-2012, on an annual basis on average 155 tons of illicit opiates in pure heroin equivalents entered the Islamic Republic of Iran10 and that between 42.3 and 59.1 tons of illicit opiates were trafficked from the Islamic Republic of Iran to Turkey11. Over the period 2009-2012, UNODC estimates suggest that on an annual basis 170 tons of pure heroin equivalent (consumption plus seizures) were trafficked from Afghanistan to the Balkan route12. Over the same period, 111 tons of Afghan opiates (expressed in pure heroin equivalents) were estimated to have been consumed each year in the Islamic Republic of Iran, Turkey, the Balkan route countries and West and Central Europe. This included 52 tons of opiates consumed in the Islamic Republic of Iran, 0.7 tons in Turkey, 4 tons in the South-Eastern Europe and 55 tons per year in the West and Central European consumer countries.13

Current estimates suggest that there may have been some 1.7 million opiate users in West and Central Europe in 2017.14 Available indicators suggest that overall heroin consumption and prevalence rate in main European markets may have been stable at a relatively low level during the years 2009-2015 compared to the periods 2003-2008 and 2016-2017 which showed higher prevalence rate15.

**Heroin entry and exit points from Iran to Turkey**

Heroin enters the Islamic Republic of Iran directly from Afghanistan or via Pakistan. In 2010, around 65 percent of the heroin entering the Islamic Republic of Iran was reported to have been trafficked via the Afghanistan–Pakistan route and the rest, 35 percent, trafficked directly via Afghanistan–Islamic Republic of Iran borders16. Over the period 2010-2017, the Islamic Republic of Iran reported that, on average on an annual basis, 73 percent of heroin entered Iran via Pakistan (Afghanistan–Pakistan–Islamic Republic of Iran) and 27 percent directly from Afghanistan17.

The provincial seizures of opiates in the Islamic Republic of Iran in 2017 show that most opiate was seized in the Sistan va Baluchestan province, bordering Pakistan’s Baluchestan province and Afghanistan’s Nimroz province (a province which also has a high Baluch tribal population). In 2017, the province with the second highest amount of opiate seizures was Kerman, which borders Sistan va Baluchestan.

The map 1 indicates the location of heroin seizures made in Afghanistan, the Islamic Republic of Iran, Pakistan, Turkey and Iraq between 2015 and 2019 as recorded in the UNODC Drug Monitoring Platform. Such seizure data indicate that heroin enters the Islamic Republic of Iran mostly by land and mainly from southern Afghanistan (i.e. Helmand, Nimroz and Kandahar provinces) and

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14 UNODC World Drug Report 2019 and previous years.
17 ARQs 2010-2017 of Islamic Republic of Iran.
that the routes are: via the Pakistan province of Balochistan to the Iranian province of Sistan va Baluchistan; directly via the Afghan province of Herat to the Iranian province of Khorassan-e Razavi; and, to a lesser extent, via the Farah province of Afghanistan to the Iranian province of Khorassan-e Janubi. Following the trafficking of heroin across the Islamic Republic of Iran, the majority of the heroin trafficked into Turkey enters the country mainly through Hakkari, Van, Agri and Igdir provinces.

In 2018, Turkey reportedly seized a record level of 18.5 tons of heroin. While this coincides with high opium production levels in Afghanistan, the relationship between trends in opium production in Afghanistan and heroin seizures in Turkey is not always linear. Changes in seizures can reflect a number of different developments, including changes in law enforcement priorities or changes in drug trafficking practices and routes. In the case of Turkey, however, there is a clear relationship between increases in production in Afghanistan and increases in opiates seized in Turkey in the following year.

As shown in Figure 2, increases in heroin seizures in Turkey are visible in the year after opium production increased in Afghanistan, while the reverse is true for decreases. However, there have been occasions where the change in the level of seizures has lagged more than a year: for instance, the decrease in opium production in Afghanistan after 2007, which at the time was the record year for production, was not reflected in reduced heroin seizures in Turkey until 2009.

Heroin is mainly trafficked by land from the Islamic Republic of Iran to Turkey. Some Drug Trafficking Organisations (DTOs) use rather creative and/or sophisticated concealment methods to traffic heroin to Turkey and via Turkey to Europe: for example, on 23 January 2019, 1.5 tons of heroin (which is a historical individual heroin seizure record in Turkey) was seized hidden inside marble blocks in a truck coming from the Islamic Republic of Iran. On 5 December 2018, another large heroin seizure of 1.2 tons was made from a truck that entered eastern Turkey from the Islamic Republic of Iran with heroin hidden inside the meat and other organs of animals.

The Turkish National Police employs...
several methods to profile vehicles crossing the border from the Islamic Republic of Iran. In addition to physical barriers and a large law enforcement network, other security measures have also been put in place. For example, the Gendarmerie of the Turkish Republic has rolled-out an automatic number plate recognition (ANPR) system, each linked to the Jandarma surveillance databases (part of the Jandarma Integrated Communications and Information System-JEMUS)\textsuperscript{25}. In 2018, out of the total heroin seized in Turkey, 537 kg (3 percent) was made by Turkish Customs\textsuperscript{26}. Although this figure may look low, it is broadly in line with global patterns. In 2015, for example, only 7 percent of the total heroin seizures were made by customs organizations worldwide\textsuperscript{27}.

In 2016, Turkey reported the possibility of some heroin trafficking to Turkey via the Makran Coast, the Red Sea and the Mediterranean – i.e. via the Southern Route - using small boats to make landfall in Turkey from larger ships, and for onward trafficking of heroin, by land to Europe\textsuperscript{28}. In part this may be a response to increased security and disruption to traditional land-based trafficking through Turkey and along the Balkan Route. It could also be an indication of the increasing use of maritime trafficking due to limited barriers as compared to overland trafficking routes, as well as the increase in border protection and control at different borders along the Balkan route and particularly between Islamic Republic of Iran and Turkey \textsuperscript{29,30}.

\textbf{Morphine seizures}

In 2018, Turkey reported total seizures of 354 kg of morphine\textsuperscript{31}, the highest amount seized since 2007 (the highest ever seized amount dates back to 2002 with 7,889 kg). During the late 1990s and early 2000s, large quantities of morphine were seized in Turkey, pointing to the possible presence of heroin labs in the country. Amongst other factors, improved Turkish law enforcement activity during the 2000s\textsuperscript{32} may have reduced the number of labs in Turkey, subsequently reducing the amount of morphine trafficked into the country. According to the Turkish National Police\textsuperscript{33}, there are currently some active heroin labs in the Iraq–Iran–Turkey border area but the capacity of these labs seems to be limited. However, the possible presence of labs in this area might account for continued small-scale morphine trafficking.

\textbf{Opium seizures}

Based on the quantities seized, Turkey is not considered an important transit country for opium trafficking. Although in recent years Turkey has seen an increase in opium seizures, the amounts remain small, amounting to less than a ton of opium annually. In 2018, Turkish drug law enforcement agencies reported a total of 709 kg of opium seized, a 25 percent decrease compared to the peak of 934 kg in 2017\textsuperscript{34}. Opium arrives in Turkey from...
the Islamic Republic of Iran and is either consumed by opium users based in Turkey\textsuperscript{35} or, far less commonly, further shipped on to Europe via land transportation. Opium seizures could point to the existence of heroin manufacturing; however, it seems more likely that with the flow of refugees to Turkey and further to Europe, which started as early as 2015, this is an indication of opium consumption by the refugee community in Turkey and in Europe. While research studies on this topic provide a mixed picture, some studies have found that refugees may continue patterns of drug use brought from their home countries and sometimes intensify them\textsuperscript{36}.

\textbf{Acetic Anhydride seizures in Turkey}

Turkish Narcotics Police have also reported that in recent years several Acetic Anhydride\textsuperscript{37} (AA) seizures have been made en-route from Turkey to Iraq and Islamic Republic of Iran, destined for Afghanistan, suggesting a reverse flow of heroin precursors through the country and wider region\textsuperscript{38}. In May 2017, media reported a seizure of 210 kg of AA in the town of Baskale in Van province of Turkey, close to the border with the Islamic Republic of Iran\textsuperscript{39}. In May 2019, a seizure of 65 kg of AA was reported in the media in the Turkish city of Yuksekova in Hakkari province, situated on the border with the Islamic Republic of Iran and Iraq\textsuperscript{40}. The origin and destination of both seizures are not reported. For 2018, Turkey reported total seizures of over 38,000 kg of AA which shows an increase of over 60 percent compared to 2017 (23,000 kg)\textsuperscript{41}, suggesting that the country was a major transit point for the trafficking of precursors, and this is unlikely to have changed since then.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>LOCATION OF SEIZURES</th>
<th>AMOUNT (KG)</th>
<th>LAST DEPARTURE LOCATION</th>
<th>DESTINATION</th>
<th>NATIONALITY OF ARRESTED PERSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>Georgia</td>
<td>116</td>
<td>Armenia</td>
<td>Europe</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>Armenia</td>
<td>850</td>
<td>I.R. of Iran</td>
<td>Georgia-Europe</td>
<td>Turkish &amp; Georgian</td>
</tr>
<tr>
<td></td>
<td>Georgia</td>
<td>2530</td>
<td>Azerbaijan</td>
<td>Turkey</td>
<td>Georgian</td>
</tr>
<tr>
<td>2015</td>
<td>Bulgaria</td>
<td>42</td>
<td>Georgia</td>
<td>Europe</td>
<td>Turkish</td>
</tr>
<tr>
<td></td>
<td>Romania</td>
<td>333</td>
<td>Azerbaijan, Turkey, Ukraine</td>
<td>Europe</td>
<td>NA</td>
</tr>
<tr>
<td>2016</td>
<td>Azerbaijan</td>
<td>500</td>
<td>I.R. of Iran</td>
<td>Belgium</td>
<td>Belarussian</td>
</tr>
<tr>
<td>2017</td>
<td>Armenia</td>
<td>105</td>
<td>I.R. of Iran</td>
<td>Georgia-Europe</td>
<td>Turkish</td>
</tr>
<tr>
<td>2018</td>
<td>Azerbaijan</td>
<td>515</td>
<td>Middle East</td>
<td>Europe</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Azerbaijan</td>
<td>105</td>
<td>Nakhchivan Autonomous Republic</td>
<td>Turkey</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Azerbaijan</td>
<td>260</td>
<td>I.R. of Iran</td>
<td>NA</td>
<td>Azerbaijani</td>
</tr>
<tr>
<td></td>
<td>Azerbaijan</td>
<td>108</td>
<td>I.R. of Iran</td>
<td>Turkey</td>
<td>NA</td>
</tr>
<tr>
<td>2019</td>
<td>Azerbaijan</td>
<td>933</td>
<td>I.R. of Iran</td>
<td>Ukraine</td>
<td>Azerbaijani</td>
</tr>
<tr>
<td></td>
<td>Azerbaijan</td>
<td>304</td>
<td>I.R. of Iran</td>
<td>Ukraine</td>
<td>Ukranian</td>
</tr>
</tbody>
</table>

Source: UNODC DMP, Container Control Programme (CCP), official and open source reports.

\textbf{Turkey and opiate trafficking through the Caucasus region}

In recent years, a number of key disruptive events have occurred along parts of the Balkan route, which may have affected parts of the traditional route and led to DTOs seeking new routes and methods to traffic opiates to the Balkans and beyond. In 2016, a series of events happened in Turkey affecting its security threats and border security: there was a failed military coup attempt and an increased flow of refugees entering Europe as spill over of the conflicts in Syria and Iraq, causing Turkey to improve its border security\textsuperscript{42}. These events coincided with a short-term decrease in heroin seizures in Turkey (from 12.5 tons in 2014 to 5.5 tons in 2016) indicating a possible trafficking route change, which was discussed in more detail in previous AOTP research\textsuperscript{43}. The heroin seizures, however, increased again in Turkey in 2017 (17.7 tons) and 2018 (18.5 tons) respectively. Around 2016, 2019.

\textsuperscript{35} Meeting with Turkish National Police, Ankara February 2019.

\textsuperscript{36} P. Lemmens, H. Dupont, I. Roosen, Migrants, asylum seekers and refugees: an overview of the literature relating to drug use and access to services, EMCDDA, 2017.

\textsuperscript{37} Acetic Anhydride is the main precursor used in the conversion of morphine to heroin, although Acetyl Chloride or a mix of Acetic acid and Acetic Anhydride may also be used.

\textsuperscript{38} Meeting with Turkish National Police, Ankara, April 2019.

\textsuperscript{39} UNODC Drug Monitoring Platform.

\textsuperscript{40} UNODC Drug Monitoring Platform.

\textsuperscript{41} Turkey ARQ 2017 and 2018.
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...the Balkan route began to be supplied
through another sub-trajectory, that
passes through the Caucasus region
(Armenia, Azerbaijan and Georgia) and
then onwards to Europe, including via
the Ukraine, Bulgaria and Romania.
As early as 2014, the countries of the
Southern Caucasus began to report
major seizures of heroin. In Azerbaijan,
total heroin seizures increased from 80
kg in 2015 to 1,186 kg in 2016. Geor-
gia started to report increased levels
of seizures between 2013 and 2016, while
after 2016 heroin seizures started to
decrease in Georgia. The Caucasus
route may still be a trajectory, albeit
one that bypasses Turkey44. A recent
seizure made in Germany from Kyrgys-
tan has revealed yet another route
for Afghan heroin to reach Europe
bypassing the traditional Balkan route
and Turkey45.

Purity of seized heroin
Heroin base is hardly ever pure. At
all stages of the conversion process
impurities remain in the product and
increase its volume. Heroin of higher
purity is easier to traffic, which is one
of the reasons why traffickers make
efforts to obtain high-purity products.
High quality heroin is predominantly
found close to the source and at whole-
sale trade level. At later stages of the
supply chain, at retail level, heroin is
adulterated to increase its volume and
thus its sales value. After adding cutting
agents, heroin needs to be consumed
within approximately 3-5 months46.
In recent years, the average typical
wholesale purity of heroin in Turkey
was reported at around 50 per cent,
ranging from between 28 to 90 per-
cent in 2017 and from 0.14 to 78.9
in 201847. Purity levels in Afghanistan
present a wide range of values, too.
The DEA reported an average purity
of bulk seizures (reflecting export qual-
ity) of highly-refined Afghan heroin
of 76 per cent (based on 25 samples
collected over four years). The aver-
age purity of crude heroin base seized
in Afghanistan was about 60 per cent
(based on 21 samples over four years).
DEA also received over 230 other
samples of heroin from Afghanistan
that were deemed to be “sham” or
“junk” samples. These samples were
not included in the averages presented.
CNPA Afghanistan reported purity
levels being mostly around 50 per
cent with some seizures having higher
purity of up to 60 to 70%.48 49 Finally,
while regular purity data for heroin
seized along the Caucasus region have
not been reported to UNODC, a 2016
seizure of 178 kg heroin in Georgia
had a purity of 52 percent50.
Combining all reports of purity that
have been reported, it appears that
there is a wide range of different heroin
qualities trafficked from Afghanistan
to destination markets. Seizures with
very high purity (e.g. the Combined
Maritime Forces found shipments with
purities of up to 83 per cent between
2012 and 2014 in the Indian Ocean) indicate
that there are laboratories that
manage to produce high quality
heroin, which is then cut closer to des-
tination markets to increase volume
and thus the profitability of the prod-
uct. However, there is in parallel a
large number of reports on heroin of
low quality, which may be destined
for markets closer to the source. More
research and more data in better gran-
ularity are needed to better understand
how the wide range of purities can be
interpreted to make conclusions on
trafficking routes and manufacturing
and trafficking practices of DTOs.

Iraq and Syria emerging
as a potential opiate
trafficking hub?
There is a variety of licit and illicit
goods smuggling through Iraq-Iran
border,51 and reports indicate there
are dozens of illegal border crossing
points along the porous Iraq-Iran
border that are used for smuggling52.
Reports indicate that the opiate trade
to and through Iraq started to increase
as early as 200353.

44 UNODC, “Heroin seizures and opiate traffic-
ing through the Caucasus route”, AOTP Short
45 UNODC Drug Monitoring Platform.
46 UNODC, “The Global Afghan Opiate Trade”,
2011.
47 Turkey ARQy 2018 and previous years.
48 Meeting with the CNPA Lab, Kabul, August
2019.
49 For calculating the production of heroin of
export quality, UNODC and the Government
of Afghanistan use a range of purities from 50
to 70 per cent.
50 “The nexus of conflict and illicit drug traffick-
ing, Syria and wider region”, The Global Initia-
tive Against Transnational Organized Crime,
2016, page 27.
51 “Sanctions and smuggling - Iraqi Kurdistan and
Iran’s border economies”, The Global Initiative
Against Transnational Organized Crime, April
2019.
52 “Sanctions and smuggling - Iraqi Kurdistan and
Iran’s border economies”, The Global Initiative
Against Transnational Organized Crime, April
2019.
53 Communication with Iraqi government offi-
As Iraq, and subsequently Syria, lost the ability to effectively police their international borders, DTOs have started to use these countries as alternative routes for opiate trafficking. Reports indicate that DTOs used the route Iran, Iraq, Syria and Georgia to smuggling contraband to Turkey. The same route, confirmed through the seizures reported to UNODC DMP and Iraqi media reports, may possibly have been used for trafficking of opiates from Afghanistan to supply the market along the Balkan route.

According to Iraqi media reports, the Iraqi provinces of Basrah, diyala, Erbil, Sulaymaniya are reported points of entry and transit for opiates entering Iraq which maybe for local consumption and for onward trafficking to Turkey, Syria and Europe.

Turkish National Police reported a seizure of 852 kg heroin in March 2012 destined to the Netherlands with the DTOs having connections in Iran, Iraq, Germany and the Netherlands. In 2013, in two different operations conducted by Turkish National Police that resulted in seizure of 266 kg of heroin, the consignment had departed from Northern Iraq and entered Turkey through Habur Border Gate into Turkey. Afghan opiates are trafficked to Iraq mainly through the Islamic Republic of Iran and are consumed locally in Iraq or destined for markets in the Middle East, Turkey or Europe, in part feeding markets along the Balkan Route. The ARQ reports from Belgium, Bulgaria, Croatia, Germany, Jordan, Syrian Arab Republic and Turkey have reported Iraq as departure/transit point for heroin and hashish seized in their territories over the last years.

Although data from Iraqi officials is limited, media reports also gave insight into the smuggling of opiates from the Islamic Republic of Iran to Iraq. In 2018, local media reported that Iraqi police had dismantled six DTOs in Baghdad, Basrah, Al-Nasiriya and Anbar.

In terms of trafficking between Iraq and the Islamic Republic of Iran, due to decades long sanctions on Iran, the smuggling of a range of licit consumable items as well as illegal contraband such as cigarettes, alcohol, and precursors from Iraq to Iran has been a profitable business. This business appears to have flourished again recently, following the enactment of new economic sanctions against the Islamic Republic of Iran. Although Iraq and the Islamic Republic of Iran have recently signed agreements to strengthen the control of their mutual border, due to the current vulnerabilities this route could also be used for trafficking of opiates from the Islamic Republic of Iran to Iraq. In 2018, local media reported that Iraqi police had dismantled six DTOs in Baghdad, Basrah, Al-Nasiriya and Anbar.

Table 2: Summary of Iraqi media reports of heroin seizures 2018 and 2019

<table>
<thead>
<tr>
<th>DATE</th>
<th>QUANTITY</th>
<th>LOCATION</th>
<th>REMARKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>17th June</td>
<td>48.7 kg</td>
<td>Haji Omaran, Erbil province</td>
<td></td>
</tr>
<tr>
<td>13th May</td>
<td>45 kg</td>
<td>Acre, at the Iraq-Kuwait border</td>
<td>Three traffickers arrested</td>
</tr>
<tr>
<td>13th May</td>
<td>880 g</td>
<td>Shorebak border between Iraq</td>
<td>One Iranian trafficker arrested</td>
</tr>
<tr>
<td>March</td>
<td>100 g</td>
<td>Soran, Erbil Province</td>
<td>50 g of methamphetamine (locally referred to as Shisha) also seized</td>
</tr>
<tr>
<td>November</td>
<td>31 kg</td>
<td>Choman town, Erbil Province</td>
<td>The consignment was trafficked from Iran to Iraq through the mountainous</td>
</tr>
<tr>
<td>13th October</td>
<td>50 kg</td>
<td>Duhok, Kurdish Autonomous</td>
<td>Two traffickers arrested</td>
</tr>
<tr>
<td>November</td>
<td>7.2 kg</td>
<td>Soran District, Erbil Province</td>
<td></td>
</tr>
<tr>
<td>4th July</td>
<td>29.5 kg</td>
<td>Duhok province, Rovia sub-district</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>36 kg</td>
<td>Soran District, Erbil Province</td>
<td></td>
</tr>
<tr>
<td>27th April</td>
<td>50 kg</td>
<td>Kurdish Autonomous Region</td>
<td>Heroin departed Iran and was to be trafficked to Syria via Turkey and Iraq.</td>
</tr>
<tr>
<td>30th April</td>
<td>12 kg</td>
<td>Near Haji Omaran, Erbil Province</td>
<td>The heroin was to be trafficked to Jordan via Iraq, Turkey and Syria.</td>
</tr>
</tbody>
</table>

Sources: UNODC Drug Monitoring Platform through open sources.

As Iraq, and subsequently Syria, lost the ability to effectively police their international borders, DTOs have started to use these countries as alternative routes for opiate trafficking. Reports indicate that DTOs used the route Iran, Iraq, Syria and Georgia to smuggling contraband to Turkey. The same route, confirmed through the seizures reported to UNODC DMP and Iraqi media reports, may possibly have been used for trafficking of opiates from Afghanistan to supply the market along the Balkan route. According to Iraqi media reports, the Iraqi provinces of Basrah, diyala, Erbil, Sulaymaniya are reported points of entry and transit for opiates entering Iraq which maybe for local consumption and for onward trafficking to Turkey, Syria and Europe.
Republic of Iran to Iraq, as well as reverse trafficking of precursor shipments with Afghanistan as the final destination.

Opiates are trafficked into Iraq from multiple entry points along the Iran-Iraq border. There are possibly two main opiate trafficking routes from the Islamic Republic of Iran to Iraq: either via Basrah Province in the south, which borders Kuwait, or through the Iranian province of Kermanshah into northern Iraq, particularly Erbil province. Due to a lack of detailed reporting, defining the internal trafficking routes in Iraq requires further research.

**Illicit opium production in Iraq**

In addition to opiate trafficking, the cultivation of illicit opium poppy may also be occurring in Iraq. A recent International Narcotics Control Board report highlighted emerging illicit opium poppy cultivation in Iraq.63 Due to the dry climate in Iraq, cultivation of opium is possibly limited mostly to parts along the Euphrates river. Illicit cultivation in Iraq brings an additional challenge in countering narcotics in the Middle East region and along the Balkan route. Due to its political and economic situation, proximity to Afghanistan and the availability of cheap labour, Iraq is potentially vulnerable to large illicit drug cultivation and production, as has happened in some other post-conflict environments.

**Heroin seizures in Iraq**

Heroin seizures in Iraq that are officially reported to UNODC are very limited and most of the reported drug seizures are of cannabis. However, media reports have referenced several heroin seizures in Iraq in recent years which indicate that there is some heroin trafficking in Iraq. According to Turkish National Police, there is indeed some trafficking via Iraq to Turkey and then on to other regional countries64. Many of the heroin seizures occur in the Kurdish regions of northern Iraq, although some have also been reported from southern Iraq. Basrah police officials reported to media sources that around 80 percent of drugs entering the province come via the Islamic Republic of Iran and that, in 2018, 187 drug-smuggling related offenses were recorded by the Iraqi Border Crossing Authorities in that province65. As of June 2019, Iraqi media had reported a total of 94.6 kg of heroin having transited Iran and being seized, mostly in Erbil Province. The year before, media reports had indicated 179.7 kg of heroin being seized, including a 50 kg seizure that was destined for Syria, via Turkey, and a 12 kg heroin seizure that was to be trafficked to Jordan from Iraq, via Turkey and Syria. In June 2018, 159 kg of heroin was seized in the Ahwaz province of the Islamic Republic of Iran, close to Iran-Iraq border and near the Iraqi city of Basrah.66

**Seizures close to Turkey-Syrian border**

As with Iraq, Syria remains vulnerable to a range of illicit activities. No recent opiate seizures have been reported within Syrian territory but the capacity of the authorities to effectively tackle trafficking activity or record opiate seizures may be limited. In May 2017, 102 kg of heroin was seized in Kilis, Turkey close to the border with Syria with source and destination unknown.67 As early as 2010, the Turkish National Police reported Syria as a transit country for the trafficking of Afghan-originated heroin to West and Central Europe and Latin America-originating cocaine to Turkish consumption markets, as well as hashish and synthetic drugs originated from the Middle East68. In particular, Syria has been identified as a country involved in the trafficking of captagon for more than a decade69. In recent years there were indications that the territory of Syria was used by some criminal groups for trafficking of opiates originating in Afghanistan (i.e. heroin manufactured in Afghanistan and possibly Afghan opiates manufactured into heroin in surrounding countries) and of opiates originating in Lebanon70. It is, however, currently not possible to assess to what extent Syria is used as a transit route for trafficking of Afghan opiates for subsequent trafficking to Turkey and further shipments along the Balkan route or Middle East.

There have been allegations in the media and in other sources that with the start of the civil war in Syria, some of the funding for the operations of armed groups in the conflict came from drug trafficking71 72, but there is no clear evidence on direct funding. With the available information it is not possible to assess if drug trafficking has been a notable source for conflict groups and if so, what proportion would come from opiate trafficking relative to other types of drugs (for example cannabis or synthetic drugs).

**Trafficking from Turkey to Eastern Europe and the Balkans**

The map4 indicates the location of the reported heroin seizures between 2015 and mid-2019 in selected countries along the Balkan route. Heroin seizures can be seen in all South East European countries, which indicates that drug traffickers use multiple land routes to traffic heroin to the main heroin consuming countries in West and Central Europe.

Heroin seizures were reported on the coasts of Albania, Montenegro, Croatia, Greece and Slovenia. This could indicate that heroin is not only trafficked to West and Central Europe via land-based methods but also by sea-based methods.

Differences in amounts seized can have various reasons. In its 2015 report on

64 Meeting with Turkish National Police, Ankara, February 2019.
66 UNODC Drug Monitoring Platform.
67 UNODC Drug Monitoring Platform.
68 Turkish National Police Annual Report 2010.
70 ARQs provided by Syria, Jordan, Israel and Turkey in recent years.
the Balkan route. UNODC found that countries closer to the source, with higher levels of wholesale (transit) trade, tend to achieve higher interception rates than countries with a relatively larger use (retail) market, because shipments tend to be made in large consignments when trafficked at the international level. With current data, this picture is confirmed.

Compared to heroin seizures reported by the Islamic Republic of Iran (annual average of 20.3 tons between 2015-2017 or Turkey annual average of 10.5), heroin seizures in eight South East European countries (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, North Macedonia, Romania and Serbia) have been rather low. These countries seized together 865 kilograms per year over the 2015-2017 period (122 kg on average per country). Annual average seizures of heroin ranged from under 10 kg in North Macedonia to close to 500 kg in Bulgaria between 2015 and 2017.

The picture is somewhat different in the major markets of West and Central Europe (France, Germany, Greece, Italy, Netherlands, Spain, United Kingdom). These countries seized together on average 3.8 tons of heroin per year (527 kg on average per country) over the period 2015-2017 with lowest (279 kg) reported from Germany and highest (852 kg) reported from France. In 2017, a total of around 1.3 tons of heroin was seized by South East European (SEE) countries except Turkey (which, in 2017, seized over 17 tons). Apart from in 2000 and 2014, the total amount of heroin seized annually by the SEE countries except Turkey has been between 700 and 2700 kg. In 2017, over 80 percent (697 kg) of the total amount of heroin seized in SEE was reported by Bulgaria. The highest level of seizures in Bulgaria may be a reflection of higher level of control and higher supply. For the same year, the total amount of reported heroin seized in Albania, Bosnia and Herzegovina, Croatia, Montenegro, North Macedonia, Romania and Serbia was only 187 kg.

Since the peak in 2014, opiate seizures declined in SEE, albeit remaining stable over the 2015-2017 period. This is part of a broader downward trend from the approximately 8000 kg reported as seized in 2004. In the main markets of West and Central Europe the total heroin seized has increased from 3,832 kg in 2016 to 4,908 kg in 2017. It is unclear why heroin seizures in West and Central Europe increased while those in South East Europe decreased over the same period. The increase in West and Central Europe can be explained, at least partially, by the previous year record high production in Afghanistan. The decrease in South East Europe may reflect in this circumstance, the emergence of routes outside of the Balkans and/or the fact that law enforcement in South East Europe may have not been able to cope with the increased supply.

Open questions
Increasing level of morphine seizures outside Afghanistan

In 2017, a record level of morphine (86 tons) was seized in Afghanistan, Pakistan and the Islamic Republic of Iran. These three countries worldwide account for almost all morphine seizures (98.5 percent of the total in 2017). In 2017, morphine seizures increased most remarkably in Afghanistan (from 47 tons in 2016 to 63 tons in 2017), and to a lesser extent in the Islamic Republic of Iran (from 11 to 15 tons) and in Pakistan (from 6.6 to 7.3 tons). In 2018, a further rise in morphine seizures to 21 tons was reported by the Islamic Republic of Iran however seizure reports from Afghanistan indicates a decline of morphine seizure (17.5 tons) in 201874. Morphine seizures have been volatile over the past decade and strong increases and peaks have been mostly driven by large scale seizures within Afghanistan. Morphine is used to produce heroin, which explains the large seizures reported in Afghanistan. But the reasons behind the large volume of seized morphine trafficked from Afghanistan to Pakistan and the Islamic Republic of Iran remains unclear. One possibility is heroin production in these two countries or countries further along the Southern and Balkan routes. When converted to heroin, morphine gains some 30 per cent in weight due to two additional “acetyl groups” that are added in the process.75 If the 22 tons of morphine that have been seized in 2017 outside of Afghanistan had been converted into heroin, this alone would have yielded 29 tons of heroin of unknown purity. The potential (global) production of heroin of export quality from Afghan opium was estimated to be 550-900 tons in 2017.76

There is limited reporting of seizures of morphine from Turkey and Bulgaria onwards into Europe. In 2017, Bulgaria reported a seizure of 221 kg morphine, the highest seizure reported to UNODC since 1986 when the country reported a seizure of 52 kg morphine77. In the same year Austria also reported a seizure of 15 kg morphine which is the highest ever morphine seizure it has reported to UNODC. In 2016, Italy also reported a seizure of 10 kg morphine. The existence of heroin labs, even on a small scale, along the Balkan route could possibly explain the reason for morphine trafficking from Turkey to Europe, and over the last years selected countries in Europe have reported dismantling heroin labs, albeit labs with a possibly limited heroin production capacity. This reporting on illicit heroin labs has come from Greece – which has consistently reported the highest numbers of heroin labs dismantled, (on average seven labs annually between 2012-2018) – Albania, Spain and Czechia. No other countries along the Balkan route have reported dismantling heroin labs.

The 2013 EU Drug Markets Report indicated the possibility of heroin production outside Afghanistan, possibly in the Islamic Republic of Iran and Pakistan78, as well as in Europe. Among...
Afghanistan’s immediate neighbours, India has also reported morphine seizures, with 2017 seizures (449 kg) showing a sharp increase compared to 2016 (29 kg). There is local opium poppy cultivation in India and in 2017 India also reported dismantling one heroin lab, suggesting that small scale heroin production may also take place in India. However, it is not clear if the opium used for this manufacturing comes from Afghanistan or India. Seizure data indicated that in 2017, some 48 – 56 per cent of the Afghan opium harvest was converted into heroin or morphine within Afghanistan and that the remainder was exported unprocessed. There is thus evidence that not all the opium is processed into heroin or morphine within Afghanistan. It is, however, not clear if major quantities of heroin available outside Afghanistan are refined from morphine outside Afghanistan. More intelligence information is needed from countries outside Afghanistan to shed light on this question.

Understanding if and eventually to what extent there is substantial heroin manufacturing outside Afghanistan (made of opium cultivated in Afghanistan) would help to better target supply reduction interventions in terms of opiate interception, laboratory detection and precursor control. There are many factors that DTOs may consider when deciding the best business model for the logistics of heroin manufacturing. The conditions that determine these factors change across countries and include issues such as level of law enforcement control, proximity to trafficking routes, corruptive practices and financial costs related to precursors, equipment and labour.

There are also other ongoing changes in opiate trafficking with the emergence of new trajectories along the Balkan route and maritime trafficking of heroin along the southern route. Data gaps in several parts of the world make it difficult to draw clear conclusions about what is driving these changes along the Balkan route.
Selected major opiate seizure cases 2018 to 2019¹

**AUGUST 2019.** 1,297 kg of heroin seized from a container ship, the MV Gibraltar, in south-eastern England which was en route to Antwerp, Belgium after it docked at the port of Felixstowe. Drugs were concealed among a cover load of towels and bathrobes.

**JUNE 2019.** Iraqi law enforcement seized 48 kg of heroin in Haji Omaran area close to Iran-Iraq border.

**MAY 2019.** German customs authorities seized 670 kg of heroin in Frankfurt (Oder) concealed inside a truck with Georgian registration number and a Turkish driver. The heroin had departed Iran and passed through Kyrgyzstan, Turkey and Poland².

**MAY 2019.** Kurdish security forces seized 45 kg of heroin in Acre.

**APRIL 2019.** Bulgarian law enforcement seized 288 kg of heroin at Kapitan Andreevo border crossing point (BCP) with Turkey. The heroin was found concealed inside the cargo of textile dyeing machine, transported by Iranian registered lorry.

**APRIL 2019.** Turkish law enforcement seized 79 kg of heroin in Nurdagi district of Gaziantep province, close to the Turkish- Syrian border.

**FEBRUARY 2019.** Iranian law enforcement seized 388 kg of opium in Khuzestan province, bordering Iraq.

**JANUARY 2019.** Turkish law enforcement seized 1,535 kg of heroin in Ashkale district of Erzurum province.

**JANUARY 2019.** Turkish law enforcement seized 454 kg of heroin at the Kapikule border crossing point between Turkey and Bulgaria in the province of Edirne.

**JANUARY 2019.** Turkish law enforcement seized 850 kg of heroin during an operation in Istanbul.

**DECEMBER 2018.** Turkish law enforcement seized 1,271 kg of heroin on the Erzurum-Erzincan highway, headed towards Istanbul.

**NOVEMBER 2018.** Iraq law enforcement seized 31 kg of heroin in the city of Soran, Erbil Governorate.

**SEPTEMBER 2018.** Bulgarian Customs officers seized 712 kg of heroin - the biggest ever opiate seizure in the country. Heroin was concealed among the legal cargo of construction materials shipped from Iran to Western Europe by two Iranian lorries travelling together.³.

**OCTOBER 2018.** Italian customs authorities seized 270 kg of heroin in the port of Genoa. Heroin bags were hidden inside a container that departed the Islamic Republic of Iran. The final destination of the heroin was the Netherlands (source: UNODC Drug Monitoring Platform).

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¹ UNODC Drug Monitoring Platform, unless otherwise specified.

² German Customs Authorities reported to UNODC.

³ Bulgarian National Customs Agency reported to UNODC.
In this issue

Afghanistan continues to be the major global source of opium production. While heroin is primarily produced in Afghanistan, it is possible that heroin production also takes place outside Afghanistan. The opiates produced in Afghanistan are trafficked to every region of the world except Latin America. The Balkan route continues to play a major role in supplying opiates to the markets in Islamic Republic of Iran, Turkey and Europe.

This Short Update is intended to provide an update on the latest developments in the early stages of the Balkan route from Afghanistan to Turkey, including latest developments in Iraq and Syria related to the Afghan opiate trade.

Recent AOTP publications

The illicit drug trade through South-Eastern Europe
AOTP Update Volume 2
Afghan opiate trafficking along the Northern route
AOTP Update Volume 1

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