

1.4 Coca / Cocaine market

1.4.1 Production

Table 7. GLOBAL ILLICIT CULTIVATION OF COCA BUSH AND PRODUCTION

GLOBAL ILLICIT CULTIVATION OF COCA BUSH AND PRODUCTION OF COCA LEAF AND COCAINE, 1990-2005																
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
CULTIVATION^(a) OF COCA BUSH IN HECTARES																
Bolivia ^(b)	50,300	47,900	45,300	47,200	48,100	48,600	48,100	45,800	38,000	21,800	14,600	19,900	21,600	23,600	27,700	25,400
Colombia ^(c)	40,100	37,500	37,100	39,700	44,700	50,900	67,200	79,400	101,800	160,100	163,300	144,800	102,000	86,000	80,000	86,000
Peru ^(d)	121,300	120,800	129,100	108,800	108,600	115,300	94,400	68,800	51,000	38,700	43,400	46,200	46,700	44,200	50,300	48,200
Total	211,700	206,200	211,500	195,700	201,400	214,800	209,700	194,000	190,800	220,600	221,300	210,900	170,300	153,800	158,000	159,600
POTENTIAL PRODUCTION OF DRY COCA LEAF IN METRIC TONS^(e)																
Bolivia	77,000	78,000	80,300	84,400	89,800	85,000	75,100	70,100	52,900	22,800	13,400	20,200	19,800	27,800	38,000	30,900
Colombia	45,300	45,000	44,900	45,300	67,500	80,900	108,900	129,500	165,900	261,000	266,200	236,000	222,100	193,340	170,730	170,730
Peru	196,900	222,700	223,900	155,500	165,300	183,600	174,700	130,600	95,600	69,200	46,200	49,300	52,500	50,790	70,300	67,900
Total	319,200	345,700	349,100	285,200	322,600	349,500	358,700	330,200	314,400	353,000	325,800	305,500	294,400	271,930	279,030	269,530
POTENTIAL MANUFACTURE^(f) OF COCAINE IN METRIC TONS																
Bolivia	189	220	225	240	255	240	215	200	150	70	43	60	60	79	107	90
Colombia ^(g)	92	88	91	119	201	230	300	350	435	680	695	617	580	550	640	640
Peru	492	525	550	410	435	460	435	325	240	175	141	150	160	155	190	180
Total	774	833	866	769	891	930	950	875	825	925	879	827	800	784	937	910

(a) Potentially harvestable, after eradication

(b) Sources: 1990-2002: CICAD and US Department of State, International Narcotics Control Strategy Report; 2003-2005: National Illicit Crop Monitoring System supported by UNODC.

(c) Sources: 1990-1998: CICAD and US Department of State, International Narcotics Control Strategy Report; 1999-2005: National Illicit Crop Monitoring System supported by UNODC.

(d) Sources: 1990-1999: CICAD and US Department of State, International Narcotics Control Strategy Report; 2000-2005: National Illicit Crop Monitoring System supported by UNODC.

(e) Refers to the potential dry coca leaf production available for cocaine production, i. e. after deducting the amount, which governments report as being used for traditional or other purposes allowed under national law. In the absence of a standard definition of "dry coca leaf" and given considerable differences in the processing of the fresh coca leaf harvested, the figures may not always be comparable across countries.

(f) Amounts of cocaine that could be manufactured from locally produced coca leaf (due to imports and exports actual amounts of cocaine manufactured in a country can differ)

(g) Production data for 2004 and 2005 is based on new field research in Colombia.

Global cultivation of coca remained essentially stable in 2005

The total area under coca cultivation in Colombia, Peru and Bolivia amounted to 159,600 hectares in 2005 suggesting that the area under cultivation remained essentially stable (+ 1 per cent as compared to 2004).

However, the area under coca cultivation continues to be 28 per cent less than the levels recorded in 2000 (221,300 hectares) and lower than in any year of the 1990s. Most coca was cultivated in Colombia (54 per cent), followed by Peru (30 per cent) and Bolivia (16 per cent).

After four consecutive years of decline, over which coca cultivation decreased in Colombia, the total area under coca cultivation in that country increased by 6,000 hectares (8 per cent) to 86,000 hectares compared to last year's estimate of 80,000 hectares. The increase came about despite sustained eradication efforts of the Government of Colombia, with fumigation levels which have constantly remained above 130,000 hectares and an unprecedented level of manual eradication of 32,000 hectares.

In Peru, on the other hand, where the area under coca cultivation increased in 2004 to 50,300 hectares, the highest level since 1998, coca cultivation appears to decline slightly, to 48,100 hectares (-4%). Bolivia, the smallest producer of coca, has reduced the area under coca cultivation, from 27,700 hectares in 2004 to 25,400 hectares in 2005. Efforts to eradicate coca continued in both Bolivia and Peru.

Longer-term cultivation trends followed different patterns in the three Andean countries. Coca cultivation declined in both Peru and Bolivia in the second half of the 1990s but showed again an upward trend in the first years of the new millenium. In Colombia, in contrast, cultivation of coca leaf increased in the 1990s and showed a marked downward trend in subsequent years.

Overall level of cocaine production remains essentially stable

The potential production of cocaine reached 910 metric tons in 2005, about the same as a year earlier. Potential production in Colombia amounted to 640 metric tons, in Peru to 180 metric tons and in Bolivia to 90 metric tons. The level of overall production is practically unchanged from the levels of a decade ago.

Alternative livelihood programmes continue to be implemented

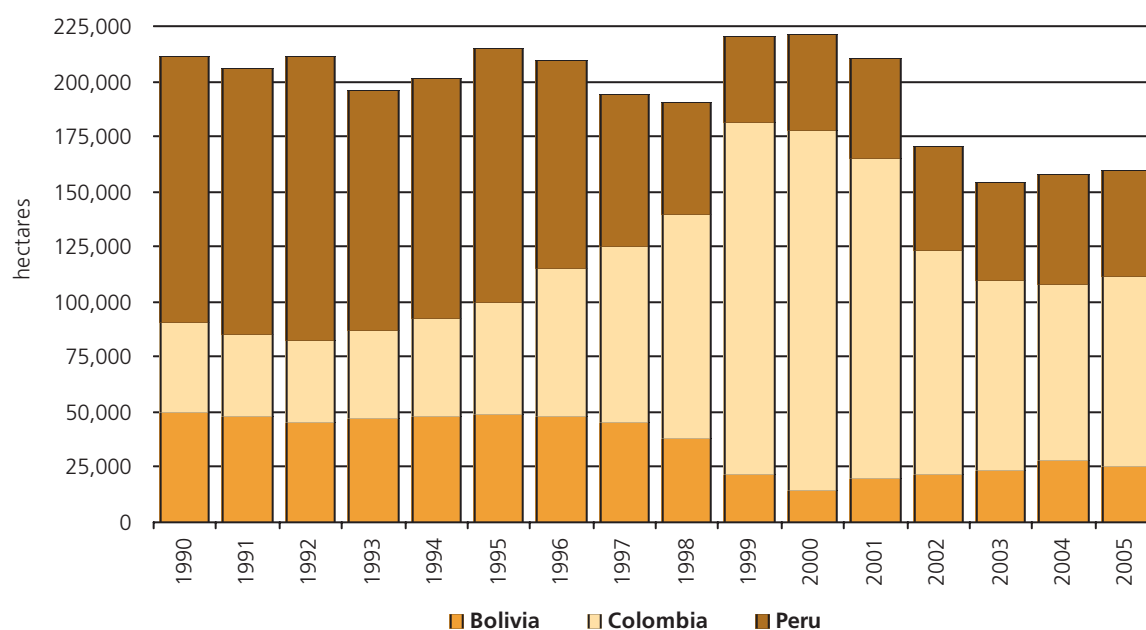
In order to bring about a sustained reduction of coca cultivation in the region, alternative development programmes continue to be undertaken in Colombia, Peru and Bolivia. In Ecuador, a similar project is being carried out, with the intention to prevent certain regions in the country to turn to illicit drug production.

Number of seized coca processing laboratories almost quadrupled between 2000 and 2004

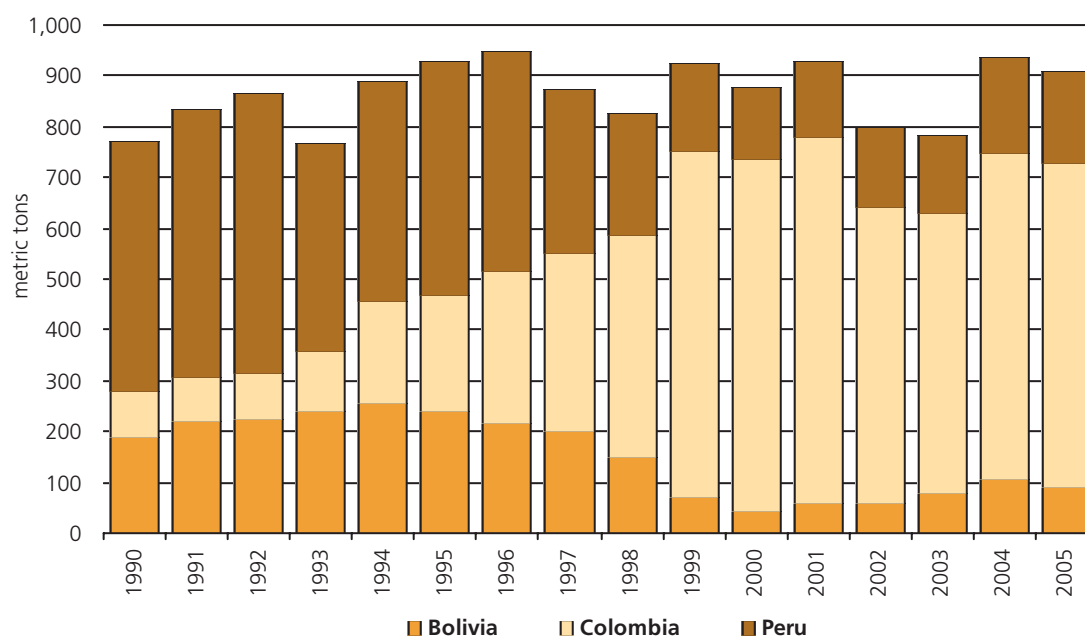
In 2004, Governments reported the destruction of 8,208 coca processing laboratories, an almost four-fold increase since 2000 when 2,104 laboratories were reported destroyed.

The destruction of laboratories and production sites reflects the fact that most processing of coca leaf into cocaine takes place close to the cultivating areas in Bolivia, Colombia and Peru. This is true for both the intermediate products cocaine paste/base and the final product, cocaine hydrochloride. Bolivia, Colombia and Peru reported more than 99 per cent of the global total.

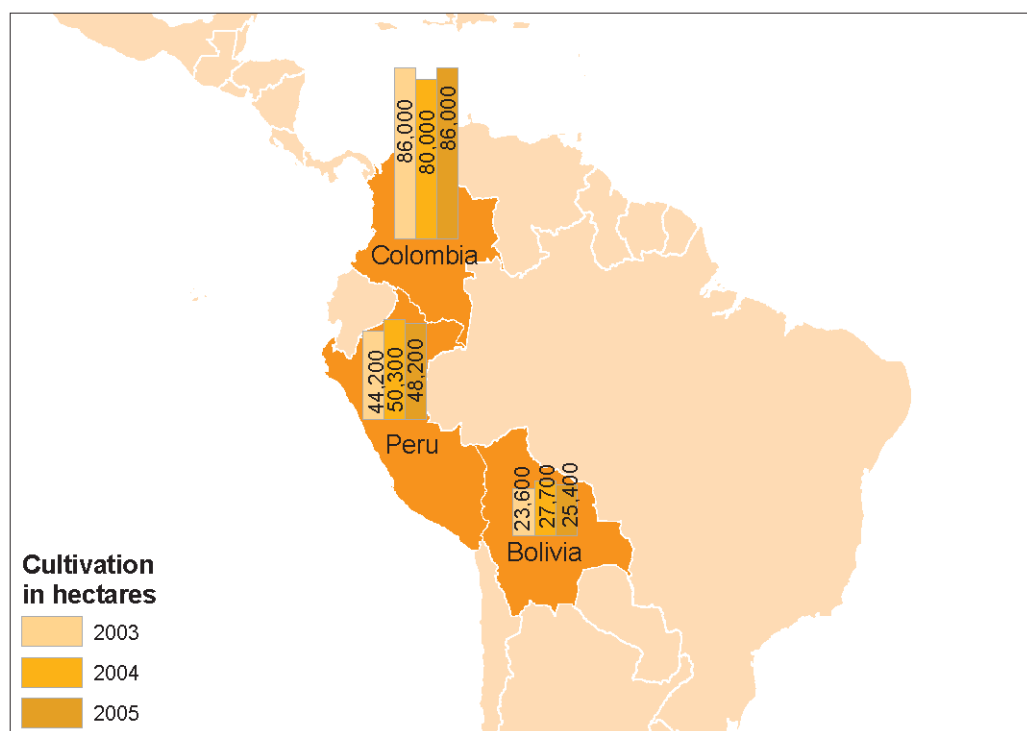
However, some differences exist between the three main coca cultivating countries. Whereas in Bolivia and Peru, destroyed laboratories produce to a large extent coca paste and coca base, some 13 per cent of all coca processing laboratories destroyed in Colombia were manufacturing cocaine. Ninety-four per cent of the 256 cocaine processing laboratories destroyed worldwide were located in Colombia. Outside South America, Spain, Hong Kong Special Administrative Region of China, United States and Australia reported the destruction of cocaine processing laboratories in 2004, which shows the existence of limited cocaine production outside the region. In addition, Argentina and Saint Lucia reported the destruction of laboratories manufacturing cocaine paste or base. All of this illustrates that some production of cocaine products exists outside the three main coca cultivating countries.

Fig. 47: Global coca bush cultivation (in ha), 1990-2005

Source: Estimates for Colombia for 1999 and subsequent years come from the national monitoring system established by the Colombian government with the support of UNODC. Due to the change of methodology, figures for 1999 and after cannot be directly compared with data from previous years.

Fig. 48: Potential cocaine production (metric tons), 1990-2005

Map 9. Coca bush cultivation, 2003 - 2005



Map 10. Potential cocaine production, 2003 - 2005

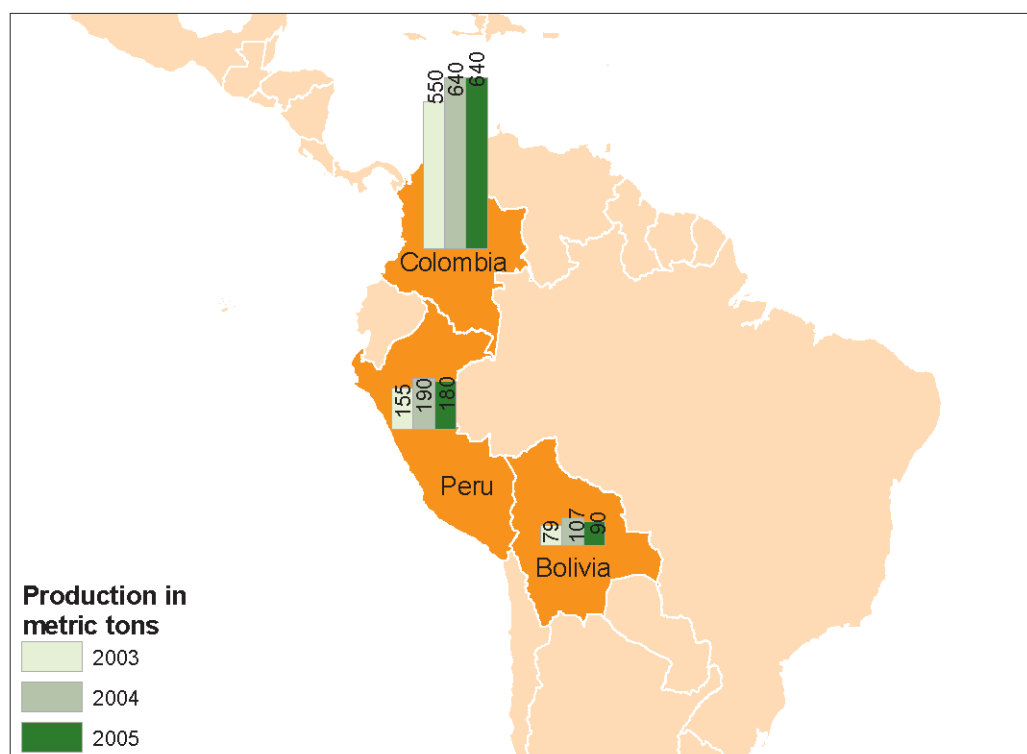


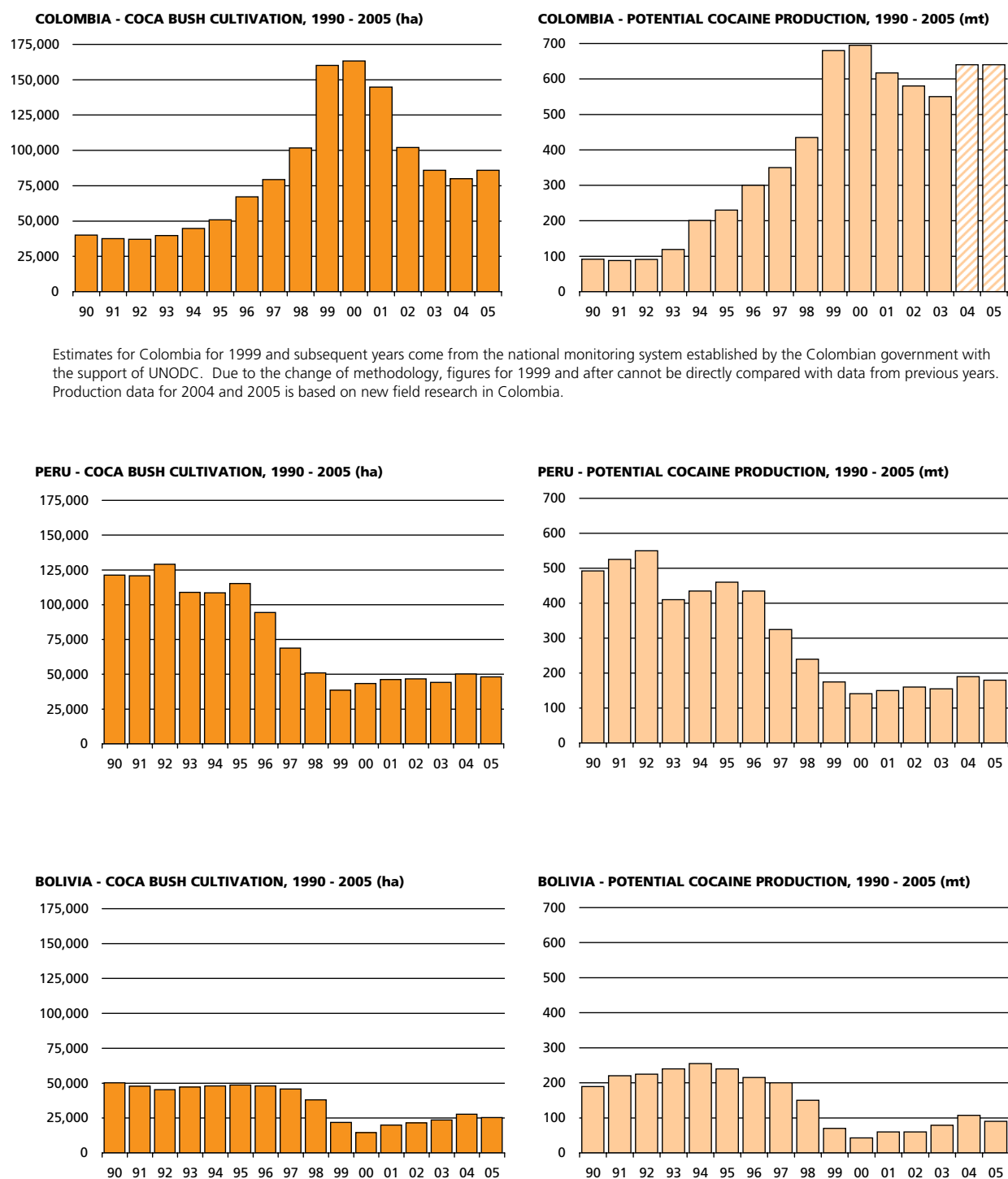
Fig. 49. Annual coca bush cultivation and cocaine production in main producing countries, 1990 - 2005

Fig. 50: Coca bush cultivation (in % of global total)

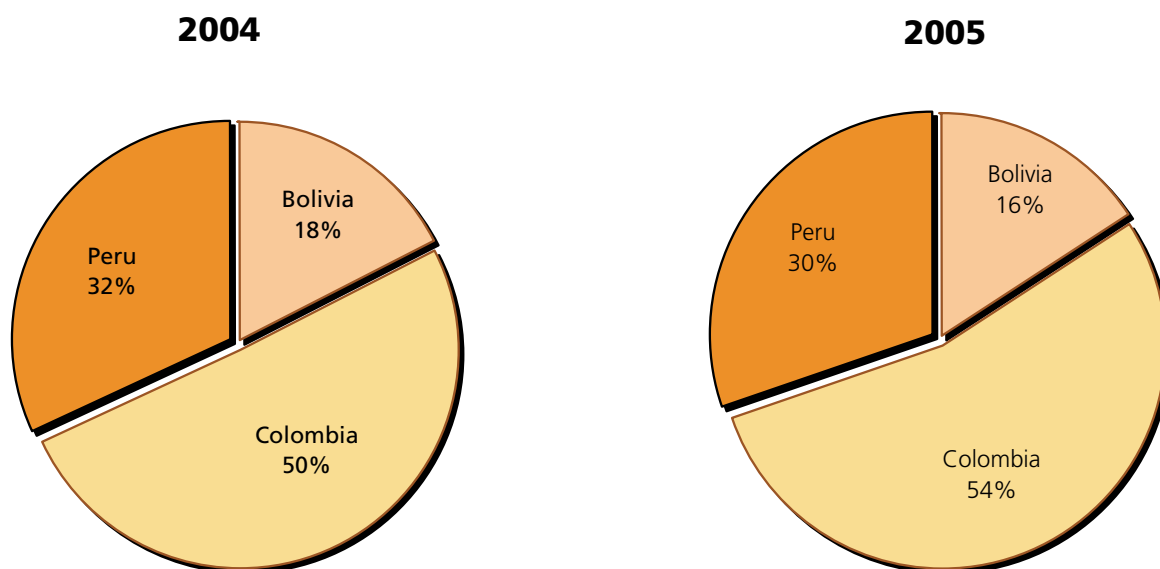


Fig. 51: Potential cocaine production (in % of global total)

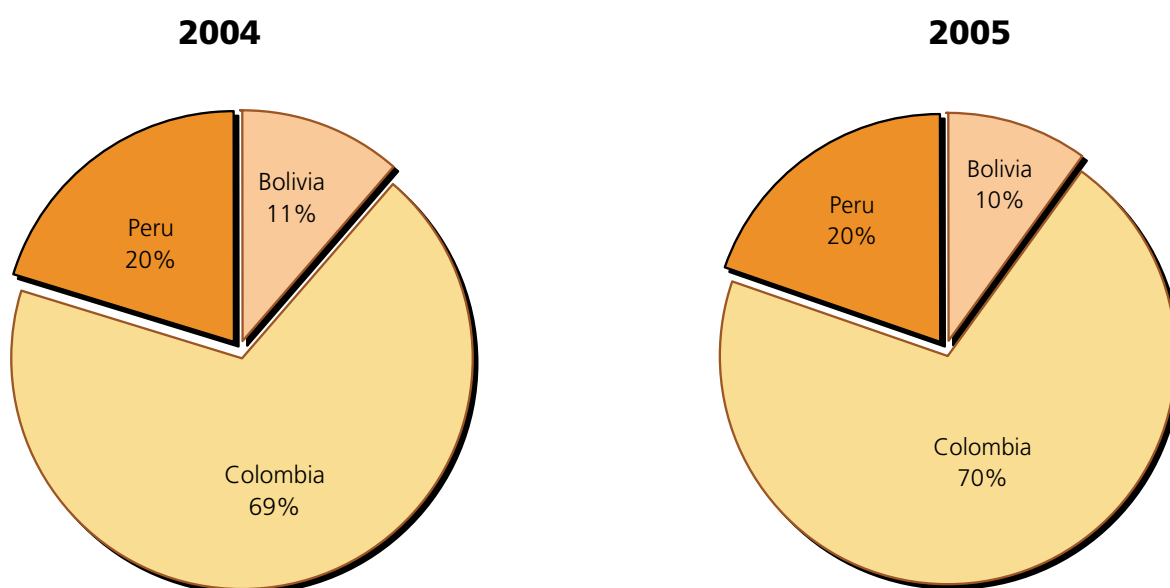


Table 8. Reported eradication of coca bush, ha

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Bolivia	1,100	5,493	7,512	7,000	11,620	15,353	7,653	9,395	11,839	10,089	8,437	6,073
Colombia	4,904	25,402	22,576	44,123	69,155	44,158	61,568	95,897	153,126	137,033	142,786	170,042
Peru			1,259	3,462	7,834	14,733	6,208	6,436	7,134	11,312	10,399	12,232

1.4.2 Trafficking

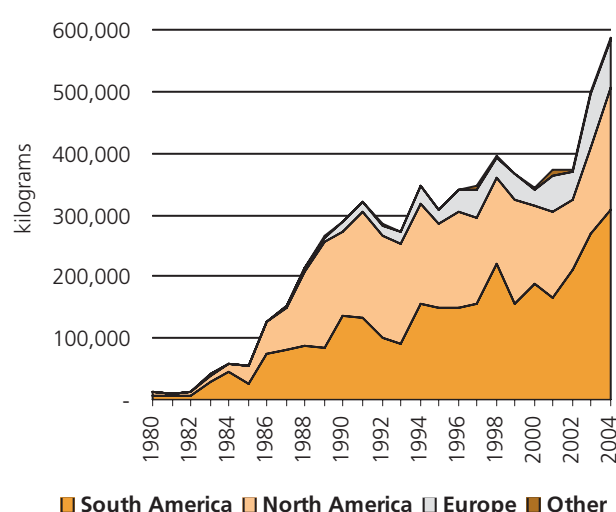
Global seizures of cocaine rose to another record high in 2004

Cocaine seizures increased, by 18 per cent, to 588 metric tons in 2004, the highest figure ever recorded. This followed an increase in global cocaine seizures of 34 per cent in 2003. The increase in cocaine seizures has been – to a large extent – the result of better cooperation among law enforcement services and improved sharing of intelligence information.

Most of the globally intercepted cocaine is seized in the Americas (86 per cent). South America accounted for 45 per cent, North America for 33 per cent and Central America & the Caribbean for 8 per cent of global seizures. The next largest market after the Americas is Europe, accounting for 13 per cent of global cocaine seizures.

For the third year in a row, Colombia topped the ranking of world cocaine seizures, with almost 188 tonnes cocaine hydrochloride (HCl) and cocaine base seized in 2004, 32 per cent of the world total and an increase of 29 per cent compared to 2003 and the highest such figure ever reported from any country. This clearly reflects the strong enforcement efforts undertaken by the Colombian authorities over the last few years. The second largest seizures took place in the United States: 166 tons or 28 per cent of the world total.

Fig. 52: Global cocaine seizures, regional breakdown, 1980-2004



Source: UNODC, Annual Reports Questionnaire Data / DELTA.

... with the main trafficking route running from the Andean region to North America

The world's main cocaine trafficking routes continue to run from the Andean region, notably Colombia, to the United States. The trafficking patterns analysis of the Colombian authorities revealed that more than half of the country's seizures took place at the ports; with 60 per cent of the cocaine leaving the country via the Pacific coast and 40 per cent via the Atlantic coast in 2004. According to the United States Interagency Assessment of Cocaine Movement, half of the cocaine trafficked towards the United States in 2004 transited the Eastern Pacific, whereas 40 per cent were trafficked through the Western Caribbean.

The main intermediate target country of cocaine shipments from Colombia is Mexico. Mexico reports that, about 55 per cent of the cocaine is trafficked to Mexico by sea, another 30 per cent by land from Central America (Guatemala and Belize) and some 15 per cent comes by air. The direction of cocaine trafficking within Mexico is from the southern parts of the country to the northern border. In volume terms, most cocaine shipments are primarily by sea; in terms of trafficking operations, however, most cocaine deliveries are by land.

Organized crime groups from Mexico have also started to target Peru as a source country for cocaine deliveries. While in the past (until the mid 1990s), coca paste and coca base exports from Peru used to be in the hands of the Colombian drug cartels, a significant proportion of the Peruvian cocaine exports these days is organized by criminal groups from Mexico and leaves the country by sea. United States sources estimate that about 70 per cent of the cocaine hydrochloride (HCl) leaving Peru is hidden in legitimate maritime cargo. In the past most of the coca paste and coca base left Peru by air to Colombia, where it was processed into cocaine HCl.

Criminal organization of ethnic Mexican background, partly holding US passports, have supplanted Colombian criminal groups as the predominant wholesale cocaine distributors in several parts of the United States (notably the southern and mid-western regions) over the last 15 years. Between 70 and 90 per cent of the cocaine entering the United States is estimated to transit mainland Mexico or its waters according to US information. Colombian organizations still handle cultivation, production and initial offshore movement and some direct shipments to the eastern parts of the United States while Mexican organizations increasingly coordinate the remaining transportation and distribution segments required for the cocaine to reach US streets.

Decreasing importance of Caribbean as a transshipment point to the United States

In the past, 30-50 per cent of the cocaine entered the USA directly via the Caribbean. For 2004, however, the United States Interagency Assessment of Cocaine Movement concluded that this proportion had fallen to below 10 per cent. The main smuggling vectors via the Caribbean in 2004 concerned Haiti and the Dominican Rep (2%), Jamaica (2%) and Puerto Rico (1%).

The United States report that about 12 per cent of all cocaine entered the country by air in 2004. In contrast to the situation in the 1980s, direct shipments by air from Colombia are no longer very common.

In addition to the countries mentioned above, other countries in South America, notably Venezuela (Bolivarian Republic of) and Ecuador, serve as important transshipment points. Cocaine seizures in Venezuela (Bolivarian Republic of) were the third largest in the Americas in 2002, 2003 and 2004, amounting to 31 tons in 2004 (after Colombia, USA and ahead of Mexico). Cocaine seizures in Ecuador increased almost 9-fold, from 5 metric tons in 2004 to more than 44 tons in 2005, following, *inter alia*, the implementation of a joint UNODC/WCO container control project, con-

firmed previous suspicions that Ecuador is used by trafficking organisations as a major cocaine outlet. Further significant cocaine seizures were reported from Ecuador in early 2006.

Strong eradication efforts in the Andean region and increased interdiction efforts in the main drug transit countries and in the United States have had an impact on cocaine availability and prices in the world's largest cocaine market. Availability of cocaine, as perceived by students in the United States, declined between 1999 and 2005. After a downward trend for many years, cocaine retail prices in the United States increased slightly in 2004 and increased by 19% over the February to September 2005 period.

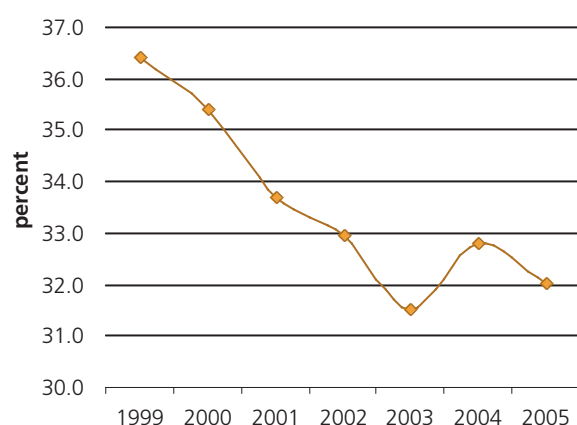
Europe is second most important destination of cocaine...

The second most important destination of cocaine produced in the Andean region is Europe. In addition to Colombia, Peru and Bolivia are frequently mentioned among European countries as source countries for cocaine found on their markets.

European cocaine seizures amounted to close to 80 tons in 2004, the second highest ever reported²¹ and are likely to show a new all-time high for the year 2005 at around 100 metric tons in the European Union according to Europol. The proportion of Europe in global cocaine seizures rose from 2.5 per cent in 1980 to 5.9 per cent in 1990, 8.4 per cent in 2000 and 13.5 per cent in 2004. Over the 1994-2004 period cocaine seizures in Europe increased by, on average, 10 per cent per year. Despite growing seizures, cocaine prices have not risen in Europe and no significant deterioration in the purity of cocaine was reported. Thus, the increase in seizures does not only reflect improved interdiction efforts but – unfortunately – also increased availability of cocaine on the European market.

Shipments to Spain, Europe's main entry point for cocaine, were reported to transit primarily Ecuador and Venezuela. Spain has reported Europe's largest cocaine seizures for the last twenty years and accounted for more than 40 per cent of all cocaine seizures in Europe in 2004. In terms of world cocaine seizures, it ranked third in 2004, after Colombia and the United States. About 60 per cent of the Spanish seizures were made while the cocaine was still at sea; 10 per cent were made at airports and 30 per cent on roads. Traditionally, most cocaine

Fig. 53: Perceived availability of cocaine among US high school students, 1999-2005 (unweighted average of 8th, 10th and 12th grade students reporting that it is 'fairly easy' or 'very easy' to obtain cocaine powder)



Source: National Institute on Drug Abuse (United States), Monitoring the Future- National results on adolescent drug use, Overview of key findings 2005.

²¹ As of 2005, seizure reports from the Netherlands show which seizures have been made in the Netherlands as such and seizures made by the Dutch authorities in and around the Netherlands Antilles. If seizures made in the Netherlands Antilles are included, overall European seizures would have remained stable in 2004 as compared to 2003. If seizures made in the Netherlands Antilles are excluded, European seizures are 10% lower than the record figure reported for 2003.

was seized along the northern Atlantic coast of Spain, notably in Galicia. Over the last two years, cocaine entered the country, in addition, increasingly via Andalusia (southern Spain). In 2005, seizure levels in Spain increased by about 50 per cent, reaching almost 50 metric tons. Large increases in cocaine seizures have also been reported from Portugal which has become another major gateway for cocaine destined for European markets. Portugal reported the third largest cocaine seizures among the European countries in 2004 after Spain and the Netherlands.

Cocaine continues to transit Caribbean on its way to Europe

One of the main cocaine trafficking route to Europe continues to go via the Caribbean region. The Netherlands Antilles are of special importance in this regard. The Dutch authorities made more than 40 per cent of their total seizures in the waters around the Netherlands Antilles in 2004²². Like in all years of the past two decades, seizures made by the Dutch authorities were the second largest ones in Europe, equivalent to 16 per cent of European seizures in 2004 or, including seizures made by the Dutch authorities in the Netherlands Antilles, equivalent to about a quarter of European seizures.

The United Kingdom notes that the Caribbean region, notably Jamaica, also continues to play an important role for cocaine shipments to that country. Important quantities are also trafficked via Spain and the Netherlands into the UK.

The role of the French departments in the Caribbean region as transshipment locations is less pronounced as significant amounts of cocaine enter France via Spain and the Netherlands. Nonetheless, reports received from France indicate that there are important cocaine shipments to metropolitan France transiting the Caribbean region, including the French overseas departments in the Caribbean. This seems to be particularly true for Martinique which had the fourth highest drug-related arrest figures per capita among all 100 French departments in 2004 exceeding, for instance, the corresponding rates for Paris.

Other important transit countries from the Andean region to Europe are Brazil, Suriname and, less frequently mentioned, Panama and Argentina. The Brazilian authorities estimate that about 70 per cent of the

cocaine originates in Colombia, 20 per cent in Bolivia and 10 per cent in Peru. Shipments from Brazil go either directly or – increasingly – via Africa to Europe.

While most cocaine shipments from South America continue to be directed towards Western Europe (more than 99 per cent of European cocaine seizures), some shipments to Eastern Europe and the Balkan countries have been noticed by the 2005 meeting of Heads of National Law Enforcement Agency (HONLEA) on Europe, held in 2005, raising fears of the potential development of new trafficking routes and/or the incorporation of cocaine into the range of products offered by traditional heroin trafficking groups operating along the Balkan route.

Cocaine seizures in West and Central Africa show six-fold increase...

The rising importance of Africa, and notably of West and Central Africa, as a transit points for cocaine shipments destined for European markets is becoming ever more evident. Seizures made in Africa increased more than three-fold in 2004 with seizures in West and Central Africa increasing more than six-fold. West and Central Africa accounted for more than 50 per cent of all African cocaine seizures in 2004. Cocaine shipments to Africa are frequent to the countries along the Gulf of Guinea, from where the cocaine is usually trafficked in small quantities by body packers by air to various destinations in Europe. In addition, large quantities of cocaine are shipped to the waters around Cape Verde and off the coast of Senegal. Most of this cocaine is destined for Spain and Portugal (and for onward shipment to other European countries). The largest cocaine seizures over the 2000-2004 period in Africa were made in Cape Verde, followed by South Africa, Kenya, Ghana and Nigeria. More than 1 metric ton of cocaine was seized in Kenya 2004, indicating that an increasing number of countries in Africa are affected by large-scale cocaine trafficking. Out of 32 African countries reporting seizure statistics to UNODC in 2004, 23 countries or 72 per cent reported seizures of cocaine, up from just 34 per cent in 1990.

The upturn in seizures can be explained by a combination of increased trafficking and strengthened interdiction efforts. It should be noted, however, that despite this increase, African seizures still account for less than 1 per cent of global cocaine seizures and only a very

22 These seizures made in the waters around the Netherlands Antilles (13.7 tons) have been subsequently excluded from the total seizures made by the Netherlands (21.4 tons) in order to gain a more accurate picture of the geographical location of seizures.

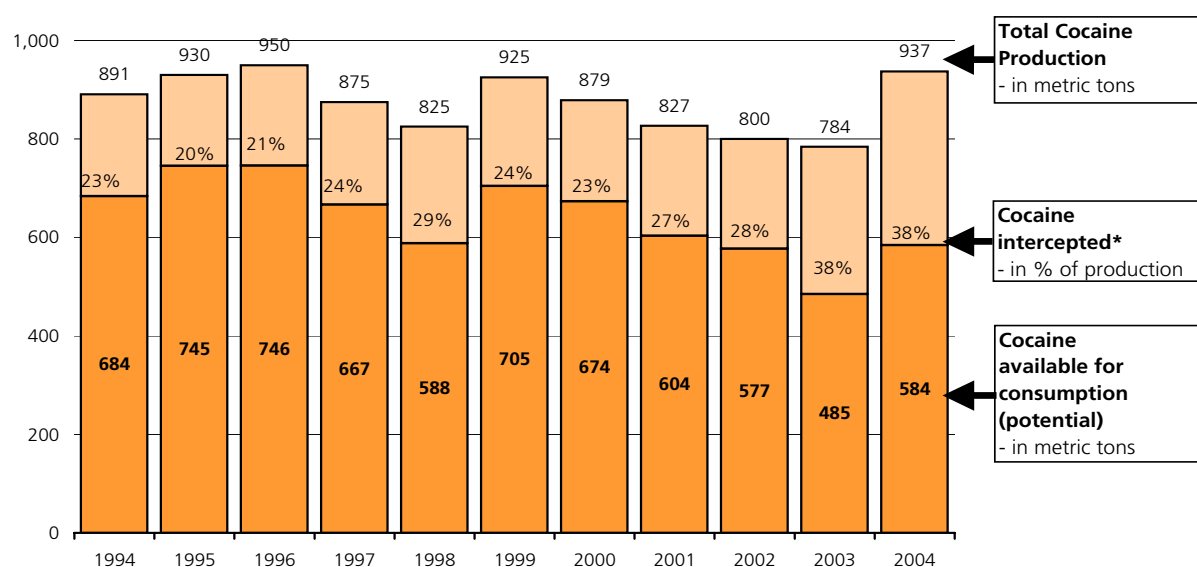
small proportion of cocaine transiting the African continent is actually being seized.

... whereas Asia and Oceania account for less than 0.1 per cent of the global total

In Asia, cocaine seizures remained essentially stable in 2004 (0.05 per cent of global total). Less than 300 kg of cocaine were seized in 2004, with the largest seizures made in Japan (88 kg) and Hong Kong SAR of China (55 kg) followed by several countries in the Near and Middle East: Syrian Arab Republic (40 kg), Jordan (32 kg), Israel (31 kg) and Lebanon (12 kg).

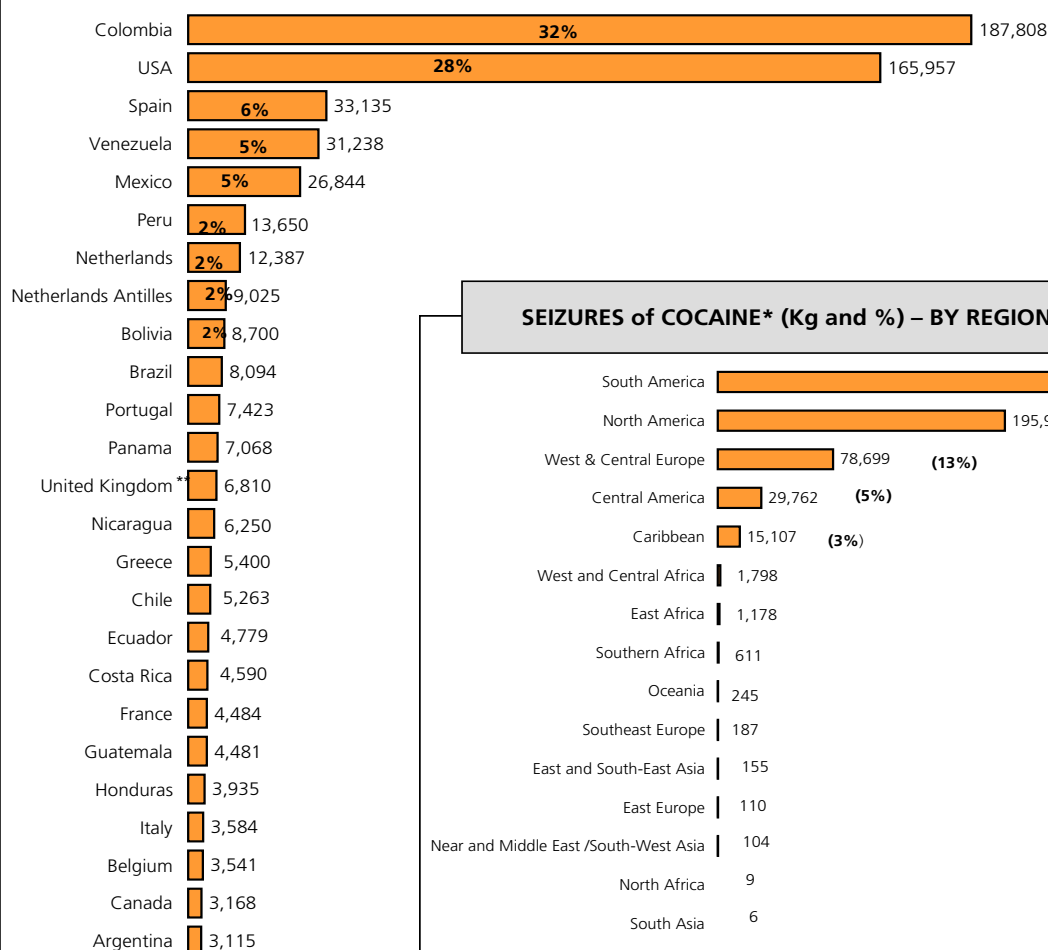
Several clandestine cocaine-manufacturing laboratories were dismantled, 4 of which were in Hong Kong SAR of China. In March 2006, authorities in China, in cooperation with the US DEA, made their largest ever cocaine seizure (135 kg), close to Hong Kong SAR of China.

Seizures in Oceania amounted to 245 kg, below 0.05 per cent of the global total. The market for cocaine in that region has remained largely stable.

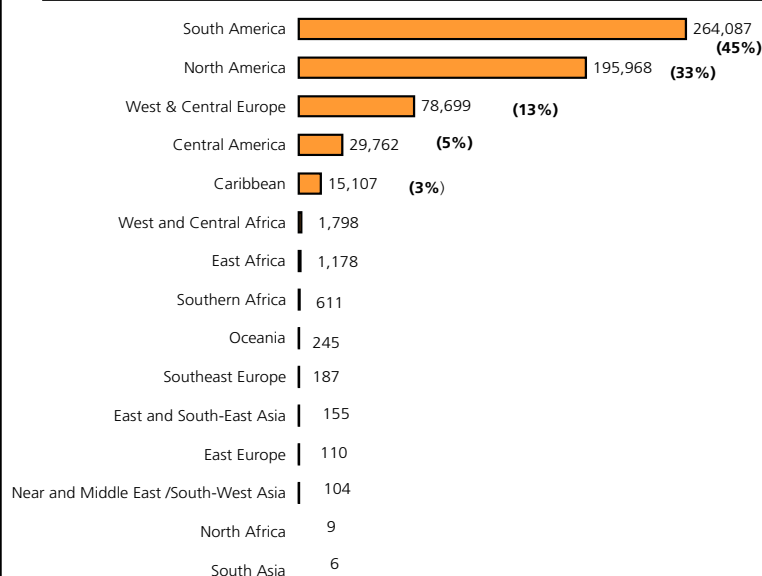
Fig. 54: Global illicit supply of cocaine 1994 - 2004

* Converted to 100% purity, assuming an actual average purity of 60%.

SEIZURES OF COCAINE* in % of world total and Kg- HIGHEST RANKING COUNTRIES AND AREAS - 2004



SEIZURES of COCAINE* (Kg and %) – BY REGION - 2004



* excluding seizures in liquid form.

** data refer to 2003

Fig. 55: Global seizures of cocaine, 1994-2004

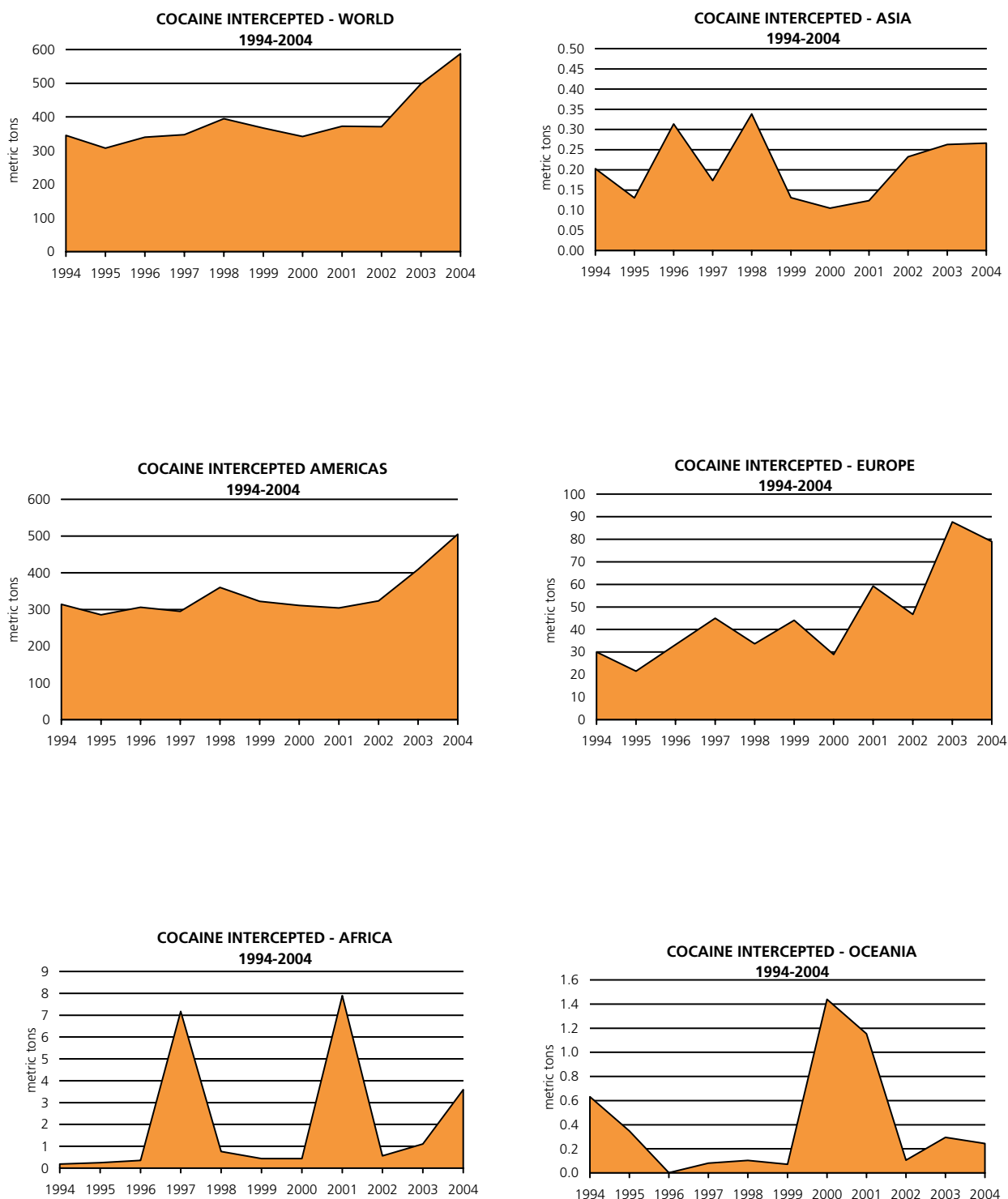
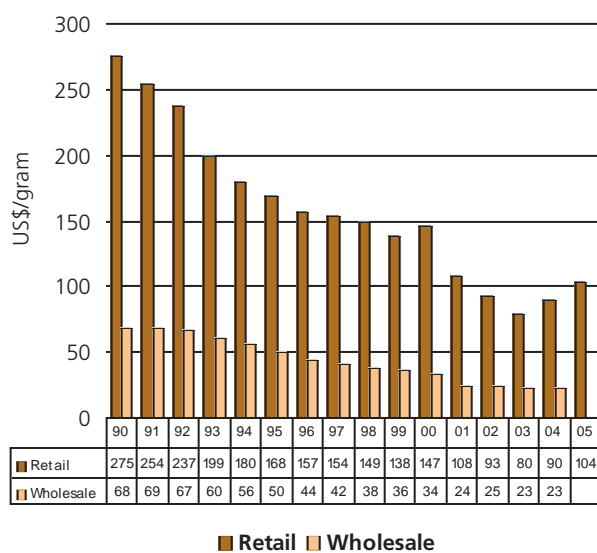
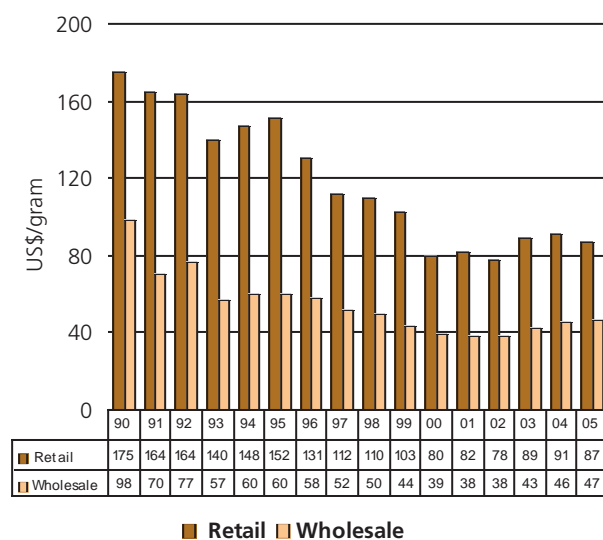
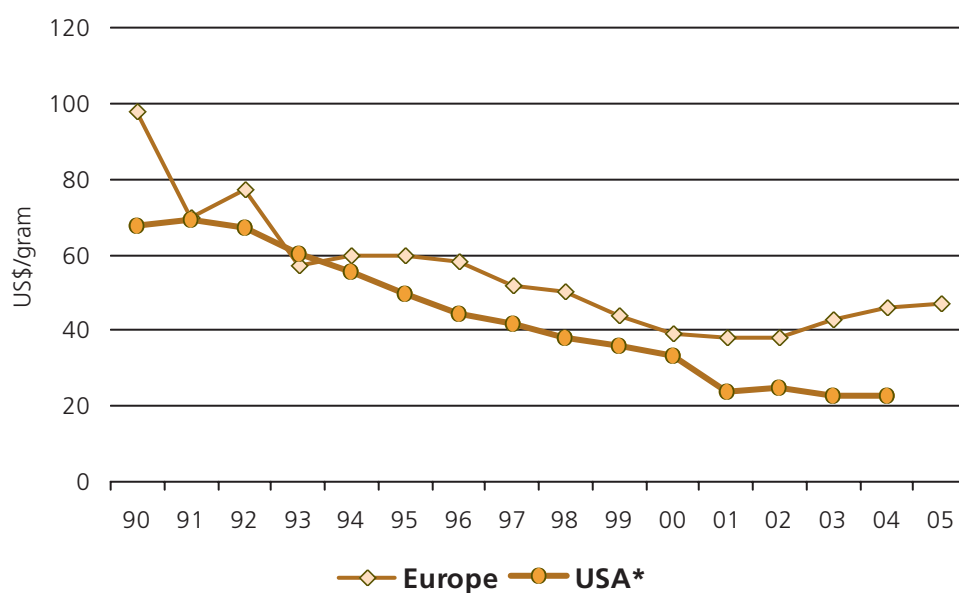
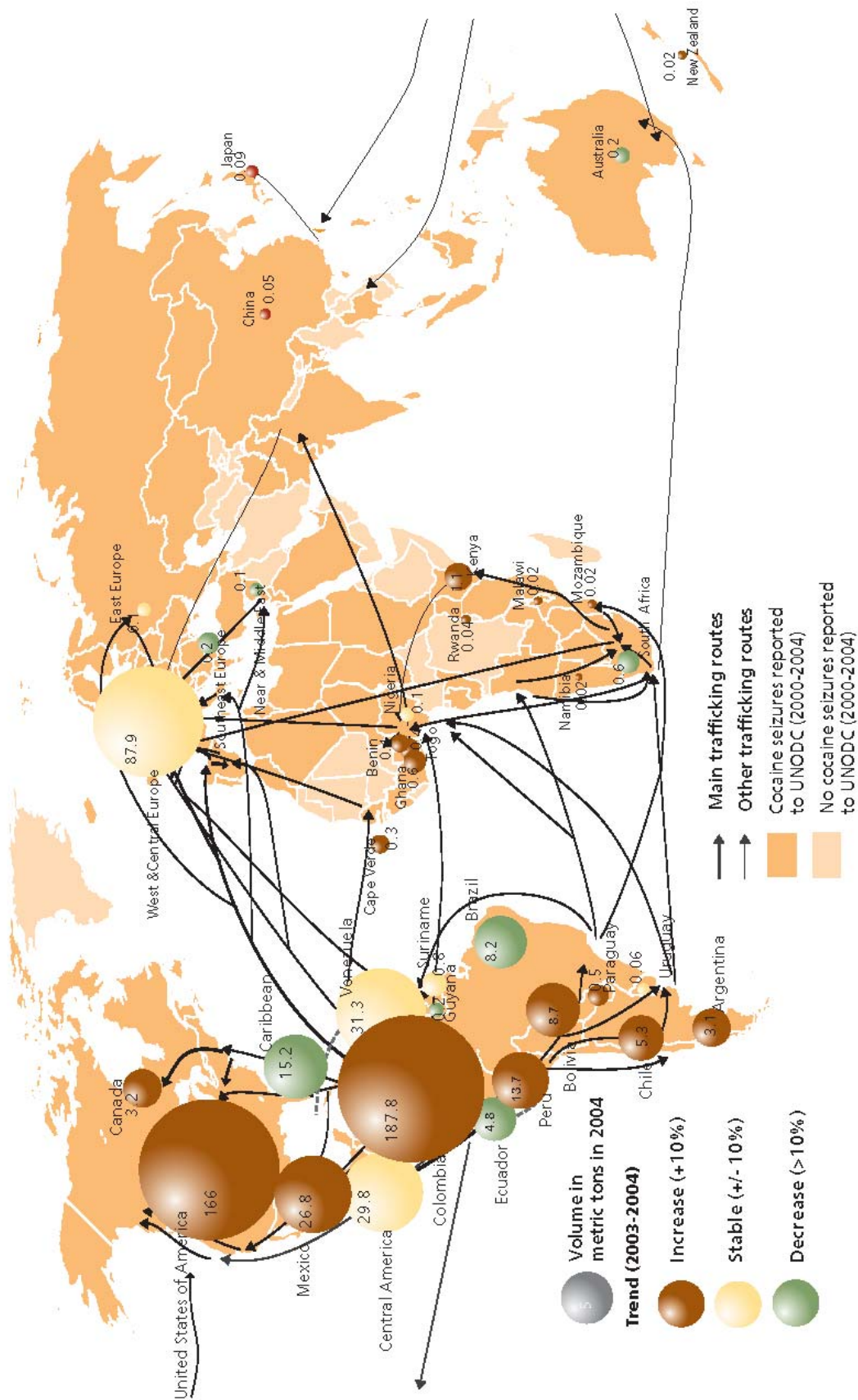


Fig. 56: USA: cocaine retail and wholesale prices, 1990-2005 (US\$/gram)**Fig. 57: Europe: cocaine retail and wholesale prices, 1990-2005 (US\$/gram)****Fig. 58: Wholesale cocaine prices in Europe and the United States (US\$/gram), 1990-2005**

* Data for 2005 not available

Map 11: Cocaine* seizures 2002 - 2004: extent and trends (countries reporting seizures of more than 0.01 mt (10kg.))



Note: Routes shown are not necessarily documented actual routes, but are rather general indications of the directions of illicit drug flows.

1.4.3 Abuse

Most cocaine is used in North America, Western Europe and South America

Cocaine use is estimated to affect about 13.4 million people or 0.3 per cent of the population age 15-64. Most cocaine continues being used in the Americas, accounting for close to two thirds of global cocaine use. With an annual prevalence of 2.3 per cent, cocaine use is highest in North America, home to almost half of all cocaine users in the world. The single largest cocaine market worldwide, which accounts for more than 40 per cent of all cocaine users worldwide, is still the United States (2.4 per cent of those aged 12 and above in 2004 or 2.8 per cent of the population age 15-64).

The next largest markets are those of West and Central Europe (prevalence rate of 1.1 percent, on average), accounting with 3.3 million people for about a quarter of all cocaine users worldwide. Rates above average have been reported from Spain (2.7 percent), from the United Kingdom (England & Wales: 2.1 per cent and Scotland: 1.4 percent) as well as Italy (1.2 per cent). Cocaine use seems to be also rather high in the Netherlands, the second most important entry point (after

Spain) for cocaine shipped to Europe. A less recent survey conducted in the Netherlands (2001) found a cocaine prevalence rate of 1.1 per cent. Cocaine use levels in the new EU member states are still substantially lower, typically ranging from 0.1 percent to 0.5 percent. The average prevalence rate of cocaine use in East Europe and South-East Europe is around 0.1 per cent, lower than in Africa (0.2 per cent).

South America (including Central America and the Caribbean) ranks third (15 per cent of the global market with an average prevalence rate of 0.7 percent of the population age 15-64, the same rate as for Europe as a whole. Countries in Oceania report slightly higher prevalence rates (0.9 per cent on average). Given differences in the part of population admitting drug use, it could well be that the actual prevalence rates in South America are higher than those in Oceania. Rates close to, or above the South American average have been reported, inter alia, in studies conducted in Bolivia (1.6 per cent for cocaine HCl and 1.9 per cent for cocaine base in 2005), Chile (1.8 per cent in 2004), Colombia (0.8 per cent in 2003), Peru (0.7 per cent in 2002) as well as in Venezuela, Ecuador and a number of

Table 9. Annual prevalence of cocaine use, 2004-2005

	Number of users	in % of population 15-64 years
EUROPE	3,524,000	0.7
West and Central Europe	3,333,000	1.1
South-East Europe	64,000	0.1
Eastern Europe	127,000	0.1
AMERICAS	8,440,000	1.5
North America	6,459,000	2.3
South America	1,981,000	0.7
ASIA	260,000	0.1
OCEANIA	175,000	0.9
AFRICA	959,000	0.2
GLOBAL	13,358,000	0.3
<div> <div></div> Cocaine abuse above global average <div></div> Cocaine abuse around global average <div></div> Cocaine abuse below global average </div>		

Sources: UNODC, Annual Reports Questionnaire data, various Govt. reports, reports of regional bodies, UNODC estimates.

Caribbean and Central American countries.

All other regions have prevalence rates below the global average. Cocaine use is still very low in most parts of Asia (average: 0.01 per cent).

Some decline of cocaine use in North Americas

Some moderate declines are found in the general population drug use data collected as part of the US National Household Survey on Drug Use and Health. Annual cocaine prevalence data for cocaine declined from 2.5 per cent of the population age 12 and above in 2003 to 2.4 per cent in 2004; crack cocaine use figures fell from 0.6 percent in 2003 to 0.5 percent. As compared to 1985 (prevalence: 5.1 percent), cocaine use declined by about 50 per cent and is at about the same level as at the beginning of the 1990s (2.6 percent in 1991). Given changes in methodology, comparisons of household survey results are, however, potentially problematic.

A better trend indicator are the high-school surveys. They show that after an increase in the first half of the 1990s, cocaine use declined in the United States among high-school students by more than 20 per cent between 1999 and 2005. Compared to data for 1985, cocaine use among high-school students is now more than 60 per cent lower.

Similarly to these trends, data for the province of Ontario, home to more than a third of Canada's total population, showed an upward trend of cocaine use in

the 1990s. This lasted until 2003. Between 2003 and 2005, however, cocaine use among Canadian high school students fell by almost 18 per cent and is now slightly below the levels reported 20 years ago.

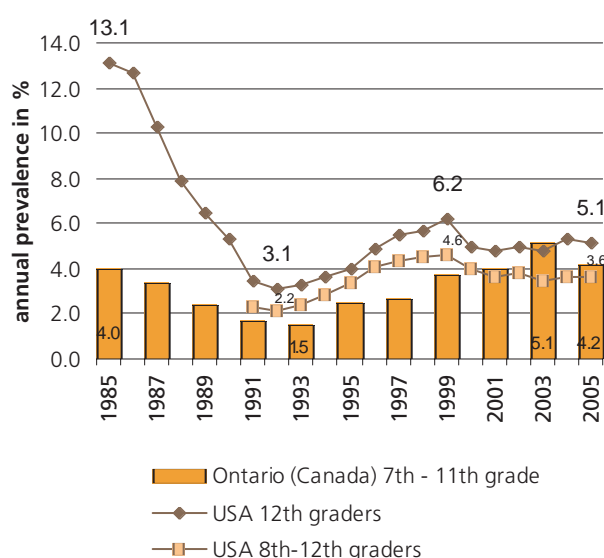
... and mixed trend patterns in South America

Survey data reported from Colombia show that life-time prevalence of cocaine use increased over the 1996-2004 period (from 1.5 per cent in 1992 and 1.6 per cent in 1996 to 3.7 percent in 2004). There are indications, however, that the increase took place in the late 1990s. Life-time prevalence of cocaine use among youth, aged 10-24, was in 2001 more than 5 times higher than in 1996. A comparison of annual prevalence estimates, derived from these studies, with actual annual prevalence data from the new national survey, suggests that cocaine use prevalence (including basuco) has actually declined over the 2001-2004 period.

Following increases in the 1990s, declines in overall cocaine use have also been reported from Chile. Annual prevalence of cocaine use among the general population declined from 1.9 per cent in 2000 to 1.7 per cent in 2004. If only cocaine HCl is considered, the decline was from 1.5 per cent in 2000 and 2002 to 1.3 per cent in 2004.

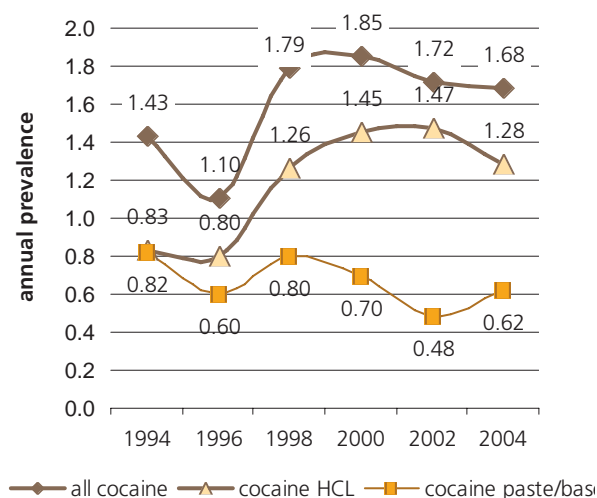
Student surveys conducted in Brazil suggest that cocaine use, after having grown strongly between 1987 and 1997, remained essentially stable over the 1997-2004 period.

Fig. 59: Cocaine use among high school students in the USA and in Ontario (Canada)

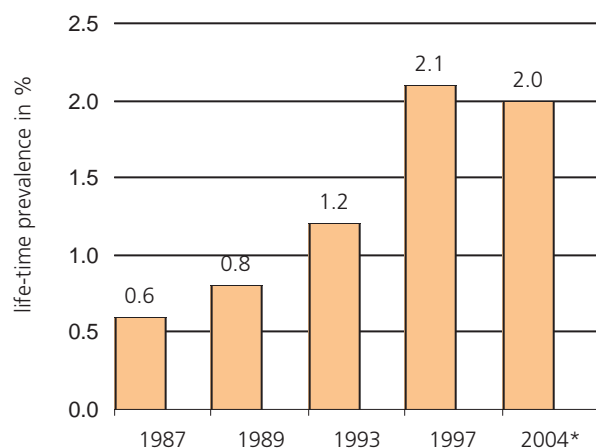


Sources: NIDA, Monitoring the Future - Overview of Key Findings 2005 and CAMH, Drug Use Among Ontario Students, 2005.

Fig. 60: Cocaine use among the general population in Chile (age 12 – 64)



Source: CONACE, Sexto Estudio Nacional de Drogas en Población General de Chile, 2004.

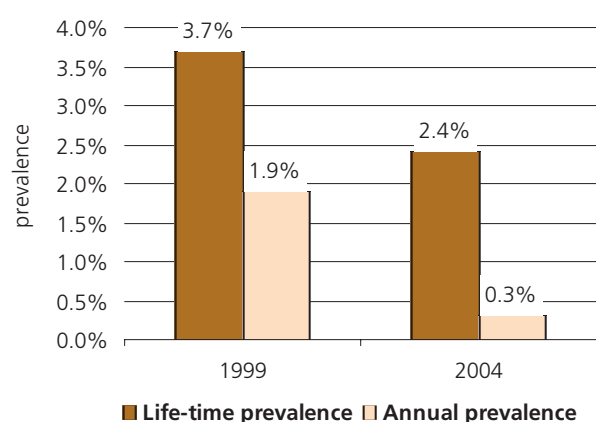
Fig. 61: Life-time prevalence of cocaine use among Brazilian students, age 10-18

* unweighted average of results in 10 provincial cities

Source: CEBRID, Levantamento Nacional Sobre o Uso de Drogas Psicotrópicas entre Estudantes do Ensino Fundamental e Médio da Rede Pública de Ensino nas 27 Capitais Brasileiras, 2004

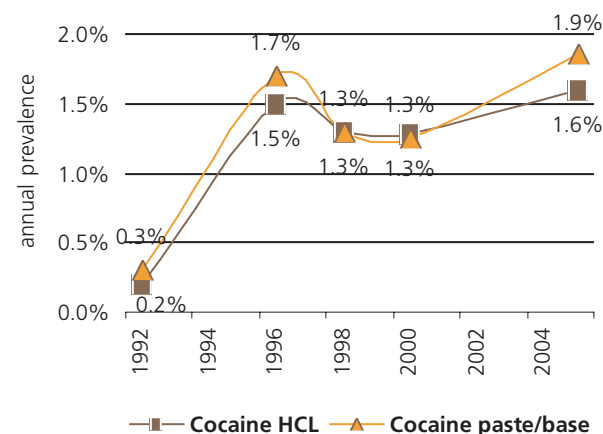
Data provided by Argentina even shows a massive decline in cocaine use between 1999-2004. Even though some of the decline may be due to methodological differences in the two surveys, it would be extremely unlikely that cocaine consumption, in reality, had increased. The Argentine authorities, however, did not see the decline in 2004 and based on other indicators reported an overall stable trend.

All of these encouraging trends are probably associated with both intensified prevention efforts in the countries concerned as well as with the overall stabilization of cocaine production in the Andean countries over the past few years.

Fig. 62: Cocaine use in Argentina among the general population (16-65), 1999-2004

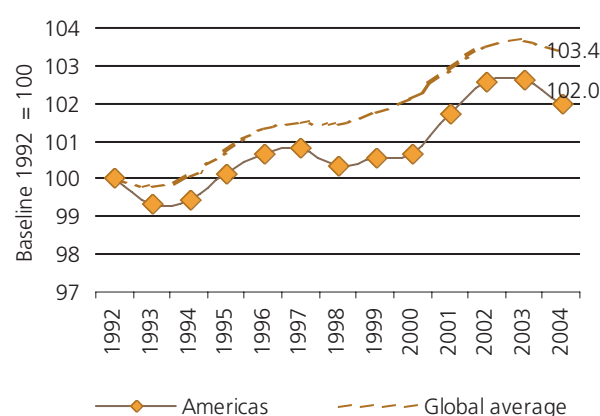
Source: UNODC, Annual Reports Questionnaire Data.

Data for Bolivia are not really an exception of these explanations, even though they show a slightly different pattern. Following strong increases in the early 1990s until 1996, cocaine prevalence rates declined and started increasing again only over the 2000-2005 period. The abuse trend is largely in line with domestic cocaine production.

Fig. 63: Annual prevalence of cocaine use in Bolivia (age 12-50), 1992-2005

Source: CELIN, Investigación: Estudio Comparativo Consumo de Alcohol, Tabaco, Cocaína, y otras Drogas en Bolivia, 1992-1996-1998-2000-2005, Bolivia 2005.

The net result of these trends was an increase of cocaine use over the last decade in the Americas that was below the global average. In 2004, cocaine use was perceived by experts as declining.

Fig. 64: Cocaine use perception trends: Americas

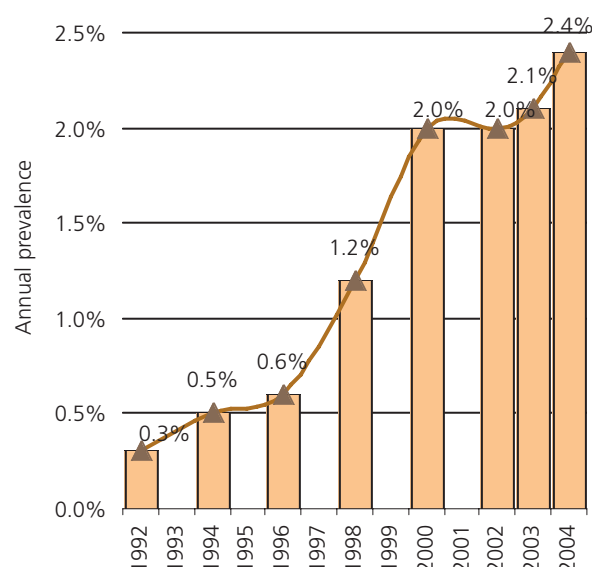
Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Cocaine use in Europe is heading upwards

Cocaine use levels in Europe have clearly shown upwards over the last decade, including in England & Wales and Spain, the countries with the highest cocaine prevalence rates in Europe. Annual prevalence of cocaine use in Spain rose from 1.6 per cent of the population age 15-64 in 1997 to 2.7 per cent in 2003. Germany experienced an increase in cocaine use from 0.2 per cent in 1990 to 1 per cent of the population age 18-64 in 2003. Data for England and Wales show an increase in cocaine prevalence from 0.3 per cent in 1992 to 2.4 per cent in 2004. For England and Wales, however, indications are that a peak may have been reached.

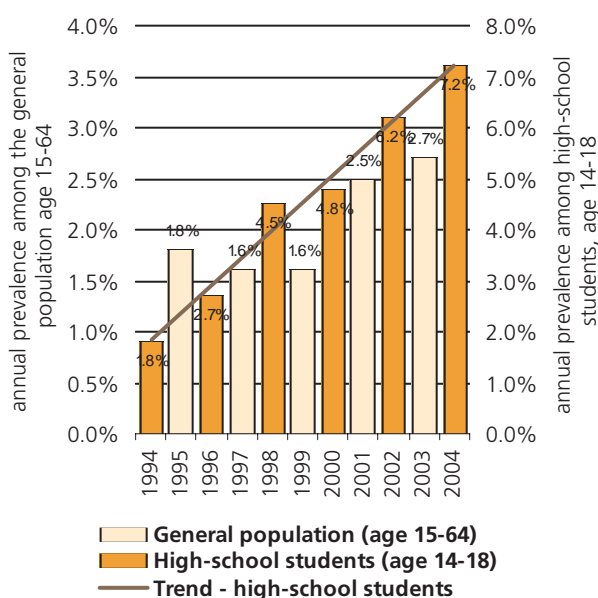
These increases are also reflected in cocaine use perception trends which has shown upwards for Europe over the last decade, including 2004. No deceleration in the upward trend was noticed in 2004.

Fig. 66: England & Wales: annual prevalence of cocaine use among the general population (age 16-59), 1991/92 - 2003/04



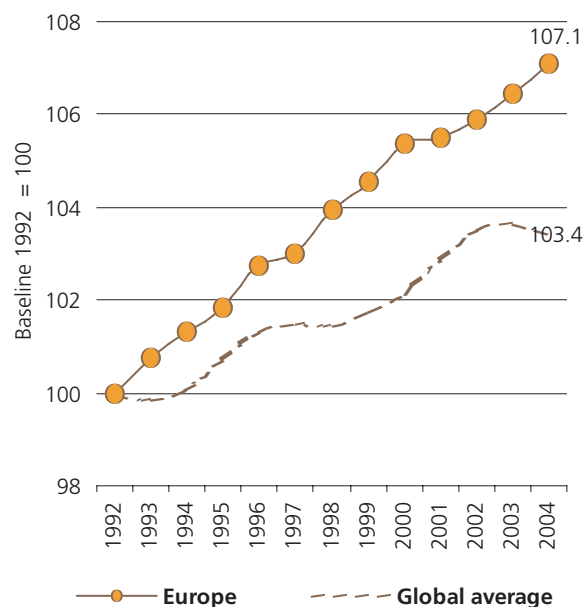
Source: UK Home Office, British Crime Survey.

Fig. 65: Annual prevalence of cocaine use in Spain among the general population and among secondary school students, 1994-2004



Source: Ministerio de Sanidad y Consumo, Plan Nacional Sobre Drogas

Fig. 67: Cocaine use perception trends: Europe



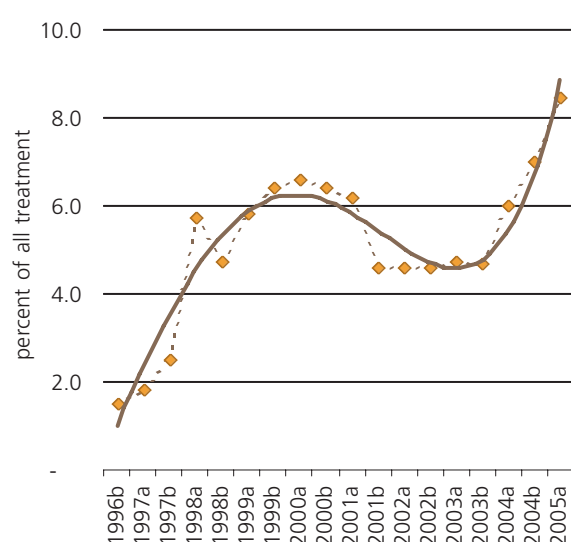
Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Cocaine use is increasing in Africa

UNODC's perception trends suggest that cocaine use was also growing faster in Africa than at the global level over the 1992-2004 period, and cocaine use was apparently increasing again in 2004 following a few years of stabilization/decline. The reported increases in cocaine use were mainly from countries in southern Africa and countries in western Africa, reflecting, inter alia, the increased use of Africa for the transshipment of cocaine to Europe.

Treatment data for South Africa show these trend patterns very clearly. Following very little cocaine related problems in the early 1990s to the mid 1990s, treatment for cocaine increased from 1.5 per cent of all treatment demand in the second half of 1996 to around 6 per cent over the 1999-2000 period, then falling to less than 5 per cent over the 2001-2004 period before rising again strongly to 7.5 per cent in 2004 and 8.5 per cent in the first two quarters of 2005. The absolute numbers of people treated for cocaine abuse in South Africa followed a similar pattern as shown in the graph below. Excluding alcohol, the increase in cocaine was from 7 per cent in the second half of 1996 to 16 per cent of treatment demand in the first two quarters of 2005.

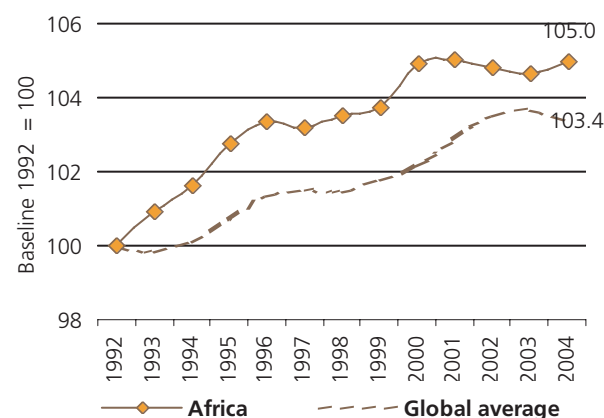
Fig. 68: South Africa - cocaine as primary drug in treatment demand*



* unweighted average of treatment (incl. alcohol) in 6 provinces.

Source: SACENDU, Research Brief, Vol. 8 (2), 1995.

Fig. 69: Cocaine use perception trends: Africa



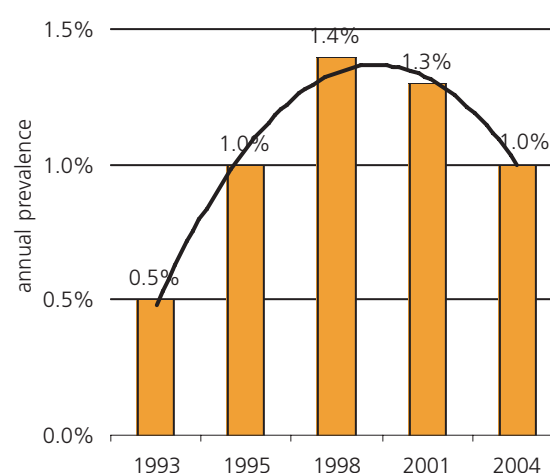
Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Cocaine use is largely stable in Asia and declining in Oceania

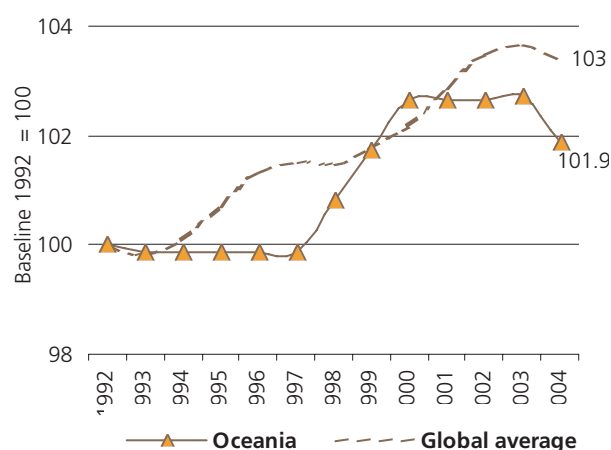
Following increases reported over the 1997-2000 period, cocaine use remained stable in the subsequent years and was reported to have declined in 2004 in Oceania. The overall increase since 1992 appears to have been less than at the global level.

These trends are also reflected in the household surveys conducted by the Australian authorities.

Fig. 70: Cocaine use in Australia, 1993-2004 (population 14 years and above)



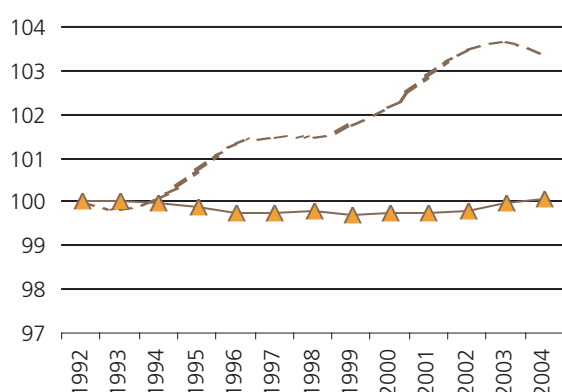
Source: AIHW, 2004 National Drug Strategy Household Survey, Canberra, April 2005.

Fig. 71: Twelve year cocaine use, as perceived by experts: Oceania

Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Stable trend of (very limited) cocaine use in Asia – but some early indications that this could change

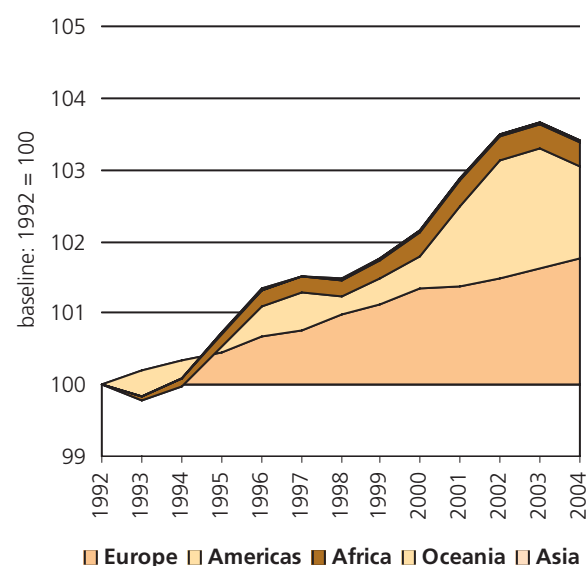
Cocaine use in Asia has been stable and hardly been noticeable at all over the last decade. However, there are some early indications that this might change in the foreseeable future. In 2005 and 2006 limited but rising amounts of cocaine were trafficked to some countries and areas in South-East Asia including Hong Kong SAR of China and China, and reports of the dismantling of some organized crime networks dealing in cocaine were received.

Fig. 72: Twelve year cocaine use, as perceived by experts: Asia

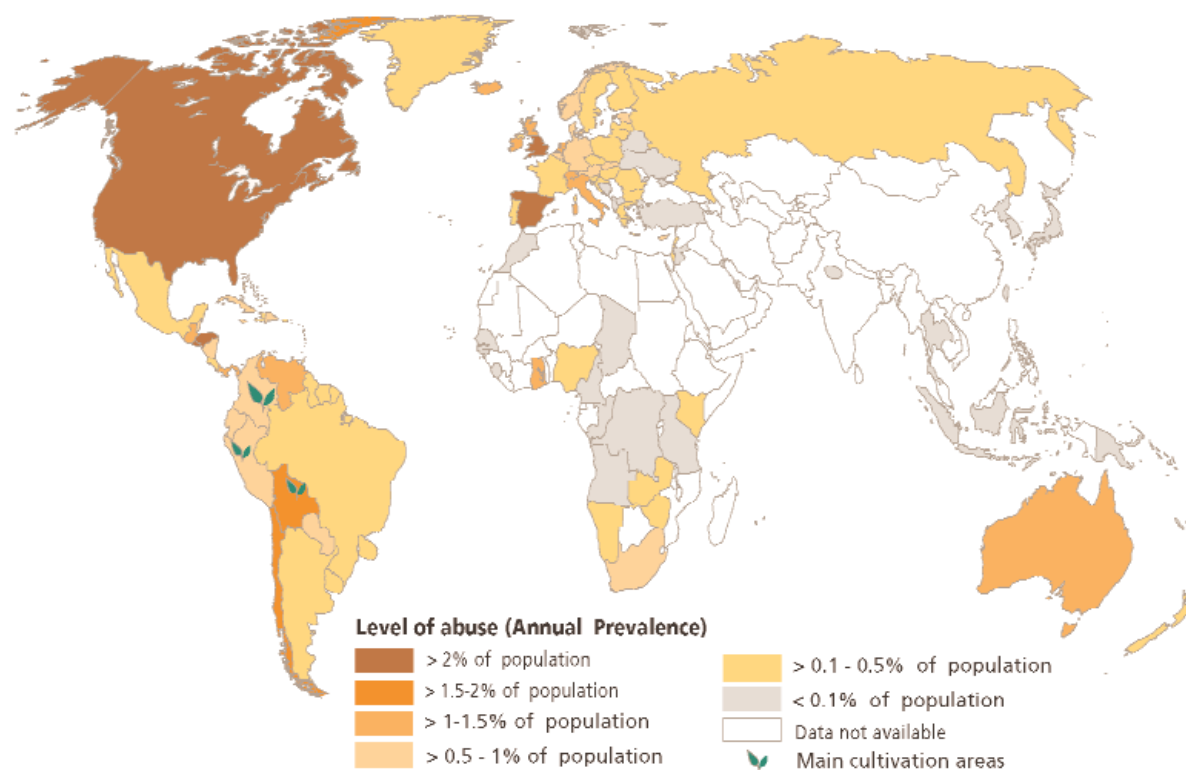
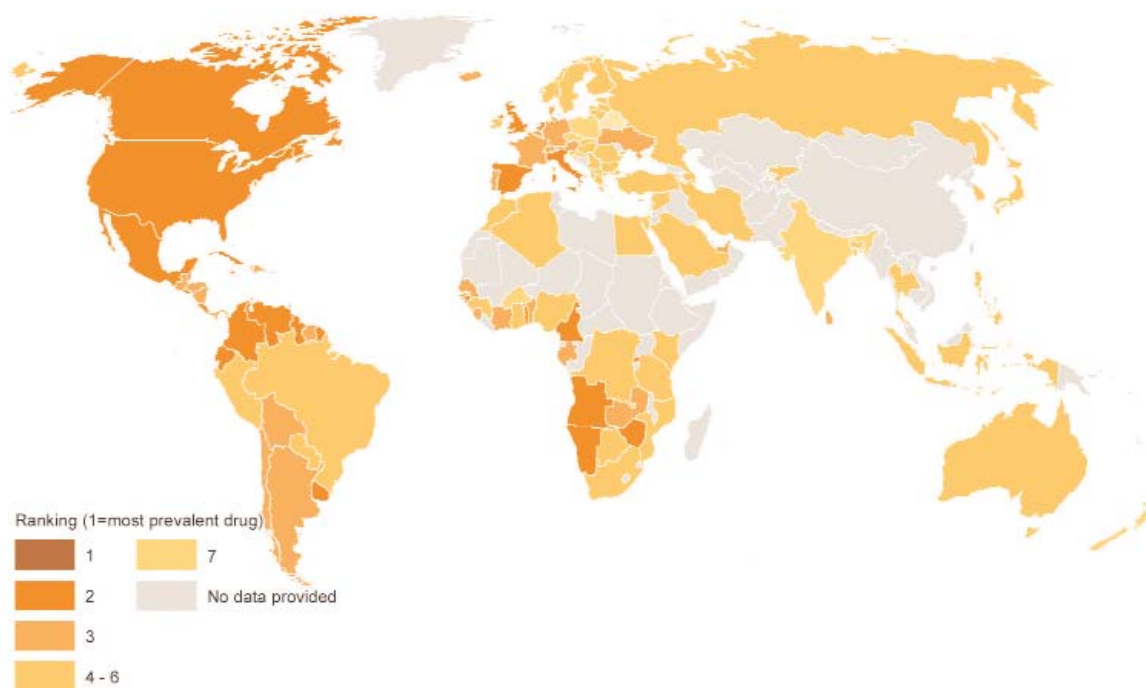
Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Overall increase of drug use perception indicator mainly due to rising cocaine use in Europe

Aggregating the various regional perception trends into the overall drug use perception indicator by region shows that Europe primarily fuelled the upward trend of this indicator over the last decade, followed by the Americas (mainly countries of South America, the Caribbean and Central America). In 2004, the perceptions of rising levels of cocaine use gave way to reports of stabilization or decline in a number of American countries, thus prompting the overall cocaine use perception indicator to decline while the upward trend in Europe continued unabated.

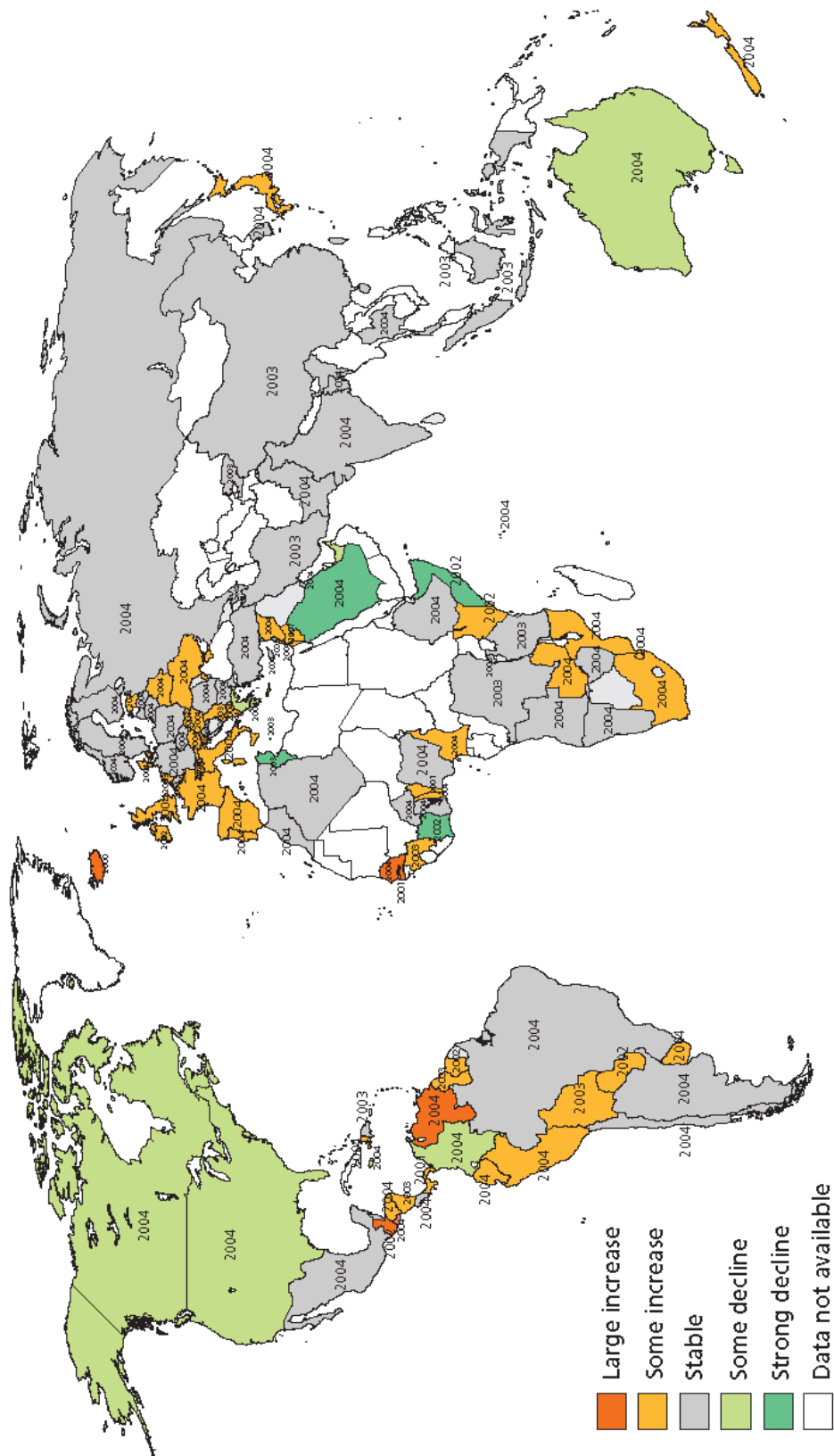
Fig. 73: Twelve year cocaine use, as perceived by experts: overall trend

Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Map 12: Use of cocaine 2003 - 2005 (or latest year available)**Map 13: Ranking of cocaine in order of prevalence in 2004**

Sources: UNODC Annual Reports Questionnaires data, SAMSHA US National Household Survey on Drug Abuse, Iranian Ministry of Health, Rapid Assessment Study and UNODC ARQ, Council of Europe, ESPAD.

Map 14: Changes in consumption of cocaine, 2004 (or latest year available)



Sources: UNODC Annual Reports Questionnaires data, UNODC (Regional Centre Bangkok) Epidemiology Trends in Drug Trends in Asia (Findings of the Asian Multicity Epidemiology Workgroup), December 1999, National Household Surveys submitted to UNODC, United States Department of State (Bureau for International Narcotics and Law Enforcement Affairs) International Narcotics Control Strategy Report, 1999; Bundeskriminalamt (BKA) and other Law Enforcement Reports, SACENDU (South African Community Epidemiology Network) July - December 1998; UNODC and Ministerio de Educacion, Estudio Epidemiológico 1999, CEDRO, Epidemiología de Drogas en la población urbana Peruana - 1995, INCB, Annual Report for 1999, CEBRID, Levantamento Nacional Sobre o Consumo de Drogas Psicotrópicas Entre Estudantes de Ensino Fundamental e Médio da Rede Pública de Ensino nas 27 capitais Brasileiras, 2004.