

SUMMARY FACT SHEET – COLOMBIA COCA CULTIVATION SURVEY, 2020

	2019	Change (%)	2020
Net coca cultivation area calculated on 31 st December (rounded to the nearest thousand) ¹	154,000 hectares	-7	143,000 hectares
Pacific region	57,897 hectares	-12	50,701 hectares
Catatumbo region ²	41,749 hectares	-4	40,116 hectares
Central region	20,335 hectares	24	25,221 hectares
Putumayo – Caquetá region	29,484 hectares	-25	22,041 hectares
Meta – Guaviare region	4,585 hectares	-3	4,462 hectares
Orinoco region	245 hectares	-51	121 hectares
Amazon region	173 hectares	-31	119 hectares
Sierra Nevada region	7 hectares	-71	2 hectares
Average fresh coca leaf yield ³	5.8 mt/ha/year	10	6.4 mt/ha/year
Potential fresh coca leaf production ³	993,100 mt (872,300 mt – 1,170,900 mt)	0.4	997,300 mt (874,300 mt – 1,180,500 mt)
Potential cocaine hydrochloride (100% purity) production	1,137 mt (999 mt – 1,340 mt)	8	1,228 mt (1,077 mt – 1,454 mt)
Average potential cocaine hydrochloride/hectare harvested ³	6.7 kg/ hectare harvested	18	7.9 kg/ hectare harvested
Cocaine seizures ⁴	428,418 kg	18	505,683 kg
Illegal laboratories destroyed ⁵	5,485	-5	5,226
Eradication advanced by the public force ⁶	94,606 hectares	38	130,147 hectares
Reported voluntary manual eradication of illicit crops in the National Substitution Program - (PNIS)	6,765 hectares	-90	702 hectares

¹ This corresponds to the area with coca found on December the 31st, 2019, vis-à-vis December the 31st, 2020.

² Prior to 2018, Catatumbo region (Norte de Santander and Cesar) was considered as part of the Central region (Antioquia, Córdoba, Bolívar, Santander, and Boyacá). Since 2018, the results of the Catatumbo region are presented separately.

³ The national average yield per hectare per year and the potential cocaine production per hectare harvested are calculated from the productive area during the year (AP).

⁴ Cocaine seizures include those cocaine hydrochloride seizures that were the results of actions by the control authorities in the national territory, as well as the results of international operations or current Maritime Agreements. Values for the year 2019 were updated to in comparison to the 2019 report, to reflect latest data.

⁵ This only includes cocaine laboratories and other structures set up to produce basic cocaine paste and cocaine base. Values for the year 2019 were updated to in comparison to the 2019 report, to reflect latest data.

⁶ Values are verified and updated on a continuous basis, which may have an impact on data and trends previously reported. Values for the year 2019 were updated to in comparison to the 2019 report, to reflect latest data.

EXECUTIVE SUMMARY

The area under coca cultivation decreased for the third year in a row. However, coca cultivation remains at high levels

The area under coca bush cultivation reached 143,000 hectares as of 31 December 2020, 7% less than in 2019 and 17% less than in 2017– the highest point in the historical series. Thus, a downward trend was maintained for the past three years, which began with a slight 1.5% decrease between 2017 and 2018. Despite the continued reduction, the area under coca cultivation in 2020 is among the five highest levels since beginning of the monitoring.

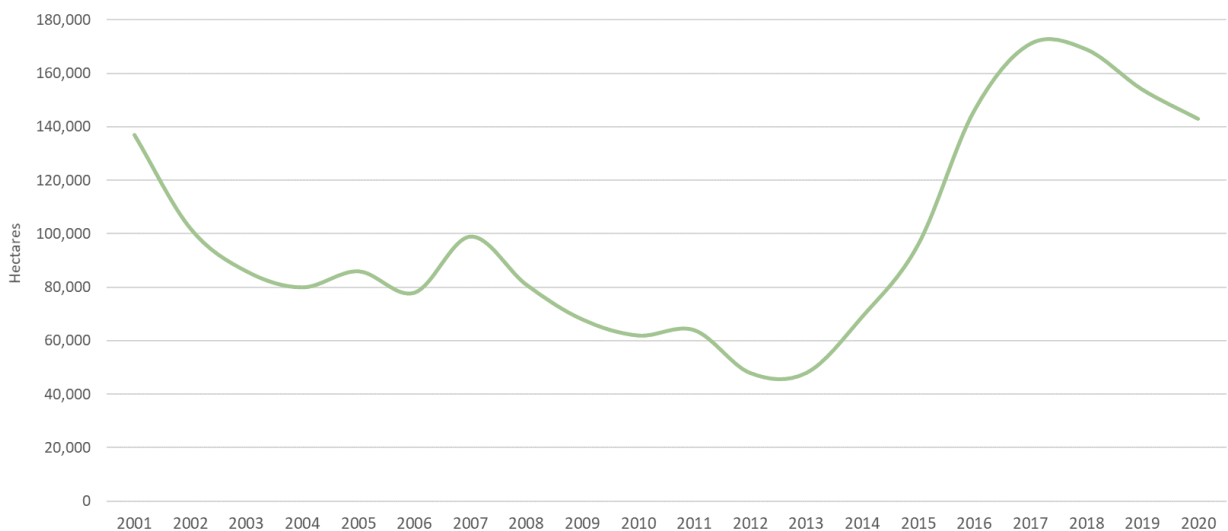


FIGURE 1. AREA UNDER COCA CULTIVATION - 2001-2020

The systematic monitoring of coca crops began in 2001, when UNODC reported 137,000 ha of coca cultivated in Colombia. Coca cultivation reduced to 86,000 ha between 2001 and 2003; remained relatively stable from this year to 2007, and then further decreased until it reached the lowest point in the historical series in 2013 with 48,000 ha. The trend was reversed between 2013 and 2017, when the area under coca cultivation reached 171,000 ha.

The downward trend that began in 2017 is related to sustained reductions mainly in Nariño, Putumayo, and Caquetá in the south of the country and in the eastern region – including Meta, Vichada, and Guainía. Of the 20 departments affected by coca crops, only four (Antioquia, Córdoba Bolívar, and Chocó) showed a significant increase in 2020; in fact, the coca cultivation in the Central region – which includes Antioquia, Córdoba, and Bolívar – increased by 24%.

In 62% of the territory that showed a downward trend no interventions to reduce coca cultivation were recorded, which indicates that there are multiple factors that drive the downward trend.

The productive enclaves⁷ occupied 16% of the affected territory in 2020 and contained 40.5% of the coca cultivated

A trend towards the concentration of coca cultivation consolidated over the last five years – particularly in border areas and in geostrategic areas for cocaine trafficking. A productive enclave is established when a concentration of area under cultivation stabilizes for four years or longer. Seven productive enclaves were detected in 2019, concentrating 34% of the entire area under coca cultivation; by 2020 this percentage increased to 40.5%.

Greater productivity and increased manufacture of cocaine continued to be observed in the enclaves, where those involved seek not only to optimize the cultivation phase, but also the transformation of leaf into cocaine and trafficking abroad. Of the seven enclaves identified in 2019⁸, Argelia-El Tambo, Putumayo border and Valdivia-Tarazá-Cáceres show an increase in the area under coca cultivation. There was both an increase in the total area (16% as compared to what was reported in 2019) and an expansion of the territories affected (more than 50% of that defined in 2019) in Valdivia-Tarazá-Cáceres.

Two more enclaves were identified in 2020 than in 2019; the first in the San Pablo-Taracué sector (Bolívar) and the second in Orito-Vides (Putumayo) where conditions of permanence, persistence and concentration of cultivated hectares emerged that define a productive enclave.

Nearly half of the coca is in areas of interest for conservation

Coca cultivation increased in Natural National Parks and continues to be concentrated in territories with special regulations for its control – such as indigenous reservations, lands of the Afro-descendant communities and forest reserve areas under the Second Act.

Almost half of all coca cultivated in Colombia is located in special management zones. Although the presence of coca decreased in community councils and reservations, 48% of the councils and 20% of the indigenous reservations continue to be affected by coca crops. *Pro-Defensa del Río Tapaje* indigenous reservation continues to be the community council strongest affected.

A slight increase of area under coca cultivation was observed in National Natural Parks. Catatumbo-Barí continues to be the natural national park strongest affected; Paramillo – located in the Central region – has been the second most affected National Natural Park in 2020, and surpassed Sierra de la Macarena that held this position in 2019.

⁷ Productive enclaves are areas where a high cultivation density of hectares of coca bush per square kilometer has persisted for at least four out of the last five years.

⁸ Tumaco border, Putumayo border, Argelia-El Tambo, El Naya, El Charco-Olaya Herrera, Catatumbo and Valdivia-Tarazá-Cáceres.

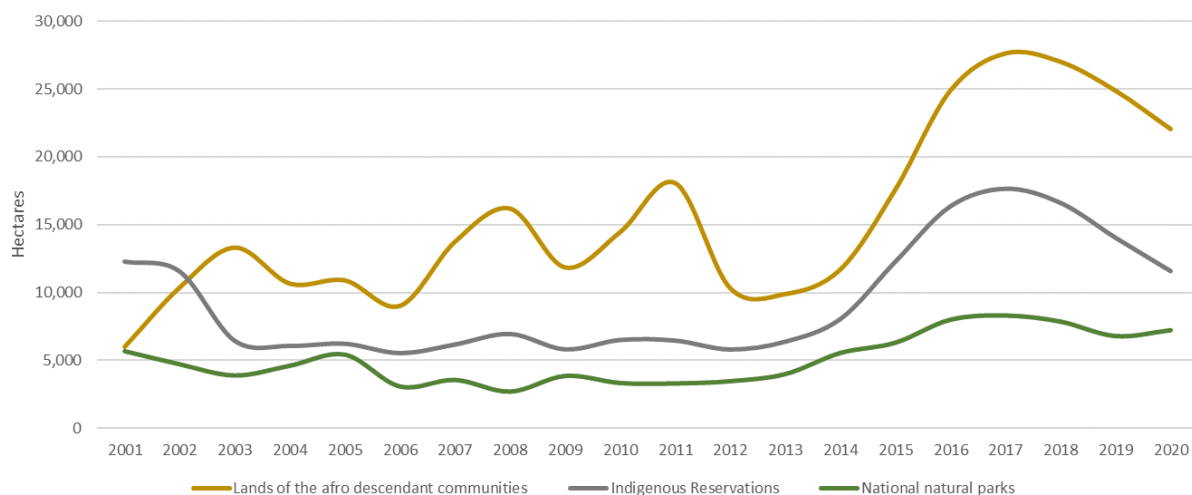


FIGURE 2. AREA UNDER COCA CULTIVATION IN NATIONAL NATURAL PARKS, INDIGENOUS RESERVATIONS AND LANDS OF THE AFRICAN-DESCENDANT COMMUNITIES

More cocaine in less area: the potential production of pure cocaine hydrochloride increased by 8% when compared to 2019

Starting from 2016, increases in cocaine production ceased to depend exclusively on increases in area under coca cultivation. Since then, improvements have been observed in agricultural practices used by farmers on the fields, and in on-site alkaloid extraction capabilities. In addition, cocaine hydrochloride production laboratories (production complexes) reportedly have become larger with increased efficiency in conversion, use of chemical substances, processing time, and employment of personnel. Thus, as of 2016, SIMCI/Colombia has found a simultaneous trend towards higher batch productivity and higher capacities of manufacturers to extract cocaine. It has been estimated that cocaine hydrochloride production per productive hectare per year (national average) went up from 6.5 kg/ha in 2016 to 7.9 kg/ha in 2020⁹, a 23% over that period.

An increase in coca leaf yields was detected in the Catatumbo and Central regions in 2020, with an average of 5.9 mt/ha/year¹⁰ and 7.7 mt/ha/year¹¹, respectively, when compared to the latest available measurements available from 2015. It is important to note that this increase did not necessarily occur in the last year, it rather is a cumulative effect that became visible with the update of the data.

These results suggest improvements in agricultural practices, which was evidenced by: (i) an observed decrease in plant density on the fields to less than 10,000 plants per hectare¹²; (ii) the

⁹ Estimate taking as reference the relationship between the potential of pure cocaine hydrochloride (1,228 mt) and the productive hectares during the year (154,930 hectares).

¹⁰ As for Catatumbo, it is reported that leaf yield went from 5.4 mt/ha/year in 2015 to 5.9 mt/ha/year in 2020.

¹¹ The leaf yield went from 4.3 mt/ha/year in 2015 to 7.7 mt/ha/year in 2020 in the central region.

¹² Productivity studies have reported a decrease in planting density since 2005; it went from 11,000 plants/ha in 2005 to 9,800 plants/ha in 2015 in the Central region. In 2020, it is estimated at 9,160 plants. In contrast, the crop density went from 14,000 plants per hectare in 2005 to 10,519 plants per hectare in 2015 and in 2020 to 9,800 plants per hectare in Catatumbo.

observation that most of the lots are between 2 to 4 years old, i.e. in their most productive ages: according to reports by farmers, the plants were pruned (this practice consists of cutting the plant to encourage foliar production) or replaced with other varieties; and (iii) renewal of coca bush with more productive cultivars.

The potential production of pure cocaine hydrochloride was estimated at 1,228 metric tons (mt)¹³ in 2020, which is equivalent to 1,444 mt of cocaine of export quality. At the national level, the annual yield of coca leaf per hectare increased by around 10%, going from 5.8 mt/ha/year in 2019 to 6.4 mt/ha/year in 2020.¹⁴

The COVID-19 pandemic temporarily caused disruptions in the coca and cocaine market, but a recovery was observed towards the end of the year

Between September and December 2020, SIMCI/Colombia collected information from key informants in coca cultivation areas in Norte de Santander, Nariño, Putumayo, Cauca, Caquetá, Meta, Guaviare, Bolívar and Antioquia. The interviews with agricultural producers explored the effects of COVID-19 on the cultivation and transformation of coca, and on local markets. The information reflects general trends in the areas where SIMCI/UNODC carried out field operations¹⁵.

The sources consulted indicated that coca markets have been most affected by during the early stages of the pandemic. Between March and June 2020, movement restrictions in the country increased the risk of entering growing areas, which in turn led to a decrease in the prices of cocaine paste/base due to the absence of buyers and a subsequent disincentive to sell the leaf. For example, the price of the leaf and its derivatives dropped in Cauca: the variety of Chiparra leaf (one of the best priced in the region) was sold at COP \$ 2,400/kg (USD \$ 0.65/kg), whilst the average price in the Pacific (the region where the department of Cauca is located) ranged between COP \$ 2,400/kg and COP \$ 3,000/kg in the last three years.

Additionally, in some areas where coca is grown illegal armed groups-imposed restrictions on entering the territory and even forced the population to comply with the curfews to avoid infections. For instance, absence of buyers influenced the reduction between 30% and 50% in the price of basic cocaine paste. Basic cocaine paste in Antioquia was sold at COP \$ 1,200,000/kg (USD \$ 324.96/kg) and in Sur de Bolívar it was sold at COP \$ 1,400,000/kg (USD \$ 379.12/kg) whilst the average price in this region ranged between COP \$ 1,600,000/kg and COP \$ 2,100,000/kg in the last three years.

¹³ Production levels of pure cocaine hydrochloride can range from 1,077 mt to 1,454 mt.

¹⁴ It should be noted that the results of the yields of the basic paste and leaf used in the estimates of cocaine production potential are subject to the availability of data, within the framework of productivity studies. These studies are updated by region every four years; for this reason, the effect of the increase in production factors is analyzed in the light of the latest available update. In this sense, an estimate of leaf yields is made at the national level, based on regional reports consolidated to date.

¹⁵ SIMCI/UNODC collected conjunctural information in the pandemic period in the context of the studies of "Production and Yield of Coca Crops in 2020" "Measurement of licit economies in coca growing areas" and "Diagnosis of needs to confront transnational organized crime and on the border between Colombia and Ecuador".

Due to the absence of buyers, farmers processed themselves or outsourced processing coca leaves to avoid losing the harvests. Once the cocaine paste was obtained, the farmer had to choose to go out to find buyers in nearby villages or cities (subject to the reduction of prices) or to store the drug until buyers would arrive in the area.

The coca market gradually recovered between July and September 2020. With increased accessibility of the highways and the increased mobility of the population, buyers managed to gradually enter growing areas again and resumed trafficking. However, despite the aforementioned recovery the prices of alkaloids remained below their levels recorded before the pandemic. Because of this, agricultural producers continued to cultivate, process and sell the alkaloid in nearby populated centers, and a gradually increasing number of buyers could take advantage of the low prices.

The stabilization of the market for coca and its derivatives in cultivation areas took place between October and December 2020. During this period, the prices of coca leaf and basic paste recovered, which allowed producers to clear their inventories, thereby minimizing their losses.

In the Catatumbo region the market dynamics were different from the rest of the territories surveyed. Local conditions did not affect the movement of buyers in the area; therefore, the prices of cocaine paste remained stable during the pandemic – at around COP \$ 2,400,000 per kilogram (USD \$ 646.92/kg). Only in the last quarter an increase was observed, and prices stabilized COP \$ 2,800,000 per kilogram (USD \$ 758.24/kg).

The presence of illegal armed groups continued to consolidate in the territories affected by coca

In some of area where coca is being cultivated, the Ombudsman's Office alerted of actions of illegal armed actors in the context of the health emergency derived from the COVID-19 pandemic¹⁶. The reports included measures adopted by illegal armed groups to prevent the spread of the virus, such as mandatory preventative isolation, restrictions on mobility, and serious attacks against the life and integrity of the community – including selective and multiple homicides.

At the beginning of the pandemic, violence of illegal armed actors took place mainly in form of threats against the civilian population – particularly in contexts where their control was hegemonic or coexisted with another illegal armed group. According to the cases monitored by the Ombudsman's Office, the armed groups-imposed norms of conduct on the civilian population, regulation of commercial and leisure establishments, price control on food and health elements such as alcohol. In addition, illegal armed groups established check points on land and river access roads as a strategy to restrict the flow of people, food, and medicine.

Based on the information generated by the Ombudsman's Office¹⁷, it was possible to identify the following features in the actions of the illegal armed actors:

¹⁶ Office of the Ombudsman. Early Warning System. ATN 018-2020. See at: <https://alertasstg.blob.core.windows.net/alertas/018-20.pdf>

¹⁷ Ibid.

- Strengthening and consolidation of Ex-FARC dissident groups operating as independent groups, with capability of territorial control.
- Presence of groups expressly dedicated to the generation of illegal income, highlighting the influence of Mexican cartels such as Sinaloa and Jalisco Nueva Generación, with direct impact on various links in the drug trafficking economy – particularly in regard to sowing and transport of the alkaloid with destination to international markets.

Impact on access to chemical substances at the beginning of the pandemic

Due to the isolation measures and mobility restrictions, the diversion of substances and supplies from the legal industry was affected in the second quarter of 2020. It has been reported that criminal networks resorted to the supply of inputs from clandestine manufacturing of controlled chemical substances, including fuels¹⁸. Media report established that some of the effects of COVID-19 could be related to shortage of production chains¹⁹ and the impact of distribution processes.

Illegal groups found supply routes blocked, or had difficulties in diversion from industrial cities, caused by the confinement and by increased police deployment. The pandemic has also created difficulties for illicit drug producers: criminal groups – especially in eastern Colombia – have suffered from shortage of gasoline which in the past used to be smuggled in from Venezuela²⁰.

Cocaine seizures increased

Information on seizures, provided by the Colombian Drug Observatory and the Ministry of National Defense, indicated that international trafficking by land was considerably reduced due to the closure of the borders (from March 2020 to March 2021) that had led to increased controls on border roads. This caused an increase in cocaine trafficking by sea, especially by means of semi-submersibles, and by using containers alongside legal cargo and speedboats heading towards Central America.

During the second half of 2020 – when the National Government decided to make confinement conditions more flexible – the authorities registered a greater number of drug seizures of drugs found camouflaged in trucks transporting food or medicinal supplies. Since then, greater control of maritime traffic led to large seizures that were destined for Europe and North America, causing difficulties for drug trafficking groups to use traditional trafficking routes through the Pacific and the Caribbean²¹. As a consequence of the increased controls, seizures of cocaine hydrochloride in 2020 increased by 18% compared to 2019.

¹⁸ National Police of Colombia, Antinarcotics Directorate, Strategic Center for Studies against drug trafficking: "Incidence of the COVID-19 quarantine in drug trafficking", 2020.

¹⁹ <https://www.eltiempo.com/justicia/conflicto-y-narcotrafico/coronavirus-y-cuarentena-damienos-en-el-narcotrafico-y-precio-de-drogas-en-colombia-492658> By surrendering the drug, resorting to chemical hallucinogens made almost by hand at home, and delivering it door-to-door, narcotics distributors try to keep their illegal businesses affected by the restrictions and controls established as a result of the coronavirus.

²⁰ Report on drug use in quarantine: informedrugscuarentena-3_compressed ATS.pdf

²¹ National Police of Colombia, Anti-Narcotics Directorate, Strategic Center for Studies against Drug Trafficking, "Incidence of COVID-19 quarantine in drug trafficking", 2020.

Implications in matters pertaining to public policy

Productive enclaves affect the territory beyond rural areas

The productive enclaves have effects beyond the production of cocaine. The size of the illicit market and its impact on security in the territories affected by enclaves has an impact on the wider area, both in terms of legal and illegal activities. Populated centers that connect rural areas affected by coca leaf and cocaine production with wider markets are at high risk of being permeated by illegality. Thirty-one population centers were identified within the enclaves where legal activities could be increased by the illegal economies associated with cocaine production and all of its related activities.

It is possible to consolidate new coca-free territories

Caldas, Arauca, La Guajira and Cundinamarca stayed free of coca cultivation in 2020. However, five departments that completed seven years with less than 100 ha are still being affected by coca cultivation.

The reason for the persistence of cultivation in these departments seems to be associated with the interaction of security and development problems that cannot be solved simply by eliminating coca from the territory, but require sustainable actions from the institutions, communities and territories.

In 2020, the Government of Colombia's Ministry of Justice and Law initiated a process to declare the Magdalena Medio subregion as a coca-free territory, following the model developed in the department of Caldas. This achievement requires not only the elimination of coca, but also the transformation of territories and institutions as well as the improvement of the living conditions of the communities. This process is expected to be completed in 2021.

The eastern departments of Colombia (Amazonas, Vaupés, Guainía and Vichada) are in a similar situation to that of Magdalena Medio. For this reason, they could advance towards their consolidation as coca-free territories.

First advances in the implementation of the "Territorialization" pillar of the Ruta Futuro policy

The *Ruta Futuro* (Pathway to the Future) policy suggests that intervention strategies are adapted to the conditions of the territory, and to take advantage of their particular characteristics to guarantee sustainability. In other words, the institutional offer should be diversified to face the problem of coca cultivation. The following achievements²² have been obtained in the implementation of the *Ruta Futuro* policy – inter alia:

- Diagnosis and participatory construction of action strategies on the drug problem with eight indigenous communities of the Inga and Awá peoples in the Putumayo department.

²² The link to consult the Inga people's report is <https://www.minjusticia.gov.co/programas-co/ODC/Documents/Publicaciones/Estrategias%20de%20acci%C3%B3n%20sobre%20el%20problema%20de%20las%20drogas.%20Pueblo%20Inga.pdf>. The link to consult the Awá people's report is <https://www.minjusticia.gov.co/programas-co/ODC/Documents/Publicaciones/Estrategias%20de%20acci%C3%B3n%20sobre%20el%20problema%20de%20las%20drogas.%20Pueblo%20Awa.pdf>

This task aided in the definition of action lines vis-à-vis the problem of production, trafficking, and consumption of psychoactive substances. This work provides a replicable model for working with other indigenous peoples and communities in the country.

- Assessment of the social impact of the deprivation of liberty of women for drug-related crimes, which provides elements for the design and adjustment of public policies in relation to this issue.

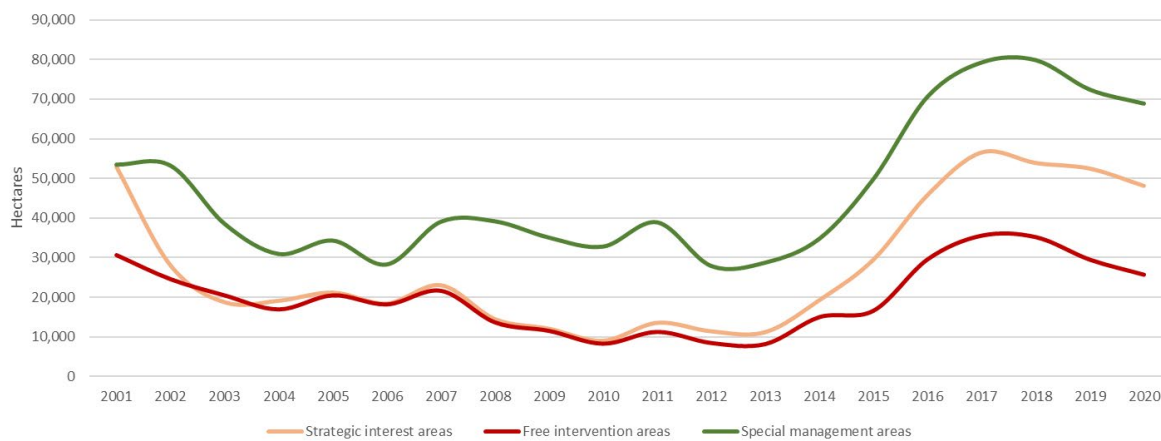


FIGURE 3. HISTORICAL SERIES OF THE AREA WITH COCA 2001-2020 ACCORDING TO CATEGORIES UNDER THE *RUTA FUTURO* POLICY

In accordance with the zoning proposed under the *Ruta Futuro* policy, 18% of the coca is in “free intervention” zones, while 82% thereof is located in zones which require differentiated actions and strategies. The aforesaid special intervention areas were classified into eight categories that include: areas of interest for the conservation of biological and cultural diversity, areas of strategic interest on borders, and proximity to municipal capitals with potential for economic integration. Nevertheless, action strategies remain focused on forced eradication. As a matter of fact, no new families were enrolled in the voluntary substitution program in 2020²³, and the actions under the Territorially Focused Development Programs (PDET) were implemented at the municipal level without necessarily considering the territorial categories within the relevant territories.

²³ In 2020, only voluntary manual eradication actions were carried out by families previously registered in 2019.