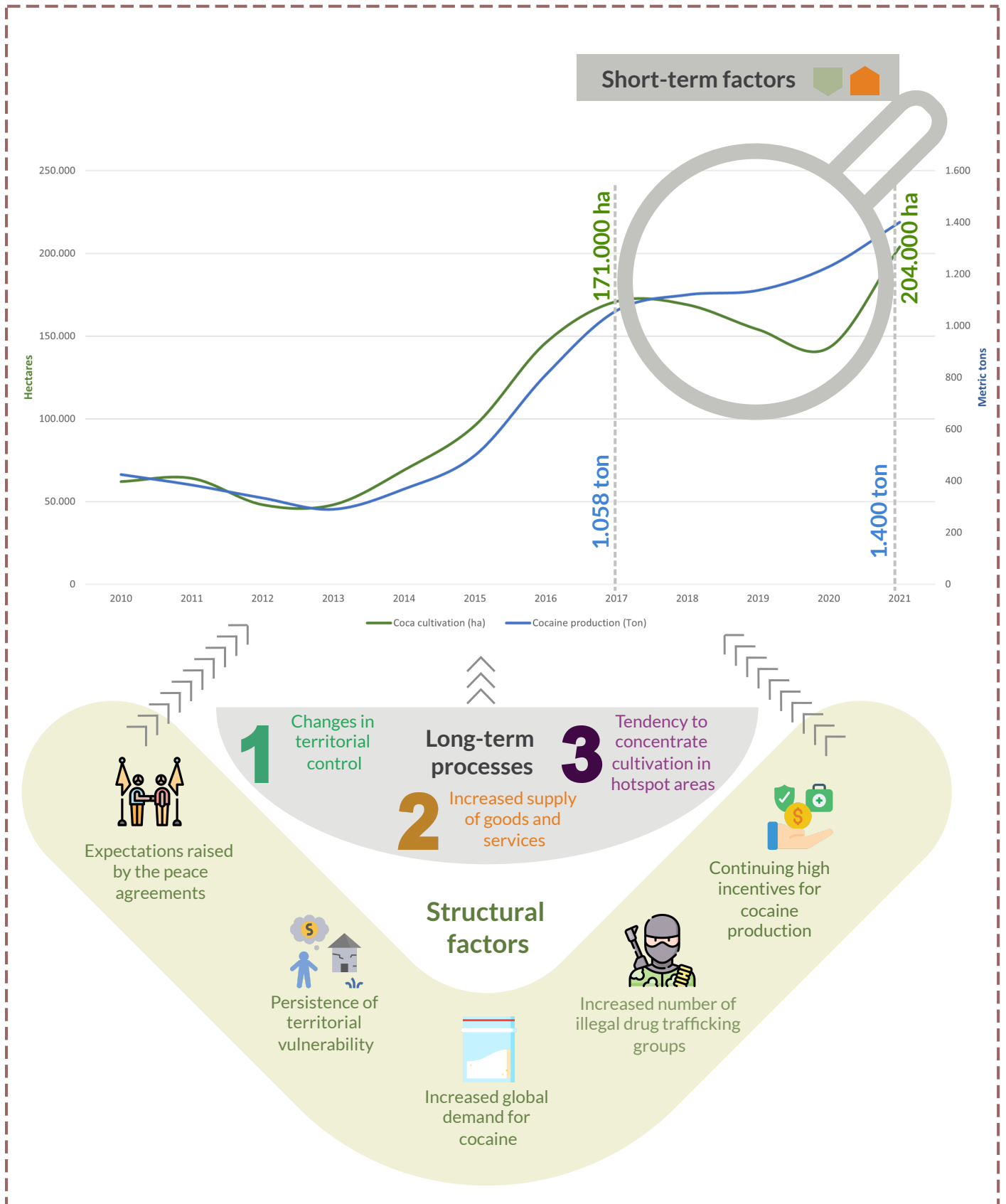


Survey of territories affected by coca cultivation, 2021

Executive summary

In 2021, coca cultivation reached a historical high level in Colombia, breaking the downward trend of the last three years. Also the potential cocaine production reached a historical record high, following the upward trend since 2014. This new situation is the result of the following short- and long-term processes and underlying structural conditions in Colombia.



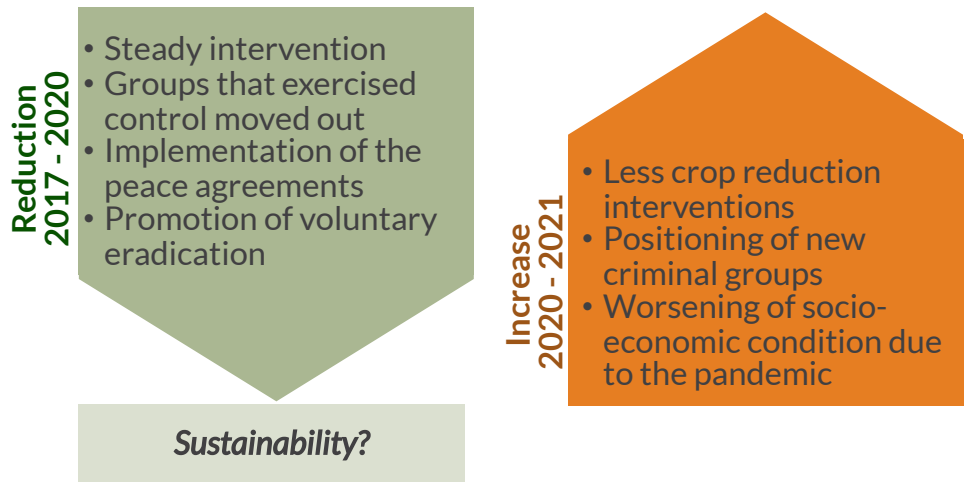
2021 Data



The increase in the coca crops includes new fields that have not yet reached their most productive age, which partially explains the difference between the magnitudes of the increase.

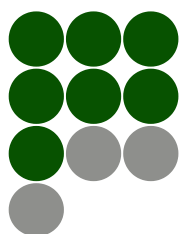
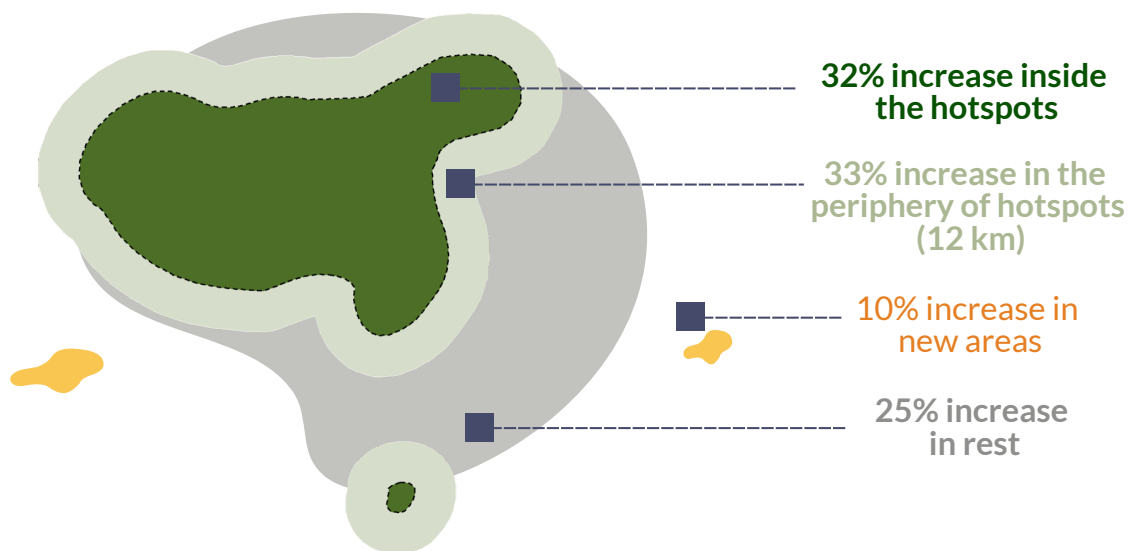


Short-term factors associated with the trend of coca cultivation



Where did the increase of coca cultivation take place in 2021?

In contrast to previous years, coca cultivation increased outside of the coca hotspots (enclaves)

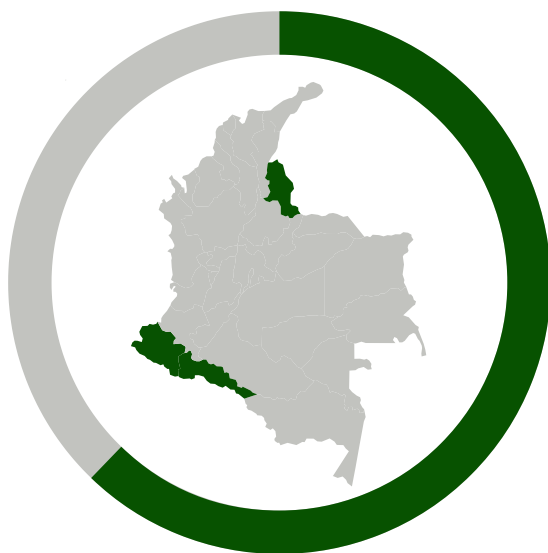


70% of the territory with coca in 2020 experienced an increase in coca cultivation in 2021.

In new areas the increase was sudden and concentrated, Northern Chocó and Cauca could quickly become hotspots.

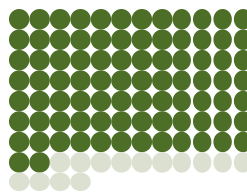
The location of coca cultivation

The location of coca cultivation in Colombia has some particularities.



62 %

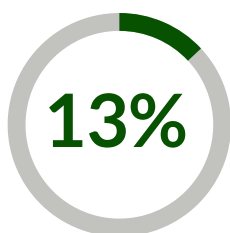
of coca cultivation is concentrated in the departments of Nariño, Norte de Santander, and Putumayo



86.5 % of coca cultivation has been in the same places for the past 10 years.

Out of Colombia's **1,122** municipalities, **181** are affected by coca cultivation, half of the national coca area is situated in **12 municipalities**.

The Tibú municipality ranks first with nearly 22,000 ha of coca cultivation.



13%

of coca cultivation in 2021 was located in areas **close to municipal capitals** where the income from coca can easily become part of the legal economy.



18%

of the increase in coca cultivation took place in the **buffer zones of National Natural Parks**, causing a risk for their conservation.

Coca cultivation threatens the preservation of biological and cultural diversity.

4 %
is located in natural national parks



17 %
is located in forest reserves of the second Act.



52 %

of coca cultivation is located in special management zones.

10 %
is located in indigenous reserves



21 %
is located in Afro-descendant communities



Not only cultivation, but also the manufacturing of cocaine can affect the ecosystems in those zones

Increased efficiency: coca fields continue to produce more leaves and more cocaine

Factors influencing coca crop productivity in 2021



Optimization of the number of plants per hectare



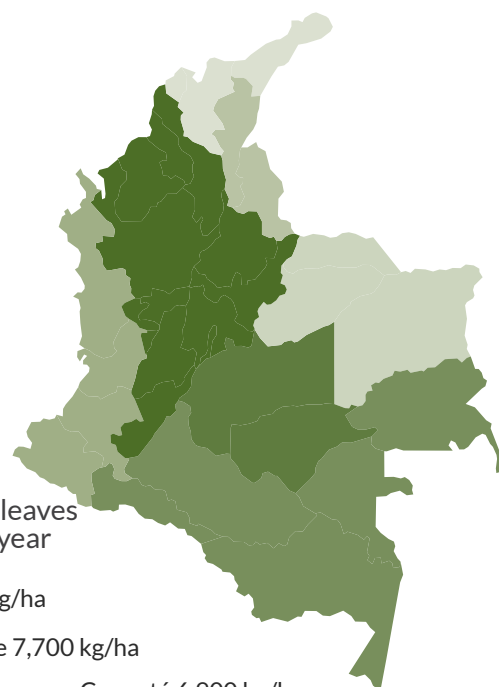
More coca fields were at their most productive ages (2 to 4 years)



Coca plants have been replaced with more productive varieties



More farmers apply agrochemicals and do that more often



Yield of fresh coca leaves per hectare per year

- Central 7,700 kg/ha
- Meta - Guaviare 7,700 kg/ha
- Amazonía, Putumayo - Caquetá 6,900 kg/ha
- Pacífico 6,000 kg/ha
- Catatumbo 5,900 kg/ha
- Orinoquía 4,100 kg/ha
- Sierra Nevada 2,000 kg/ha

Coca - cocaine production		2014	2020	2021
	Annual fresh coca leaf production	308,500 mt	997,300 mt	1,134,700 mt
	Potential cocaine hydrochloride production	368 mt	1,228 mt	1,400 mt
	Average coca leaf yield	4.7 mt/ha/year	6.4 mt/ha/year	6.4 mt/ha/year
	Average potential cocaine hydrochloride	5.6 kg/hectare	7.9 kg/hectare	7.9 kg/hectare

Criminal groups push for cost efficient production to maximize their incomes

The impact of long-term processes on the current state of coca cultivation



1 Changes in the role of illegal armed groups: from hegemony of three predominant groups to more and diverse groups that include drug traffickers and producers.

Dynamics of criminal groups

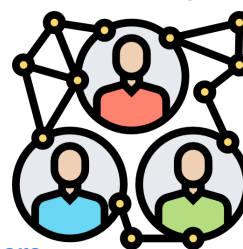


3 predominant illegal armed groups with hegemonic control

More than **60** organized organizations (source: INDEPAZ)

Changing roles and relationships

Local groups that control the territory

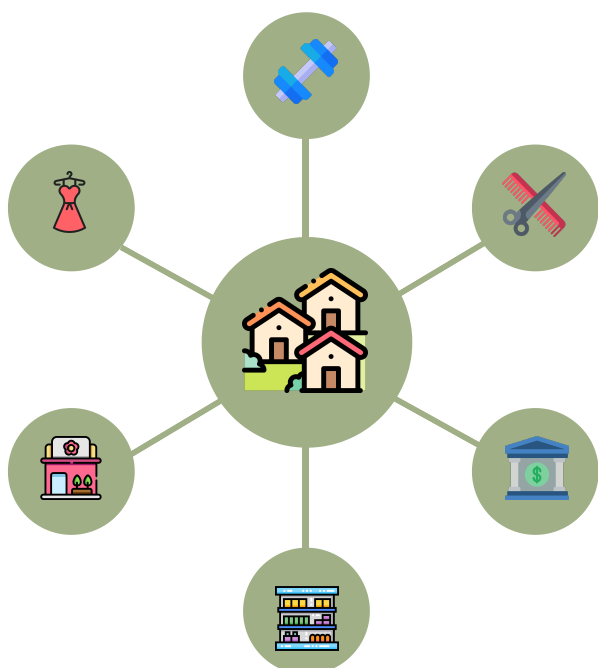


Producers coca/cocaine

Drug Traffickers

Populated places near coca growing areas offer greater supply and demand of services and goods, which is attractive to drug producers and coca farmers.

2



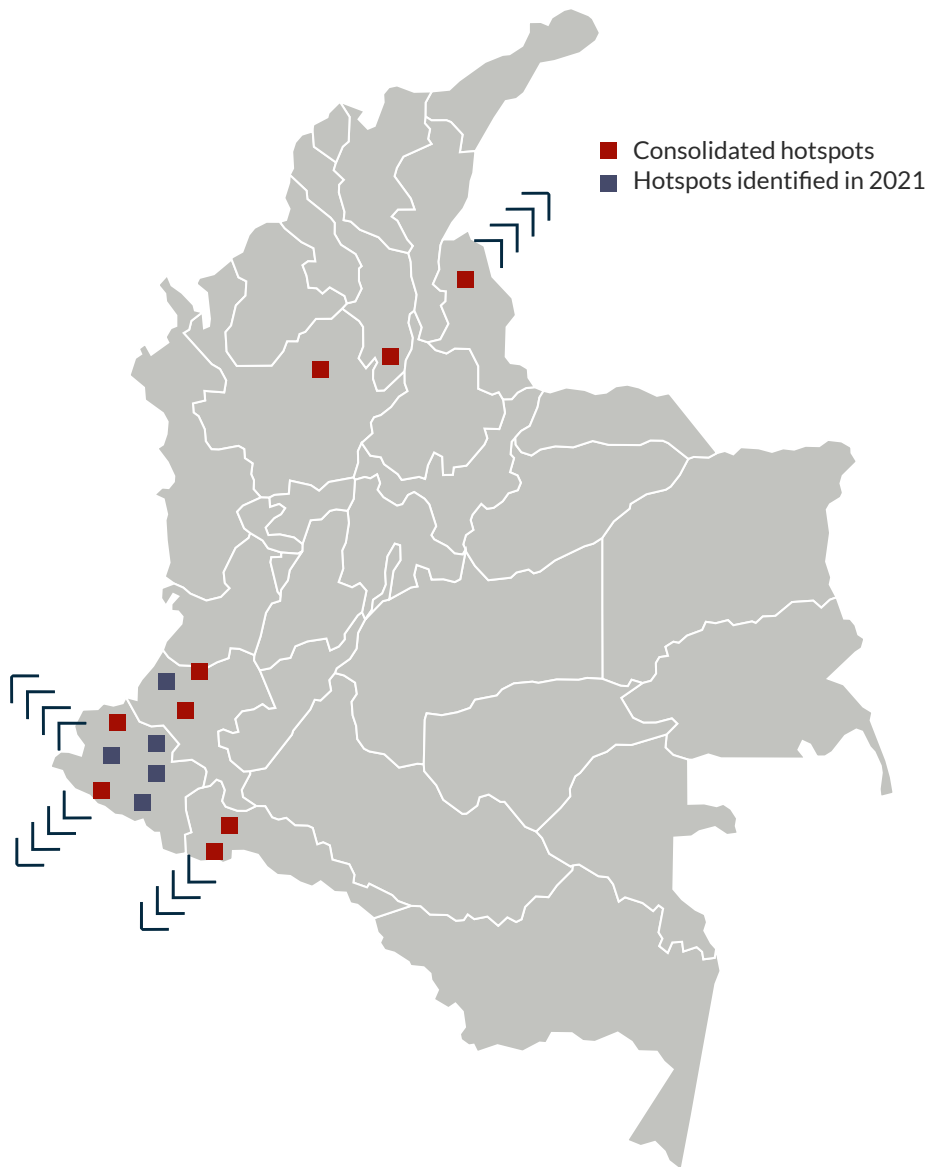
In coca hotspots, there is a greater flow of financial resources that stimulates trade and allows access to goods and services that would not have been available without the illegal activity.

"...a wide variety of clothing and beauty stores, restaurants, pharmacies and supermarkets, meat shops where you can find everything from groceries to household appliances, as well bars and prostitutes"

(Source: Coca farmers)

3

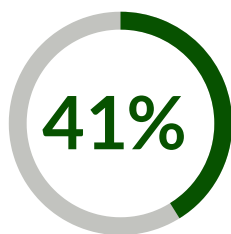
Concentration of cultivation in hotspots: an efficient agro-industrial model to grow coca, that could expand to other areas.



Out of the 14 coca hotspots, 5 were newly identified in 2021.

The coca hotspots are characterized by:

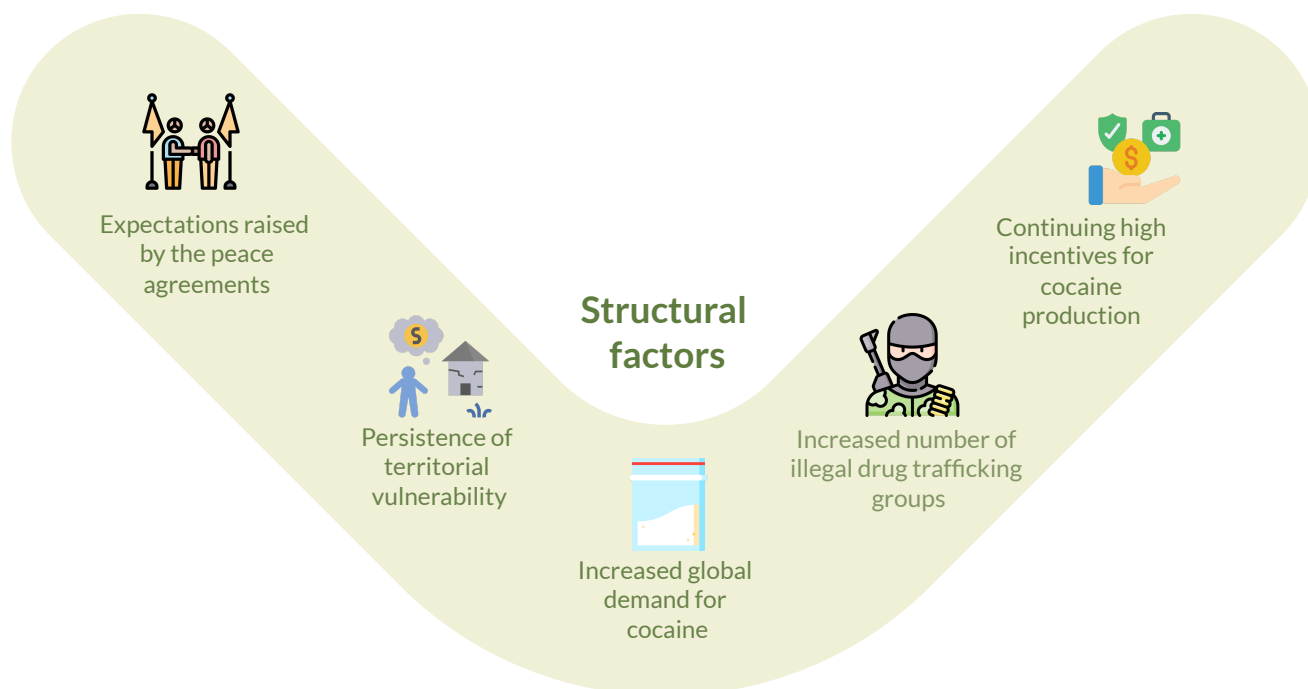
1. Concentration of the coca cultivation (higher number of hectares per square kilometer)
2. Persistence (coca crops cultivated in the same location/territory for more than four consecutive years)
3. More productive coca fields than before
4. Concentration of all steps in the production of cocaine in the same territory
5. Proximity to major trafficking routes
6. Better prices of coca products than outside



41% of coca is located in the **coca hotspots** where there are more hectares of coca per square kilometer and the fields are more productive, a situation that has persisted for more than four years.

- Crops within the most consolidated hotspots are up to **2.4 times more productive** than outside, as in the case of Argelia - El Tambo.
- The concentration and persistence of coca cultivation is located in areas where cocaine is trafficked. **The locations are beneficial for drug trafficking** ; 12 of the 14 coca hotspots are located in international border departments with direct access to the sea.
- In those coca hotspots there **is a convergence of illegal armed groups, drug traffickers and producers.**
- Drug trafficking **groups move ever closer to coca production areas.**

The changes are driven by the convergence of multiple factors



The interplay of several factors has created a context favorable to the increase in cocaine production and production efficiency

Increased global demand for cocaine



There has been a growing demand for cocaine globally that may affect its supply in producing countries. There were an estimated 21 million users of cocaine-type substances in 2020. Looking at trends over the last 10 years, there is evidence of a steady long-term increase in the number of estimated users of this type of drug.

Persistence of territorial vulnerability



The municipalities where coca production is concentrated continue to face conditions of poverty and limited market access opportunities. The Multidimensional Poverty Index (MPI) for the rural sector (populated centers and dispersed rural areas) for PDET (Development Programs with a Territorial Approach) municipalities is 46%, or 28 percentage points higher than the national aggregate (18%) in 2021.

Expectations raised by the peace agreements



According to the results presented by the *Kroc Institute*, peace accord implementation levels in the country are low: only 2 % of the provisions of the peace accord regarding the Comprehensive Rural Reform have been completed. The average implementation progress recorded is over 50%, based on the management indicators registered in the *Integrated Post-Conflict Information System* (SIIPO).

Increased number of illegal drug trafficking groups



Drug trafficking groups are expanding into areas with historically favorable conditions for coca production. In 2021, post-Farc armed groups were present in 138 municipalities formerly occupied by the guerrilla group Fundación Paz y Reconciliación (Peace and Reconciliation Foundation).

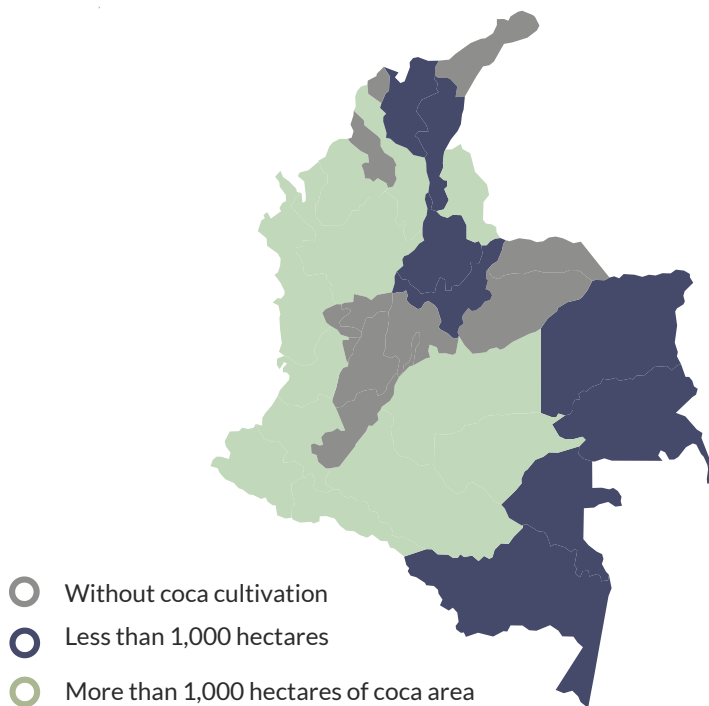
Continuing high incentives for cocaine production



The continued devaluation of the Colombian peso over several years has progressively improved profits for drug traffickers. In addition, there have been increases in crop yields and economic returns for producers. Moreover, drug traffickers offer financial support to farmers to grow coca.

Major changes in drug production require major changes in intervention strategies in the territory

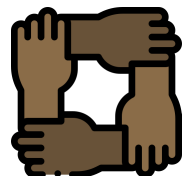
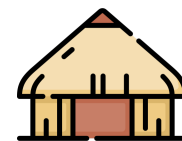
Interventions where coca cultivation is phasing out



Focusing actions on territories where coca cultivation is phasing out can achieve fast results. Caldas was declared a territory free of coca crops in 2019. The Magdalena Medio and Western Boyacá sub-region is moving towards the abandonment of illicit crop production. Currently, eight departments with less than 1,000 hectares of coca are identified where this type of strategy could be implemented to ensure that the elimination of coca cultivation there is sustainable.

Support the indigenous and Afro-Colombian cultures to find their own way out of the drug economy

It is necessary to work with indigenous peoples and Afro-descendant communities to understand the differentiated impacts caused by the drug problem with an ethnic and rights-based approach, supporting the design of actionable strategies in their territories.



Long-term strategies to deal with the drug problem

Action axes



1.Environmental protection



2.Supply reduction



3.Rural development and security

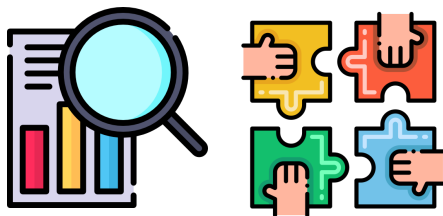
Generating technical evidence of the impact of interventions in the territories affected by illicit cultivation requires strengthening the recording system that includes actions in different components: supply reduction, rural development, security, investment in infrastructure and services, and socioeconomic monitoring of the implementation and impact of the different interventions.

Inter-institutional coordination for territorial transformation



A comprehensive transformation of the territories affected by coca cultivation requires coordinated work between national government agencies, local governments, international cooperation agencies, private sector companies and civil society, to strengthen actions to promote economic and social development, formal ownership, access to land, self-sustainability and food security, payment for environmental services, inter alia.

Research and monitoring for a better understanding of the problem



To better understand the problem of illicit drugs in the country, it is necessary to produce more and better evidence that covers the whole drug trafficking chain in the territories affected by coca cultivation to support the design and implementation of new interventions.



**MINISTERIO DE JUSTICIA Y
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