Cocaine market expands

The impact of COVID on cocaine markets worldwide

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- Impact on eradication activities.
- Increases in coca leaf cultivation.
- Difficulties for buyers to access sellers.

Brazil
- Difficulties faced by criminal groups in the internal consolidation and redistribution of cocaine towards ports on the Atlantic.
- Increased use of aircraft for incoming and internal movement of cocaine.
- Upswing in incoming flows at the same time as declines in outgoing flows.

Western and Central Europe
- Following a period of steady growth, cocaine seizures stabilize in 2020 before rebounding in 2021.
- Wastewater-based indicators suggest a dip in consumption before rebounding in 2021.
- Similar trends visible in prevalence where data availability allows.

Central America
- Increases in, and diversification of, channels through Central America and surrounding seas towards Europe.

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South Africa
• Shift towards the use of sea transportation and vehicles.

Australia
• Consumption peaked in the middle of 2020, declined by 50% over the following year and rebounded moderately in the last quarter of 2021.
• Decrease in detections of all drug importations into some jurisdictions.
• Cocaine detection volume rebounded in the latter half of 2020.

Africa, Asia, East and Southeast Europe
• Following record levels in 2019, seizures fell in 2020.
• Preliminary data indicate rebounds in 2021, especially in Africa.

Central America

Western and Central Europe
• Increases in, and diversification of, channels through Central America and surrounding seas towards Europe.
Cocaine market reasserts itself after COVID-19 bump

The COVID-19 pandemic had a disruptive effect on drug markets. With international travel severely curtailed, producers struggled to get their product to market. Nightclubs and bars were shut as officials ramped up their attempts to control the virus, causing demand to slump for drugs like cocaine that are often associated with those settings.

However, the most recent data suggests this slump has had little impact on longer-term trends. The global supply of cocaine is at record levels. Almost 2,000 tons was produced in 2020, continuing a dramatic uptick in manufacture that began in 2014, when the total was less than half of today’s levels.

The surge is partly a result of an expansion in coca bush cultivation, which doubled between 2013 and 2017, hit a peak in 2018, and rose sharply again in 2021. But it is also due to improvements in the process of conversion from coca bush to cocaine hydrochloride.

In parallel, there has been a continuing continuing growth in demand, with most regions showing steadily rising numbers of users over the past decade. Although these increases can be partly explained by population growth, there is also a rising prevalence of cocaine use.

Interceptions by law enforcement have also been on the rise, at a higher speed than production, meaning that interdiction has contained the growth of the global amount of cocaine available for consumption.

Quantities of cocaine seized in selected markets, in comparison with global cocaine manufacture, 2005–2021

Coca bush cultivation, by country, and cocaine seizures worldwide, 2010–2021
Estimated supply of cocaine available for consumption (net of seizures) per past-year cocaine user worldwide, 2005–2020

In comparison with selected actual estimates of consumption, expressed per past-year user

- Grams of cocaine per past-year user (best estimates)
  - Estimated quantity of cocaine available for consumption per past-year user (global, range)
  - Estimated cocaine consumption (RAND) per past-year user, United States (best estimate)
  - Estimated cocaine consumption (EMCDDA, 2022) per past-year user, European Union
  - Estimated cocaine consumption per past-year user, Western and Central Europe, based on modelling of wastewater data (UNODC)
  - Estimated cocaine consumption per past-year user, Western and Central Europe, based on simple average of wastewater measurements in 142 cities

In comparison with selected availability indicators

- Availability indicators: Average seizure purity (worldwide) / retail price (United States), (indexed, 2007=1)
  - Estimated average purity of seizures worldwide (indexed, 2007=1, right axis)
  - Purity-adjusted retail price, United States (indexed, 2007=1, right axis)
The presence of foreign criminal groups could incentivize producers in Colombia

The cocaine trade in Colombia was once controlled by just a few major players. As a result of a fragmentation of the criminal landscape following the demobilization of the Fuerzas Armadas Revolucionarias de Colombia (FARC) in 2016, it now involves criminal groups of all sizes, structures and objectives. But, signs of consolidation of some of these groups have recently emerged.

These developments have led to an increasing presence of foreign actors in Colombia. Mexican and Balkan criminal groups have moved closer to the centre of production to gain access to supplies and wholesale quantities of cocaine.

These foreign groups are not aiming to take control of territory. Instead, they are trying to make supply lines more efficient. Their presence is helping to incentivize coca bush cultivation and finance all stages of the supply chain.

Concentration of established markets raises potential for large expansion

In established cocaine markets, the proportion of the general population using the drug is high. But these markets only cover around one-fifth of the global population.

If the prevalence in other regions increases to match established markets, the number of users globally would increase tremendously because of the large underlying population.

This type of market convergence has already been happening in the case of Western and Central Europe, where purity levels and prices have harmonised with the United States, although prevalence of cocaine use in Western and Central Europe has not yet reached the level in the United States.

### Retail purity of cocaine in Europe and the United States, 2005–2020

![Retail purity of cocaine in Europe and the United States, 2005–2020](image-url)
Potential additional cocaine users if the prevalence rate in Western and Central Europe or in North America extends to other regions in the world

- 215 million current users (2020)
- 55.0 million potential additional users (*)
- 24.5 million potential additional users (**)

*Assumption 1: prevalence levels increase to the levels of Western and Central Europe
** Assumption 2: levels increase further to the levels of North America

Note: The total global population aged 15–64 is 5.1 billion.
Use of ‘crack’ on the rise in Europe

The use of “crack” cocaine is on an upward trend in several Western European countries, according to data on people seeking treatment for the first time. While the use of “crack” has been well documented in the United Kingdom, countries in continental Europe also appear to show an increased incidence. Belgium, France and Spain each registered abrupt rises in crack users entering treatment starting in 2017 or 2018. Italy also showed a slow but steady increase.

This comes in parallel with an increase in cocaine consumption shown by wastewater data, where rises in overall use appear to come a year before rises in admissions to treatment. The lag could be down to the time it takes users to feel the physical impact of their drug use.

While smoking of cocaine products could be a driver contributing to the increase in consumption, it could also be part of the broader trend of intensifying use patterns in the subregion.
Research reveals how cocaine ‘competes’ with methamphetamine

Cocaine users are often involved with other drugs, so high levels of cocaine use often go hand in hand with other drugs such as cannabis and ecstasy. This relationship has been shown across various indicators, including residues found in wastewater and levels of seizures by law enforcement.

However, this relationship may be reversed with methamphetamine. Analysis shows that a big domestic market for cocaine appears to “alternate” with a big market for methamphetamine.

These findings appear to show methamphetamine as a potential “competitor” to cocaine. Though it is possible that these relationships on a global level simply reflect the geography of drug trafficking. Methamphetamine is much more widespread than cocaine in Asia. For Latin America and Europe, the opposite is true.

But data from the United States, where both drugs have a foothold, show how this relationship also plays out within a country. The more frequently a person uses methamphetamine, the less they use cocaine. Cannabis trends, for example, showed the opposite relationship: heavier users of cannabis were more likely to be heavier cocaine users.
Brazil faced spike in cocaine-related deaths during the pandemic

The pandemic seems to have disrupted the cocaine market in Brazil on both supply and demand sides. Faced with severe logistical hurdles, traffickers increasingly shifted to aircraft to get cocaine into the country, leading to an overall rise in amounts entering Brazil. But criminal gangs seem to have struggled to coordinate transit of the drug within Brazil to ports on the Atlantic. Various indicators show that the level of cocaine leaving the country fell.

At the same time, there was a dramatic spike in the number of deaths attributable to cocaine use. It is possible that the shifting trafficking dynamics resulted in a surge in the availability of cocaine in Brazil, and intensified use patterns.

Changing trends (rates of change) in cocaine seizures in Brazil following the onset of COVID

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COVID restrictions aided the growth in trafficking via international postal services

The use of parcel and courier services increased significantly during COVID-related lockdowns. Restrictions on passenger flights meant traffickers could not rely on couriers to transport drugs on planes.

Some countries in West Africa have noted a significant increase in these services to smuggle small quantities of cocaine to Europe and beyond. In Costa Rica, smaller quantities of cocaine were being mailed to Asia, Africa and Europe concealed in goods such as books, religious images, and vehicle spare parts.

The pandemic may have accelerated the trend, but traffickers had already been increasing their use of international mail services to get cocaine into Europe. Evidence from Spain and Argentina points to a longer-term decline in the use of drug mules on passenger flights. Both countries recorded instances of larger shipments being concealed in unaccompanied luggage.

### Air trafficking

- **General aviation**
  - Increasing importance in recent years of clandestine flights moving cocaine along the southern cone route
  - Use of airdrops – drugs thrown from airplane while a group on the ground picks them up (used with ultra-light aircraft and aerial drones)

- **Air passengers**
  - Small quantities of cocaine carried on passenger flights by passengers, crew members, or in unsupervised luggage

### Maritime trafficking

- **Containers**
  - Camouflage concealment
  - Rip-on/rip off method
  - “drop-off”, “three-seals”, “switch”, “trojan horse”
  - Front companies used to imitate legitimate import-export activity
  - False paperwork

- **Sailing vessels**
  - Technological advances in maritime navigation allowed sailing vessels to diversify their departure ports on the Atlantic coast from where they deliver cocaine to Europe or Africa

- **Fishing vessels**
  - “mother ships” from which smaller vessels traffic drugs
  - Provide go-fast boats in transit with fuel and supplies
  - Smaller fishing vessels traffic drugs in smaller quantities

- **Speed boats (go-fast)**
  - Used for trafficking over shorter stretches
  - Long-range maritime routes are used for trafficking quantities above 500 kg by go-fast boats or by semi-submersibles

- **Merchant vessels**
  - Tugboats, general cargo vessels and bulk carriers

- **(Semi)-submersible and water drones**
  - Artisanal vessels built specifically for trafficking drugs
  - Uncrewed underwater vehicles following a pre-programmed trajectory

- **Parasite modality**
  - Method where cocaine is attached to the vessel from the outside, below the waterline
New trafficking hubs emerge

‘Southern Cone’ route becomes major departure point for Europe-bound cocaine

Colombia still dominates trafficking routes from South America, particularly to North America where most cocaine is Colombian. However, trafficking routes to Europe have evolved. The dominant role of Colombia’s ports as a point of departure appears to be declining, with traffickers increasingly transiting their product through Central America and other countries in South America.

Cocaine from landlocked Bolivia (Plurinational State of) and Peru is increasingly transported via the so-called Southern Cone route through Paraguay and the Paraná-Paraguay waterway. Criminal groups, often from Brazil, use planes to cross the border and then boats along the river to the Atlantic.

Seizures linked to the Paraná-Paraguay waterway or the River Plate estuary, and aircraft-related incidents along the Southern Cone Route, 2017–September 2022

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The points of arrival in Europe have also changed, with Belgium and the Netherlands now eclipsing the Iberian peninsula as the main hub. These two developments appear to be linked, with seizures connected to the Southern Cone route prominent in North Sea European ports.

The growing prominence of Netherlands-linked routes over the past decade, and the more recent rise to prominence of the Southern Cone route, may have been instrumental in increasing the availability of cocaine in Europe.

Cocaine seized at seaports by customs authorities in Western and Central Europe, quantities seized in 2021 and trend in comparison with 2020

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Africa’s role in global supply chain on the rise

Seizure data suggest that the role of Africa, especially West and Central Africa, as a transit zone for cocaine on its way to markets in Europe has picked up substantially since 2019. Both the total quantity seized in Africa and the number of large seizures appear to have reached record levels during 2021, according to preliminary data.

Maritime nations in West Africa account for much of the volume of cocaine seized. But other indicators suggest a widening issue on the continent. South Africa, for example, reported a record amount of cocaine seized, suggesting a large increase in flows into the country and raising the prospect of a rebound in the domestic market.

Brazilian crime groups seem to be increasingly targeting Portuguese-speaking countries like Mozambique, Angola and Cabo Verde. And airports in Kenya and Ethiopia are also believed to have been targeted as “stopovers” en route from Brazil to Europe.

Main cocaine trafficking routes into and out of Africa, and cocaine seizure cases in Africa, 2018–2022
Conflict in Ukraine likely to affect transit routes and consumption patterns

Cocaine is expensive and its use in Eastern Europe is the preserve of groups of high-income consumers, and often associated with recreational venues like night clubs. In Ukraine, the market had been expanding. But the armed conflict that began in February 2022 is likely to have drastically disrupted those lifestyle patterns and reduced opportunities for cocaine use.

In the Russian Federation, the domestic market for cocaine had also been expanding. It is not yet clear how the economic fallout from the current armed conflict with Ukraine and sanctions might disrupt consumption habits. Some supply lines are also likely to be affected. There is evidence that foreign criminal groups have used Ukraine’s ports as a way of avoiding law enforcement controls in Western Europe. It is likely that those groups will shift such activities to other Black Sea ports in Romania or Bulgaria.

Cocaine trafficking routes affecting Eastern and South-Eastern Europe

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South-Eastern Europe consolidates position as transit region

Türkiye’s role as a transit country for cocaine has been growing in recent years. Since 2014, the amount of the drug seized in the country has increased sevenfold to a record 2.8 tons in 2021. Some of the cocaine reaching Türkiye arrives after transiting through Western Africa, and some also comes directly from Latin America.

From Türkiye, the outbound cocaine flows westwards through the Black Sea and the Balkans, a route traditionally associated with trafficking of opiates and smuggling of cigarettes.

Neighbouring Greece has also been receiving rising quantities of cocaine in recent years, much of it destined for the same Balkan route and the markets of Western Europe. Seizure data showed Greece intercepting almost 2 tons in 2020 before falling back slightly in 2022. Brazil and Ecuador are often the countries of departure for seized cocaine shipments.

Cocaine seizures in Greece and Türkiye, 2011-2021
Control of trafficking routes fragments

Loose networks of criminal groups take charge of smuggling

Small to medium-sized criminal groups are playing an increasingly key role in global cocaine trafficking. They function like networks rather than well-delineated organizations. These groups manage only parts of the supply chain and form partnerships with other organizations. This fragmentation has been seen across regions, and the actors involved have become increasingly specialized.

Mexican crime groups remain powerful actors at the global level. The Cártel de Sinaloa and the Cártel Jalisco Nueva Generación (CJNG), for example, largely control the trafficking corridors from Mexico to the United States. But they then rely on local criminal groups and street gangs to distribute cocaine. Most Mexican crime groups are offshoots of former larger organizations. They constantly shift their alliances and fight for control of territory.

The Brazilian crime group Primeiro Comando da Capital (PCC) has expanded its presence in other South American countries and beyond in Africa and Europe, and controls several stages of the cocaine supply chain. But the criminal landscape in Brazil is increasingly fragmented and many smaller criminal groups now also operate in the cocaine trade, often specializing in logistics.

In Europe, cocaine smuggling appears to be controlled by European criminal groups, some facilitating the receipt of the drug and others specializing in its distribution. Crime groups from the Balkan region have become major players in large-scale cocaine trafficking into Europe.

Expansion of the criminal group Primeiro Comando da Capital from Brazil to other countries in South America, and beyond to Africa and Europe
Crime groups increasingly farm out work to ‘service providers’

The move to decentralized networks of criminal groups has given rise to a system of “service providers” who manage parts of the supply chain without ever owning the drug. They often collect the cocaine from the port, provide local transportation, and protect the shipments.

These service providers will generally guarantee delivery of the cocaine in return for a fee based on the quantities trafficked. Some groups receive payment for their services in kind, which drives cocaine availability on the domestic market of the transit countries.

These groups range from motorcycle gangs in Belgium to well-connected organized crime groups in Guatemala. Experts believe the practice is widespread throughout South and Central America, the Caribbean, and Africa.

Some service providers are so successful that they have been able to gain political protection and set up as independent traffickers.

Local service providers may work for several clients and organize deliveries to buyers in various locations. Lieutenants of foreign crime groups often travel to transit countries to establish operations with local service providers. For example, traffickers from the Balkans and members of Italian crime groups have set up in Ecuador to establish supply lines to European markets.

Example of a network of criminal groups
Nigerian groups dominate African traffic routes

Criminal networks from Nigeria appear to play an especially significant role in smuggling activities across West and North Africa. They are also active globally, supported by a segment of the Nigerian diaspora and a large network of drug couriers.

Nigerian groups are known for trafficking of small quantities by means of mules on passenger flights. Data from Brazil show that in each year since 2018 the most common foreign nationality of drug mules arrested at Brazilian airports has been Nigerian.

Nigerian trafficking groups are understood to be tribe-based cells of four or five members, where each member of the cell has a small number of people working for them without knowing the members of the core group. They are thought to collaborate with larger groups outside of the country.

Cocaine trafficking routes across West and North Africa, and significant cocaine seizures in the Sahel and North Africa 2018-2022

Cocaine trafficking gets entangled with other criminality

As routes and methods of trafficking converge, the same actors may become involved in different trafficking activities. For example, criminal networks in the north-western Spanish province of Galicia make drug boats for hashish traffickers that may also be used by other groups smuggling migrants. Galician trafficking groups are also active in redistributing heroin by land to the rest of Spain and Portugal. Some Galician cocaine smuggling groups appear to have transitioned from cocaine to heroin distribution, lured by the promise of greater rewards and less risk.

Trafficking of cocaine also occurs along the same routes as smuggling of legal goods. The Brazilian criminal group Primeiro Comando da Capital apparently uses the same logistics to transport cigarettes and drugs, facilitated by their control over smuggling corridors on the borders with Bolivia (Plurinational State of) and Paraguay.

And in South and Central America, trafficking of cocaine is carried out by backpackers across porous land borders. Migratory and contraband flows often intersect with drug-trafficking on these routes, exposing people who use them to increased levels of criminality.
Technology boosts trafficking

Smuggling by sea buoyed by technological advances

Trafficking groups have access to a growing variety of vessels – from yachts and speedboats to ferries and fishing boats – to help get their product to market. Sophisticated navigation technology is enabling traffickers to construct ever more efficient maritime routes.

To avoid law enforcement at seaports, traffickers frequently offload cocaine from the mother ship before reaching land. Ship-to-ship transfers occur at rendez-vous points using small and medium-sized vessels like speedboats and fishing boats. This method is widely used around West and North Africa, in Central America and the Caribbean, and in the Pacific islands.

Container ships are also known to have dropped off cocaine to be picked up by speedboats. This is a known tactic for vessels bound for the Netherlands and Belgium.

Transatlantic trafficking routes involving sailing, merchant and fishing vessels, 2022

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Smugglers expand use of shipping containers

Cocaine traffickers have long taken advantage of shipping containers to transport their cargo. But this method of transportation is growing in importance and the logistics are becoming more complex and sophisticated.

Cocaine trafficked in container ships can be introduced at various stages – away from the port, in transit to the port, in the port itself, or even at sea. Traffickers often use creative methods of camouflage. Drugs have been found stuffed into fruit, passed off as sugar or flour, mixed with soya, and even concealed in the structure of a container.

While traffickers are known to organize their own shipments, typically using front companies, the most popular method in recent years is to “piggy-back” on a legitimate shipment without the shipper’s knowledge. Moving large quantities of cocaine in this way requires a network of collaborators – port workers, transport companies, drivers, or customs officials.

Container shipping of cocaine
Chemical camouflaging on the rise in Europe

Some of the most sophisticated techniques to conceal cocaine involve impregnation into a carrier material – from textiles to animal skins. Trafficking of cocaine hydrochloride impregnated in clothing was detected several decades ago. But evidence suggests traffickers are getting increasingly sophisticated. Cocaine has been detected recently in beeswax, plastics, herbs, charcoal and various liquids. In Europe in particular, these methods are making the drug hard to detect.

However, this method requires a complex process of chemical extraction to separate the cocaine from other substances. Large extraction laboratories have been uncovered in Europe in recent years, suggesting this process is becoming more widespread. According to Dutch police, these clandestine laboratories are set up as exact copies of Colombian cocaine production sites. Dutch crime groups organize the chemicals and equipment, using highly skilled local facilitators to build the laboratories using technical drawings from South America. They hire Colombian chemical experts to carry out the extraction process.

Example of cocaine camouflaging
CRIMJUST is implemented by UNODC in partnership with INTERPOL and Transparency International. CRIMJUST seeks to enhance law enforcement and judicial strategies beyond interdiction activities and to foster transnational responses along drug trafficking routes targeting each stage of the drug supply chain. This includes the production of knowledge on the cocaine market to support evidence-based policy and strategies designed to counter the cocaine threat.