

## 1.3 Coca / Cocaine Market

### 1.3.1 Summary Trend Overview

Although the coca/cocaine market is stable overall, it has experienced considerable fluctuations over the 2006/07 period. On the supply side, coca cultivation expanded in Bolivia, Colombia and Peru. In Bolivia and Peru, expansion was moderate, but in Colombia coca cultivation grew by 27%.

In 2007, the total area under coca cultivation in Bolivia, Colombia and Peru increased 16% to 181,600 ha. Despite the increases, the global area under coca cultivation continues to be lower than in the 1990s and 18% below the level recorded in 2000 (221,300 ha). (In Colombia, the level of cultivation in 2007 is 40% lower than it was in 2000.) In 2007, coca cultivation in Peru increased by 4 % to 53,700 ha. For a second consecutive year, coca cultivation increased in Bolivia, and amounted to 28,900 ha in 2007, an increase of 5%.

The expansion in cultivation in Colombia occurred in the region which has the largest area under coca cultivation. The region is known to have low yielding coca bush, and this, combined with the fact that cultivation declined in high yielding areas, seems to have prevented production in Colombia from growing apace with cultivation. Overall production remained at roughly 2006 levels.

Around 85% of all cocaine seizures were made in North, Central and South America. While the proportion of seizures in the western hemisphere continue to reflect use and production patterns, some new trends are emerging which merit attention. First, seizures have declined considerably in North America, consistent with contractions in the consumer markets of the USA and Canada; however, seizures are also falling in South America where use is expanding. Bolivia is a notable exception to the latter trend. Second, seizures are continuing to increase in West and Central Europe, and they have begun to increase in West Africa. The latter is likely to be related to the development of new trafficking routes linking South America to West and Central Europe, as reported in last year's *World Drug Report*.

There are indications that there was a shortfall in cocaine supply in the USA in 2007.

On the demand side, global stabilisation is being led by a continuing decline in consumption in North America where the largest markets for cocaine are found. At the global level, the decline has almost offset increases in South America, Western Europe and Western and Southern Africa.

Similarly, although increases in Europe have been fueling the overall increase in cocaine consumption over the last decade, there are signs that a stabilisation may be on the horizon.

While the demand side contraction in the main cocaine market is encouraging, the growth in markets which are either close to source (South America) or on emerging trafficking routes (Africa) indicate that further containment is still a challenge.

## 1.3.2 Production

**Table 5: Global illicit cultivation of coca bush and production of coca leaf and cocaine, 1990-2007**

|  | 1990           | 1991           | 1992           | 1993           | 1994           | 1995           | 1996           | 1997           | 1998           | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           |  |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--|
| <b>CULTIVATION OF COCA BUSH IN HECTARES <sup>(a)</sup></b>                 |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |  |
| <b>Bolivia <sup>(b)</sup></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         | 27,500         | 28,900         |  |
| <b>Colombia <sup>(c)</sup></b>   | 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         | 78,000         | 99,000         |  |
| <b>Peru <sup>(d)</sup></b>   | 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         | 51,400         | 53,700         |  |
| <b>Total</b>   | <b>211,700</b> | <b>206,200</b> | <b>211,500</b> | <b>195,700</b> | <b>201,400</b> | <b>214,800</b> | <b>209,700</b> | <b>194,000</b> | <b>190,800</b> | <b>220,600</b> | <b>221,300</b> | <b>210,900</b> | <b>170,300</b> | <b>153,800</b> | <b>158,000</b> | <b>159,600</b> | <b>156,900</b> | <b>181,600</b> |  |
| <b>POTENTIAL PRODUCTION OF DRY COCA LEAF IN METRIC TONS <sup>(e)</sup></b> |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |  |
| <b>Bolivia</b>   | 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         | 28,200         | 33,200         | 36,400         |  |
| <b>Colombia</b>  | 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        | 186,050        | 164,280        | 164,280        | 154,130        | 154,000        |  |
| <b>Peru</b>  | 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         | 72,800         | 101,000        | 97,000         | 105,100        | 107,800        |  |
| <b>Total</b>   | <b>319,200</b> | <b>345,700</b> | <b>349,100</b> | <b>285,200</b> | <b>322,600</b> | <b>349,500</b> | <b>358,700</b> | <b>330,200</b> | <b>314,400</b> | <b>353,000</b> | <b>325,800</b> | <b>305,500</b> | <b>294,400</b> | <b>286,650</b> | <b>303,280</b> | <b>289,480</b> | <b>292,430</b> | <b>298,200</b> |  |
| <b>POTENTIAL MANUFACTURE OF COCAINE IN METRIC TONS <sup>(f)</sup></b>      |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |  |
| <b>Bolivia</b>   | 189            | 220            | 225            | 240            | 255            | 240            | 215            | 200            | 150            | 70             | 43             | 60             | 60             | 79             | 98             | 80             | 94             | 104            |  |
| <b>Colombia <sup>(g)</sup></b>   | 92             | 88             | 91             | 119            | 201            | 230            | 300            | 350            | 435            | 680            | 695            | 617            | 580            | 550            | 640            | 640            | 610            | 600            |  |
| <b>Peru <sup>(h)</sup></b>   | 492            | 525            | 550            | 410            | 435            | 460            | 435            | 325            | 240            | 175            | 141            | 150            | 160            | 230            | 270            | 260            | 280            | 290            |  |
| <b>Total</b>   | <b>774</b>     | <b>833</b>     | <b>866</b>     | <b>769</b>     | <b>891</b>     | <b>930</b>     | <b>950</b>     | <b>875</b>     | <b>825</b>     | <b>925</b>     | <b>879</b>     | <b>827</b>     | <b>800</b>     | <b>859</b>     | <b>1,008</b>   | <b>980</b>     | <b>984</b>     | <b>994</b>     |  |

(a) Potentially harvestable, after eradication.

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

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

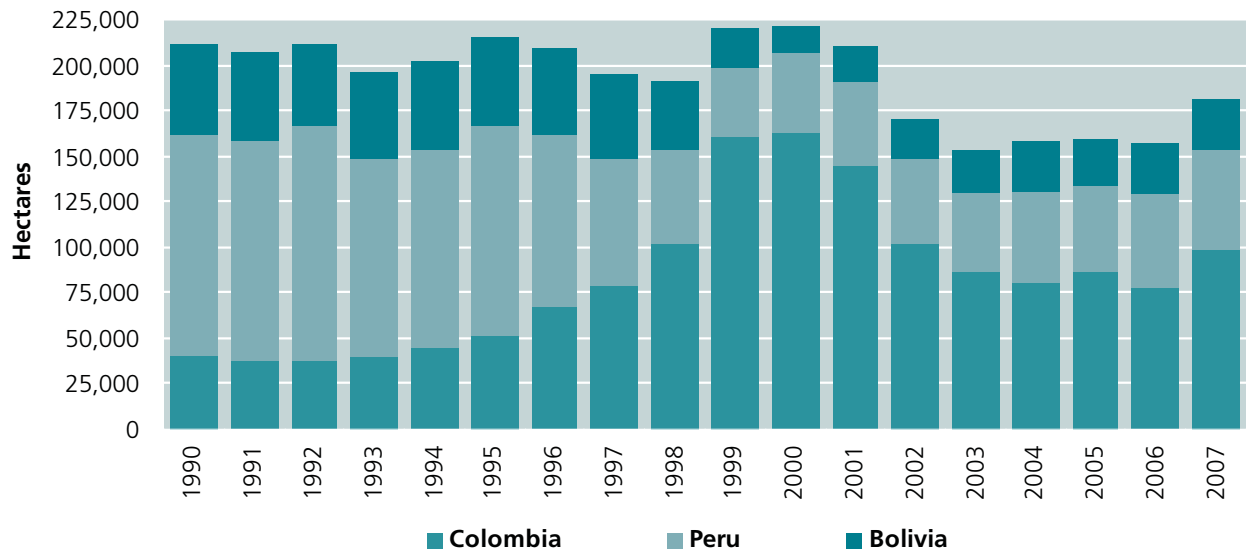
(d) Sources: 1990-1999: CICAD and US Department of State, International Narcotics Control Strategy Report; since 2000: National Illicit Crop Monitoring System supported by UNODC.

(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) Colombian cocaine production estimates for 2004 and later are based on new research and cannot be directly compared with previous years.

(h) Figures from 2003 to 2005 were revised in 2007 based on updated information available on the amount of coca leaf necessary to produce one kilogramme of cocaine HCl.

**Fig. 45: Global coca bush cultivation (hectares), 1990 to 2007**

### Global area under coca cultivation increases in 2007

In 2007, the total area under coca cultivation in Bolivia, Colombia and Peru rose to its highest level since 2001. The 16% year-on-year increase brought the total area under cultivation to 181,600 ha. The increase itself was led by a 27% increase in the area under cultivation in Colombia, followed by smaller increases of 5% and 4% in Bolivia and Peru respectively. Despite these recent increases, the global area under coca cultivation continues to be lower than in the 1990s and 18% below the level recorded in 2000 (221,300 ha).

Fifty-five per cent of coca bush was cultivated in Colombia, followed by Peru (30%) and Bolivia (16%). In 2007, Colombia remained the world's largest coca cultivating country with 99,000 ha of coca bush, an increase of 27%, or 21,000 ha, over 2006.

Seventy five per cent of the total increase in area under cultivation in Colombia occurred in the Pacific and Central regions. The Pacific region had the largest areas under cultivation in 2007 with 25,960 ha, followed by the Putumayo-Caquetá, Central, and Meta-Guaviare regions. Together, these four regions represented 89% of the total area under coca cultivation in Colombia.

In 2007, coca cultivation in Peru increased by 4% to 53,700 ha. Coca cultivation remained well below the levels registered throughout the mid 1990s, when Peru was the world's largest cultivator of coca bush. Coca cultivation in Peru's three largest coca regions, which together represented 86% of the total area under coca bush, remained relatively stable. The smaller coca cultivating regions were responsible for most of the 4% increase reported in 2007.

Bolivia still trails behind Colombia and Peru, in terms of total area under cultivation. For a second consecutive year, coca cultivation increased in Bolivia, bringing the total area under cultivation to 28,900 ha in 2007. This 5% increase over 2006 brought the total area under cultivation to its highest level since 1998, when it was 38,000 ha. Overall, the total area under cultivation in Bolivia remained well under annual totals during the early and mid 1990s.

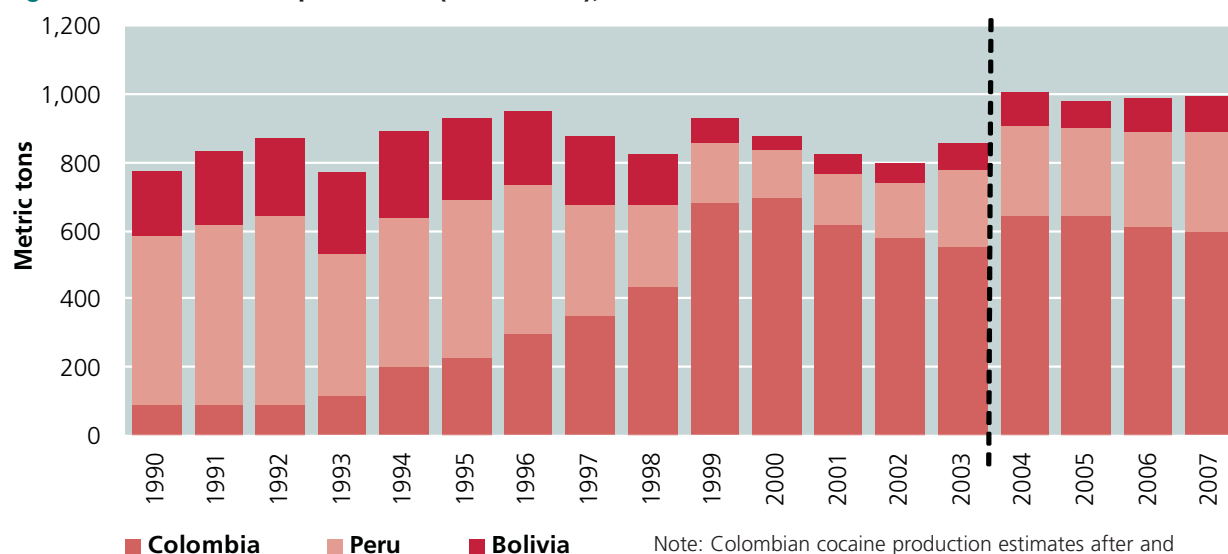
Although sizeable coca cultivation does not exist outside these three main countries, eradication reports from Governments in the region indicate that small-scale coca cultivation takes place in other countries in the region.

### Cocaine production remains stable

Despite the large increase in area under coca cultivation recorded in Colombia, low yields seemed to limit production, keeping the global potential production of cocaine fairly stable. In 2007, global potential production of cocaine reached 994 mt, slightly above the 984 mt recorded for 2006. Of this total, 600 mt were produced in Colombia, 290 mt in Peru and 104 mt in Bolivia.

### Prices estimated to be stable to increasing

In Peru, farm-gate prices of sun-dried coca leaf remained unchanged at US\$ 2.5/kg in 2007. As in the previous six years, monthly average prices remained in the range of US\$ 2 to US\$ 3/kg. Coca leaf prices in Bolivia continued to be considerably higher than in Peru. In Bolivia, farm-gate prices for sun-dried coca leaf in the Chapare region increased considerably from US\$ 3.2/kg in 2006 to US\$ 3.8/kg in 2007, approaching levels reached in 2005 (US\$ 4.1/kg). Comparing farm-gate prices of coca leaf in Colombia with prices for sun-dried leaf in Peru

**Fig. 46: Global cocaine production (metric tons), 1990 to 2007**

Note: Colombian cocaine production estimates after and including 2004 are not directly comparable with earlier years.

and Bolivia is difficult due to important differences in marketing: in Colombia coca is marketed either as fresh leaf or converted on the farm into coca paste. However, given the utility of price to market analysis, UNODC undertakes an annual comparison (mathematically converting fresh to sun-dried) which, this year, indicates that farm-gate prices for fresh coca leaf collected in Colombia are similar to those for Peru.

Prices of coca paste at the farm-gate increased in both Colombia and Peru, from US\$ 853/kg in 2006 to US\$ 946/kg in 2007 in Colombia, and in Peru from US\$ 559/kg to US\$ 601/kg. As in the past four years, coca paste prices in Peru were considerably lower than in Colombia. In Colombian peso terms, coca paste prices declined by 5%, while the wholesale price of cocaine HCl increased in both peso and US dollar terms (by 10% and 25% respectively).

Little is known about the tightness of these markets and how price responsive they are, therefore it is difficult to say whether local prices have stabilised or not. Even the product prices themselves need to be interpreted with caution in the absence of detailed knowledge about their composition and quality. Also, in 2007, the national currencies in the three cocaine producing countries strengthened against the US dollar. The effects of this in combination with the higher costs of some farming and processing inputs are not entirely clear.

#### Destruction of illicit laboratories increases

In 2006, Governments reported the destruction of over 6,390 clandestine coca processing laboratories worldwide, over 99 % of these were located in Bolivia, Colombia and Peru. The increase over the 5,901 laboratories destroyed in 2005 is mainly due to increases in Bolivia

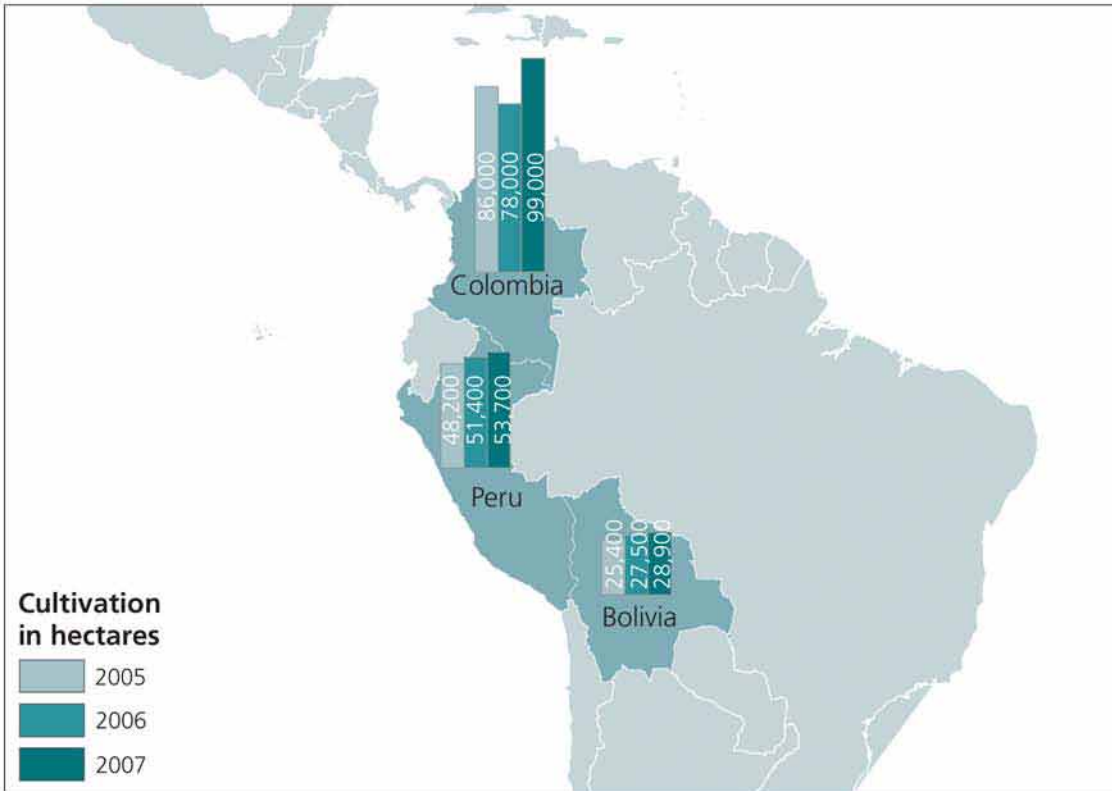
and Colombia. In addition, Bolivia and Peru destroyed large numbers of coca maceration pits.

The entire manufacturing cycle of cocaine HCl is more or less confined to the three coca cultivating countries, and there are very few reports of laboratories producing cocaine in other countries. Spain (10), the United States of America (4), Chile (2) and South Africa (1) reported the destruction of cocaine laboratories and the SAR Hong Kong reported the destruction of five 'crack' laboratories. Preliminary figures for 2007 indicate that the number of coca processing laboratories destroyed in Bolivia, Colombia and Peru stabilized at the 2006 level.

Colombia accounted for the largest volume of potassium permanganate seizures worldwide (99 mt) in 2006. Fifteen illicit clandestine laboratories producing this precursor, which is an essential ingredient for producing cocaine, were destroyed in the country. Smaller amounts of potassium permanganate were seized in Peru and Ecuador. Most of the potassium permanganate shipments intended for South America originated outside the region, with Argentina, Brazil and Chile being the major importers. Operation Purple, a comprehensive precursor control programme, is thought to have tightened the control of the international trade in potassium permanganate, which in turn, may have shifted international trafficking in the region to overland smuggling.<sup>1</sup>

<sup>1</sup> International Narcotics Control Board, E/INCB/2007/4, p.13.

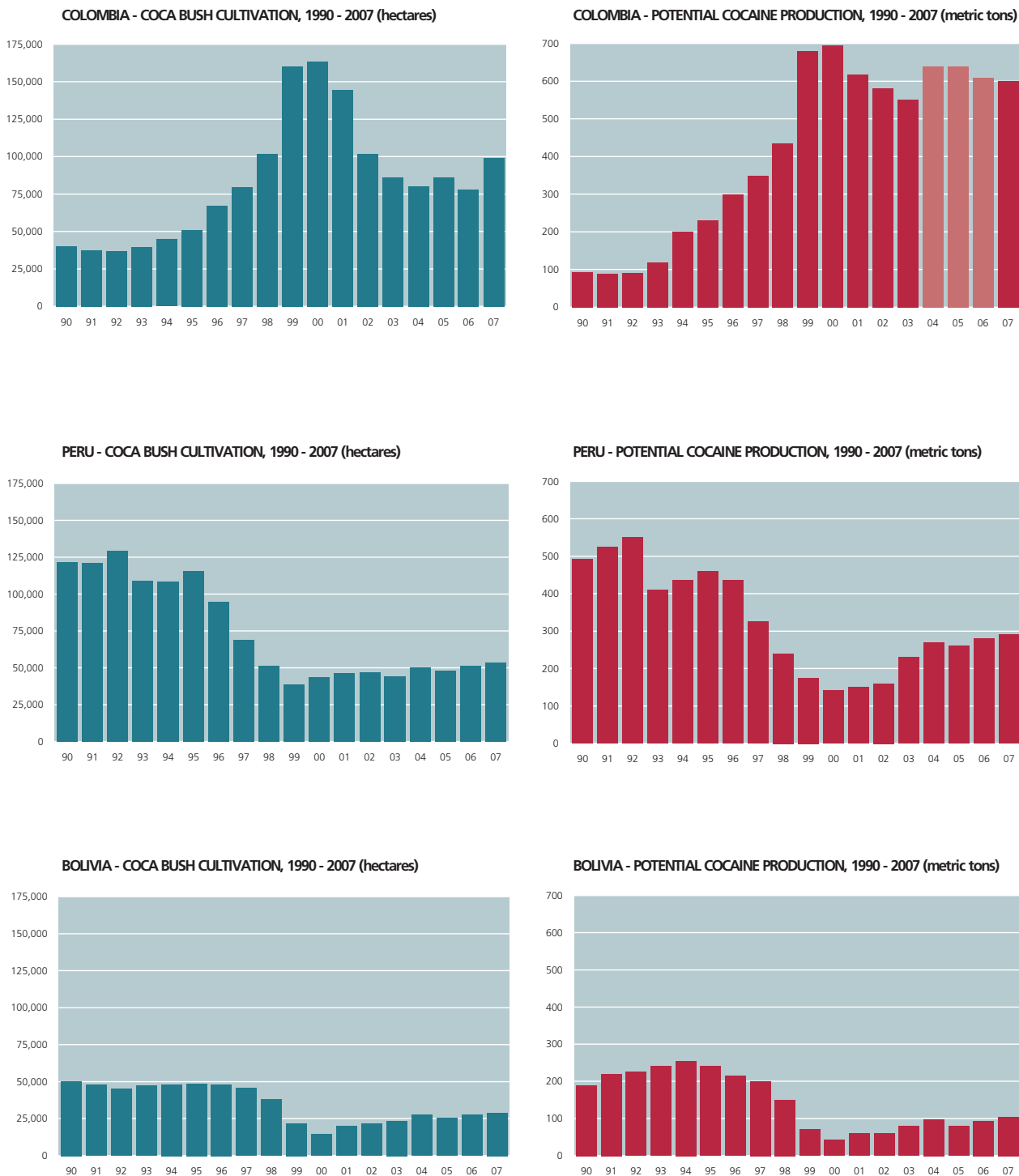
**Map 9: Coca bush cultivation, 2004-2007**



**Map 10: Potential cocaine production, 2004-2007**

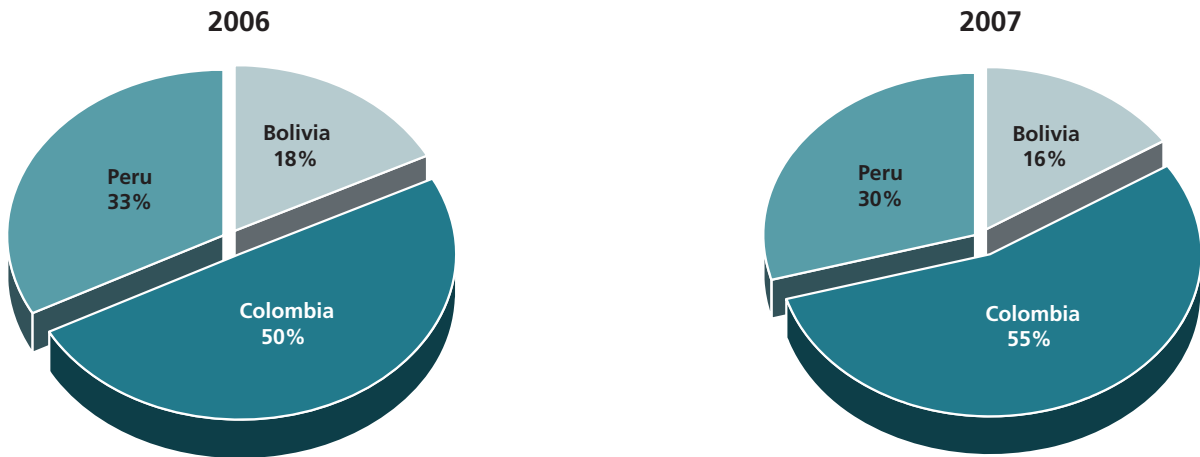


**Fig. 47: Annual coca bush cultivation and cocaine production in main producing countries, 1990-2007**

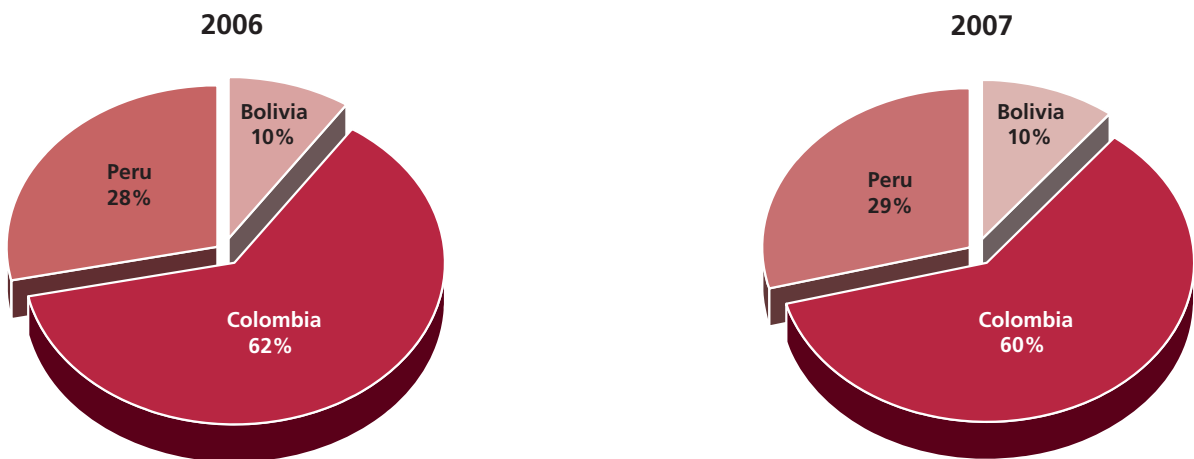


Estimates for Bolivia since 2003, for Colombia since 1999 and for Peru since 2000 come from national monitoring systems established by the respective Governments with the support of UNODC. Due to the change of methodology, these figures are not directly comparable with data from previous years. Colombian cocaine production estimates for 2004 and later are based on new research and cannot be directly compared with previous years.

**Fig. 48: Coca bush cultivation (in per cent of global total)**



**Fig. 49: Coca leaf production (in per cent of global total)**



**Table 6: Reported cumulative eradication of coca bush (ha), 1994-2007**

|                   | 1994  | 1995   | 1996   | 1997   | 1998   | 1999   | 2000   | 2001   | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    |
|-------------------|-------|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|---------|---------|---------|
| 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   | 5,070   | 6,269   |
| Colombia manual   | 1,033 | 1,487  | 4,057  | 2,262  | 3,126  | 1,046  | 3,495  | 1,745  | 2,762   | 4,219   | 6,234   | 31,980  | 43,051  | 66,805  |
| Colombia spraying | 3,871 | 23,915 | 18,519 | 41,861 | 66,029 | 43,112 | 58,073 | 94,153 | 130,364 | 132,817 | 136,552 | 138,775 | 172,026 | 153,134 |
| Peru              | -     | -      | 1,259  | 3,462  | 7,834  | 14,733 | 6,208  | 6,436  | 7,134   | 11,312  | 10,399  | 12,237  | 12,688  | 12,072  |
| Ecuador           | -     | -      | -      | -      | -      | -      | -      | -      | -       | -       | 4       | 18      | 9       | 36      |
| Venezuela         | -     | -      | -      | -      | -      | -      | -      | -      | -       | -       | 118     | 40      | 0       | -       |

### 1.3.3 Trafficking

#### Global seizures of cocaine fell slightly in 2006

Cocaine seizures (at street purity levels) fell 6%, from their record high of 750 mt in 2005, to 706 mt in 2006, reversing the previous upward trend. Global cocaine seizures are twice as high as they were a decade ago, which is impressive given the overall stability in cocaine production over the same period. This is thought to be the result of greater efficiency in law enforcement services and improved sharing of intelligence information, both of which enable seizures to be made before the cocaine reaches its final destination.

#### The global cocaine interception rate remains high

As a result, the calculated global cocaine interception rate remained near 42 % in 2006<sup>1</sup>, up from 29 % in 1998. A portion of this increase is due to improvements in law enforcement. However, a small portion may also be due to the double counting of seizures when more than one law enforcement agency is involved (e.g. customs and police). The potential for double counting becomes greater when different countries work together

and report the same seizure(s). As cooperation among the various law enforcement agencies has increased in recent years, the likelihood of double counting of cocaine seizures increased as well.

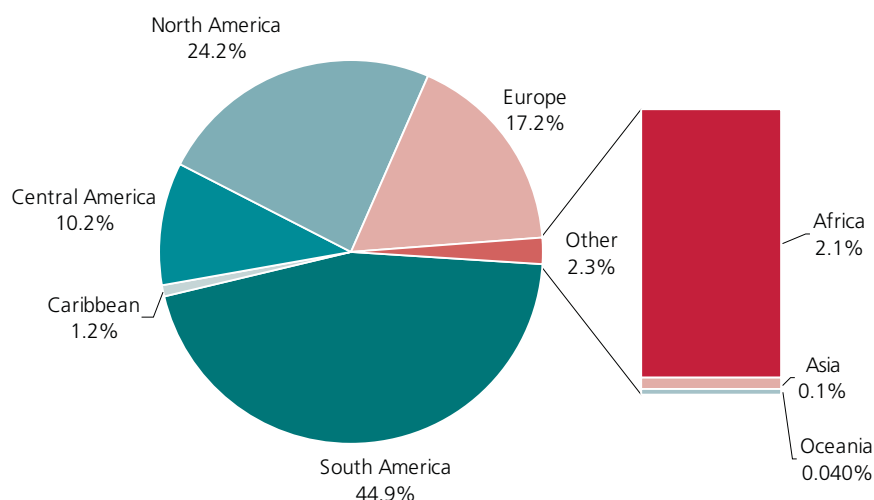
#### Cocaine seizures remain concentrated in the Americas and in Europe

Globally, most cocaine is seized in the Americas (81%). South America, where most cocaine is manufactured, accounted for 45 % of global seizures in 2006. North America, the world's largest cocaine market, accounted for 24%. Central America and the Caribbean, which are major transit regions, accounted for 11 % of global seizures.

The only large market outside of the Americas is Europe. Seventeen per cent of global cocaine seizures were made in Europe in 2006, and 99 % of these were made in West and Central Europe.

The rest of the world was responsible for about 2 % of global seizures and more than 90% of these were reported by countries in Africa.

**Fig. 49: Distribution of global cocaine seizures<sup>(a)</sup> in 2006 (N = 706 metric mt)**



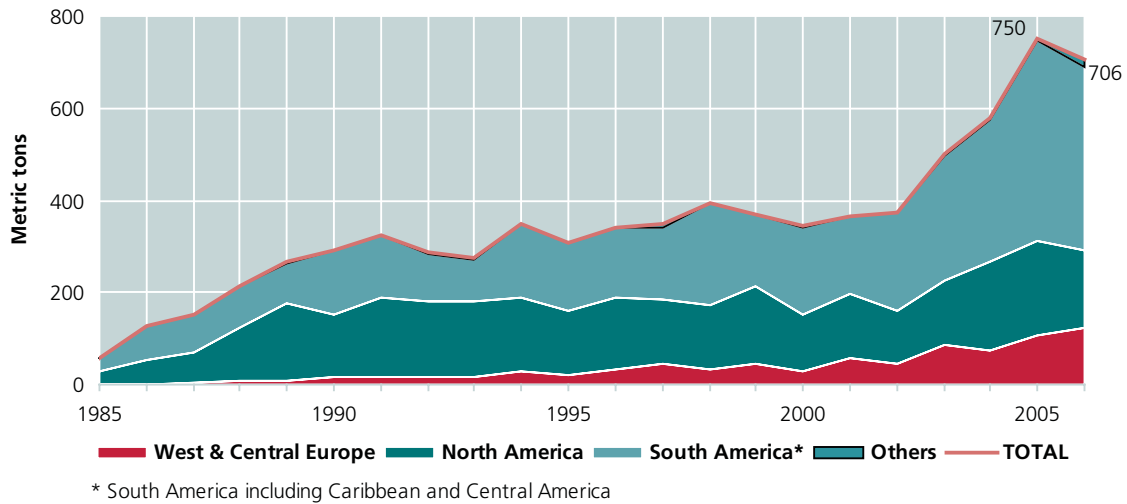
(a) as reported, at street purity levels

Source: UNODC, Annual Reports Questionnaire Data / DELTA.

<sup>1</sup> The global interception rate was calculated on the basis of a global cocaine production of 984 metric mt in 2006 and global seizures of 706 metric mt at street purity, which – given a global average cocaine purity of 59% in 2006 (as reported by member states to UNODC in the annual reports questionnaire) - would be equivalent to pure cocaine seizures of some 416 metric mt.



**Fig. 50: Global cocaine seizures<sup>(a)</sup> regional breakdown, 1985-2006**



(a) as reported, at street purity levels  
 Source: UNODC, Annual Reports Questionnaire Data / DELTA.

**Seizures fell in South America and the Caribbean in 2006**

In the Americas cocaine seizures declined 11% from the record levels reported in 2005. Only Central America saw an increase in 2006. Cocaine seizures fell in South America (-17%), the Caribbean (-27%) and in North America (-18%).

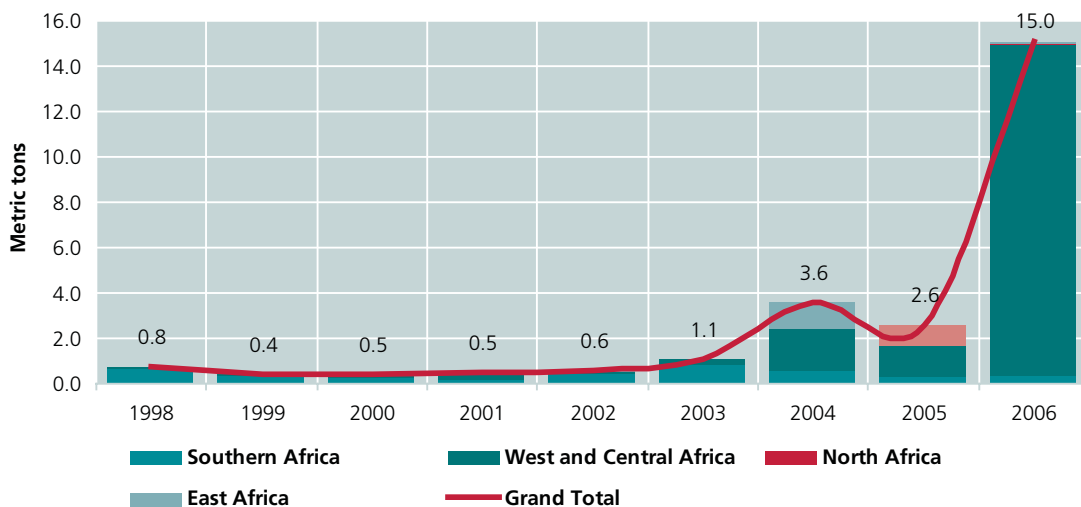
South American cocaine seizures rose from 31 % of global seizures in 1996 to 45% in 2006, reflecting the growing efforts made by coca producer countries and their neighbours to improve interdiction efforts close to source.

The bulk of South American cocaine seizures, 181 mt,

are carried out by Colombia. This figure is equivalent to 26% of global cocaine seizures. Colombian seizures represent 57% of South American cocaine seizures and 84% of coca-base and cocaine HCL seizures made in the three Andean countries which produce coca leaf for cocaine production.

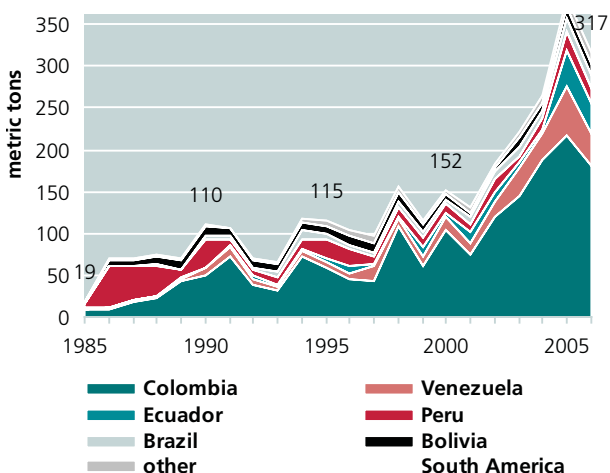
Large seizures in South America are also undertaken by Venezuela (39 mt), Ecuador (34 mt), Peru (19 mt) and Brazil (14 mt). Cocaine seizures in all of these countries declined in 2006 as compared to a year earlier. Increases in cocaine seizures were reported from Bolivia, Chile, and Uruguay and, to a lesser extent, Argentina and Paraguay, suggesting that trafficking to and/or via the Southern Cone may have increased in 2006.

**Fig. 51: Cocaine seizures in Africa, 1998-2006 (N = 215 metric mt)**



Source: UNODC, Annual Reports Questionnaire Data / DELTA

**Fig. 52: Cocaine seizures<sup>(a)</sup> in South America, 2005-2006**

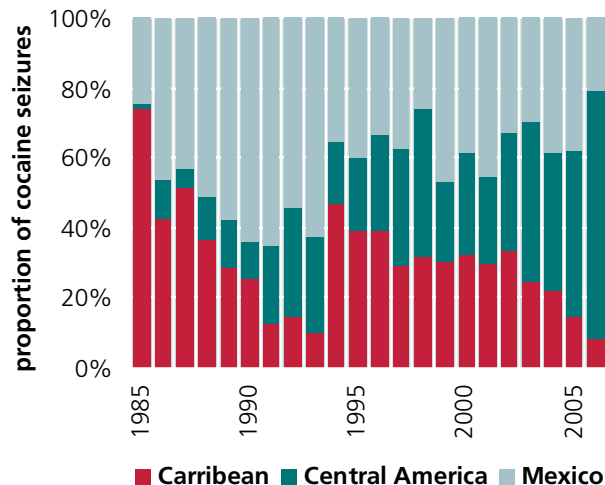


(a) as reported, at street purity levels  
Source: UNODC, Annual Reports Questionnaire Data / DELTA.

**Seizures shifted away from the Caribbean and towards Central America**

There has been a strong increase in seizures made by the countries of Central America (+88% in 2006) and an on-going decline of seizures made in the Caribbean region. Cocaine seizures undertaken by Mexico also declined in 2006. These trends are consistent with longer-term shifts. Taking the seizures reported in the main transit zones to the US and Canadian markets as 100%, the proportion of seizures undertaken in the Caribbean declined from 74% in 1985 to 33% in 2000, and from 15% in 2005 to 8% in 2006. In contrast, the proportion of seizures undertaken in Central America increased over the same period from 1% in 1985 to 29% in 2000, and from 48% in 2005 to 71% in 2006. This corre-

**Fig. 53: Cocaine seizures in main transit zones to USA and Canada, 1985-2006**



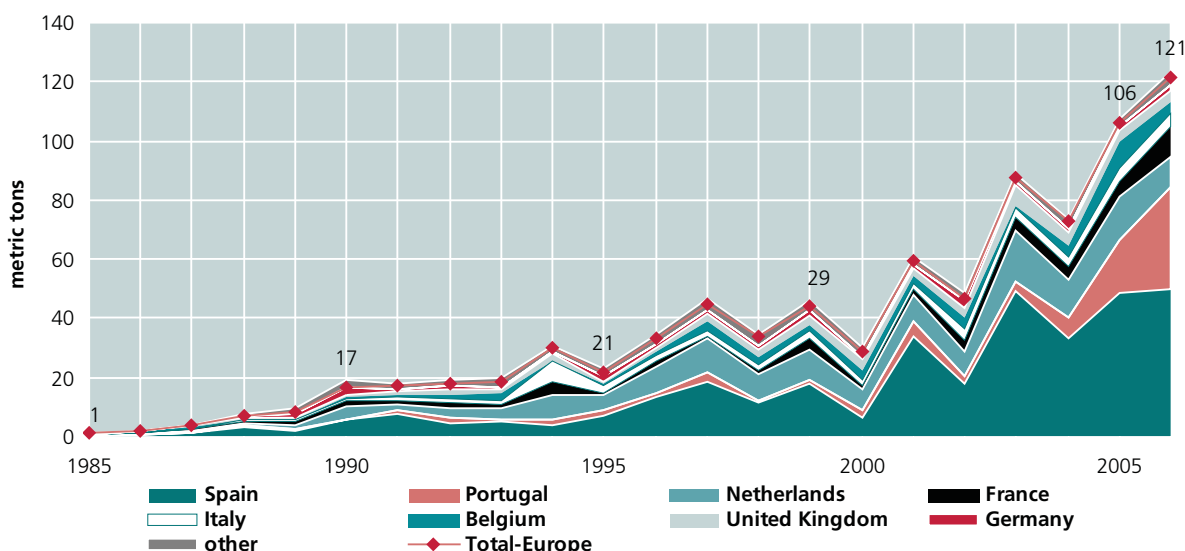
Source: UNODC, Annual Reports Questionnaire Data / DELTA.

sponds with the regional trend of seizures being made increasingly closer to source. Most of the increase in 2006 was due to large seizures made by Panama. The proportion of seizures made by Mexico rose from 25% in 1985 to 39% in 2000, but fell back to 21% by 2006.

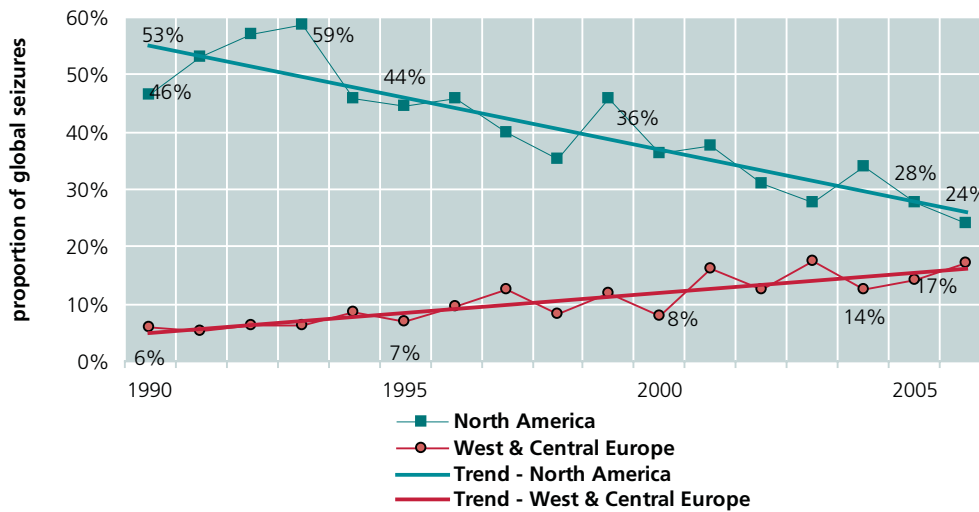
**Cocaine seizures continue rising in Europe**

Cocaine seizures in Europe rose by 14 % in 2006, reaching a new record high of more than 120 metric mt. Cocaine seizures in Europe have been increasing steadily since 1980 parallel to the overall expansion of the market in Europe. Europe's share of global cocaine seizures rose from less than 3% in 1980 to 8% in 2000, and from 14% in 2005 to 17% in 2006.

**Fig. 54: Cocaine seizures in Europe, 1985-2006**



Source: UNODC, Annual Reports Questionnaire Data / DELTA.

**Fig. 55: Proportion of global seizures made in North America and in West & Central Europe, 1990-2006**

Source: UNODC, Annual Reports Questionnaire Data / DELTA

### Seizures decline significantly in North America as the market contracts

Seizures declined by 18% in North America in 2006. The proportion of North American seizures in global cocaine seizures declined from 46% in 1990 to 36% in 2000, and from 27% in 2005 to 24% in 2006. The stabilization or decline in North America has occurred in conjunction with increased efforts to strengthen the interdiction capacities of source and transit countries, again with the objective of seizing drugs before they arrive in the final destination countries.

### Surveys and intelligence reports identify a cocaine shortage in the USA in 2007

The stabilization/decline of supply of cocaine in North America is also reflected in student survey data. Student surveys suggest that strong eradication efforts in the Andean region and increased interdiction efforts in the main drug transit countries have had a measurable impact on cocaine availability within the USA. The availability of cocaine, as perceived by US 8<sup>th</sup>, 10<sup>th</sup> and 12<sup>th</sup> grade high-school students, declined over the last decade. The proportion of students who found it 'easy' or 'fairly easy' to obtain cocaine fell from 38% in 1998 to 32% in 2007.

Major shortages of cocaine across the United States for the year 2007 based on information from federal, state and local enforcement agencies were also reported by the US National Drug Intelligence Centre. The information from law enforcement agencies was confirmed by a number of demand indicators, including drug testing and emergency room visits. Investigators in the 38 drug markets which described cocaine shortages, reported that drug distributors were often unable to obtain their regular supplies of cocaine. Law enforcement assess-

ments also indicated that the decrease in availability was accompanied by a corresponding increase in cocaine prices and a decrease in cocaine purity. Some reported prices increased as much as 100%.<sup>2</sup>

Drug Enforcement Administration (DEA) reports indicated that the price per pure gram of cocaine rose 44 % between January and September 2007. In parallel, cocaine purity levels fell. The cocaine shortage was also confirmed in the 2008 National Drug Control Strategy Report of the United States. Based on available intelligence it was argued that the cocaine shortage was the cumulative result of control efforts in the source and transit zones. Dedicated efforts by the Government of Colombia, massive seizures of cocaine in transit, and aggressive Mexican and U.S. law enforcement efforts targeting large Mexican drug trafficking organizations are thought to have disrupted the flow.<sup>3</sup> The escalation of the internal fights among the various competing Mexican drug cartels in 2007 also contributed to this temporary cocaine shortage in 2007.<sup>4</sup>

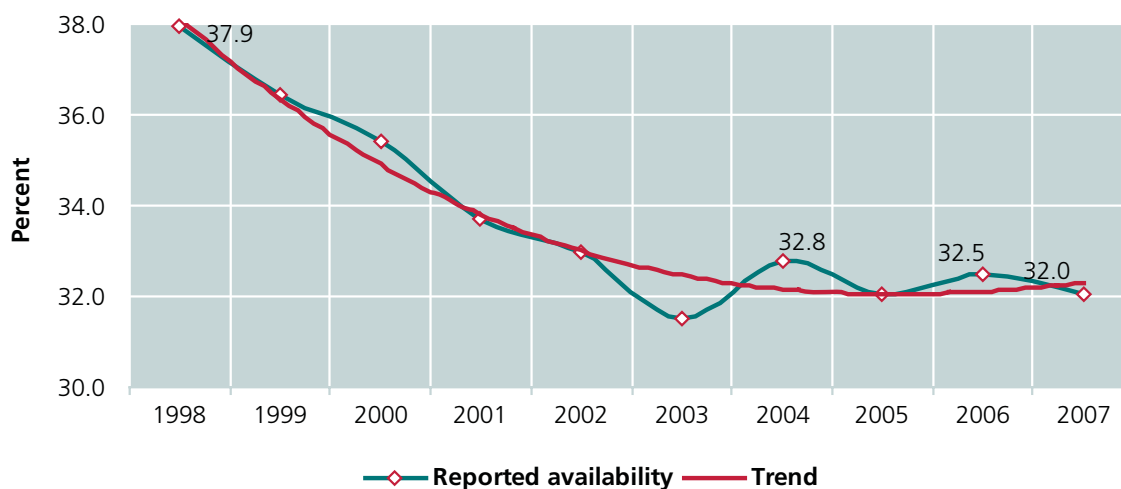
### Large seizures remain concentrated in a few countries

While there are a growing number of countries reporting cocaine seizures, the largest amounts of cocaine are still seized in a limited number of countries. The five countries with the largest cocaine seizures accounted for 64% of global cocaine seizures in 2006.

<sup>2</sup> US Department of Justice, *National Intelligence Center, National Drug Threat Assessment 2008*, October 2007.

<sup>3</sup> ONDCP, *National Drug Control Strategy, 2008 Annual Report*, Washington February 2008.

<sup>4</sup> US Department of Justice, *National Intelligence Center, National Drug Threat Assessment 2008*, October 2007.

**Fig. 56: Perceived availability\* of cocaine among US high school students, 1998-2007**

\*unweighted average of 8th, 10th and 12th grade students reporting that it is 'fairly easy' or 'very easy' to obtain cocaine powder.  
Source: NIDA, *Monitoring the Future*

For the fifth year in a row, Colombia undertook the world's largest cocaine seizures, seizing 181 mt of cocaine hydrochloride and cocaine base in 2006, equivalent to 26% of the world total. The interception rate of cocaine produced in Colombia amounted to 30% in 2006, up from 13% in 2000. Seizures of cocaine hydrochloride amounted to 130 mt in 2006. The second largest cocaine seizures took place in the United States (147 mt). The US share in global cocaine seizures has declined from 46% of global seizures in 1985 to 36% in 1995, and from 23% in 2005 to 21% in 2006. In 2006, Spain continued to seize the largest amount of cocaine in Europe and accounted for 7% of global seizures (50 mt). Since 2001, Spain has recorded either the third or the fourth largest annual cocaine seizures at the global level. Important transit countries, Venezuela and Panama seized 6% of the total or 39 mt, and 5% of the total or 36 mt, respectively.

#### The majority of cocaine still flows 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. Frequently quoted estimates among enforcement agencies in recent years suggested that some 450 mt of cocaine (46% of production in 2006) may be destined for markets in North America<sup>5</sup> (trend falling) and some 250 mt (25% of production) for markets in Europe (trend rising)<sup>6</sup>. Most of the remainder is

seized in the coca producing countries (215 mt of cocaine base and salt in 2006, or less than 170 mt expressed in pure cocaine) or consumed in South America.<sup>7</sup>

The US 'Interagency Assessment of Cocaine Movement' (IACM) assumes higher shipment figures of cocaine towards North America. Estimates by the IACM suggest that between 530 and 710 mt of cocaine may have departed South America towards the United States in 2006<sup>8</sup>. Out of this amount some 90% is thought to have transited the Mexico-Central America Corridor in 2006. The IACM assumes that 66% of the cocaine departing South America towards the USA in 2006 moved through the Eastern Pacific Vector, more than a year earlier (50%).

In 2006, traffickers began increasingly using overland routes to transport cocaine from Colombia through Venezuela and Ecuador to the United States of America and Europe.<sup>9</sup> Fifty four per cent of the cocaine was seized on the overland route and 44% was seized at sea.<sup>10</sup> The Colombian authorities estimate that 78%

<sup>5</sup> UNODC, *World Drug Report 2007*, June 2007.

<sup>6</sup> Direction Centrale de la Police Judiciaire / Police Nationale, 'The Traffic of Cocaine through the Maritime Channel in 2006', presentation given by the French delegation to the Commission on Narcotic Drugs, 12-16 March 2007. A 250 metric ton figure of cocaine destined for Europe has also been repeatedly quoted by Europol as an estimate for Europe.

<sup>7</sup> The actual amounts available for consumption are substantially lower than the 450 mt targeted for markets in North America. For the year 2000, the Office of National Drug Control Policy estimated that the cocaine available for consumption in the USA amounted to 259 metric mt. (Office of National Drug Control Policy, *National Drug Control Strategy, Data Supplement, Feb. 2003*). As there are no indications that the market has expanded since, a figure of around 250 metric mt would seem to be a reasonable estimate of the size of the US market in terms of actual consumption.

<sup>8</sup> US Department of Justice, National Intelligence Center, National Drug Threat Assessment 2008, October 2007.

<sup>9</sup> 'Country Report - Colombia', Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean (HONLAC), Quito Ecuador, 15-19 October 2007.

<sup>10</sup> UNODC, Annual Reports Questionnaire (Colombia), for the year 2006.

may be eventually trafficked by sea, mostly going by go-fast vessels (65%). They also estimate that 55% of the cocaine produced in South America is transported along the Mexico-Central America corridor towards North America, while 35% of the cocaine produced and shipped from the coasts of Colombia, Venezuela, the Guyanas and Brazil is trafficked via the European/African corridor.<sup>11</sup>

Mexico is the main transit country of cocaine shipments to North America. Trafficking to Mexico and further on to the United States declined, however, in 2006 and 2007. About 52% of cocaine was trafficked to Mexico by sea in 2006, another 18% by land from Central America (Guatemala and Belize) and 30% by air. These figures suggest that 2006 saw a decline in trafficking by sea and by land and – in relative terms – an increase in trafficking by air as compared to a year earlier. Aircrafts often bring cocaine into Mexico from Venezuela, Colombia and from countries in Central America, notably Guatemala.<sup>12</sup> Important entry points for cocaine into Mexico by sea continue to be the Pacific region and the peninsula of Yukatan on the Atlantic coast. From there, the drug is usually transported by land northwards. In volume terms, most cocaine shipments are by sea. In terms of cases, most seizures are for deliveries by land. About 90% of the cocaine is destined for the USA, 7% is destined for Europe (often by air to Spain, Belgium, Germany, France and Italy) and 3% is for local consumption.<sup>13</sup>

The US authorities estimate that around 90% of the cocaine, which entered their country in 2006, transited the Mexico-Central America corridor. The amounts of cocaine trafficked into the United States declined, however, in 2006 and this trend became more pronounced in 2007 as Mexican authorities stepped up efforts to fight the drug cartels operating on their territory, which also increased the level of cocaine related violence in Mexico. US cocaine seizures along the country's southern border declined by 20% over the first two quarters of 2007 on a year earlier and by almost 40% in the second quarter of 2007, as compared to the second quarter of 2006. The main entry point of cocaine into the United States continues to be the common border of Mexico with southern Texas (accounting for a third of all seizures along the border with Mexico in 2006), followed by the border with southern California (18%).<sup>14</sup>

11 'Country Report – Colombia', Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean (HONLAC), Quito Ecuador, 15-19 October 2007.

12 'Country Report – Mexico', Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean (HONLAC), Quito Ecuador, 15-19 October 2007.

13 UNODC, Annual Reports Questionnaire (Mexico), for the year 2006.

14 US Department of Justice, National Intelligence Center, *National Drug Threat Assessment 2008*, October 2007.

### Trafficking from the Andean region to Europe continues

The Colombian authorities estimated that around 35% of the cocaine produced and shipped from the coasts of Colombia, Venezuela, Brazil and the Guyanas is trafficked via the European/African corridor.<sup>15</sup> Colombia still dominates ARQ mentions as the main source country for cocaine arriving in Europe. Taking only mentions of the three Andean countries, Colombia accounted for more than half of all such mentions from European countries in 2006. The most frequently mentioned transit countries in the ARQ in South America were Venezuela, followed by Ecuador, Mexico, Brazil, the Netherlands Antilles, Suriname and the Dominican Republic in 2006.

Based on individual drug seizures reported to UNODC, most of the cocaine intercepted in Europe could be traced back to Venezuela in 2006 (36% of seizures, in weight terms, for which the origin was known), followed by Colombia (17%), the Dominican Republic (5%), Brazil (3%), Ecuador (3%), Argentina (3%) and Peru (3%). The ranking for 2007 started again with Venezuela (44%), followed by Panama (11%), Colombia (5%), the Dominican Republic (4%), Peru (4%), Brazil (2%), Argentina (2%), Bolivia (1%), Mexico (1%) and Costa Rica (1%).

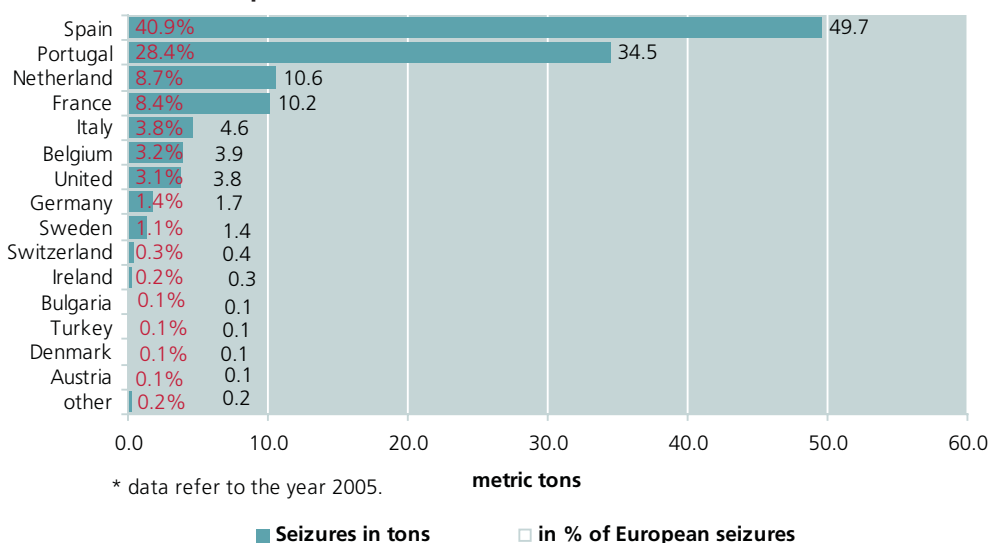
### Spain and Portugal are the main entry points into Europe

In 2006, European cocaine seizures reached 122 mt, their highest level ever. This represented a 14% increase on a year earlier, and was consistent with the average annual growth rate over the 1996-2006 period. Despite this ongoing growth in seizures, cocaine prices have not increased and purity levels have not deteriorated in Europe over the last decade. This is a strong indication that the availability of cocaine has increased in Europe.

Spain continues to be the main entry point for cocaine into Europe. In 2006, Spain reported cocaine seizures of 50 mt, accounting for 41% of all such seizures made in Europe. This was the highest volume of cocaine seized by a European country ever. Sixty six per cent of Spanish seizures were made while the cocaine was still at sea; 11% were made in containers and 6% at airports in 2006. Traditionally, most cocaine was seized along the northern Atlantic coast of Spain, notably in Galicia. Over the last few years, cocaine increasingly entered the country via southern Spain (Andalusia) as well as via Madrid (by air) and via Barcelona and Valencia. In addition, there is also some local manufacture of cocaine in Spain. Spain reported the dismantling of 10 cocaine

15 'Country Report – Colombia', Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean (HONLAC), Quito Ecuador, 15-19 October 2007.

**Fig. 57: Cocaine seizures in Europe in 2006**



Source: UNODC, Annual Reports Questionnaire Data / DELTA

laboratories in 2006, about the same as a year earlier (11), up from 4 in 2001.

Shipments of cocaine to Spain were reported to have left South America mainly from Venezuela (31% of seizures of known origin in weight terms in 2006), followed by the Dominican Republic (8%), Ecuador (6%), Brazil (5%), Argentina (5%) and Colombia (4%). Drug trafficking groups of Colombian origin dominate the trafficking operations. Members of such groups also accounted for the largest number of cocaine related arrests among foreigners in Spain (23% in 2006), ahead of members of Moroccan groups (11%) and of groups from the Dominican Republic (6%), Romania (3%), the UK (2%), Portugal (2%) and Italy (2%).

The rather high level of arrests of Moroccans and Portuguese point to the increasing role of trafficking of cocaine through Western and Northern Africa to Spain and Portugal. The main new trend for the last three to four years has been the growth in cocaine shipments via West Africa – typically off the coasts of Cape Verde, Guinea Bissau and the Canary Islands, as well as to various countries along the Gulf of Guinea, including Ghana, Cote d’Ivoire, Togo, Nigeria, and, further west, Guinea, Sierra Leone, Liberia and Senegal, for subsequent deliveries to Europe, including Spain and Portugal.

Portugal has become another major gateway for cocaine destined for European markets. Portugal reported 35 mt of cocaine seizures in 2006, equivalent to 35% of all European cocaine seizures in 2006. Large volumes of European cocaine seizures were also undertaken by the Netherlands (11 mt), France (10 mt) and Italy (5 mt).

Portugal’s cocaine seizures basically doubled in 2004, in 2005 and in 2006 (rising from 3 mt in 2003 to 7 mt in 2004, 18 mt in 2005 and 35 mt in 2006). The large

seizures made by the authorities in Portugal are mainly linked to the rising importance of West Africa, including some of the Portuguese speaking countries, such as Cape Verde or Guinea Bissau. Cocaine is smuggled to these countries from the Andean region, often via Venezuela, Brazil and Western Africa to Europe. Foreigners arrested in Portugal for cocaine trafficking in 2006 were mainly from Cap Verde (19%), Venezuela (14%), Brazil (13%), Guinea Bissau (5%), as well as Angola (1%) and Sao Tome and Principe (1%). In addition, European traffickers were arrested trying to smuggle cocaine out of Portugal. These arrests included citizens from Spain (13%) and the Netherlands (6%). Individual seizures reported by Portugal to UNODC in 2007 suggested that 99% of the cocaine shipped to Portugal transited African waters. Most shipments were reported to have originated in Senegal and Guinea Bissau in 2007.

### Cocaine trafficking via West Africa emerges as a serious problem

The most striking new trend in cocaine trafficking in recent years has been the rising importance of Africa, notably of West and Central Africa, as a transit area for cocaine shipments to Europe. Seizures made in Africa rose from less than 1 mt over the 1998-2002 period to 15 mt in 2006. Most of the increase took place in 2006.<sup>16</sup> The largest African cocaine seizures were

<sup>16</sup> The massive increase of seizures shown for West and Central Africa in 2006 was to a large extent due to one major seizure in 2006 reported by Nigeria. This concerned a shipment of cement mixed with cocaine. Samples analyzed by the Nigerian authorities identified cocaine. Other samples analyzed later by the US Drug Enforcement Agency failed, however, to confirm the existence of cocaine. This could indicate that not all of the 14.2 mt may have been cocaine. On the other hand, a number of other West and Central African countries which had growing and important amounts of cocaine seizures according to press reports, did not fill in the Annual Reports Questionnaire, and these seizures are thus not included in the total.

reported by Nigeria, followed by Ghana, South Africa, Morocco and Cap Verde in 2006. In addition, Guinea Bissau emerged in recent years as an important cocaine trafficking hub. Out of the 33 African countries that provided seizure statistics in 2006 to UNODC, 25 African countries, or 76%, reported seizures of cocaine, up from 34% in 1990.

African cocaine seizures are now equivalent to 2.1% of the global total, up from 0.3% in 2005 and 0.1% in 2000. Since law enforcement in Africa is hampered by a lack of resources and other important factors, this marked increase may not fully reflect the actual trafficking flows through the region.

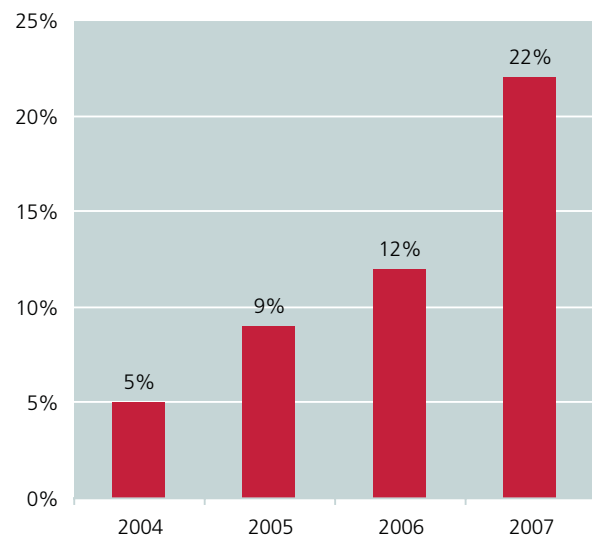
UNODC's database of individual drug seizures showed that, out of the total number cocaine seizures made in Europe in 2007 (where the 'origin' had been identified), 22% had been smuggled via Africa to Europe, up from 12% in 2006 and 5% in 2004. Criminal groups from West African countries continue to dominate the cocaine retail trade in a number of European countries.

The most frequently mentioned country of origin of cocaine trafficked to Africa is Colombia, followed by Peru. The most important transit country for cocaine seizures made in Africa is Brazil, followed by Venezuela.

#### **Cocaine trafficking in Asia and the Oceania region increases but remains limited**

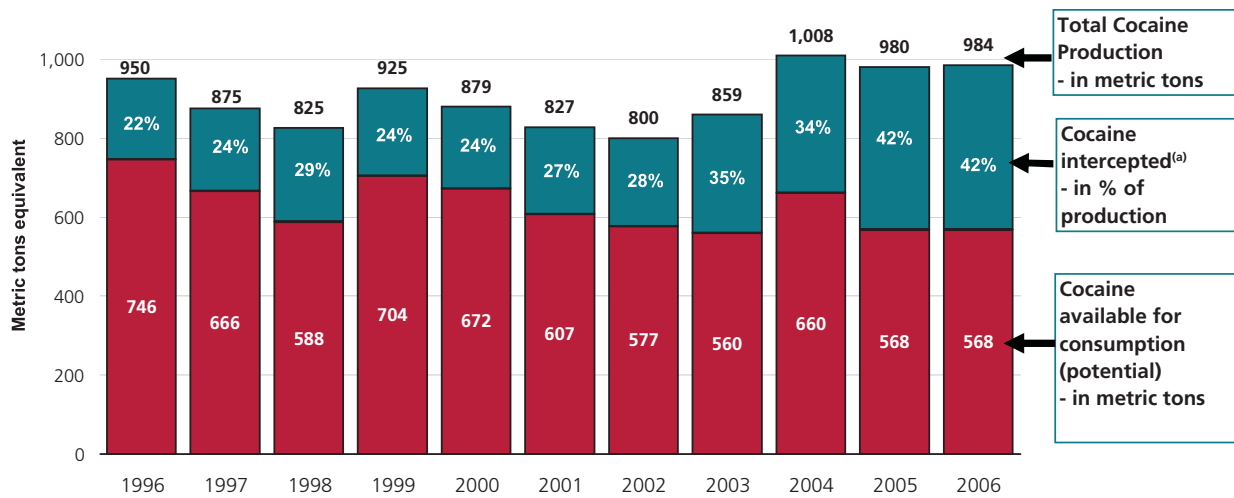
Although cocaine seizures almost doubled in Asia in 2005 and rose by a further 27% in 2006, they remained at very low levels compared to other regions (0.7 mt or 0.1% of global seizures). Seizures in the Oceania region tripled to 0.3 mt in 2006. The largest cocaine seizures in the Oceania region take place in Australia (252 kg in 2006 or 88% of all cocaine seizures in the Oceania region). The largest cocaine seizures in Asia in 2006 were made by China (358 kg), followed by India (206 kg), Thailand (36 kg), Hong Kong (15 kg), Iran (11 kg), Japan (10 kg) and Lebanon (9 kg). Out of 41 Asian countries which reported seizure information to UNODC, 18 countries (43%) reported seizures of cocaine in 2006. This is a far lower proportion than in the other continents. Cocaine manufacture in Asia is extremely rare. Nonetheless, a few clandestine cocaine-manufacturing laboratories were dismantled: 4 laboratories were dismantled in Hong Kong SAR of China in 2006 and one laboratory was dismantled in mainland China, close to the Hong Kong border.

**Fig. 58: Proportion of individual cocaine seizures made in Europe that transited Africa, 2004-2007**

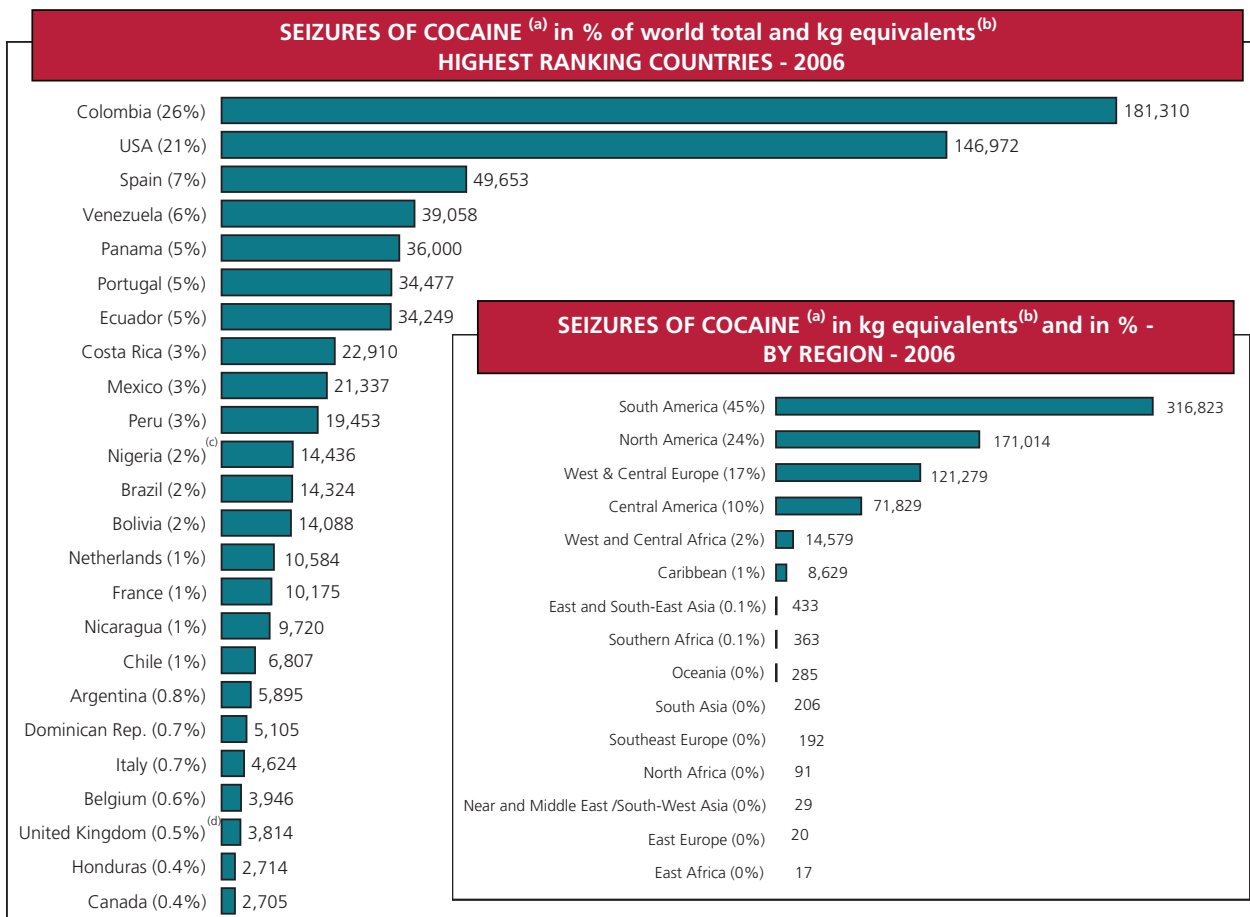


Source: UNODC, Individual drug seizures database.

**Fig. 59: Global illicit supply of cocaine, 1996-2006**



<sup>(a)</sup> Seizures as reported (street purity). Includes cocaine HCl, cocaine base, crack cocaine, and other cocaine types.



<sup>(a)</sup> Includes cocaine HCl, cocaine base, crack cocaine, and other cocaine types.

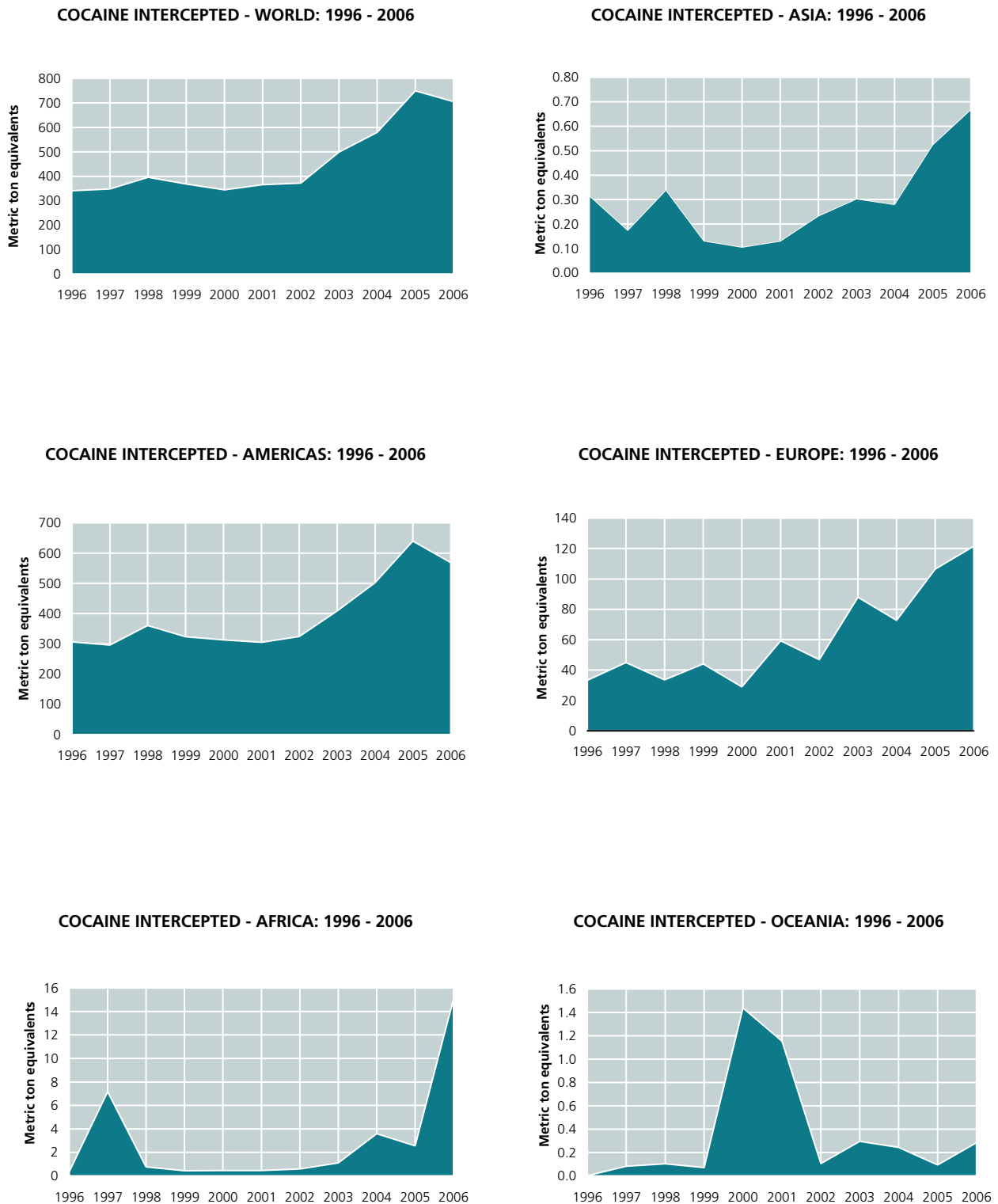
<sup>(b)</sup> Seizures as reported (street purity).

<sup>(c)</sup> Substance purity unknown.

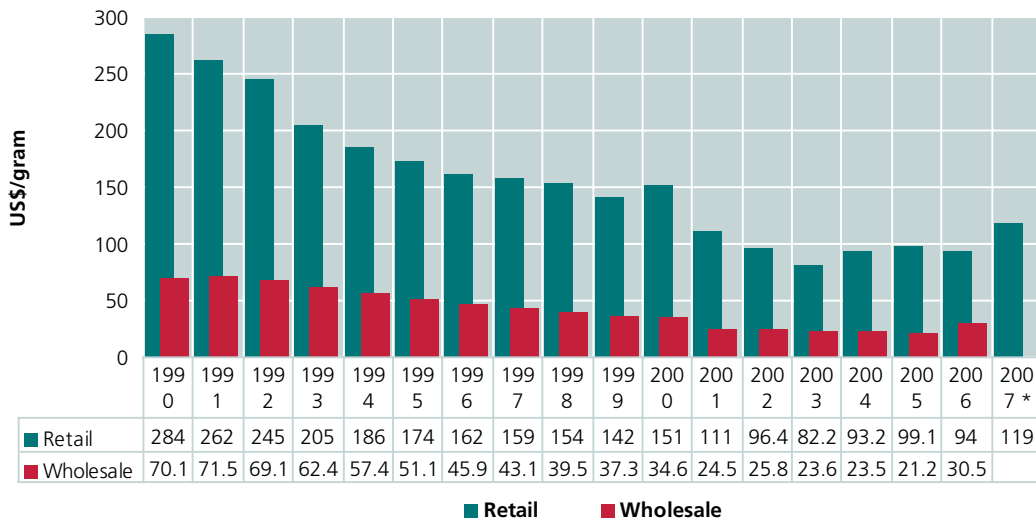
<sup>(d)</sup> Data refer to 2005 England and Wales only.



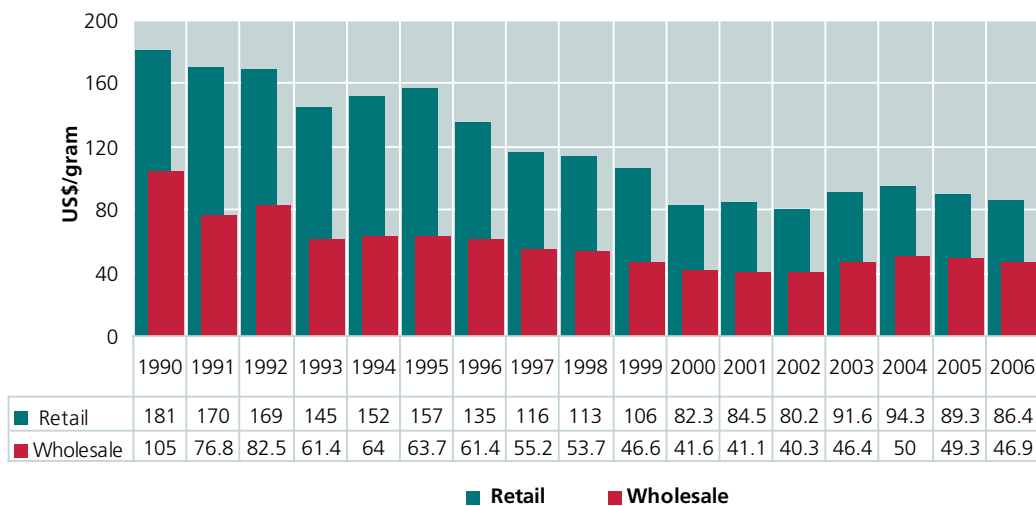
**Fig. 60: Global seizures of cocaine, 1996-2006**



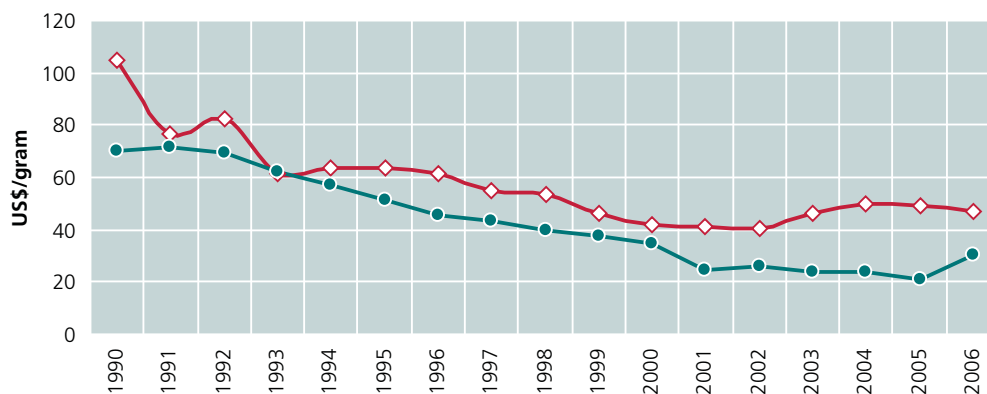
**Fig. 61: USA: Cocaine retail and whole sale prices, 1990-2007 (US\$/gram)**



**Fig. 62: EUROPE: Cocaine retail and whole sale prices, 1990-2007 (US\$/gram)**



**Fig. 63: Wholesale cocaine prices in Europe and the USA, 1990-2007 (US\$/gram)**





### 1.3.4 Consumption

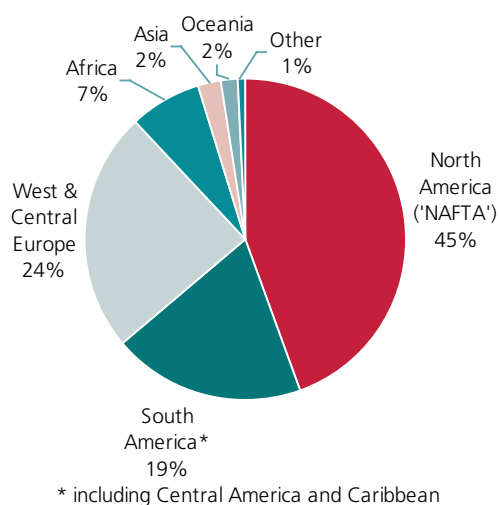
#### Global cocaine use largely stable

In 2006/07, an estimated 16 million people worldwide, or 0.4% of the global population aged 15-64, consumed cocaine. The largest numbers of cocaine users are found in North America (7.1 million people or 45% of the world total), followed by West & Central Europe (3.9 million people or 24%) and South America (including Central America and the Caribbean: 3.1 million or 19% of the total). Estimates for these regions are largely based on epidemiological research results. The same applies to estimates for the Oceania region (0.3 million or 2% of the total).

The estimate of cocaine users in Africa (1.1 million people), in contrast, is based on selected rapid situation assessments, 'guesstimates' by government officials and qualitative information. These estimates should be treated with caution. The same applies to estimates for Asia (0.3 million cocaine users).

The annual prevalence of cocaine use is highest in North America (2.4%). In 2006/07, the Oceania region (1.4%) has replaced West and Central Europe (1.2%) as the region with the second highest rates of prevalence for

**Fig. 64: Annual prevalence of cocaine use in 2006/07, distribution by region (N=16.0 million)**



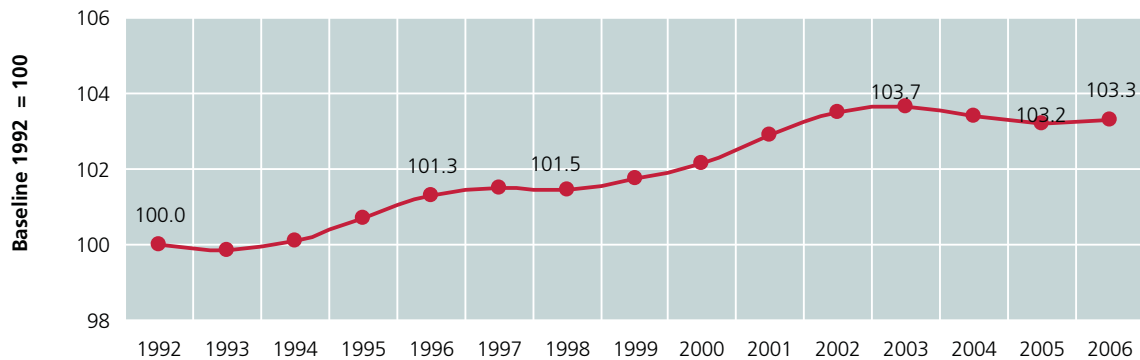
Sources: UNODC, Annual Reports Questionnaire Data, UNODC Field Offices, UNODC's Drug Use Information Network for Asia and the Pacific (DAINAP), UNODC, Global Assessment Programme on Drug Use (GAP), Govt. reports, EMCDDA, CICAD, HONLEA reports, local studies, UNODC estimates.

**Table 7: Annual prevalence of cocaine use, 2006 or latest year available**

|                       | No. of users      | in % of population 15-64 years |
|-----------------------|-------------------|--------------------------------|
| EUROPE                | 4,008,000         | 0.73                           |
| West & Central Europe | 3,895,000         | 1.22                           |
| South-East Europe     | 67,000            | 0.08                           |
| Eastern Europe        | 46,000            | 0.03                           |
| AMERICAS              | 10,196,000        | 1.74                           |
| North America         | 7,097,000         | 2.42                           |
| South America         | 3,099,000         | 1.05                           |
| ASIA                  | 335,000           | 0.01                           |
| OCEANIA               | 301,000           | 1.37                           |
| AFRICA                | 1,147,000         | 0.22                           |
| <b>GLOBAL</b>         | <b>15,987,000</b> | <b>0.37</b>                    |

Above global average  Below global average

Sources: UNODC, Annual Reports Questionnaire Data, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), UNODC, Global Assessment Programme on Drug Abuse (GAP), Govt. reports, EMCDDA, CICAD, HONLEA reports, local studies, UNODC estimates.

**Fig. 65: Cocaine use trends\* as perceived by experts: 1992-2006**

\* Note: Trends as reported by national experts in response to UNODC's Annual Reports Questionnaire. Points allocated for trend data: 'strong increase' 2; 'some increase': 1; stable: 0; 'some decline' -1; 'strong decline' -2. Reported drug use trends were weighted by the proportion of cocaine users in a country expressed as a %age of global cocaine use. If all countries had reported 'some increase', the global trend line would have increased by one point each year and would have reached 114 by 2006. Sources: UNODC, Annual Reports Questionnaire Data, UNODC Field Offices, UNODC's Drug Use Information Network for Asia and the Pacific (DAINAP), UNODC, Global Assessment Programme on Drug Use (GAP), Govt. reports, EMCDDA, CICAD, HONLEA reports and local studies.

cocaine use. South America (incl. the Caribbean and Central America: 1.1%) follows closely in third place. The change in this ranking is due to the results of a new household survey conducted in Australia in 2007. This survey found that cocaine use had grown significantly over the 2004-2007 period (prevalence rates for other drugs were found to have declined). Africa (0.2%), East and South-East Europe (0.1%) and Asia (0.01%) all have rates of annual prevalence below the global average.

#### Estimates of global annual prevalence should be interpreted with caution

The global prevalence rate of cocaine use (0.37%) estimated for 2006/07 is higher than the one reported in last year's World Drug Report (0.34%). For many reasons however, the difference is not statistically significant and most of the difference can be linked to methodological improvements bringing previous estimates closer to reality, *inter alia* by replacing some older, unrealistically low estimates, with higher new estimates based on local studies. If only data officially reported by States Members had been considered for this estimation, global cocaine use would have remained stable.

Trend estimates, based on expert perceptions provided to UNODC (weighted by the number of cocaine users in each country), also suggest that global cocaine use remained basically stable in 2006. These trend data suggest, in addition, that global cocaine use is slightly lower than in 2003. While one should not over-interpret these data, it seems safe to state that, according to expert opinion, the strong increases in global cocaine use seen in the 1990s have given way to a general stabilization over the 2003-2006 period.

#### Global stabilisation led by declines in North America

The global stabilization over the last few years was due

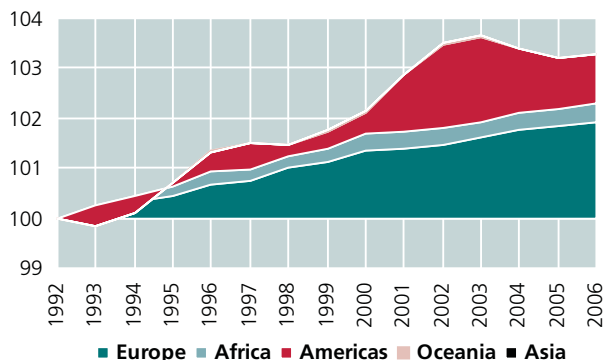
to a contraction in cocaine use in North America, offsetting increases in South America, Western Europe and West and Southern Africa. While cocaine use was reported to have fallen in the USA and in Canada, it increased in most countries of South America and Central America. In the Caribbean region, use seems to be stable to declining, consistent with reports of a declining importance of this sub-region for shipments of cocaine to North America. While, in 2001, nine Caribbean countries reported rising levels of cocaine use and only three countries saw a stabilization, in 2006 the number of countries reporting increasing cocaine consumption fell to two. In contrast, the number of Caribbean countries reporting stable or declining levels of cocaine use increased to five.

Cocaine use in the Oceania region was reported as largely stable in 2006. However, the new household survey conducted in Australia in 2007 indicated a reversal of this trend, showing a statistically significant increase in cocaine use over the 2004-07 period.

#### Cocaine use in Europe continues to increase but could be headed for stabilization

Most of the global increase of cocaine use over the last decade can be attributed to rapidly rising cocaine consumption in Europe, and cocaine use continued to increase in 2006. Nonetheless, data also indicate an underlying trend towards stabilization in a growing number of European countries. While the number of European countries reporting increases in cocaine use fell from 18 in 2001 and in 2002 to 14 in 2005 and in 2006, the number of European countries reporting stabilizing or declining cocaine use increased from 17 in 2001 to 28 in 2005 and 37 in 2006. The latter figure is more than 2.5 times the number of countries showing increases.

**Fig. 66: Cocaine use trends as perceived by experts: regional contribution to global change, 1992-2006**



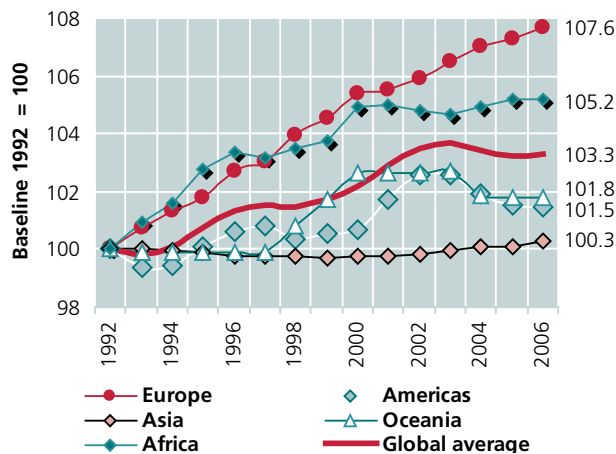
Sources: UNODC, Annual Reports Questionnaire Data, UNODC Field Offices, UNODC's Drug Use Information Network for Asia and the Pacific (DAINAP), UNODC, Global Assessment Programme on Drug Use (GAP), Govt. reports, EMCDDA, CICAD, HONLEA reports and local studies.

**Cocaine use in Africa increases**

There was an increase of cocaine use in Africa. While, in 2001/02, 11 African countries reported rising levels of cocaine use, this number increased to 14 over the 2005/06 period; in parallel, the number of African countries reporting falling levels of cocaine use fell from 7 to 2. The increase was particularly noticeable in western and southern Africa, and along the Atlantic coast of North Africa. This is related to the increasing importance of Africa as a transshipment location for South American cocaine destined for Europe.

Cocaine use in Asia increased as well, although it continues to occur in only a very small portion of the gen-

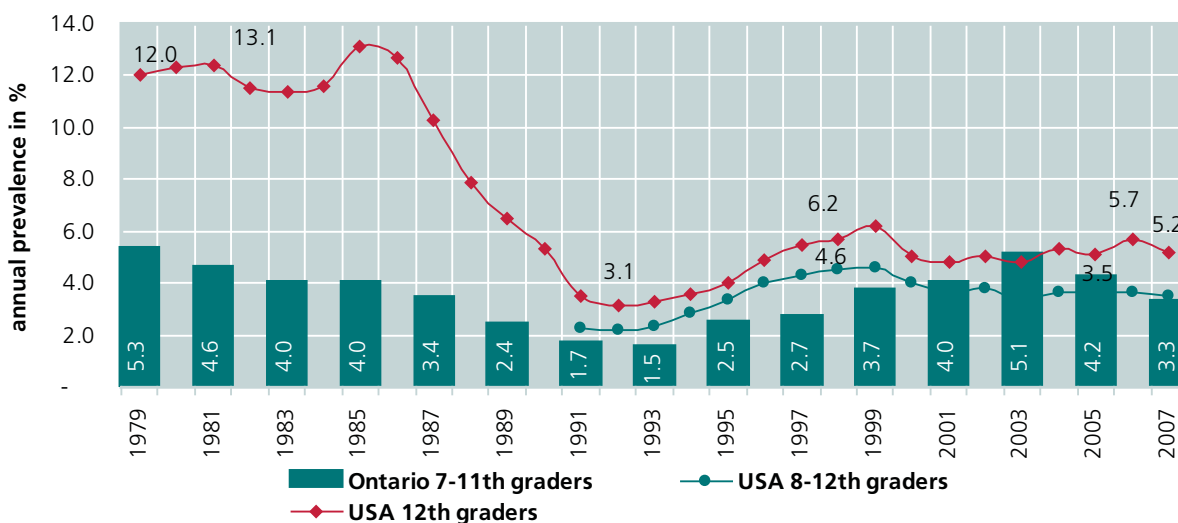
**Fig. 67: Cocaine use trends as perceived by experts - changes in regions, 1992-2006**



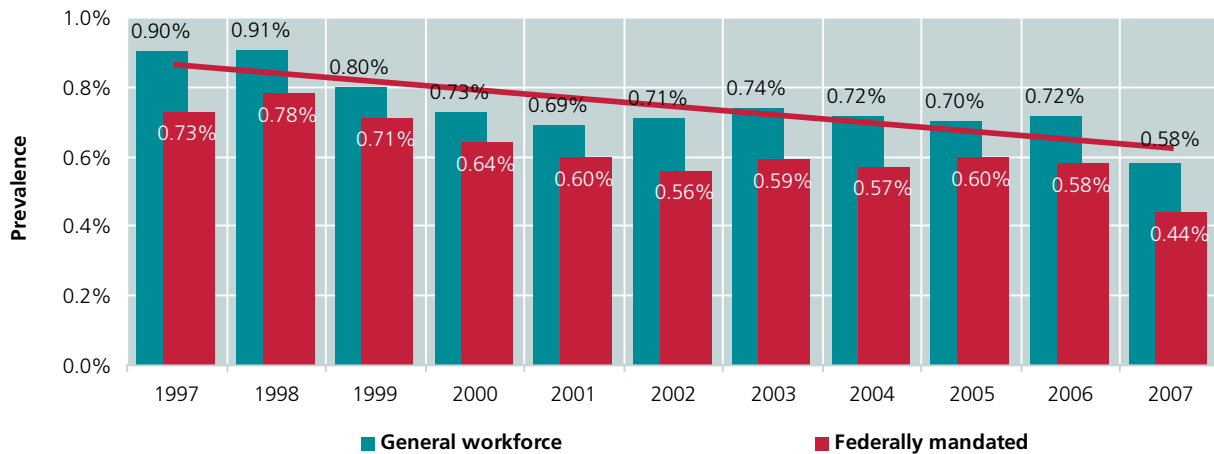
Sources: UNODC, Annual Reports Questionnaire Data, UNODC Field Offices, UNODC's Drug Use Information Network for Asia and the Pacific (DAINAP), UNODC, Global Assessment Programme on Drug Use (GAP), Govt. reports, EMCDDA, CICAD, HONLEA reports and local studies.

eral population. West African groups and, to a lesser extent, South American groups, are often involved in the trafficking of cocaine to the various Asian countries. The increase in cocaine use could reflect the rising levels of affluence in the region. In 2005, four Asian countries reported rising levels of cocaine consumption. This number rose to eight in 2006 and included Hong Kong SAR of China, Japan, the Philippines (for cocaine powder), Thailand, as well as Bangladesh, Nepal, Pakistan and the Lebanon. In parallel, the number of Asian countries reporting falling levels of cocaine use fell from three to two.

**Fig. 68: Cocaine use among high-school students in the USA and Ontario, Canada, 1979-2007**



Sources: NIDA, *Monitoring the Future*, 2007 and CAMH, *Ontario Drug Use Survey 2007*

**Fig. 69: US national workforce\*: percentage testing positive for cocaine**

\* Results based on 6.6 million tests among the general workforce in 2007 and 1.8 million tests among the federally mandated, safety sensitive workforce.

Source: Quest Diagnostics, *Quest Diagnostics Drug Testing Index*, March 2008

### Surveys and expert perceptions both point to declines in cocaine use in North America

Indications of a decline in cocaine use are found in student surveys from Canada and the United States, admission to drug treatment reports and data from US drug testing.

The annual prevalence of cocaine use among 12th graders declined from 5.7% in 2006 to 5.2% in 2007, and was 60% lower than the peak found in 1985 (13.1%). Average annual prevalence of cocaine use among 8th-12th graders fell by more than 20% (from 4.6% to 3.5%) between 1999 and 2007. The use of crack-cocaine, which is responsible for a large part of problem drug use in the USA, also declined. Similarly, cocaine use among high-school students in Ontario – Canada's most populated province – fell by 35% between 2003 and 2007.

The number of cocaine related treatment admissions fell in the USA from 263,300 admissions in 2004 to 250,100 in 2006 according to the Treatment Episode Data Set (TEDS). Even more impressive have been the declines of positive drug tests among the US workforce in recent years, notably in 2007. The population testing positive for cocaine use fell from 0.91% in 1998 to 0.72% in 2006, and then to just 0.58% of the general US workforce in 2007. This is equivalent to a decline of 19% in 2007 and 36% since 1998. For federally mandated tests in safety-sensitive professions, the decline was more pronounced, amounting to 24% in 2007 and 44% since 1998. The decline in 2007 seems to have been related to strong price increases (more than 40%), following successful law enforcement operations against drug trafficking organisations, led by Mexico, the United States and Canada.

Prevention appears to have played less of a role in the 2007 decline. Survey data show that the perceived 'harmfulness' of cocaine use among high-school students did not increase in 2007. US high school student reports on the perceived cocaine availability showed a decline in 2007 and a marked reduction over the 1998-2007 period. The perceived availability of cocaine was also reported to have declined among high-school students in Ontario, Canada in recent years.

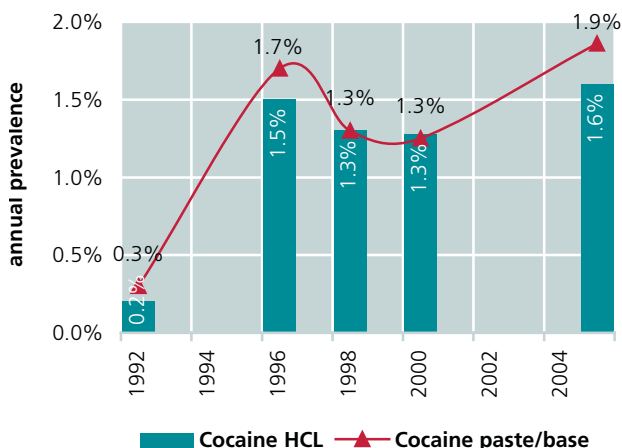
### Levels of use rise in Latin America

In contrast to falling cocaine use levels in North America, most of the countries in Latin America report rising levels of cocaine use.

Cocaine use in Bolivia increased over the 2000-2005 period, from 1.3% to 1.9% of the population age 12-50. The improvements in the second half of the 1990s coincided with the decline of domestic coca leaf production, and the increase in the first years of the new millennium also coincided with a rise in cultivation and cocaine production.

Cocaine use also increased in Brazil, the second largest cocaine market (some 870,000 persons) in the Americas after the USA (some 6 million persons). Household surveys conducted in Brazil showed an increase from 0.4% of the population age 12-65 in 2001 to 0.7% in 2005. Reports of increasing activities of cocaine trafficking groups in the south-eastern states of the country indicated that there may be a greater availability of cocaine in those areas. The territory of Brazil is increasingly exploited by international organized crime groups looking for transit points for cocaine shipments from Colombia, Bolivia and Peru to Europe. This is likely to have brought more cocaine to the local market.

**Fig. 70: Bolivia: annual prevalence of cocaine use (age 12-50), 1992-2005**

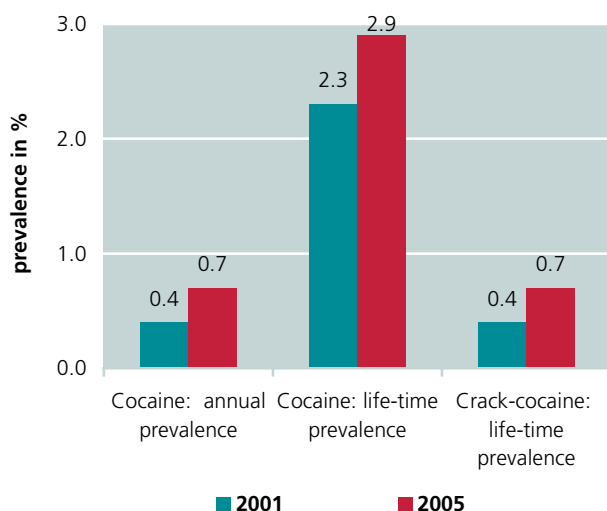


Source: CELIN, *Investigación: Estudio Comparativo Consumo de Alcohol, Tabaco, Cocaína, y otras Drogas en Bolivia, 1992-1996-1998-2000-2005, Bolivia 2005.*

The South-East and the South of Brazil are the areas most heavily affected by cocaine consumption. Life-time prevalence of cocaine use in the South-East of Brazil is 3.7% of the population age 12-65. In the South, life time prevalence is 3.1%, while in the North-East and the North life-time prevalence reaches at 1.2% and 1.3% respectively.

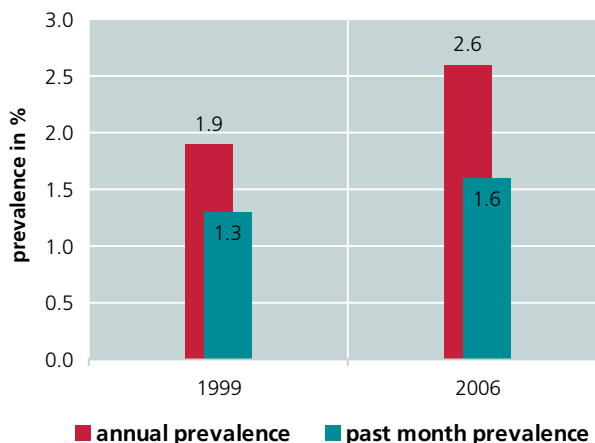
Argentina is the second largest cocaine market in South America (approximately 640,000 persons in 2006). In relative terms, the results of the 2006 household survey suggest that Argentina has the highest annual prevalence

**Fig. 71: Brazil: annual prevalence of cocaine use in 2001 and 2005**



Source: CEBRID, *Il Levantamento Domiciliar sobre o Uso de Drogas Psicotrópicas no Brasil: Estudo Envolvendo as 108 Maiores Cidades do País, 2005, Sao Paulo 2006* and CEBRID, *Il Levantamento Domiciliar sobre o Use de Drogas Psicotrópicas no Brasil: Estudo Envolvendo as 107 Maiores Cidades do País, Sao Paulo 2002.*

**Fig. 72: Argentina: cocaine use among the population age 12-65, 1999-2006**

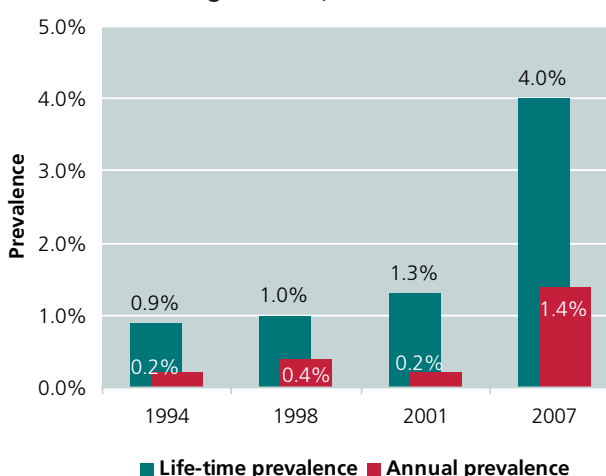


Sources: SEDRONAR, *Estudio Nacional en Población General sobre Consumo de Sustancias Psicoactivas 2006, Buenos Aires 2007* and previous years.

rate of cocaine use (2.6% of the population age 12-65) in South America and the second highest in the Americas after the USA (3% in 2006 among the population age 15-64). Over the 1999-2006 period, the annual prevalence rate rose from 1.9% to 2.6%. In addition, 0.5% of the population age 12-65 admitted to have used 'pasta base' (coca paste) in 2006.

Increases in cocaine use were also reported from Uruguay. The annual prevalence of cocaine use among the population age 12-64 increased from 0.2% in 2001 to 1.4% of the population age 12-65 in 2007 (about

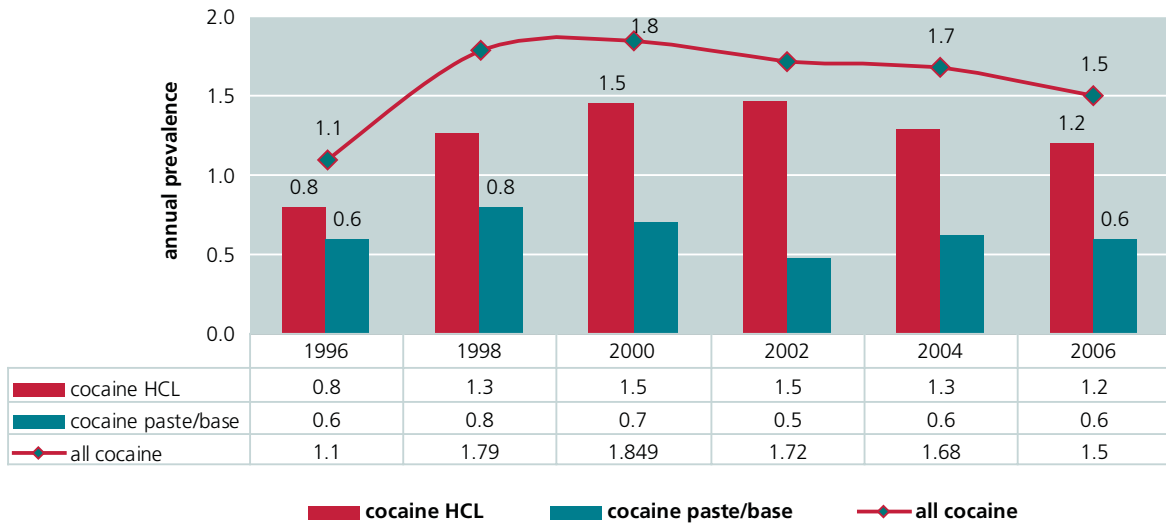
**Fig. 73: Uruguay: cocaine use among the population age 12-65\*, 1994-2007**



\* Age group 15-65 for survey in 1994; age group 12-64 in 1998 and in 2001; and age group 12-65 in 2007. Sources: Observatorio Uruguay de Drogas (OUD), *Encuesta Nacional en Hogares sobre Consumo de Drogas 2007* and Secretaría Nacional de Drogas y Junta Nacional de Drogas, *Encuesta Nacional de Prevalencia del Consumo de Drogas 2001.*



**Fig. 74: Chile: cocaine use among the general population, age 12-64, 1996-2006**



Source: CONACE, *Séptimo Estudio Nacional de Drogas en Población General de Chile, 2006*, Santiago de Chile 2007.

30,000 people). In addition, consumption of coca paste ('pasta base') has increased from previously negligible levels as of 2002 and now affects 0.3% of the population. School surveys suggests that cocaine use also increased in Ecuador and Paraguay in recent years.

The only documented exception of the general upward trend in cocaine use in Latin America is Chile. Cocaine use in Chile increased strongly in the late 1990s but gradually declined after 2000. The annual prevalence rate of cocaine use fell from 1.8% of the general population age 12-64 in 2000 to 1.7% in 2004 and 1.5% in 2006 (about 170,000 persons).

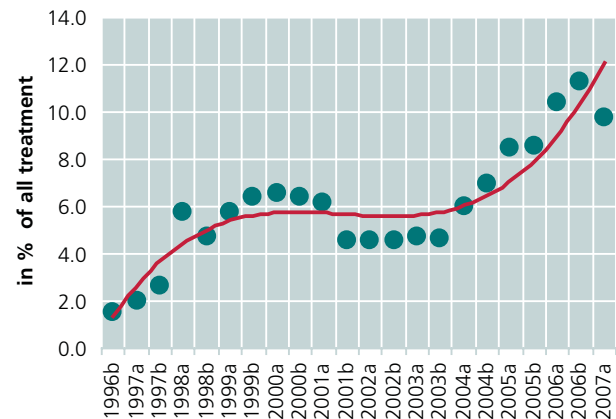
**Cocaine use continues to expand in South Africa**

The increasing use of African countries as transshipment locations of cocaine from South America to Europe has had a negative impact on cocaine consumption. Increases in cocaine use have been reported throughout the continent, but are particularly significant in countries of western and southern Africa.

The best documented increase of cocaine use is found in South Africa where the South African Community Epidemiology Network on Drug Use (SACENDU) has been collecting data for the last decade. Data from treatment centers in six locations - Cape Town, Gauteng (which includes the capital Pretoria and Johannesburg), Durban, Port Elisabeth, East London and Mpulanga (the province bordering Swaziland and Mozambique), show that cocaine use has been increasing rapidly in recent years. Cocaine (and/or crack-cocaine) related treatment demand - expressed as an unweighted average of the proportions of patients found in treatment for cocaine abuse in the six sites mentioned above - rose from less than 2 % in 1996 to 6.5% in 2000. In the first two quarters of 2007, around 10 % of all treatment

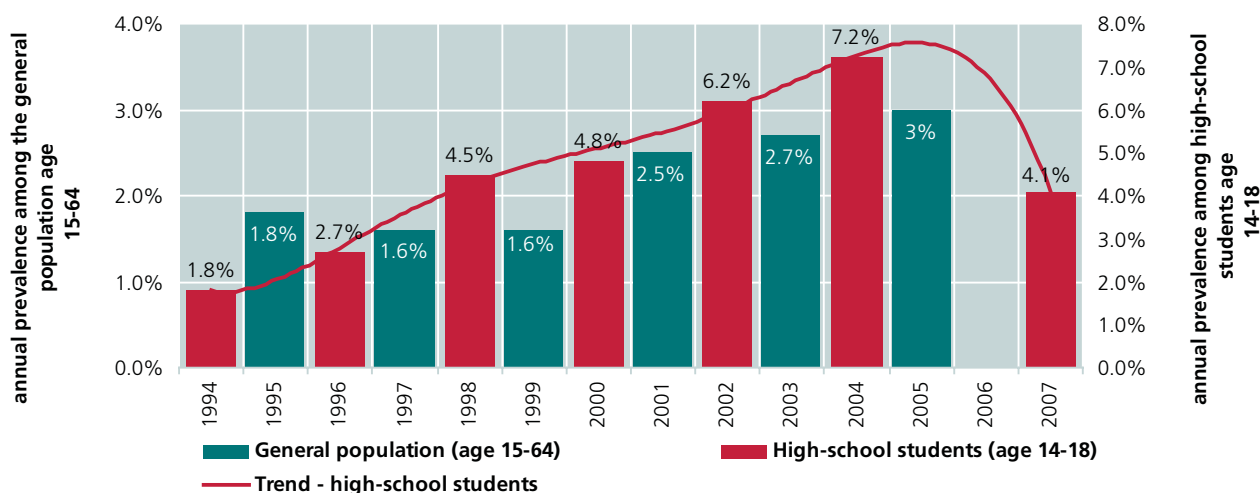
demand, including alcohol, was due to cocaine and/or crack-cocaine use. Excluding alcohol, the (unweighted) proportion would have amounted to some 18%, much higher than the African average (10%). The two exceptions to the increase in cocaine related treatment demand in South Africa over the first two quarters of 2007 were the Western Cape province (Cape Town), where methamphetamine predominates, and the Eastern Cape where treatment related to alcohol problems predominates. The highest proportions of treatment related to cocaine and/or crack-cocaine abuse over the first two quarters of 2007 were reported from the Eastern Cape province, which also includes the towns of Port Elisabeth and East London (14% of all treatment including alcohol), followed by the province of Gauteng that includes Johannesburg and the capital Pretoria (13%).

**Fig. 75: South Africa: cocaine as primary drug of abuse in treatment demand\*, 1996-2007**



\* unweighted average of treatment (incl. alcohol) in 6 provinces. Source: SACENDU, "Monitoring Alcohol & Drug Abuse Trends in South Africa, July 1996 – June 2007", *Research Brief*, Vol. 10 (2), 2007. Six monthly data.

**Fig. 76: Annual prevalence of cocaine use in Spain among the general population and among high-school students, 1994-2007**



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

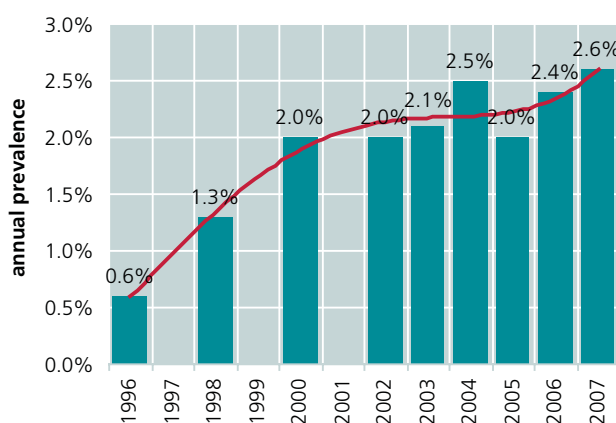
**Cocaine use continues rising in Europe, amidst signs of stabilization in some areas**

One of the most alarming trends in recent years has been the rapid increase of cocaine use in Europe. While use continued to rise in 2006, there are indications that the increase may be flattening. The number of European countries reporting increases in cocaine use fell from 18 in 2001 to 14 in 2006, while the number of European countries reporting stable or declining levels of cocaine use increased from 17 to 37 over this period. In a few European countries cocaine use appears to have started falling.

The highest prevalence rates for cocaine use in Europe are found in Spain, the main entry point of cocaine into Europe. Cocaine use doubled among the general population (age 15-64), from 1.6% in 1999 to 3.0% in 2005. Cocaine use levels in Spain are more than twice the West European average (1.2%), and similar to those reported from the USA. School surveys conducted in Spain over the November 2006-February 2007 period suggest that the upward trend may be ending. Surveys of 14-18 year old high-school students found a marked decline in cocaine use: from 7.2% in 2004 to 4.1% in 2007. In parallel, the monthly prevalence rate of cocaine use among high-school students fell from 3.8% in 2004 to 2.3% in 2007. Spanish authorities linked this evolution to the intensification of both prevention and law enforcement efforts over the last few years. The perception of the risks associated with cocaine consumption increased markedly over the 2004-2007 period, while reported access to cocaine (perceptions of availability) deteriorated. The average age of initiation of cocaine use, however, did not increase. It fell slightly from 15.8 in 2004 to 15.4 in 2007.

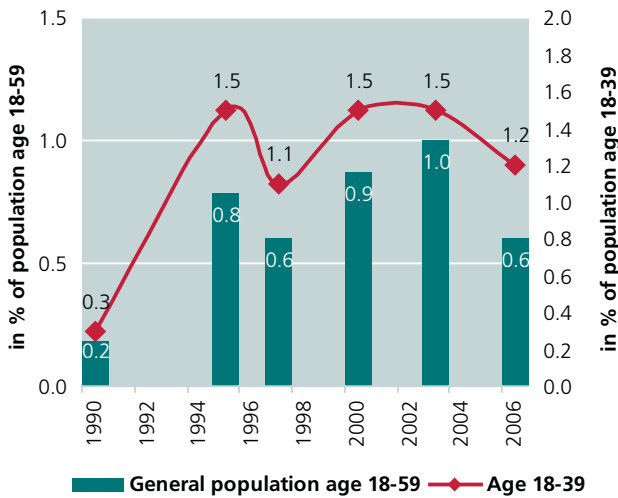
Cocaine use in the United Kingdom, Europe's largest cocaine market in absolute terms and second largest in prevalence terms, continued to rise slightly. The annual prevalence rate of cocaine use in England & Wales increased from 2.4% of the population age 16-59 in 2005/06 to 2.6% in 2006/07. According to data collected as part of the British Crime survey, the annual prevalence rate of cocaine use is now more than four times higher than it was a decade earlier. Most of the increase took place in the 1990s when the annual prevalence of cocaine use grew from 0.3% in 1992 to 2% in 2000. The highest cocaine use levels in 2006/07 were reported from northern England and from London, and the lowest from Wales. Use of crack-cocaine remains limited (0.2%).

**Fig. 77: England & Wales: annual prevalence of cocaine use among the general population (age 16-59), 1996-2007**

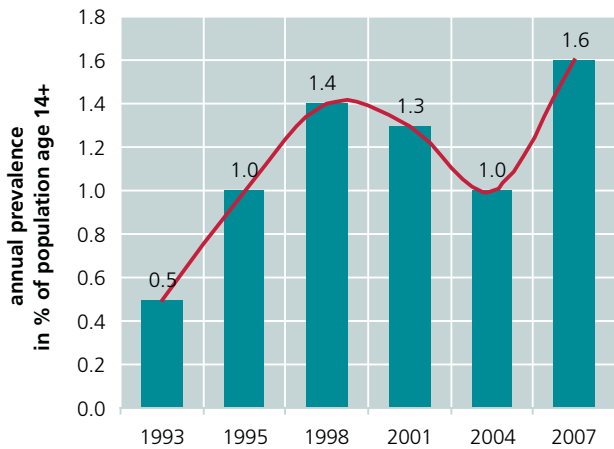


Source: UK Home Office, British Crime Survey, 2006/07.

**Fig. 78: Germany: annual prevalence of cocaine use among the general population, 1990-2006**



**Fig. 79: Australia: annual prevalence of cocaine use among the population age 14 and above, 1993-2007**



Source: Australian Institute of Health and Welfare, 2007 *National Drug Strategy Household Survey*, April 2008.

Data from Germany, the most populated country in the European Union, suggest that cocaine use declined over the 2003-2006 period. The annual prevalence of cocaine use among the population age 18-59 fell from 1% in 2003 to 0.6% in 2006, the lowest level since 1997. Use of crack-cocaine affects around 0.1% of the population age 18-59. Crack-cocaine use remains mainly limited to Hamburg and Frankfurt. Among the population age 18-39 the annual prevalence rate of cocaine use fell from 1.5% to 1.2% over the 2003-06 period, the lowest level since 1997. The number of newly identified (by the police) cocaine users fell by a further 10% in 2007, according to the Bundeskriminalamt (federal German police).

Prior to the release of the new household survey for 2006, Germany had reported stable cocaine use levels. The same applied to most neighbouring countries, including Austria, Switzerland, Belgium, the Netherlands, Denmark, Poland, the Czech Republic and other central European countries (Slovakia and Hungary). Increases in cocaine use in 2006 were however reported by a number of South-European countries, notably Portugal, Italy and some countries of the western Balkan, as well as France, the United Kingdom, Ireland and several Nordic countries.

**Cocaine use up in Oceania**

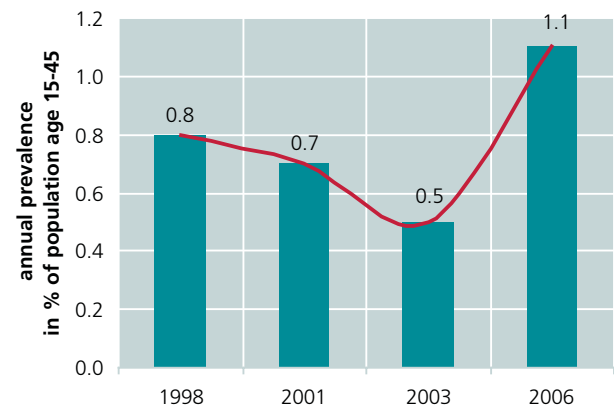
In contrast to the decline of cocaine use in North America and the first signs of a flattening of the upward trend of cocaine use in Europe, cocaine use appears to be growing strongly in the Oceania region, notably in Australia and New Zealand.

Annual prevalence of cocaine use among the population age 14 and above grew in Australia from 1% in 2003 to 1.6% in 2006. The upward trend in cocaine use over the

2003-06 period was surprising insofar as drug use, in general, declined markedly over the same period in Australia. There is a possibility that the increasing difficulties of shipping cocaine to North America, in combination with the high prices of cocaine in Australia increased the attractiveness of Australia to drug traffickers. The existence of an established synthetic stimulants market may have also helped drug users to experiment with cocaine. The overall size of the cocaine market in Australia, however, remains limited compared to many other countries.

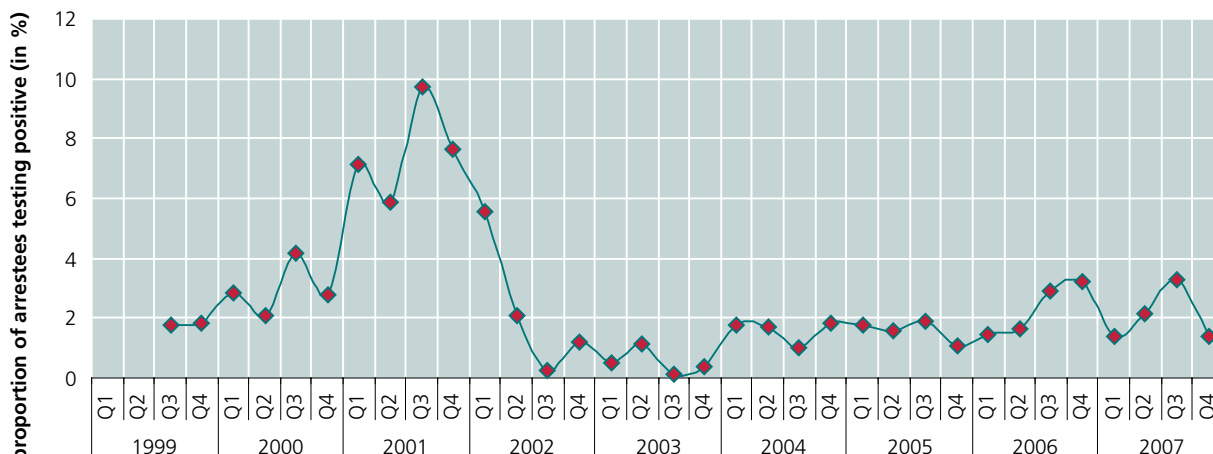
Similar trends can be found in New Zealand, where use declined over the 1998-2003 period, but more than doubled between 2003 and 2006. In both Australia and New Zealand, cocaine prevalence is now higher than in 1998.

**Fig. 80: New Zealand: annual prevalence of cocaine use among the population age 15-45, 1998-2006**



Source: Centre for Social and Health Outcomes Research and Evaluation, *Trends in drug use in the population in New Zealand: Findings from national household drug surveying in 1998, 2001, 2003 and 2006, Auckland 2007.*

**Fig. 81: Proportion of arrestees testing positive for cocaine in Australia\*, 1999-2007**



\* unweighted average of the following sites: Bankstown, Parramata, Southport, Brisbane, Port Elizabeth, Adelaide and East Perth  
 Source: Australian Institute of Criminology, *Drug Use Monitoring in Australia (DUMA)*, Canberra 2008.

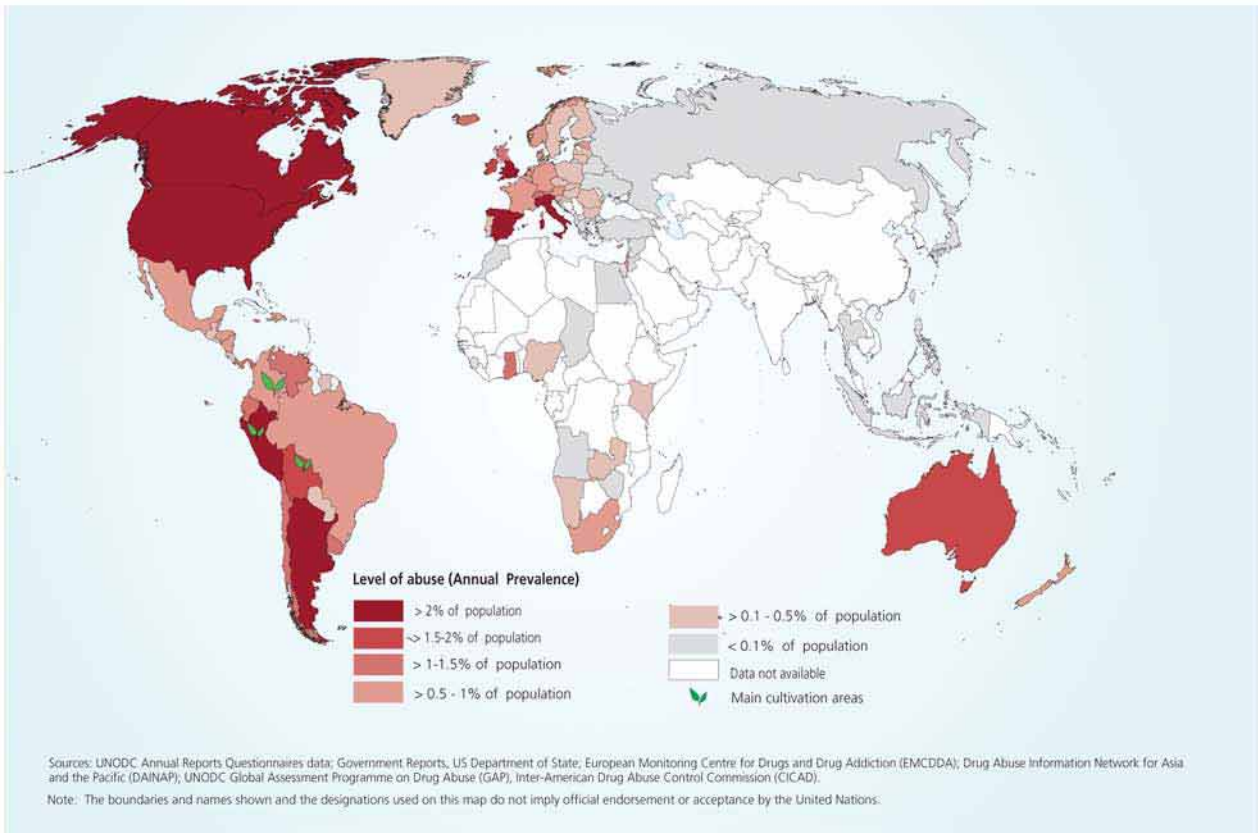
**Fig. 82: Proportion of arrestees testing positive for cocaine in Australia\*, 1999-2007**



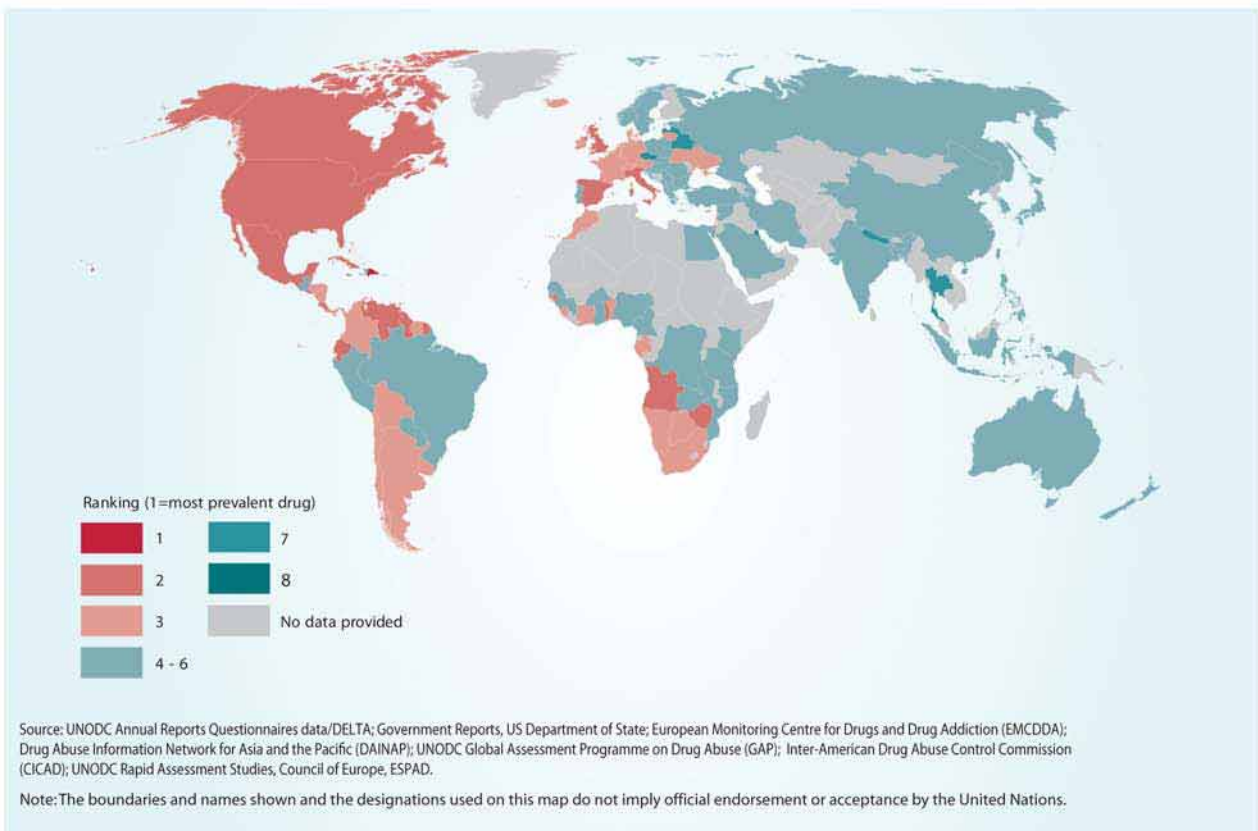
\* Results for New South Wales from Sydney (Parramatta and Bankstown); for Queensland from Brisbane and Southport; for South Australia from Adelaide and Elisabeth); for Western Australia from East Perth. Results for 'Australia': unweighted average of the proportions of the sites mentioned above.  
 Source: Australian Institute of Criminology, *Drug Use Monitoring in Australia (DUMA)*, Canberra 2008.

The increase in cocaine use in Australia over the 2003-2006 period is also documented in 'DUMA' data (collected by the Australian Institute for Criminology for the ongoing Drug Use Monitoring in Australia project) on drug testing amongst arrestees. Cocaine use appears to be widespread in New South Wales but far less so in the rest of the country. DUMA data also suggest that cocaine use, in contrast to heroin and methamphetamine abuse, is still not frequent among criminals in Australia. Cocaine use levels in this group used to be higher a few years ago. In the third quarter of 2001, following Australia's 'heroin drought', close to 10% of those arrested consumed cocaine, far more than the 2% found in 2006 and 2007.

**Map 12: Abuse of cocaine 2006 - 2007 (or latest year available)**



**Map 13: Ranking of cocaine in order of prevalence, 2006**



Map 14: Changes in the use of cocaine, 2006 (or latest year available)

