



FIRST PART

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STATUS AND TRENDS IN WORLD DRUG TRAFFICKING

OVERVIEW

A global overview on the status of drug trafficking, taking into account the last decade trends, reveals a largely stable drug market, both from the supply and the demand point of view. A thorough survey regarding the different types of drugs as well as the various areas of the world, gives useful and interesting ideas to better understand this phenomenon in its complexity and its possible developments.

First of all, the clear distinction between producing and consumption areas does not exist anymore, as a result of the globalization process: new Countries are now experiencing the threat posed by the scourge of drug addiction. The wrong perception of the past, when the consumer Countries put the blame of the drug trafficking on the producing areas has been put aside, once for all. In this context, 2008 represented a benchmark: 10 years after the elaboration of the UNGASS¹, "Action Plan on international cooperation on the eradication of illicit drug crops and on alternative development", the International Community has started a review of the objectives that were once fixed and that will lead, in the course of the CND² Session of March 2009, to the adoption of a new Action Plan mostly regarding the aspects linked with the demand reduction and, above all, the enhancement of international activities in relation to the alternative development in the producing areas.

A general overview on the different types of drugs

¹ UNGASS - United Nations General Assembly Special Session
² CND - Commission on Narcotic Drugs



reveals that in 2007³ in relation to **cocaine**, an increase by 16% of the areas under coca cultivation was recorded between Colombia, Peru and Bolivia, for a total amount of 181,600 hectares, the peak record since 2001. However, because of different productivity of cultivated areas production has remained quite stable (944 tons). 99% of clandestine laboratories for cocaine production were detected in the three above-mentioned producing Countries. This shows that local criminal organizations can easily manage the whole productive chain, increasing their profits.

Last data concerning the seizures of cocaine - put on the illicit market with different purity levels - amount to 706 tons, with a decrease by 6% with respect to the previous year, and corresponding to 42% of the pure substance actually produced. Although this indicator has decreased - after a long period of increase - the values recorded have almost doubled with respect to those of the last decade. The American Continent has contributed to the 81% of the seizures (45% South America, 24% North America and 10% Central America), followed by Europe with 17.2%, equal to 102 tons, which represents a record confirming the steady rise started in the eighties. Among the EU Countries, Italy ranks third for cocaine consumption, after Spain and the United Kingdom⁴. The analysis of values concerning the seizures suggests two series of observations: on one hand, they reflect a higher counter-narcotic effectiveness, even thanks to the contribution of the producing Countries. On the other hand, this analysis highlights the areas where, instead, there is a need for a tougher activity, in particular, in the Caribbean and in Western Africa. In the Caribbean this can be explained by a shift of drug trafficking from sea to land routes through Central America while in Africa, the scarcity of seizures does not reflect the real threat posed by the African area, which is more and more used as transit and stockpiling location for drugs bound for Europe.

As to **heroin**, describing the situation in 2007⁵, an increase in the producing areas of 17% was recorded. This rise was caused by the ever increasing extent of

³ Estimates and data are generally taken from official UNODC documents.

⁴ European Monitoring Centre for Drugs and Drug Addiction - 2008 Annual Report.

⁵ Following last data on Afghanistan - these will be deepened later on - the scenario of areas under illicit cultivation has significantly changed, showing a remarkable decrease that, however, has not caused a consequent drop in opium production. Said decrease plays a particularly important role in the socio-political front of this Country.



Opium

areas under cultivation in Afghanistan and Myanmar, which represent 94% of the global opium poppy crops. Afghanistan was expected to increase its production - even considering its upward trend in the last few years - while Myanmar has recorded a worrying trend reversal with respect to previous estimates.

The increasing extent of areas under cultivation has resulted in an expansion of opium production, estimated in 8,870 tons, the highest level ever recorded in the course of the last 20 years. This rise in supply has caused a significant decline of prices in the above-mentioned Central Asian Country, from 140\$ to 111\$ for one kilogram of dried opium (-21%).

The seizure of numerous laboratories for opium manufacture in Afghanistan as well as their disappearance from other areas located along the smuggling routes, show that the drug processing systems are directly made in this Country. This fact has also revealed that large quantities of acetic anhydride are smuggled – this precursor is necessary for opium manufacture – although the seizures of such a substance are rare.

The opium derivatives⁶ seizures have increased by 14%, accounting for 142 tons⁷. Out of this quantity, 69% were seized in Central Asia, i.e. Afghanistan and neighboring Countries. The drug traffickers choose the Balkan Route because of the shift of illicit crops towards the Southern provinces of the most important producing Country. Through this avenue, they can easily reach the most lucrative market, represented by the Old Continent.

⁶ The Opium derivatives include: opium, morphine and heroin. Only the first two substances have recorded an increase while heroin figures are largely stable with respect to the previous year..

⁷ This number corresponds to the equivalent quantity of heroin that could be manufactured (10 kg. of opium correspond to 1 kg. of heroin or morphine).

The main concern is that an increase in production/supply, and the consequent decline of price, can extend this illicit market. However, up to now, this has not been the case and the retail prices are presumably maintained largely stable by specific marketing strategies, based on the stockpiling of huge quantities of said drugs. The EMCDDA⁸ has reported that since 2003⁹, the indicators pertaining to opium derivatives consumption in Europe have been slowly increasing.

Giving a detailed and accurate picture of the **cannabis**¹⁰ scenario is much more complicated for several reasons: first of all, the different approach of national

legislations with respect to this type of drug. It must be considered that, even thanks to the new systems of hydroponic cultivation, cannabis production - reported in at least 127 Countries - is remarkably parceled out within these Countries and territories. Because of this fragmentation, reliable estimates cannot be formulated. As to producing areas, a remarkable increase in cannabis crop cultivations can be noticed in Afghanistan. However, in this Country, the attention is focused on opium production and the risk is that of underrating the danger represented by the massive conversion of opium poppy crops into cannabis plots. This choice can be ascribed to a minor counter-narcotic action, to more affordable costs and, above all, to the decrease of dried opium price. Based on these surveys, cannabis production amounts to 41,000 tons, with a slight decline with respect to previous years, even though an increase can be noticed with respect to the last two decades. Said figures show that this substance has the control over the drug market both for the spreading of crops, the volume of production and the number of abusers. The consumption market has recently recorded a decline in the demand of this drug, above all in the Western Countries. This is mainly due to the increase of THC obtained by the farmers during the growing process. This led the habitual consumer - worried for the higher dangers of this substance - to produce cannabis on his own and for his personal use.

⁸ European and Monitoring Centre for Drugs and Drug Addiction – Annual report 2008..

⁹ Among the indicators the drug death toll, the heroin seizures and heroin treatment applications are considered..

¹⁰ The term cannabis includes : marijuana, extracted by the dried pistillate (female) flowers of the “cannabis sativa-indica” plants and hashish, deriving from the resin of this plant and whose THC content is significantly higher.



Ice methamphetamine

With regard to *hashish* – whose world production is estimated at 6,000 tons – a drop in cultivations can be noticed in Morocco, which has always been considered the traditional source country. This is also confirmed by the decline in seizures operated, above all, in Europe that is the most important destination market of this substance. Comparing the data pertaining to seizures of main substances according to their different purity levels, only 17% of the production is actually intercepted, against 22% of opium derivatives and 42% of cocaine, thus confirming the different attention and importance given to this type of drug.

Data on **synthetic drugs** show the general stability of this market that is mostly due to the effects of the precursors monitoring programs. Nowadays, it is much more difficult to purchase chemicals which are necessary to produce drugs than it was, late in the nineties. Moreover, information and prevention programs have the merit of warning about the great danger of

these synthetic substances. Methamphetamines are mostly produced in North America, United States and Mexico as well as in South East Asia (China, Philippines and Myanmar). Europe is the major producer of ecstasy: in particular, Holland, Belgium, Poland and Baltic Countries. Synthetic drugs consumers are about 25 millions, more than cocaine abusers (14 millions) and heroin ones (11 millions). These substances are not connected to a particular geographical area of production, as for the other drugs: for this reason, the elaboration of production estimates is quite difficult. Also the seizures of these substances cannot be considered real indicators since they indifferently refer either to the final product (tablets) or to the quantities of precursors. However, some data reflect the

relevance of this phenomenon: for example, last data reported the seizure of 30 tons of ephedrine and 700 kg. of pseudo-ephedrine, that can be used for the production of 20 tons of methamphetamines, of more than 2,600 liters of P2P¹¹, of 1.3 tons of amphetamines and of 8,816 liters of PMK that are necessary to manufacture more than 7 tons of ecstasy. A more effective variable is that reflecting the number of laboratories detected, equal to 8,245, showing a clear drop with respect to previous data amounting to 13,436.

NORTH, CENTRAL AND SOUTH AMERICA

The American Continent, considered as a whole, represents the fundamental stages of a typical drug trafficking scenario: the production, mainly concentrated in South America, the transit, located in Central America

¹¹ P2P – phenylpropanone, also known as benzyl methyl ketone (BMK).



Hashish



Marijuana



and in the Caribbean, the market, represented by the United States and Canada. Several strategies are consequently developed in the different Countries of this Continent, all having the common aim of fighting against drugs. As previously said, recent surveys have indicated a significant increase in the extent of crops in the Andean region (Colombia, Peru and Bolivia), that is not followed by a consequent rise in the production, linked to the weather conditions and the crops yield. Criminal organizations use the most sophisticated farming techniques, including pesticides and fertilizers in order to ensure the best crops yield. The illicit coca production caused a dramatic environmental damage due to the indiscriminate and unchecked dissemination of chemicals used and to the forest fires in order to get new areas designed for drug crops. These are clear indicators of a serious threat for health and of a grave danger for a delicate ecosystem of global importance. The environmental factor has led the international community to a more careful consideration of this problem, also taking into account that to produce 1 kg. of cocaine you need 360 kg. of coca leaves and that 1 hectare of land can give about 1,000 kg. each harvest.

Colombia, with an area of 99,000 hectares and a potential output of 600 tons is still the major world producing Country (60% of global production). To this purpose, UNODC has reported an increase by 27% in the Colombian production: these data are firmly refused by the Government of this Country. The counter-narcotic efforts of the local Authorities, based on a strong eradication program, have initially showed a reduction in illicit crops. However, the downward trend started in 2006 has not been confirmed by recent surveys. Notwithstanding this, the Colombian Authorities are strongly committed in fighting against the equation Colombia=cocaine and try to present their country as a modern State, having many resources and looking ahead. In fact, a recent reform of the legal system has been carried out in this Country: since January 1st, 2008 Colombia passed to the accusatorial system with an increase in the sentences rate from 3% to 60%. In Colombia, the fight against drug trafficking has also a political character, if you consider that the most important crime groups heading the international cocaine trafficking are:

- the Fuerzas Armadas Revolucionarias de Colombia

- Revolutionary Armed Forces of Colombia (FARC): this is a guerrilla movement of Marxist-Leninist origin, which has been recently become very popular because of the release of Ingrid Betancourt. This group is composed of several thousand members and controls a large area above all in the Putamayo and Nariño regions; it has changed its old revolutionary nature, choosing drug trafficking as its source of income;

- the Ejército de Liberación Nacional – National Liberation Army (ELN): operating since 1965, this group is composed of about 2,500/3,000 members and, like the above-mentioned FARC, of Marxist origin;
- the Aguilas Negras – Black Eagles, an illegal right wing paramilitary group, partly coming from the demobilized Autodefensas Unidas de Colombia (AUC) in the region of Santander. This group would be disputing the control of drug trafficking with the FARC and the ELN in the Selva Region.

In addition, there is also the Norte del Valle Cartel, which is currently the major organization and the only survived between the large Cartels of the past, dismantled by the Colombian counter-narcotic efforts in the nineties (the well-known Cali and Medellín cartels). The Norte del Valle Cartel is a complex and powerful illicit organization active in the international drug trafficking field.

Recently, along with the above-mentioned vast organizations, numerous small crime groups have been established: they have turned from “Cartels” into small “clans” in order to maintain a low profile. They operate as family communities or small enterprises, acting as front companies.

As to the counter-narcotic activities, according to the Colombian Authorities data, more than 126 tons of cocaine were seized and 2,367 clandestine laboratories dismantled. They were located in the remotest areas of the Colombian forest and near small rivers, used for drug processing. Also eradication programs were successfully completed, both the manual eradication with 66,805 hectares and the air fumigations, with 99,000 hectares. The manual eradications are much more effective since coca bushes are completely destroyed. In addition, this method implies high costs for the farmers and a long period of inactivity.

On the contrary, air fumigations are often neutralized by the heavy rain or by the farmers’ washing up of the

coca leaves and, anyway, there is only the loss of only one harvest (it must be considered that the new modern farming technologies allow four harvests per year). The direct consequence of drug trafficking is the laundering of money derived from illicit transactions contaminating the economic life of this Country. In particular, recent investigations have showed that drug trafficking groups have re-invested capitals in lucrative and prestigious enterprises and companies, such as clothing stores or shops. The Governmental control on money laundering has been recently acknowledged by the Financial Action Task Force of South America against Money Laundering (GAFISUD)¹² as follows: " Colombia has a complete system to fight against money laundering that mostly meets the 40 FATF recommendations. This is a well-established Country, going forward through projects aimed at improving its policy ".

The drug phenomenon in **Peru** is deeply entrenched in the historical-social process of this Country; the ancient Andean populations used the coca leaf as anesthetic to combat hunger and bad weather conditions. The surveys on the drug production in this Country estimate an extent of 53,700 hectares under cultivation, mainly concentrated in the regions of the Upper Huallaga, Apurimac Ene and La Convencion-Lares, for an annual production of 116,800 tons of dried coca leaves, with an increase by 2% with respect to previous estimates. Since 1998, after the promulgation of the "Plan Colombia" and the Colombian Cartels loss of the monopoly on cocaine production and trade, local criminal organizations have been established in Peru, with the assistance of foreign gangs, mainly of Mexican cartels.

In addition, the law enforcement agencies have identified about 20 street gangs that have turned into powerful and well-equipped organizations and operate in the drug and arms trafficking sector; they often collaborate with the traditional crime groups. Furthermore, a degradation of human values can also be noticed in this Country : people start taking drugs at 13 years' old and 3% of students attending the secondary school have already used marijuana.

The counter-narcotic strategy of the Government for the period 2007-2011 is based on three main pillars: prevention, drug trafficking interdiction and sustainable

development.

This last item is reflected in the "Programa Nacional de Desarrollo Alternativo" (PNDA)/National Plan of Alternative Development, for the reduction of coca bush cultivations and the development of alternative licit crops. After the initial positive phase, when thousands of hectares of illicit crops were eradicated and about 28,000 families opted for licit products such as bananas, heart of palm, cotton and cocoa, the increase in coca leaf price and the decrease of licit cultivations prices (above all, coffee and cocoa) persuaded the farmers to go back to coca bush cultivations, forming organizations (CONPACC, FEPAVRAE, FEPCACYL) against these conversion programs.

Cocaine, but also heroin and marijuana illegally produced, are introduced onto the illicit markets:

- by air, using clandestine airstrips, mainly located in border areas, close to Brazil and Colombia. The international airport Jorge Chàvez (AIJCH) is often used to send drugs abroad, by means of the well-known "burrier"(drug mules)¹³;
- by land, from the Huallaga Valley to the Northern Coast of the Country, where drugs are traded along the Ecuador border. The "South East Corridor" in Madre de Dios, is considered a safe route by the drug trafficking organizations to transport their illicit shipments to the clandestine laboratories located in Atalaya, Nohaya, Butsaya, Purus and Iñapari, near the borders with Brazil and Bolivia.



Colombia - opium poppy fumigation

¹² GAFISUD – Financial action task force of South America – regional inter-governmental organization which brings together the countries of South America in order to combat money-laundering and terrorism financing.

¹³ Burrier: couriers transporting small quantities of coca (often swallowed). They are usually young people, unemployed, or pregnant women, who can in this way avoid the x-ray controls carried out in airports.



Peru - seizure of drug concealed in banana boxes

- by sea and rivers. Crime groups usually transport huge quantities of drugs by sea, directly towards the most relevant international markets (USA, Europe and Asia). The port of Callao is a key and transit point for about 85% of containers and cargos imported or exported from Peru. All the navigable rivers going to Brazil or Bolivia are used by the crime rings to transport precursors to the labs and drugs to the illicit markets.

As to the counter-narcotic activities, in the first six months of 2008, about 6,000 people were arrested for drug-related offences. To this purpose, a striking difference between data concerning the subjects under criminal proceedings and data on subjects actually sentenced must be pointed out: this situation is symptomatic of the difficulties that this Country is meeting in the pursuance of the Judicial Authority. As to the seizures, in the first six months of 2008, 4,815 tons of coca paste were seized as well as 6,471 of cocaine hydrochloride. This last substance is increasing with respect to the previous years so that we can suppose that manufacture is carried out within Peru. 4,430 hectares (with a drug potential of 11 tons) of areas were eradicated following the Project CORAH¹⁴. Illicit laboratories detected and dismantled amounted to 581, of them 568 for the coca paste processing, 12 for cocaine HCL production and 1 for opium manufacture. The seizures of precursors and essential chemicals are insignificant and equal to only 5% of the actual amount taking into account the cocaine output of this Country.

¹⁴ CORAH - Special Project for the Control and Eradication of Coca in the Upper Huallaga. In Peru only the manual eradication is allowed and not the one by means of air fumigations.

Bolivia - with its 28,900 hectares under cultivation and a potential production of 104 tons¹⁵ - is the third world coca producing country. The rise in illicit crops, equal to 5% with respect to the previous year, was recorded in Los Yungas de La Paz and in the Tropic of Cochabamba – Chapare. The above mentioned figures include 12,000 hectares (42% of coca crops) authorized by the national legislation in 1988 for the production of a substance to be consumed by the native populations - by chewing, or drinking (the “mate” is an infusion of coca leaves) – or for medical purposes. Also 3,200 hectares of crops authorized in the Chapare by the Bolivian Government in October 2004 are here included. The slogan of the President Evo Morales “coca yes, cocaine no” is used to justify the coca crops meant to be a sort of cultural heritage, a renewable natural resource of the Bolivian biodiversity and a factor of social cohesion. Again with this purpose, the Government is considering the possibility to give each farmer, an area equal to one cato (0.16ha) to be destined for coca growing. This is only one aspect of the political events of this Country that, in the last few years - from the arrival of President Morales - have seen a chill in relations with the United States, Colombia and Peru, and the establishment of a special alliance with Venezuela and Ecuador. This rupture with the international Community and in particular with the United States - there was also the expulsion of the respective ambassadors – could have repercussions in the fight against cocaine trafficking, even considering the key roles played by these two Countries in the global scenario. A recent survey has reported that 50% of young people in Bolivia make use of tobacco and alcohol, while the most abused drugs are still marijuana, cocaine and coca paste. There are no data on drug-abusers and on drug deaths: in fact, in this Country, there is no official information concerning treatment and rehabilitation centers. In Bolivia there are essentially three coca producing areas: Yungas and Apolo, in the department of La Paz, and Chapare in the department of Cochabamba. In these regions, the FELCN¹⁶ have found out and seized an ever-increasing number of illicit labs for the production of cocaine HCL (an average of 13 laboratories per day). Most of them

¹⁵ It should be pointed out that these estimates are elaborated by the UNODC and are based on empirical data: however, they are often reductive with respect to the cocaine production result. In fact, the modern systems used by the drug traffickers in the cultivation and then in the cocaine production, allow higher yields, that are not easily quantifiable. Thus, the potential of production is higher than that indicated by the survey.

¹⁶ FELCN – Fuerza Especial de Lucha Contra el Narcotráfico/ Special Force for the Fight against Narco-trafficking.

were detected in the department of Santa Cruz and are mainly run by Colombian syndicates, and along the Peruvian border. Drug traffickers allegedly use small mobile laboratories, powered by small generators, which can be easily moved through the Amazonian forest. Drug smuggling within the Country is mainly operated overland and by air: small aircrafts are generally used, departing from 473 clandestine airstrips. Also the rivers are used by smugglers to transport drugs to Brazil, Paraguay and Argentina. As to the European market, the drug traffickers send small/medium quantities of cocaine using foreign couriers: in this way, they try to avoid the police checks usually made on the Bolivian/ South-American nationals and reduce the expenses/ risks to lose large drug shipments. Europol has launched a project called LOGO in order to identify the real producer as well as the common origin of cargos. Through the classification of logos stamped on the cocaine packages seized – real trademarks of quality and purity – you can identify the different consignments, establishing the routes and the criminal capacity of the organizations involved. The above-mentioned FELCN have also reported the use of private shipping companies to transport cocaine to Europe and to the USA. They are mainly national and international cargo companies used to transport cocaine (in different forms: liquid or soaked). The coca and cocaine smuggling coming from Peru has increased; this is mostly due to the difference of prices offered by these two Countries. The Peruvian cocaine is imported in Bolivia where is then mixed and manufactured with the Bolivian one in the well-known maceration pits/mobile laboratories located along the borders of the two Countries. Cocaine is then moved on to Brazil, Argentina, Paraguay and European Countries and sold at the Bolivian price. In some regions located along the Chilean border, drug traffickers and smugglers have made real arrangements often based on cocaine swap. Drug trafficking is rapidly spreading towards Brazil, Chile, Paraguay and Argentina and cocaine easily reaches the consumption markets of these Countries that are also used as transit locations towards Europe and North America. The counter-narcotic activity carried out by the local Authorities in the first six months of 2008 remarkably increased, above all with respect to drug seizures. More than 12 tons of cocaine base were intercepted (+76% with respect to the same period of the previous year) and about 2 tons of cocaine



hydrochloride (+37%). Also data on the detection and seizure of maceration pits and clandestine laboratories are remarkably high (on the whole 5,387). The current political scenario in **Venezuela** (Bolivarian Republic of) is similar to the Bolivian one; there is the clear intention of the President, Hugo Chavez, to give life to a new era, strategically based on the Bolivarian Revolution and on the revolutionary democracy towards a Venezuelan socialism. The opposition to the Colombian Government, above all in the fight against the FARC, falls within this policy: the Venezuelan government neutrality to the armed conflict in Colombia in 1999 and then on the non-recognition of the FARC as a terrorist group in 2007. The worsening of relations with the USA is based on the hypothesis of Venezuelan financing terrorist groups: also in this case, there was the expulsion of the ambassador and the rupture of a strategic alliance in the war on cocaine. This situation is extremely serious considering the great importance of Venezuela as transit Country towards the consumption markets. The worsening of security conditions in the border areas with Colombia, has persuaded many land owners to sell their properties and move to safer areas. In this context, many purchasers, who were covering the illicit activities of narco-traffickers, were ready to buy these estates located along the border, to create real stockpiling locations for ever-increasing quantities of drugs to be sent to the illicit consumption markets. In Venezuela, these stockpiling centers are mainly located in the Central-Eastern regions: drugs are adequately packed and stored inside deep pits in areas under cultivation or in the forest. The Venezuelan Authorities



estimate about 200 tons of cocaine and heroin in transit per year; cocaine is bound for Europe and North America while heroin is only destined for North America. The Venezuelan criminal network operating in the cocaine trafficking sector has significantly increased in the last five years; in fact, according to the statements of a well-known Colombian drug trafficker arrested in 2007, "Venezuela is the temple of drug trafficking". On the contrary, the local production is negligible and mainly operated in small plots along the Colombian border. Also the presence of clandestine laboratories for the drug manufacture is scarce and limited to some phases of drug processing that would be then completed abroad. The drug transit routes from and to Venezuela correspond to all roads available: overland, by air, by sea or river, with a strong variety of the so-called means of transportation to minimize the risks of interception. Drugs are usually smuggled overland on board trucks, adequately equipped with false compartments or concealed inside legal goods. By air, passengers/ couriers on commercial flights are generally used, as well as air drops of narcotics from irregular flights. As to the maritime routes, containers loaded at the ports along the river Orinoco, or at the commercial ports of La Guaira and Porto Cabello are often used. Also speedboats, fishing boats or private vessels, as well as sorts of submarines, are used to export drugs from Venezuela, loading or unloading cocaine in the open sea. Also passengers on board cruise ships are sometimes recruited as couriers. As to the seizures, last year a drop of about 5% of drugs intercepted was recorded, with a more considerable decrease by 18% regarding

cocaine (32 tons in 2007 with respect to approximately 39 tons of 2006).

In the world scenario of drug trafficking, **Brazil** is a major transit and consumer Country. Notwithstanding its closeness and its geographical and climatic similarities with the three major producing Countries (Colombia, Peru and Bolivia), no large-scale areas of coca crops are present. Apart from a modest production of cannabis sativa (maconha), which is exclusively destined for the domestic market, Brazil plays a prominent role as transit area for cocaine and cannabis and, above all as supplier of precursors and essential chemicals for the manufacture of narcotic drugs, being the most important hub of chemical industry in South America. The causes of these trends can be found in the long landline borders with almost all South American Countries, as well as in the easy movement of licit and illicit goods all over the country and, above all, in the high-tech financial and banking system. For this reason, Brazil has all characteristics to play a major role, also considering the government projects aimed at improving the infrastructures and at increasing exports. 70% of cocaine reaching Brazil and destined for the domestic market comes from Bolivia, and the high availability of this substance has caused a significant fall in prices in San Paulo, where there is a real stock drug trade centre where every day prices and quotations are fixed and where the major world drug trafficking networks are represented. The connections between Brazil and Africa are confirmed and, according to the Brazilian Police Authorities, huge quantities of cocaine often transit this Country to reach Africa, and Europe as final destination. The investigations carried out during the first six months of 2008 have revealed that the cocaine consignments originate from the French Guiana and reach the Brazilian territory, where are then loaded onboard motor vessels reaching the African coasts in about two weeks time. Guinea Bissau is used as staging post and is one of the most involved countries in Africa because of drug traffickers' good relations and the linguistic ties with Europe, in particular with Portugal and because of its proximity to Cape Verde. Further evidence is the establishment of a real "joint venture" between Brazilian and Nigerian criminal organizations, in



Brazil - drug seizure

order to search for and then recruit couriers. According to Federal Police information, the involvement of Nigerian nationals has been ascertained in 80% of drug operations. In Brazil, drug trafficking is not operated by large crime groups or complex networks but by small local crime syndicates, characterized by flexible and elastic operational patterns that, as a consequence, easily avoid police and financial checks. In Latin America, drug trafficking is strictly connected either with urban and rural violence or with the strengthening of organized crime, with political corruption or with the destabilization of states, unable to ensure legality and security. It should be pointed out that in the last five years, the abuse of maconha has increased by 160% while that of cocaine of 75%, involving age groups from eleven to sixty-five years' old. The consumption of cocaine and synthetic drugs is going to increase since Brazil has a middle/upper class of around 30 million people, composing an interesting market of potential drug purchasers. In 2007, the Brazilian Federal Police seized 13 tons of cocaine hydrochloride, about 1 ton of cocaine base and 153 tons of marijuana.

A similar role is played by **Argentina**, which is a transit country for cocaine towards Europe and North America, and a source country of precursors and essential chemicals that are diverted from the legal channel and reach the clandestine laboratories for drug manufacture. The Government has introduced significant changes in the control systems of these products as well as in their production and marketing phases, in order to prevent and fight against this phenomenon. Colombian cocaine

is traditionally smuggled by commercial flights passing through Argentina into the United States and Europe. Also for this reason, the local Authorities have identified as main Airport for International flights in Argentina, the Ministro Pistarini International Airport, 35 km. far from the capital city of Buenos Aires: this is the only airport where arrests for drug trafficking offences are made. Another important governmental initiative aimed at curbing the criminal activities is the recent reform of the legal system from the inquisitorial system to the adversarial one, based on common law, which should ensure the rapidity in criminal proceedings. Cocaine is introduced into Argentina mostly overland through the major routes originating in Bolivia and Paraguay, and recently, along a new route from Chile.

The false compartments inside luggage and clothes soaked with drugs are always the principal methods of concealment. The human couriers - "camellos" (camels) and "mulas" (mules) - are still the favorite means of transportation. The local crime groups are not able to manage the drug trafficking sector: Chilean, Peruvian and Paraguayan organizations settled in Buenos Aires slums are constantly fighting for the supremacy over drug trafficking. Recently, a well-known Peruvian drug trafficker named Marcos Estrada Gonzalez has been arrested, together with his associates. The new scenario resulted from this arrest is composed of small crime groups of young people having different nationalities - Chileans, Argentines, Paraguayans and also Peruvians - who have started their struggles for the drug "business" in this area. To this regard, the criminal development of a small organized group of Argentines can be noticed: they are all under 20 and known as "Los Quebrados". They deal with robberies and with *paco*¹⁷ pushing. There are two Counter-narcotic Agencies in this Country (SEDONAR¹⁸ and UFIDRO¹⁹) having separate database: for this reason, an elaboration of reliable estimates on drug seizures is quite difficult. Last year, 8 tons of cocaine, 46 tons of coca leaves and 75 tons of marijuana were seized. The increase in the seizures of small mobile labs - *cocinas (kitchens)*²⁰, - has confirmed

17 PACO: a highly addictive, smokable cocaine residue. It is a regional phenomenon and it is typical of coca leaves processing areas.

18 SEDONAR - Secretaría de Programación para la Prevención de la Drogadicción y la Lucha contra el Narcotráfico (Secretariat of Planning for the Prevention of Drug Addiction and Drug Trafficking), under the control of the Presidency of Argentina.

19 UFIDRO - Unidad de Apoyo Fiscal para la Investigación de Delitos Complejos en Materia de Drogas y Crimen Organizado (Prosecutorial Support Unit for the Investigation of Complex Offenses and Organized Crime), under the control of the Attorney General's Office but financed by the Ministry of the Interior.

20 Cocinas - transl. Kitchens, concealed inside houses or in the open air.



the trend noticed in the previous years that is, the shift of the last processing phase from the plantations of the Andean highlands to the city. This shift has caused the spreading of the so-called *paco* among the Argentine young population. This drug is also known as “dirty” drug and is mostly consumed by lower classes because of its low price, its high availability and its strong impact (*paco* is highly addictive).

The **United States** are considered the protagonist of the drug market in the American Continent. Here, trafficking and abuse in narcotics are heavy burdens to the population, economy, public health and counter-narcotic Agencies. Just think that in 2009, the Federal Government allocated 14,000 billion dollars for the war on drugs, both from the demand and the supply side. The enormous efforts made are now giving their fruits. The analysis of the activities carried out in 2007, shows a decrease in cocaine trafficking in major drug markets, above all in the Eastern States. This decline is mainly connected with the huge seizures and the dismantling of vast Mexican narco-traffickers’ organizations. In addition, the record successes obtained in cannabis crops eradication must be also taken into consideration. Also methamphetamines production has significantly decreased and the downward trend in laboratories seizures is confirmed. Notwithstanding the successes achieved, the world largest drug market is still challenging the counter-narcotic efforts, through the ever-increasing power of Mexican and Asian crime groups settled in Canada. The first groups, mainly responsible for drug trafficking and distribution, have a major control over the US illicit market. Also the Colombian organizations are increasingly putting their illicit business into the hands of the Mexican criminal networks, in order to introduce South-American cocaine and heroin into the United States. In this way, these Mexican groups get the control over the main trafficking routes towards the American market. Mexican Cartels have also grabbed a large slice of the methamphetamines market. In fact, the drop in the production of these substances within the United States corresponds to the shift of many clandestine laboratories towards Mexico, which is used as starting point for the new distribution networks that have replaced the one-time single dealers. Bush administration strongly believed in the “*Merida Initiative*”²¹, a strategic

²¹ From the name of the town Merida, in Mexico, where in March 2007 President Bush and President Calderon met.

agreement with Mexico, enhancing a joint approach between the United States, Mexico and Central American Countries in the field of the fight against drug trafficking, transnational crime and terrorism. The Asian groups settled in Canada are increasing the production of marijuana having a higher level of THC in the United States. Their indoor crops are progressively moving from Canada to the North-Eastern and North-Western States. These gangs are also stabilizing the MDMA (ecstasy) market that remarkably declined in 2002 because of numerous drug operations. These crime groups are also supported by the well-known Colombian and Dominican networks, active in South American cocaine and heroin trafficking, as well as by the Cuban and Jamaican rings, mainly dealing with the production and smuggling in marijuana. Heroin consumption – that is mostly abused in the most populated urban areas and also in some suburban and rural ones – is stable, even though an increase among young people is recorded. In this context, both the rise in the prescriptions of some pharmaceutical precursor of heroin and the spreading of the so-called “cheese heroin” – that is formed by combining Mexican black tar heroin with crushed tablets of certain “over-the-counter cold medications” – are particularly worrying. Drugs are introduced into the United States mainly on board commercial flights and through the well-established drug routes, by means of couriers crossing the permeable borders with Mexico and the very long coastline. Notwithstanding the remarkable increase in opium production in Afghanistan, the Central Asian heroin is present on the illicit markets of Chicago, Detroit and New York only in limited quantities. Last year, a decrease in cocaine availability was recorded in many cities, along with an increase in its price and a decline in its average purity. The East Pacific Route, that together with the Central American Corridor is one of the most important trafficking routes, still plays a prominent role in the drug trafficking towards the United States. Drug flow through California border points has considerably increased; however, the Southern borders of Texas are still the hot spots of cocaine smuggling in the USA. The IACM²² estimates that between 530 tons and 710 tons of cocaine have left South America to the United States, 90% through the Mexican-Central American corridor. In 2006, at least six million people in the United States consumed cocaine, which is considered the most

²² IACM – Interagency Assessment of Cocaine Movement: it is a survey on the cocaine phenomenon elaborated by the National Drug Intelligence Center of the US Department of Justice.

dangerous drug for society.

Also the risks linked with marijuana trafficking in the USA are steadily increasing. Here, Mexican, Asian and Cuban organizations are the most active in the sector of marijuana crops. The first are strengthening their networks by introducing marijuana cultivations in brand new areas, where this phenomenon was once absent. The Cuban rings have mostly increased the indoor cultivations both for the high price of the final product and for the numerous – and as a consequence lucrative – harvests (up to 4 harvests a year). A 1,000 plants crop can yield, at every harvest, marijuana for 4 million dollars. The new methods of hydroponic cultivation and the use of genetics and clones of seeds allow very high levels of THC (more than 21%).

NORTHWEST AFRICA

Nowadays, the threat posed by West Africa in the narco-trafficking scenario is crucial and draws the attention of the persons involved in this sector as well as of the media and of Governments all over the world. The transnational organized crime has found in this area the favorable conditions to perform all kinds of illicit activities, from drug and arms smuggling to trafficking in human beings. Huge quantities of cocaine are transported from Latin American Countries (Brazil and Venezuela) to Western African coasts on board vessels, fishing boats, yachts and private aircrafts. Cocaine is then moved to Portugal or Spain (usually by sea and with the assistance of Galician crews) or is stored there, waiting to be parceled out and then introduced by human couriers into the European illicit market. Also the Afghan heroin – that from the Arabian Sea reaches the Horn of Africa to be moved along the Sahel Route – is transported along the same well-established routes used by the local crime groups to smuggle hashish and cocaine. At present, Guinea Bissau is the drug traffickers' favorite African state but also Mauritania, Cape Verde and Ghana have been rapidly contaminated by this illicit business. Cocaine reaches the unmonitored coasts on board motor-vessels or by plane coming from Brazil and Venezuela and landing on clandestine airstrips in the middle of the desert. This is the first part of the route,



Seizure of a submarine used for drug trafficking

that is usually managed by South-American traffickers (Colombian living in Guinea Bissau, Guinea Conakry and Senegal) who pay back with cocaine the logistic assistance given by the local crime groups. Here, the drug passes in the hands of African traffickers and, via Portugal and France, onto Europe, aboard commercial flights²³.

Since 2005, 46 tons of cocaine have been seized, thus proving the existence of an African hub. Moreover, if you take into account a very limited counter-narcotic capacity, these data only reflect a minimum part of the real volume of illicit trafficking. The UNODC estimates about 50 tons of drugs per year. Till some time ago, drug was almost completely unknown in this part of the world. West Africa is becoming more and more important in the drug trafficking sector; at the same time illegality and insecurity are progressively growing in this region that is trying to forget decades of civil wars. In this context, the high profits derived from illicit drug trafficking jeopardize the criminal justice and encourage corruption. The risk is that of transforming the Countries of this region in real narco-states: in fact, the illicit drug trafficking turnover far exceeds gross domestic product. These nations cannot be considered "sovereign states": they have actually abdicated their own authority. In this situation, it is easy to understand the criminal appeal of these crime groups and the level of threat, that is not only limited to the drug phenomenon and, anyway, not only to cocaine. Considering the drug volumes intercepted according to the country where the flight originated, **Senegal**

²³ Since 2004 up to now, 1357 "swallowers (human couriers) have imported about 3 tons and a half of cocaine into Europe on commercial flights. They were mostly Nigerians, followed by Guineans, Malians and Senegalese nationals.



United States - Mexican blacktar (DEA)

ranks first as to the origin of the flight and has totaled 434 kg. subdivided in 105 different seizures. On the contrary, the Senegalese couriers have been only 2% with respect to 29% from Nigeria, 22% from Cape Verde and 15% from Guinea Bissau. The most affected destination countries are France, Spain and Belgium because of their commercial, linguistic and cultural ties with Senegal. However, the European nationals – above all French nationals, Belgians, Romanians, Bulgarians and Ukrainians – often reach Dakar to purchase and then transport drugs to the final destination. Also the Italian criminal organizations, such as Mafia and 'Ndrangheta, send their associates over there, to make negotiations of large quantities of drugs that they will transport by themselves or by means of local human couriers recruited for only one trip. In Senegal, and in the whole West African area, all types of drugs destined for Europe are stored. Not only cocaine, but also hashish from Morocco and, thanks to the opening of commercial routes with East Africa, Afghan hashish and opium. Also precursors and essential chemicals are channeled through this region. This area is a sort of free port to sell off these substances to Europe and the USA. Along with cocaine, the production and trafficking in other types of drugs are traditionally rooted in this region and will saturate different targets and groups of population. In particular, **Morocco** plays a prominent role in hashish production, even though its importance is slightly decreasing. Last figures reported an extension of 76,400 hectares under cultivation, with a decrease by 40% with respect to the previous data. The production was obviously affected by this contraction passing from the potential²⁴ 2,760 tons to

²⁴ The conversion parameters are based on 2 kg. of hashish every 100 kg. of raw cannabis.

a bit more than 1,000 tons. This drop also had effects on prices, even increasing by 186%. The most affected provinces were those of Chefchaouen (more than 50%), Taunate (17%) and Al Hoceima (16%). Among them, there is another difference between the irrigated and not irrigated crops (80% of the total) influencing a different productivity (1,821 kg. of cannabis per hectare against 459 kg.). The main trafficking route is still that crossed by speedboats that, from the Mediterranean coastline between Jebha and Ceuta, reach the Spanish coasts, with large quantities of drugs. Another usual modus operandi is that of subdividing small lots of drugs (generally less than 100 kg.), concealed on board private cars, which are adequately equipped to deceive the sniffing dog units. In 2007, in the port of Tangier, 35 tons of drugs were seized. The main final destination is the European illicit market. Since the traditional routes have become more intensively policed, the traffickers were forced to move their activities to Eastern areas in order to reach, through the Sahara, the Algerian, Tunisian and Libyan coasts. From these places, the traffickers operating both in drugs and in human beings reach the neighboring European coasts, above all the Italian ones. The Authorities of the kingdom of Morocco, aware of this phenomenon and its evolution, have taken a series of initiatives to fight against this problem as a whole: demand, supply and drug trafficking. They have elaborated a national drug strategy also including the progressive reduction of the cannabis crops and the improvement of Morocco's image abroad. The strategy of this Country is supported by its adoption of all the Conventions pertaining to this issue, thus demonstrating its sharing the position of the International Community in the war on drugs. Since 2003, the commitment of this Country in drug supply reduction has been translating into a progressive decrease of cannabis crops - and as a consequence of cannabis resin – through the eradication systems. The social cost of this strategy has been relieved by the agricultural reconversion financed by the State. In fact, the cannabis industry sustains more than 96,000 families living in the region located between the Rif and the Mediterranean Sea, although their profit is negligible with respect to the narco-traffickers' high income (every year, of 13,000 billion dollars estimated as illicit trafficking revenue, only 325 million dollars are assigned to the farmers). However, the attention of the Moroccan Government is focused on the threat posed

by hard drugs, above all cocaine, that was almost negligible until 2005. The aforesaid observations on Africa as hub of drug trafficking, also include Morocco, considered a transit area for the new channels connecting Latin America with Europe. Morocco is in fact located in perfect triangulation between the source Latin American Countries, the stockpiling areas in West Africa and the final destination markets of consumption in Europe. In this narco-trafficking geography, Morocco is an excellent transit area and the Moroccan couriers – having long experience in hashish trafficking – are showing their skills in cocaine smuggling, too. In 2007, only at Casablanca Airport 107 kg. of cocaine were seized, 6 times more than in 2006.

EUROPE

The drug phenomenon in the European Continent can be analyzed through several aspects: the relevance of seizures, the new trends, the role of organized crime and the changes in the consumers' choices. However, the role of the Old Continent on the global scenario of drug trafficking has not changed: Europe is a terminal of illicit trafficking and, at the same time, the consumption market that, considering the volume, is second only to the North American one. Data show stabilization and in some cases even a decrease of this market. Among good news, an ever-increasing synergy and cohesion between EU Member States must be emphasized. These Countries are aware that a shared approach is essential to give a strong response. For this reason, in the course of international meetings, they try to speak with one voice when facing this problem and to commit themselves in projects that implement national strategies in line with the European policy. However, there is still a lot to do and data can give you the idea of the relevance of this phenomenon. Cannabis is still the commonest drug and Western Europe confirms the first hashish market worldwide. In fact, at least 71 million people (22% of adult European nationals) have used this drug at least once in their lives²⁵. However, a slight decrease has been noticed among young people, probably caused by a major awareness and by a drop in the production in Morocco. Cannabis is grown in different European Countries such as Holland, Germany - where hydroponic cultivations are spreading – Bulgaria, Poland



Senegal - cannabis fields

– disguised in cornfields, gardens and in greenhouses. Albania is the major exporter of this drug, supplying the Central and Western areas, first of all Italy. Europe is also the second world market for cocaine, as proved by the increase in seizures above all made in the Iberian Peninsula mostly caused by the use of the new African Routes. The record quantity is that of approximately 120 tons, with an increase by 14% with respect to previous estimates, with peaks of 59% in Germany and 25% in Switzerland. The situation is critical considering that the systematic increases, in the eighties, were less than 3% a year. 12 million European nationals (3.6% of the adult population) have used cocaine once in their lives. Cocaine consumption is stable in the Central Eastern regions but is rising in the Western areas. This difference comes from a different approach with regard to stimulants and from different consumption models. In fact, cocaine has spread all over the Western and Southern European markets (Italy ranks among the first), while the markets of the Central area are dominated by stimulants and the Northern and Eastern European markets are mainly fuelled by amphetamines. On the contrary, the heroin spreading is inversely characterized: this drug is stable and even decreasing in Western and Central European Countries while in the Eastern area and in the Balkan region, is increasing. It was estimated that the abusers of opium derivatives in the Old Continent are equal to 3 million people (1-6/1,000 inhabitants). Heroin is still the most frequent cause of drug deaths. Heroin consumed in Europe is mostly produced in Afghanistan: it reaches the Old continent through the well-established Balkan routes leading to the Netherlands, a secondary

²⁵ EMCDDA – Annual Report 2008.



sorting center for narco-traffickers. Most of seizures are reported by Great Britain, followed by Germany and Italy. With respect to the synthetic drugs, Europe is an important producing area, in particular the Western-Central countries such as Belgium, Holland and Poland, but also in Lithuania and Bulgaria. Of the 6 tons of amphetamines seized all over the world, 97% has been intercepted in Europe, in particular in the United Kingdom. As to the clandestine laboratories of these substances, Europe ranks first with 79% of the 156 laboratories detected. The phenomenon of the methamphetamines - except for the Czech Republic production and consumption - is almost unknown, here. Europe has the world record for ecstasy production: in fact, the Old Continent is also able to supply other continents with this substance. Europe has taken concrete initiatives aimed at curbing the massive invasion of drugs, in order to effectively combat this phenomenon. The well-established MAOC-N²⁶, operational center on the Atlantic Coast aimed at fighting against cocaine trafficking by sea, is joined by the CeCLAD-M²⁷, a project shared by Italy, France and Spain, aimed at intercepting the drug smuggling along the Western Mediterranean Sea Routes, that are increasingly used by traffickers who were forced to choose southern routes leading to the West African coastline.

This change in routes and trends is also proved by the volume of the seizures performed in **Spain** in the first six months of 2008, that confirmed the strongly downward trend with respect to the same period of the previous years: 27 tons in 2006 and 16 in 2007. While routes and apparently, modus operandi of the large drug consignments have changed, the small lots of drugs are still smuggled by couriers on board commercial flights coming from South America. In the first six months of 2008, 800 subjects were arrested, with an average of 5 arrests per day, mainly Dominicans, Peruvians and Colombians. The downward trend of cocaine is not confirmed for cannabis, with 368 tons seized in the



first six months of 2008, with respect to 264 of the previous year. The upsurge of cannabis trafficking, that is affecting the whole coastline facing Morocco, has recently favored the routes passing through the Balearic Islands. Heroin trafficking is scarce, but increasing, and 100 kg. of this substance were intercepted in this Country. Particular concern is given by the introduction of the ecstasy crystals (easy to produce), on the Spanish market. This substance is in the form of a whitish or slightly yellow powder or of small fragments of crystals like rice grains. Its effects include increased heart rate and blood pressure that, in some cases, can cause death. Another important aspect affecting this Country is the reverse side of the coin of the large-scale trafficking, which is the money flow connected with it. In fact, the Governor of the Bank of Spain has recently reported that the movement of € 500 banknotes in this country is really abnormal if compared to the European context. In the Iberian Peninsula € 110 million of banknotes of €500 are put into circulation, compared with 464 millions regarding the whole Euro area. In addition, cases of "currency swallows" leaving Spain have been recently reported: these couriers smuggle significant sums of money to be delivered to the Colombian Cartels. The other "hot spot" in Europe is represented by the **Balkan area**, a forced transit hub for the numerous routes used to introduce the Afghan heroin into the consumption markets. Notwithstanding the significant progress made by some Countries of this region to disprove the idea that Balkans are a synonym of

²⁶ MAOC-N – Maritime Analysis Operation Center – Narcotics, located in Lisbon/P, seeing the participation of Italy, Spain, Portugal, France, Great Britain and Ireland. Italy is represented by DCSA.

²⁷ CeCLAD – M, Centre de Coordination pour la Lutte Anti-Drogue en Méditerranée, located in Toulon/France.

criminality, a strong collusion between the political, economic and criminal power remains valid and supports the organized crime groups in South East Europe. One of the strong points of these criminal organizations is the strategic control and the management of the Balkan Route connecting the major heroin producing Country (90% of heroin comes from Afghanistan) with the most lucrative consumption market (Western Europe). About 100 tons of heroin cross South Eastern Europe, with a turnover of 25-30 billion \$, higher than the GDP of many countries of this region. The heroin smuggled through the Bosphorus and reaching Bulgaria has changed its itinerary in the course of time. The original Balkan Route passed through former Yugoslavia where, during the Milosevic era, heroin trafficking was equal to two tons a month. This illicit activity was probably tolerated by the regime. During the war, this tacit agreement was probably interrupted and the Balkan route was subdivided into two branches, the first going to the Northern and the second towards the Southern regions. The latter has facilitated the Albanian criminal networks active in heroin trafficking along the final part of the Balkan route, establishing new ties with the Turkish rings – for heroin trafficking – and with the Colombian Cartels, for cocaine trafficking. In Italy, the local criminal organizations have accepted the Albanian networks as “partners” in the management of the drug market in some regions of the national territory. As to cocaine, although the geographical position of the Balkans is not strategic, criminal syndicates entrenched in this area and able to manage large quantities of this drug, use this region as a transit, and probably, stockpiling location. However, there are no consolidated data at the moment. As to narcotic drugs production, Albania is the most important cannabis producing Country of this region. This drug is consumed domestically and exported abroad (especially to Italy and Great Britain). This drug is also grown, to a lesser extent, in Kosovo and Bulgaria. The recent expansion towards East has led the external European borders onto the Black Sea, widening a strong economic potential area. The possible future abolition of borders, the spreading of commercial exchanges, the increase in maritime trafficking between the Black and the Mediterranean Sea are all good opportunities for drug traffickers to strengthen this new nerve center of South East organized crime. In this context, Romania and Bulgaria will allegedly play a major role as transit

and stockpiling sites for heroin and cocaine trafficking to Western Europe and, inversely, for synthetic drugs and precursors bound for Turkey and Eastern illicit markets. The ever-increasing use of the Northern route of the Black Sea directly involves the Russian organized crime which is very active in other nations of the Balkan area, such as in the Czech Republic. There is growing concern about the settlement of Asian criminal rings – above all, Vietnamese syndicates – that are trying to corner the illicit market of methamphetamines and heroin.

MIDDLE EAST

Being an important crossroads of illicit trafficking, **Turkey** plays a central role in the drug scenario: opiates, synthetic drugs and precursors pass through this country, which is a gateway between West and East. Turkish criminal organizations managing such flows are located mainly in the South- Eastern area, they are family-based organizations relying on right-hand men in Istanbul and abroad where such affiliates are fellow villagers. Investigations confirm that the conventional Turkish families having a monopoly on trafficking no longer exist since they split into micro- groups. Their modus operandi consists in managing the production cycle from abroad, entrusting right-hand men- who are not in contact each other- with the responsibility of the different phases of the importation process, so as not to jeopardize the whole organization, in case of arrests. Such a modus operandi in watertight compartments is used mainly to carry out large trafficking in heroin and synthetic drugs such as captagon²⁸.

Turkey is the primary heroin point of entry; the increased production in 2007 brought to an increase in seizures, which rose from 7 to 9 tons. The drug's purity is never less than 60%; it is imported, once refined, through Iran and, is temporarily stored in the areas of Van - Hakkari - Yuksekova, and then transported to Europe following two routes.

The first one is the “Black Sea Route” (Azerbaijan, Georgia, Ukraine, Romania and Poland), the second one is the “Balkan route” passing through the Marmara region (Istanbul). Since 2003 seizures have constantly increased, overcoming the overall amount of the seizures carried out by all EU Member states. The largest quantities were seized in October, during opium poppy harvest. The amount of the seizures carried out show

²⁸ Captagon - the commercial name for phenethylamine, a synthetic substance used as a stimulant belonging to the family of amphetamines.



that heroin arrives in Turkey from Iran and then comes out from the land border with Bulgaria. The entry points in Turkey are located in the crossing points in the Eastern part of the country near the provinces of Van – Hakkari and in the Northern crossing places in Kapi koy and Gurbulak, the main transit point of the trucks coming from East and of the commercial traffic between Turkey and the countries along such an area.

The alternative route is the “Northern Black Sea Route” originating in Afghanistan and arriving in Georgia, through Turkey. Sometimes traffickers prefer to use such a route due to the lack of controls at the border and the fact that Russian is the common language, spoken in a wide area going from Afghanistan to Norway. Mention must be made of the seizures carried out in the areas of Bitlis and Malatya, in the South-Eastern part of the country, which up to 2006 were not affected by the problem. The same applies to the province of Bursa, 200 km away from Istanbul, where in the first semester of 2008 important operations took place. Such a scenario proves that, in order to elude controls, criminal organizations prefer to use areas with low population and criminal density, where prevention actions by law enforcement officers are less aggressive.

In Turkey there are concrete elements showing the connection between drugs and terrorism. Operations carried out revealed that among the terror organizations operating in Turkey, Pkk was the most closely linked with drug trafficking. According to the information gathered in the nineties, Turkish mafia families paid commission

to PKK to ensure the “smooth” transit of the heroin deliveries, produced and moved in the Eastern area. In 1995 PKK understood the importance of first-hand management of this business and changed its strategy, both operating and promoting illicit trafficking. Also **Lebanon** plays a major role as far as drug trafficking in the Middle East is concerned. Although drugs do not come first in a country which is affected by other problems, Lebanon authorities prove to be thoroughly willing to increase their efforts both in terms of prevention and repression. In the last two years indeed drug cultivation and trafficking have exponentially increased along with the growing security problems characterizing the whole Middle Eastern area and particularly this country. Besides small opium quantities, the Bekka valley still yields the best quality of hashish (Red Lebanese) sold in the markets.

There is evidence of an important resurgence in the cultivation of both products, also encouraged by the long political crisis (which is still going on notwithstanding the election of the President) which strongly limited the State capacity, as they admitted, to cope with the problem. No eradication, neither of cannabis nor of poppy opium plants has been accomplished over the last two years. The reduced attention paid is also proven by the remarkable decrease in seizures. Such a decrease could also be justified by the market choice made by criminal organizations. Considering the large availability of raw material they preferred to limit the introduction of drug in the market, stocking the drug surplus in the Valley, so as to avoid the price collapse,.

There are two factors stirring the structured resurgence in production, which supports the hypothesis that Bekka also hosts processing laboratories.

First of all illicit cultivations still represent the only means of subsistence of many farmers since this is the most depressed area in the country and the least supported by the State. The area lacks of irrigation systems which would support alternative development, as well as schools capable of offering local young people viable alternatives. Secondly, the family-based model strongly permeates the social tissue of the region, reflecting the structure of organized crime. The clans based in the Bekka Valley are hierarchically structured and militarily prepared. In this context it is difficult and dangerous for law enforcement officers to penetrate the area. Production is in the hands of the “families” who exploit

the local farmers, dealing with hashish, cocaine and heroin with no distinction. Heroin reaches the Valley from the neighbouring Syria, after crossing Iraq. In particular, as far as cocaine trafficking is concerned, Lebanese organizations use fellow citizens operating in South America who are in close contact with local cartels.

As far as transport is concerned, links with African organizations have recently been identified.

CENTRAL ASIA AND RUSSIAN FEDERATION

Due to its enormous size, the Asian country plays a variety of roles in the world drug trafficking scenario. It comprises producing countries – interested in curbing drug cultivations – and countries primarily interested in curbing the trafficking flows- also huge trafficking – causing degradation and drug addiction.

93% of opium world production comes from **Afghanistan**, yielding about 4,000 billion dollars. This factor, together with the problems of insurgence and their consequent repercussions on world security as well as an instable political situation can well explain why the efforts of the international community are concentrated – sometimes with overlaps - in this area. Only in the long run it will be possible to see the concrete and everlasting results of these efforts.

The heroin world flood, foreseen in 2007, did not occur while cultivations which were supposed to undergo an upward trend, remarkably decreased, going from 193,000 to 157,000 ha. It is too early to claim success also because the actual decrease in opium production was rather contained, going from 8,2000 to 7,700 tons, since irrigated and fertilized lands gave greater yields than expected. Such a decrease did not affect raw materials supply and prices, which remained almost stable. It is thus reasonable to assume that certain drug amounts were stocked in order not to suffer from the fluctuations connected to a higher or lower production. Although it



Poland - customs dog controlling a Turkish TIR truck

is not possible to come to definite conclusions on the downward production trend, it is necessary to highlight an increase in “poppy free” provinces, which rose from 6 to 13 in the two preceding years, to 18 in 2008. In this area UNODC²⁹ is leading a widespread campaign to foster and finance alternative development programmes that is programmes aimed at supporting legal cultivations which guarantee growers the same means of subsistence as opium cultivations. However, if these projects are not constantly controlled and monitored, opium cultivations run the risk of being replaced by cannabis cultivations considering their lower production costs and the less controls paid in comparison with heroin. Other initiatives carried out in the area aim at strengthening the democracy of the institutions, building an efficient judicial system (with Italy playing a leading role) and combating corruption.

Production continues to be concentrated in the Southern and South-Western regions, 98% of the cultivations are concentrated in the provinces of Hilmand, Kandahar,

29 UNODC put into practise the outcomes and the recommendations drawn up by the States and the organizations belonging to the Paris Pact, working out the “Rainbow Strategy for Afghanistan”, which consists in a series of initiatives aimed at combating opium trafficking and use. Such measures are entailed in five books, coming in different colours according to the area of interest.



Uruzgan, Zabul, Farah and Nimroz, where Taliban are active and protect criminal organizations. The link between opium and Taliban insurgency is one of the most debated issues. According to the information gathered³⁰ there is not however a direct involvement of Taliban in heroin trafficking and above all they reportedly do not influence the market choices. The link drugs-Talibans can be traced back in the “ushr”, a 10% income tax that each company has to pay to the authorities which effectively control the territory. It was estimated that opium production contributes to the tax with a total amount of 200-400 million dollars. This can justify how Taliban succeeded in withstanding the attack launched by the Afghan Government and the allied forces.

As opposed to public opinion, poppy cultivation can be ascribed to poverty only to a very small extent. Indeed cultivations have decreased in the safest, though poorest regions, in the Central and in the Northern areas of the country while they continue to be high in the areas bordering Pakistan and Iran where the land is richer and the population is more inclined to trade. Farmers choose this cultivation because it is easier, less demanding and has a guaranteed income.

An important change is represented by the fact that while in the past Afghan opium was exported as raw material to be then processed and transformed first into morphine and then into heroin along the routes leading to the consumption markets (Pakistan and Iran), nowadays it is estimated that about 75% of the

raw material, around 5,800 tons, are refined within the country and are then transported to the destination markets, above all Russian, European, Chinese and American markets, also feeding the markets of the transit areas which are more and more affected by the problem of drug addiction and HIV infections. The areas where opium is transformed into heroin are mainly located in the South-Western part of the country and in the inaccessible and impassable areas in Central and Central-Northern Afghanistan hosting the labs managed by the local crime, assisted by foreign chemists. The end product is then transported along three main directions:

- towards Iran, where about 53% of the opiates destined both for the increasing local market and for Turkey (with Europe and the Arab peninsula as final destination) are channelled to;
- towards Pakistan, where 32.5% of the production are transported to the West, always through Iran and to a lesser degree towards the United States. A part of the trafficking is destined for China, which is both a consumption and a transit area for the deliveries destined for the United States and Australia;
- towards Turkmenistan, Tajikistan, Kazakhstan, Uzbekistan and Kyrgyzstan where about 14.5% are transported, with the Russian Federation and Europe as areas of final destination.

Recently a fourth route directly affecting Europe has been discovered. Drug is transported by air above all to Germany and Great Britain.

There are many criminal organizations participating in the drug trafficking in Afghanistan. They share the same tribal-type structure, made up of few members (about 8/10), controlling the whole trafficking, from the harvest up to the delivery to laboratories. Such laboratories are managed by groups which are in contact both with the “warlords” and Taliban insurgency, who guarantee laissez-passers and protection, and with the international criminal organizations located in Iran, Pakistan, Central Asian Republics, who are the consignees of the refined product.

Usually not too much care is given to opium concealment methods. The drug is transported by mules, inside trucks or carriages driven by animals. Due to the high corruption rate among police forces there is no need in

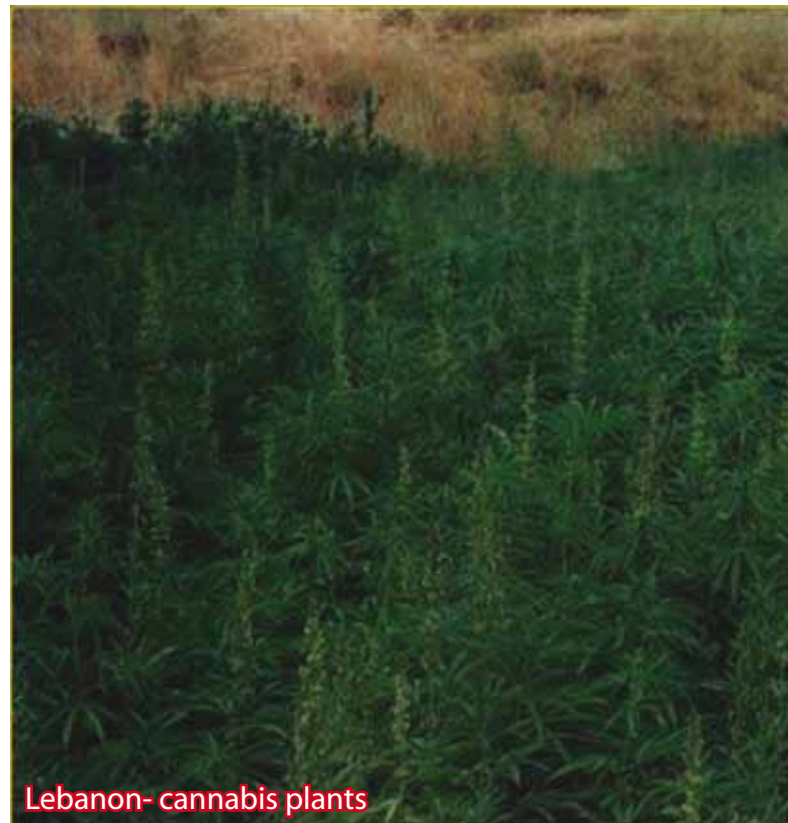
³⁰ UNODC – Afghanistan Opium Survey – November 2008.

taking precautions to conceal the drug.

As far law enforcement counteracting activity is concerned, mention must be made of the first data provided by CJTF³¹ for the first semester of 2008, reporting the seizures of 1, 373 kilos of heroin, more than 70 tons of opium and 27 tons of hashish. The amounts of precursors intercepted - almost 60 tons - are also significant. They are still far away from the actual amount needed to refine the opium produced but they show an increased attention paid to such substances. Out of the 53% of the Afghan opium production reaching **Iran**, around the half is destined for the domestic consumption market. This leads to a progressive increase in the number of drug addicts and AIDS/HIV cases, as well as in the perpetration of the petty crimes linked to drug trafficking. Before the Islamic revolution of 1979, around 33 thousand hectares of land in Iran were used to cultivate opium poppy. Cultivations were then completely destroyed and now there are apparently no areas which are constantly and intensively used to cultivate poppy. As far as processing is concerned, law enforcement bodies officially reported the detection and dismantling in October 2006, near Mashad, of just one laboratory for heroin production.

There are two main types of trafficking: large-scale trafficking involving major loads and trafficking by individuals and independent traffickers, the so-called "barducks" (literally on the shoulder) and body-packers. Barducks smuggle drugs between Iran and Afghanistan, carrying medicines, kerosene etc. on their shoulders on the outward trip and heroin and opium on their return trip. Body-packers are mostly couriers of African origin who bring small amounts of drugs contained in ovules swallowed. However, the alarming problem in Iran is represented by large-scale trafficking carried out along the following routes both from and to the country:

- the "Northern route" at the borders with Turkmenistan. The impervious terrain of this area makes the control for law enforcement officers difficult if not impossible. The area is inhabited by Afghan refugees and is one of the main transit points of illegal migrants. Traffickers are usually made up of small Afghan-Iranian groups crossing the border by foot, carrying out small/mid scale trafficking;
- the Southern route at the border between Pakistan,



Lebanon- cannabis plants

Oman sea and Afghanistan. Also this territory is rough and impervious and characterized by a high-level of poverty and illiteracy. The population comprises many Afghan refugees and about 20,000 nomads. The latter (Baluchies and Sistanis) are independent and rebels by tradition and have always smuggled any type of goods between Iran and Pakistan. They are now providing logistic support also to drug traffickers, as reported by a recent study, according to which about 40/65% of the population earn their living on the smuggling between Iran and Pakistan. Trafficking is carried out by armed and escorted convoys and, as opposed to the Northern route, the support by local communities is determining;

- the "Hormuzgan route" situated along the Persian Gulf coast. Its core is the port in Bandar Abbas, the main Iranian port. Numerous TIR trucks and lorries daily enter the port for loading and unloading commercial goods and cargos going from and to the ports in the Persian Gulf and Europe. Bandar Abbas is also considered the port of arrival of chemical precursors destined for Afghanistan;
- the "Western route" at the borders with Azerbaijan and Turkey;

³¹ CJTF – Criminal Justice Task Force, set up with the support of UNODC in 2005. As of 2008 it can fully cope with drug trafficking within the drug law, which has not been duly approved yet.



- the “Eastern” route towards the markets of the Middle East and which, due to the recent war in Iraq, is also used to smuggle weapons.

Criminal organizations buy the drug either directly in Afghanistan from local producers or through brokers. Once purchased, the drug is then brought to the borders. The person responsible for the drug transport to Iran is the caravan leader who for transport safety relies on a pyramid-shaped structure of co-workers. Usually when the drug arrives in Iran, it is stocked in border villages and is sent to final destination only after buyers have been identified and payment made.

The fight against drug trafficking continues to be carried out above all by reinforcing the security measures and road blocks deployed along the 1,900 km-long border with Afghanistan and Pakistan where, about 30,000 police officers were posted, 1000 km-long barrages and embankments created and 400 border and observation posts set up. The seizure of about 197 tons of opiates carried out in the first four months of 2008 can well explain the scope of the phenomenon, namely: about 11,000 kilos between morphine and heroin, 166 tons of opium and about 19 tons of hashish. Only the latter is sharply decreasing while opiates seizures are remarkably increasing. It is worth mentioning that the huge amounts of raw opium seized testify a resurgence in its consumption, after a period characterized by heroin consumption following the ban of poppy cultivation by Taliban in 2001.

The role played by **Pakistan** in smuggling the opium produced in the neighbouring Afghanistan is not only that

of a transit country. According to investigations carried out, trafficking towards Europe is managed by Pakistani organizations which are well rooted in the Old Continent and can economically finance huge trafficking. Among such organizations, mention must be made of “Mafia in Pashtun”, a real holding company with different criminal interests, rooted at the border with Afghanistan. Besides being an important heroin consuming country, Pakistan is also a sorting centre for the heroin destined for all world consumption markets.

As of 2001, when Pakistan was close to become a “poppy free” state, poppy cultivations have recovered. Eradication campaigns by the Government once again have undergone a new growth, giving positive results. Nowadays the areas where drug production has never decreased are those near the Afghan border, the North-western border, Waziristan and Balochistan. Pakistan continues to be one of the main hashish suppliers in the world. The quality of hashish produced is called charas and is obtained scraping from hand-rubbing the resin from the gland-rich parts of the plants. Charas is largely used by Pakistani young people of the middle class, girls included.

As far as drug processing is concerned, besides the detection and destruction of eight laboratories located near the Afghan border in 2006, no other case was reported. By contrast, precursors trafficking was intense in the whole country. In the first months of 2008, ANF³² carried out an important seizure - the largest in the world- of acetic anhydride. The substance was produced in Japan and destined for Afghanistan, passing through South Korea. Besides the privileged conventional itinerary: Afghanistan-Pakistan-Iran-Turkey and Balkan countries – Europe, alternative air and land routes involving China and India were also introduced. As already mentioned, as far as heroin-trafficking is concerned, Africa is becoming more and more important and thus more and more dangerous. Criminal organizations operating in Africa increasingly use couriers to import drugs from Pakistan, mainly resorting to Dubai international airport. Such couriers are mainly Asian, European and Pakistani nationals. The number of Pakistani women used as couriers at international airports is increasing. Drug deliveries, above all heroin, are increasingly parcelled out in letters and packages, which are sent via mail.

³² ANF – Anti Narcotic Force, the Pakistani law enforcement force, set up in 1995, specialized in the fight against drug trafficking.

The number of opiates seizures is very low while that of hashish is significant. In the first eight months of 2008, 5 tons of heroin, almost 15 tons of opium and 63 of hashish were intercepted.

Up to the early nineties, only the "Balkan route" was used to transport heroin from Afghanistan to Western Europe. With the collapse of the Soviet Union, also the "Northern route" was opened. This route passes through the **Republics of Central Asia**³³, longitudinally crosses Russia, joining at the end the conventional Balkan route. 14.5% of the opiates produced in Afghanistan are transported through this route. Political instability and the disputes between the different countries over the governance of territories, where no recognized national authority can exercise a real control, could increasingly attract the interest of criminal groups carrying out any kind of illicit trafficking. The whole area is a gateway crossed by a series of routes outlined by the orographic shape of the territory. Since 1998 the number of seizures has increased, in the last two years there has been a trend reversal probably following the increasing counteracting activity carried out in Russia and the increased transit difficulties in the final part of the route. Tajikistan (where 46% of the total amount were seized) continues to be the main access route to the Northern route. The Central-Asian criminal organized groups started to enter into alliances – and in some cases to compete - to increase their criminal potential, above all those supervising the crossing of the Amudarya and Pyrani rivers, which divide Afghanistan from Central Asia. They often use unemployed people but the number of women and children acting as couriers is increasing. Since it is easy to obtain opiates at low prices in Central Asia, also lower-income population groups can easily afford them. Such availability will cause an increase in petty crimes and AIDS/HIV cases as it happened to other countries. In Kazakhstan an heroin dose costs as a bottle of vodka, while in Kyrgyzstan a gram of heroin costs between 2 and 2.3 dollars. Opiates prices depends on quality and become higher and higher after crossing the border with Afghanistan and moving from one country to another: for example one kilo of opium rises from 200-600 dollars in Tajikistan to 600-1,500 dollars in Kazakhstan.

According to the data reported there are no refining laboratories in such countries, confirming that heroin

is processed in Afghanistan or, as it happens to opium smuggling, it is smuggled as raw material.

Among the international initiatives carried out in the region, a particular attention must be paid to CARICC³⁴, set up by UNODC initiative. The centre aims at rationalizing efforts and resources as well as at improving cooperation between the counteracting agencies of the relevant countries. Italy promptly supported the initiative, giving an important financial contribution. Italy will also have the regional chair of the Dublin Mini Group until the end of 2009. The Dublin Mini Group was set up in 1990 in order to coordinate the regional cooperation policies in favour of drug producing and transit countries. It is an informal group, made up of EU countries, United States of America, Canada, Australia, Japan and Norway.

After crossing the Central Asian Republics, the "Northern Route" enters the **Russian Federation** which, due to its geographic and social conditions, is one of the most affected regions in terms of international drug trafficking. 85% of the drug arriving in Russia are destined for domestic consumption and the remaining 15% are destined for North-Western European countries. Only a minimum part of this 15% remains in Ukraine for local consumption.

Such a situation has a great impact on the population. According to the data provided by FSKN³⁵, the number of registered drug addicts in the whole Federation reported in September 2008 accounts for more than 350,000. Such a number is probably lower than the real one since it comprises only reported subjects. According to UNODC estimates, there are indeed more than 2 million drug addicts, with a high number of young people between 16 and 24 years. HIV/AIDS cases flared up again, with about 130 new cases each day, most of them due to drug abuse by injection, thus highlighting the scope of the phenomenon. It is clear that, considering the geographic proximity, the opiates and cannabis products produced in Afghanistan and Pakistan are responsible for such a situation. However, the abuse of over the counter medicines and psychotropic substances together with the production and increased abuse of synthetic drugs such as ephedrone, pervitine and phencyclidine are a priority

³⁴ CARICC – Information and Coordination Centre in Central Asia, also including Russia and Azerbaijan and the five Republics of Central Asia (Uzbekistan, Kazakhstan, Kyrgyzstan, Tajikistan and Turkmenistan).

³⁵ FSKN - Federal Drug Control Service – Although the Ministry of the Interior also hosts a Department for the Fight against Crime dealing with the fight against drug trafficking, such a subject falls under the exclusive competence of FSKN.

³³ Comprising Kazakhstan, Kyrgyzstan, Turkmenistan and Uzbekistan.



Pakistan - opium destruction

at present . Production areas are concentrated around the big urban centres, above all Saint Petersburg and Moscow where clandestine labs are set up in farmhouses or in the kitchens of popular dwellings in the town suburbs. The production of such substances is managed by native criminal organizations which reconverted to this end also chemical-pharmaceutical industries.

The majority of synthetic drugs is however imported from China, the Netherlands, Poland, Germany, Lithuania, Latvia, Belorussia and Israel.

Trimetiltentanile produced in China is particularly dangerous. In jargon it is called "crocodile" and is usually mixed with heroin (just 10 millilitres of this substance can provide two thousand doses).

As far as local opiates production is concerned, small poppy cultivations are reported in the regions of Caucasus, Urals or in Siberia. However, cultivations do not exceed 100 ha as a whole and production is only for local consumption. Wild hemp spontaneously grows in the Far Eastern regions, in the Southern regions of Siberia, in Northern Caucasus and in the regions crossed by the Volga river. The end product which is processed in the same places where it is cultivated is then transported to the main cities. The whole production is destined for the domestic market but is not sufficient to fully meet the demand. To this end drugs are also smuggled from Central Asia.

As far as cocaine is concerned, no cultivation, processing and production areas are reported. In the last years, also encouraged by its price stability, the consumption of this drug has increased, above all in the exclusive night

clubs in Moscow, frequented by the "new rich". Cocaine reaches Kaliningrad and Saint Petersburg, above all by sea routes, transported by cargo ships coming from South America though Oman, Benin, Ghana, Zambia and Guinea, concealed in containers with fruits destined for the Russian markets..

Being one of the most lucrative income sources, such a trafficking is controlled by international organizations closely linked together. Among traffickers arrested, Central Asian traffickers, particularly from Tajikistan and Azerbaijan are prevailing, followed by Ukrainian traffickers who control the route towards Europe. It is worth noting that almost all foreign traffickers arrested can speak the Russian language, facilitating the job of the criminal organizations which transit through the Federation.

Precursors and chemical substances – needed to refine the drug - play an important role in the fight against drug trafficking carried out by Russia. Indeed, in 2007 almost 400 tons of such substances were seized in Russia. The country is crossed by the commercial Eastern and Western transit routes, has many chemical industries and the lack of ad-hoc rules and in-depth controls allows to divert huge quantities of chemical substances to the illicit market, destined for the laboratories in Afghanistan, Turkey, Ukraine and Moldavia.

In the first nine months of 2008, almost 30 tons of drugs, mostly marijuana, were seized, while the quantity of heroin seized amounted to around two tons. Considering the exposure of the country to drug trafficking and on the basis of the results achieved, the Russian Federation is making further efforts, encouraging and renewing its commitment in the field of international cooperation in order to achieve more effective forms of cooperation, towards above all the countries of the European Union.

SOUTH-EAST ASIA

The virtual journey through the world drug scenario ends in South-East Asia where drugs are part of its culture and tradition, as it is shown for example by the opium war between Great Britain and China which ended in 1842 with Hong Kong becoming a Crown Colony of the British Empire.

Though with swinging trends and with tiny quantities in comparison with Afghanistan, the "golden triangle"³⁶ has

36 The golden triangle is the second Asian area in terms of importance and dimension (350,000 km²) as far as opium production is concerned. It comprises Myanmar, Laos and Thailand. Also Vietnam could be included in this area.

always strongly contributed to the world opium market, being the second largest producer in the world. Since the percentage sank from 30% in 1998 to 6% in 2007 some hopes were raised about the possibility to free this region from illicit cultivations. However, the last data show a trend reversal. After a six-year downward trend, opium cultivations have sharply increased in the area, reaching 22%. Opium cultivations are almost totally concentrated in Myanmar (the former Burma) where, among other factors, favourable weather conditions and new techniques allowing to have multiple yields in twelve months, increased production by 46%. The areas mostly affected by the phenomenon are in Shan and Kachin, which cover 95% of national cultivations. Refining laboratories are concentrated in Shan, where since 1991 178 laboratories have been discovered. The steady increase in the drug price, caused by an ever-increasing demand, made new regions turn to poppy cultivation, involving farmers who did not have the means to maintain their families. The strong increase in prices, which in some areas rose by 500% is a real temptation for those communities who chose alternative cultivations without seeing the real benefits. Ten kilos of raw opium yields 1 kg of China White, which is packaged in slabs of 700 gr. each, bearing the famous emblem of two lions rampant.

The drug is sold for 3,000 dollars. In Hong Kong the price rises to 15,000 reaching 70,000 in Europe. When 50% of the drug are cut, it yields up to 140,000 dollars. While in the early nineties most of the heroin was introduced into the country through the Golden Triangle Route, which crossed Thailand and Laos, nowadays most of Burmese opiates is smuggled through the Yunnan Route: heroin passes through China and reaches Hong Kong, Macao and the other commercial sites in the area hosting international ports and airports, to be then transported by air and sea routes – to the markets in Australia, Taiwan, Europe and North America. The other route used passes through Central Myanmar, forking either South towards the Andaman Sea, reaching the markets by sea, or North, reaching India. Though heroin production is remarkably recovering, heroin seizures have been decreasing since 2006. In the first six months of 2008, only 41 kg were intercepted. Ten years before, in 1997, the quantities seized by Burmese law enforcement authorities amounted to almost one ton and a half.



Pakistan - opium poppy field

Apart from opium, also the production of synthetic drugs has increased. The whole region is affected by this phenomenon and is usually referred to as the “Ice triangle”, due to the increasing production of crystallized methamphetamines, called ice.

“yaba”³⁷ is a largely used substance, consisting in orange or bright green coloured pills containing a variable mixture of methamphetamines and caffeine (60-70%). In the early 70ies such pills were commonly sold outside petrol stations to truck drivers who were to stay awake for many hours. They were banned by the Government after the death of many people following terrible car accidents.

In **Thailand** opium production is almost negligible. It plays an important role as a transit country for the drug produced in the whole region and destined for international markets. Drug trafficking is still punished with death penalty. Aggressive eradication campaigns carried out by the Government brought about a sharp reduction in cannabis and opium poppy cultivations, which moved to the neighbouring countries. The remaining production areas are in hardly accessible mountain regions, which can be located only by air or satellite detection, making it possible for farmers to accomplish the production cycle (90 days) without being discovered by the Authorities.

Using irrigation systems and fertilizers the amount of yearly yields steadily increased: from 3 in 1995 to 6 in

37 Yaba – “madness drug”, called in the past ya ma. “horse medicine”, to stress its powerful effect. This name fostered its abuse among farmer populations.

2008.

Usually sowing is carried out in October/November and harvest in February/March. In order to elude law enforcement actions fields are sown per lots, every 3 or 4 weeks, making it more difficult to carry out the destruction plan in case of detection. Indeed, if less than 70 days have elapsed since the fields were sown plants are to be eradicated one by one and this takes an extremely long time and requires a high number of workers.

Drugs are usually concealed in commercial deliveries, transported by cargo ships or airplanes or they are concealed in packages sent by ordinary or special mail. The use of couriers swallowing ovules containing drugs or hiding them in corpore is also frequent. In this field, an important role is played by Nigerian criminal organizations, which are tough and deep-rooted in Bangkok, and Malaysian couriers of Chinese origin. The Thai capital is used as a transit place for the drug destined for the European countries. Nigerian mafia continues to recruit Asian women couriers in order to transport heroin to China, passing through India

and Malaysia, as well as to import cocaine from South America. Such a trend is undoubtedly proven by the high number of arrests of African affiliates carried out in 2007. The use of women is increasing, indeed local authorities expressed their concern about the increasing number of marriages between Thai woman and foreign citizens, who use such women as couriers.

The native criminal groups who are controlled and managed by Chinese and Malaysian nationals purchase heroin in Myanmar and recruit native couriers to transport the drug to Laos by land route. The drug is then handed over to Laotians who have the duty to transport the drug to the Cambodian border and deliver it to local couriers. The latter, often assisted by corrupted soldiers, reach the Cambodian commercial port in Kaoh Kong where the drug is concealed in commercial loads to be then sent to Australia, Hong Kong, Malaysia and Indonesia,

In 2007 many seizures of tiny quantities of heroin were carried out, amounting to 295 kg as a whole. In the first six months of 2008 the quantity seized amounted to around 15 kg.



Laos - seizure

MAIN DRUG TRAFFICKING ROUTES

DRUG TRANSIT ROUTES

In the last decade the drug phenomenon has become growingly complex, considering both the trafficking expansion and the social impact of abuse.

As a consequence, drug market trends cannot be analysed without taking into account the characteristics of drug demand and supply and the illicit trade patterns. With regard to the drug supply, one of the most significant external variables is the growing importance, in terms of quality, of the global trade networks; in fact their characteristics represented a stimulus for the globalization of the drug illicit market.

As a consequence, drug trafficking methods are able to adapt to the changes in the global trade routes.

This fact is reflected in the criminal organizations that became versatile and multiform and that, even if they are strongly based on identity overtones such as their ethnic origin, often interact with heterogeneous large-scale criminal syndicates.

During 2008, a particular attention was focused on the geographic areas more involved in drug trafficking as far as production and transit are concerned:

- South America: all world cocaine production is concentrated in the North of this area, where drug traffickers set up different sorting points from which the drugs are forwarded to North America and to Europe, through the Atlantic ocean, often in transit through Western African countries.
- Western Africa: this area is growingly preferred by the drug traffickers as a base from which the drugs arriving from South America are forwarded to destination countries; some countries, in particular Morocco, are strongly involved in the production of cannabis derivatives;
- Central Asia: most opiates are produced in Afghanistan. The trafficking flows start from this country following different transit routes, in particular the Balkan route and its variants, towards the European markets.

The drug routes towards the destination markets are detected analysing the intelligence contributions by the relevant international bodies, the foreign drug agencies,

D.C.S.A. Drug Experts and Liaison Officers, as well as analysing the drug operations in the framework of the analysis support to drug trafficking investigations.

In particular, the analysis of the main international drug operations revealed that the drug traffickers are increasingly using new *modi operandi* involving unusual and unexpected land, air and sea routes.

Such routes, that at first sight seem to be uneconomic due to their tortuousness and complexity, are in fact less subject to the risk of seizure.

Furthermore, long stand-bys at the airports make difficult for Customs Authorities to find out the origin of the trip, and consequently to establish the risk profile of passengers.

The overall scenario of the actual and potential routes relating to each type of drug will be examined in detail later in this report.

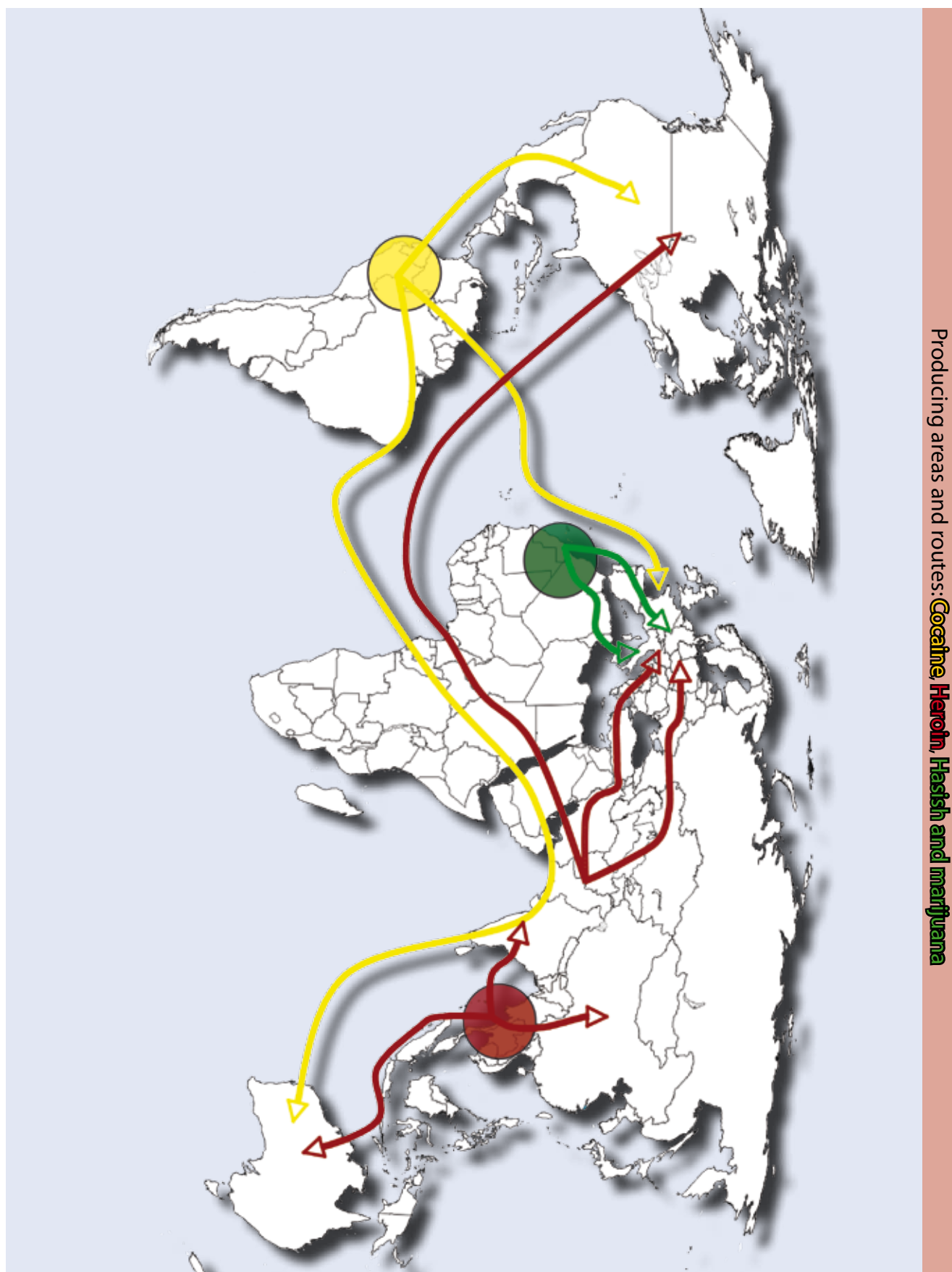
COCAINE

Innumerable routes are utilized to move large drug shipments towards the European market, the second one in the world after the U.S. one.

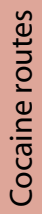
Generally speaking, the Caribbean islands are strongly involved in the transit of sea shipments and the Atlantic waters in front of the Cape Verde archipelago and the African States of the Gulf of Guinea are increasingly used to tranship and/or store the drug loads intended for Europe, mainly crossing Spain. The West African route is now also used to transfer South American cocaine to the U.S.A. market, in order to bypass the strict controls enacted by the international community on the Caribbean Sea.

In this context, the gradual settlement of the Colombian organizations in the main Western African countries was registered; in particular in Senegal, where, through import-export as well as fishing companies, they collect (at sea and on land), stock and transfer the drugs to the European markets.

The main cocaine transit routes are:



Producing areas and routes: **Cocaine**, **Heroin**, **Hashish** and **marijuana**





Latin-American route: from producing countries to Argentina, Paraguay, U.S.A., Canada, Europe;

North Pacific route: from producing countries via Mexico to the Western American coasts;

Atlantic route: from Venezuela, Colombia, Brazil, Argentina towards Europe. Within this route the mainly used ports and airports are:

- **European ports:** Lisbon, Malaga, Marseille, Italian Tirrenian and Sicilian Ports;
- **European airports:** Madrid, Paris, London, Frankfurt, Milan and Rome;
- from the South American producing countries, as well as through Argentina and Brazil, the cocaine shipments reach Cape Verde, Canary islands and Western African countries by sea; they are then sent to different European countries through land and sea routes.

At present, because of the constant monitoring of the mentioned maritime area, the centre of illicit trafficking carried out by the Colombian, Venezuelan, Mexican organizations was moved to the area between Guinea Conakri, Liberia, Sierra Leone and Ghana, where there are no maritime controls.

Isthmus route: From Colombia the drug reaches the United States through the Isthmus countries and Mexico.

The overall statistical data on the cocaine seizures carried out along said route suggest that the Central American corridor became more important than the traditional Caribbean route.

From the producing areas in South America cocaine reaches Turkey, from where it is further transported to Europe. The airport used is Ataturk airport in Istanbul, the focal point of the air routes from Africa (Nigeria, South Africa, Morocco and Ethiopia).

HEROIN

With regard to the opium and heroin routes towards the international markets, the criminal organizations exploit the weak socio-political stability characterizing some drug transit countries, thus setting up new and diversified routes.

All major transit routes start from Afghanistan, the main producing country. They pass through the Russian Federation along inaccessible roads in Central Asia and

on their way to Europe they follow the "silk route" until Turkey.

Later they go through the Balkan route reaching Italy or the Eastern states of E.U. (Austria, Czech Republic, Poland, Latvia and Estonia) or by sea routes towards the Mediterranean countries. As an alternative, the drug goes through the Caucasian or Central Asian route, crossing then Ukraine or Belarus and reaching Eastern European or Baltic countries.

The flow of heroin produced in Afghanistan and transiting through Africa is constantly growing.

In particular, the opening of new flights connecting Eastern Africa (Ethiopia, Kenya and Arabian Emirates) with West African countries (Nigeria, Ivory Coast and Senegal) facilitates traffickers' activities. Heroin reaches then U.K., U.S.A. and E.U. countries airports through the Nigerian and Ghanaian organizations having logistic bases in those countries.

The main heroin transit routes are:

Balkan route: from Afghanistan and Pakistan, drugs arrive in Europe through Turkey and Balkan countries; from Afghanistan heroin crosses the former Soviet Union Central Asian Republics and reaches Western Europe;

"Golden triangle" route (Myanmar, Laos,

Thailand): from Myanmar a part of the morphine base reaches Thailand and another part of it India. Heroin instead reaches Bangkok, Hong Kong, Bangladesh, Malaysia (by sea) and Vietnam through Laos; from Thailand heroin, transported in containers by sea and air route, directly arrives in Australia, Hong Kong and Singapore;

from the producing areas it reaches the Pacific U.S. coasts;

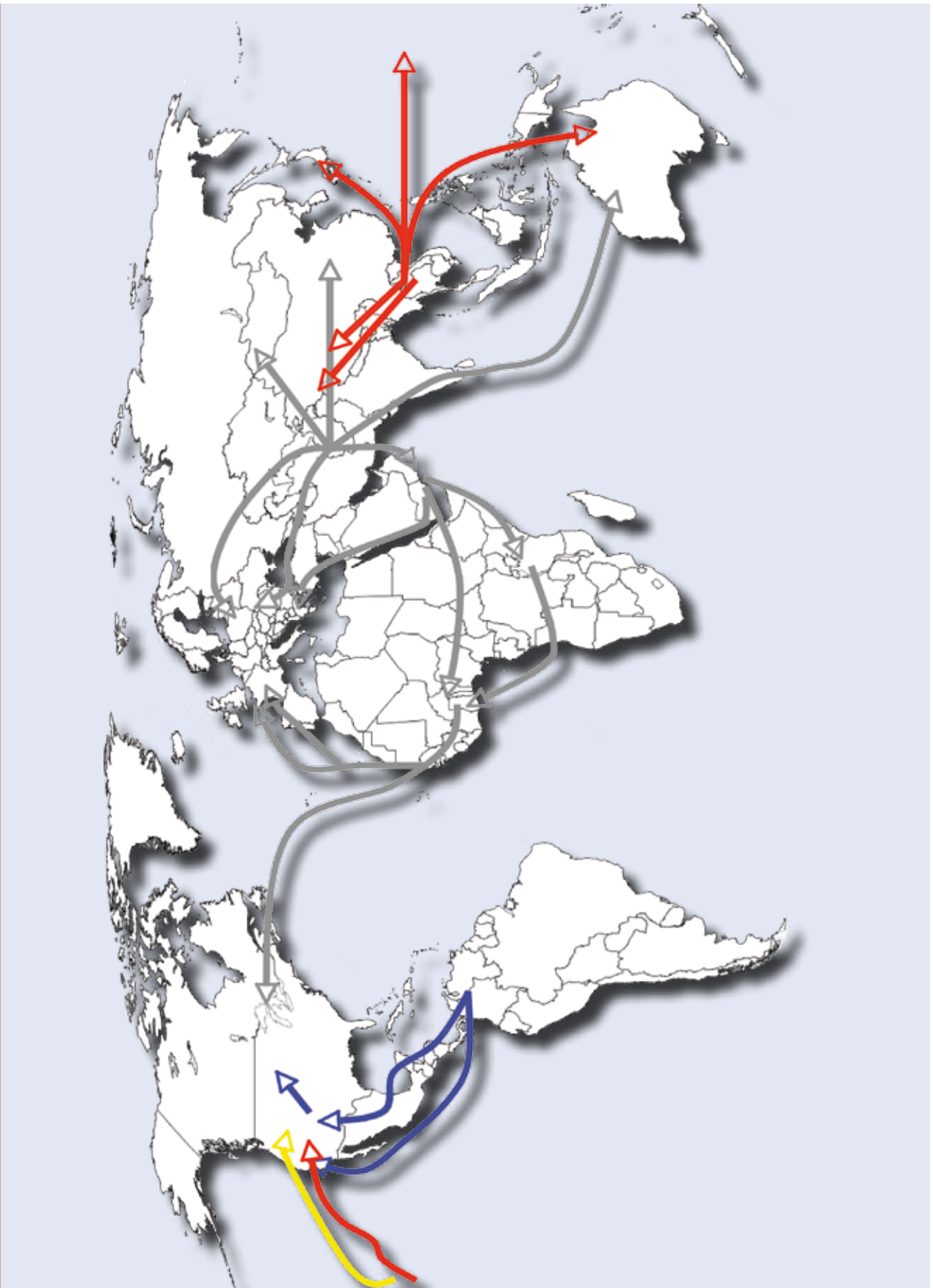
"Golden Crescent" route (Afghanistan, Iran and

Pakistan): from Afghanistan and Central Asian countries a large network of different land routes branches off, leading to Iran or to the coast, to Ukraine or Russia. Said routes are passable only by camel, since they are located in inaccessible areas;

Isthmus route: From Colombia drug reaches the United States across the Isthmus countries and Mexico.

Heroin is forwarded through the Arabic peninsula where two routes destined for Europe branch off: one of them crosses the Red Sea, the second one passes through the African countries located in front of the Gulf of Guinea.

Heroin routes (produced in Colombia, Iran-Pakistan-Afghanistan, Laos-Myanmar-Thailand)



Balkan route and its alternatives



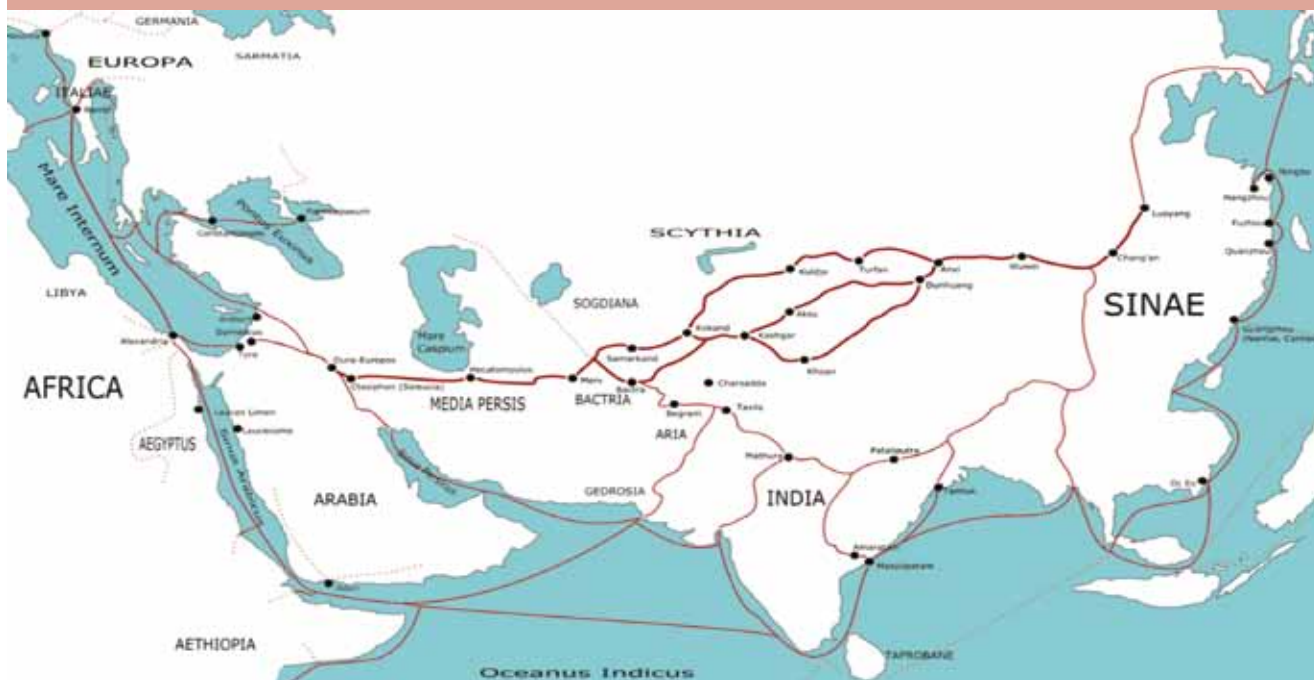
The Karachi (Pakistan) port has a leading position; from there heroin goes to Yemen through the Red Sea or reaches the European and North American markets through Somalia, Ethiopia and Kenya. The heroin flow through air routes involving the main international airports is also significant. From said airports traffickers send heroin, through couriers, to the

main consumption markets. The most used airports for heroin trafficking are those in Pakistan: Karachi, Lahore and Peshawar.

CANNABIS

The African North-Western area plays a key role in the cannabis derivatives trafficking, in particular the hashish

The silk route



destined for Europe, that is the world largest consumer market for this substance. Most part of the Moroccan hashish is forwarded to Spain through the Strait of Gibraltar by local organizations and is there stored in huge quantities.

Recent data point out a diversification in the trafficking routes. This is aimed at escaping the increasingly strict controls enacted by the Spanish Authorities both at sea and in the enclaves of Ceuta and Melilla that are, in this case, the outpost for counteracting activities.

The stringent counteracting measures drove the criminal organizations buying the drugs to bypass Spain for transactions and to directly turn to brokers in Morocco.

Due to its tolerance policy with regard to cannabis and its derivatives, also Holland plays a significant role in the distribution of hashish large shipments.

However, this substance comes to Europe also from other major producing countries, such as Lebanon, Pakistan and Afghanistan.

The main transit routes of the cannabis derivatives are:

Hashish

Indian route: from Afghanistan and Nepal it crosses India heading to Europe and the Eastern coasts of Africa;

Syrian route: it moves along two directions: one southwards to Jordan and Saudi Arabia and one westwards to Lebanon and Egypt;

Balkan route: the drug reaches Europe from Afghanistan and Pakistan, via Turkey, the Balkan states and former Yugoslavia;

Mediterranean route: consists in the following three directions:

from Lebanon to Cyprus, Greece, Italy, France and Spain;

from the Iberian peninsula via the Atlantic ocean to Northern Europe;

from Morocco to North America.

Latin-American route: from Colombia, Venezuela, Perú, Brazil, Paraguay and Argentina hashish reaches the U.S.A., Canada and Europe along the Atlantic routes.

Marijuana

A well-established channel for cannabis and its derivatives is active between Albania and Italy. It is part of the route involving the ports in Durres, Vlore and Saranda in Albania and those in Bari, Brindisi and Otranto in Italy.

Besides this route, mention can also be made of:

South-East and South-West Asian route: it starts

from the producing countries through Southern China, Vietnam and Cambodia and reaches Northern America by sea and/or air through the Pacific ocean;

Indian Ocean or Indonesian route: two routes start from the producing and refining countries: one reaches Australia through Malaysia and Indonesia; the other one reaches Europe transiting through the African Eastern coasts;

African route: the drug is moved from Swaziland, Kenya, Nigeria and Ghana to Europe through the Mediterranean sea or circumnavigating the African Western coasts (Ivory Coast, Liberia, Sierra Leone, Guinea, Senegal, Morocco);

Latin American route: the drug is sent to Northern America from Colombia, Venezuela, Perú, Brazil and Paraguay.

SYNTHETIC DRUGS

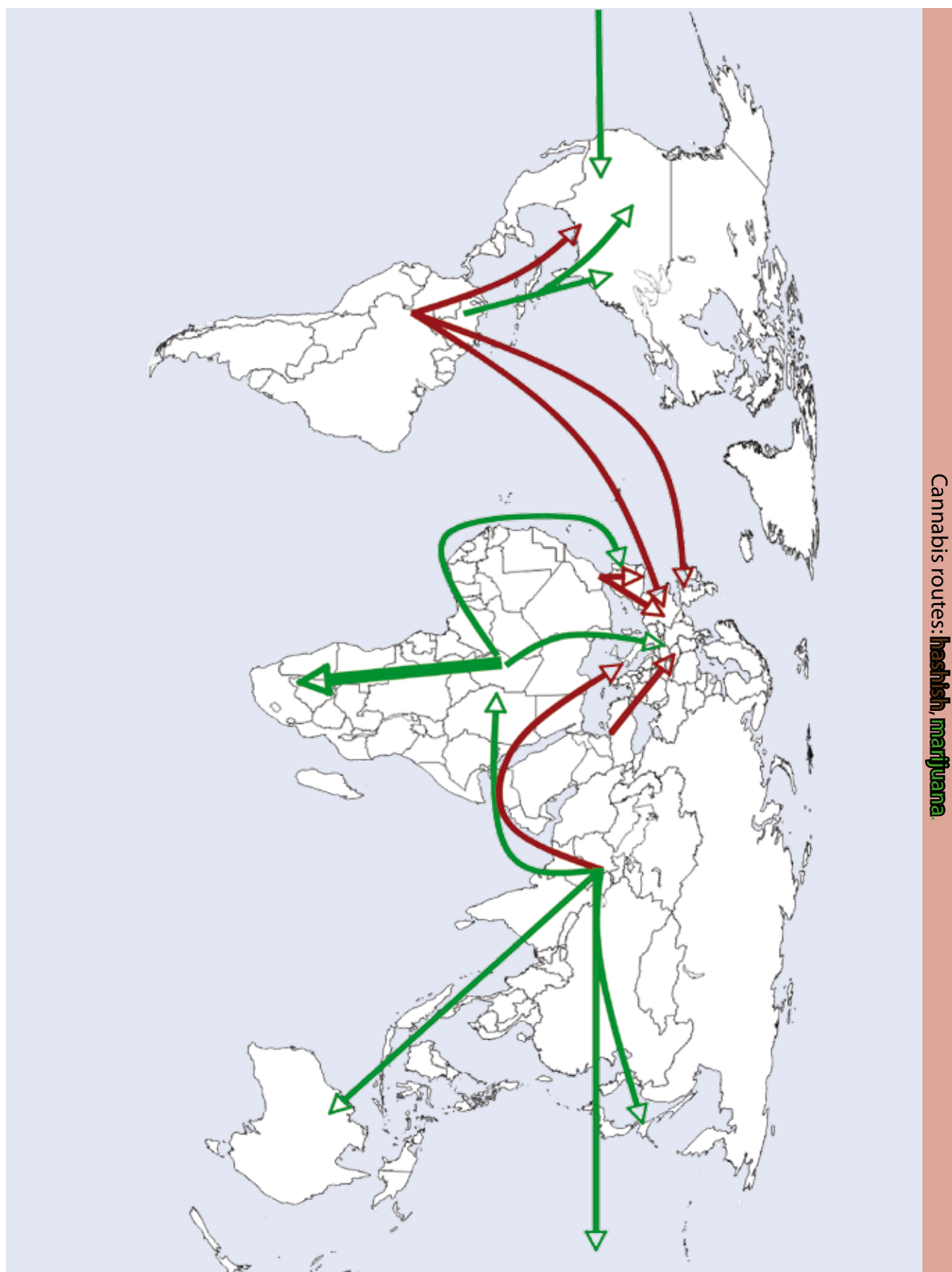
Europe remains the main synthetic drugs producer, although it is not possible to estimate the scope of the production of such drugs, that fuels almost the entire world market.

The whole South East Asian region seems to be at present involved in the ATS (Amphetamine Type Stimulants) production too and such drugs are those mainly used in Far East and Oceania. They represent one of the major dangers for the U.S. market where both Vietnamese and Mexican organizations are growingly setting up laboratories for the production of ice (crystal methamphetamine with a strong active principle, also called shaboo).

On the contrary, the "Chinese ecstasy" does not seem to gain ground in the regional market and in the European one. This drug is considered as poor in quality also because its molecule is composed of ketamine, which makes it completely different from the traditional one.

New Zealand plays a major role in ATS production, since most clandestine laboratories are concentrated in this country. In some operations leading to the disruption of criminal networks producing ATS in South East Asia and Oceania, the involvement of European chemists emerged, in particular from Holland and France, who improved their expertise in this sector in European laboratories.

The flow of this substance, which was once destined for the European countries, gradually entered the American



Cannabis routes: **hashish**, **marijuana**.

and Asian markets.

The analysis of the drug operations highlighted a high flexibility in the distribution by the Dutch suppliers. The latter are very often in a position to supply large drug consignments, directly in the Netherlands and at very low prices, to the Italian traffickers who take the risk of transporting the drug to Italy.

In the other E.U. countries a growing number of seizures was carried out on trains and, to a lesser extent, on buses coming from the countries of the former Soviet Union.

Synthetic drugs are introduced into Italy almost exclusively by Italians through land borders, concealed in legal goods, vehicles, baggage, on light aircrafts.

NEW ROUTES

OPIATES

From Myanmar to North America via China

(including Hong Kong and Taiwan): the drug loads are exported to North America from Myanmar, an opium producing country, through a route that is partly similar to the traditional one, which involved Thailand and Hong Kong and has now been abandoned.

Variant of the Balkan route: from Turkey, the drug passes through Greece, FYROM and Albania reaching Italy through the Otranto channel.

From the Albanian ports in Vlore, Saranda and Durres the ships carrying drug loads reach the Italian Adriatic coasts.

The **Eastern Mediterranean route** is playing a more and more strategic role. The heroin, from the Persian Gulf and the port in Karachi, through the Suez Channel enters the Mediterranean sea and heads for the Black sea –namely the Port in Odessa, overlapping with the large trafficking activities along the European corridors.

COCAINE

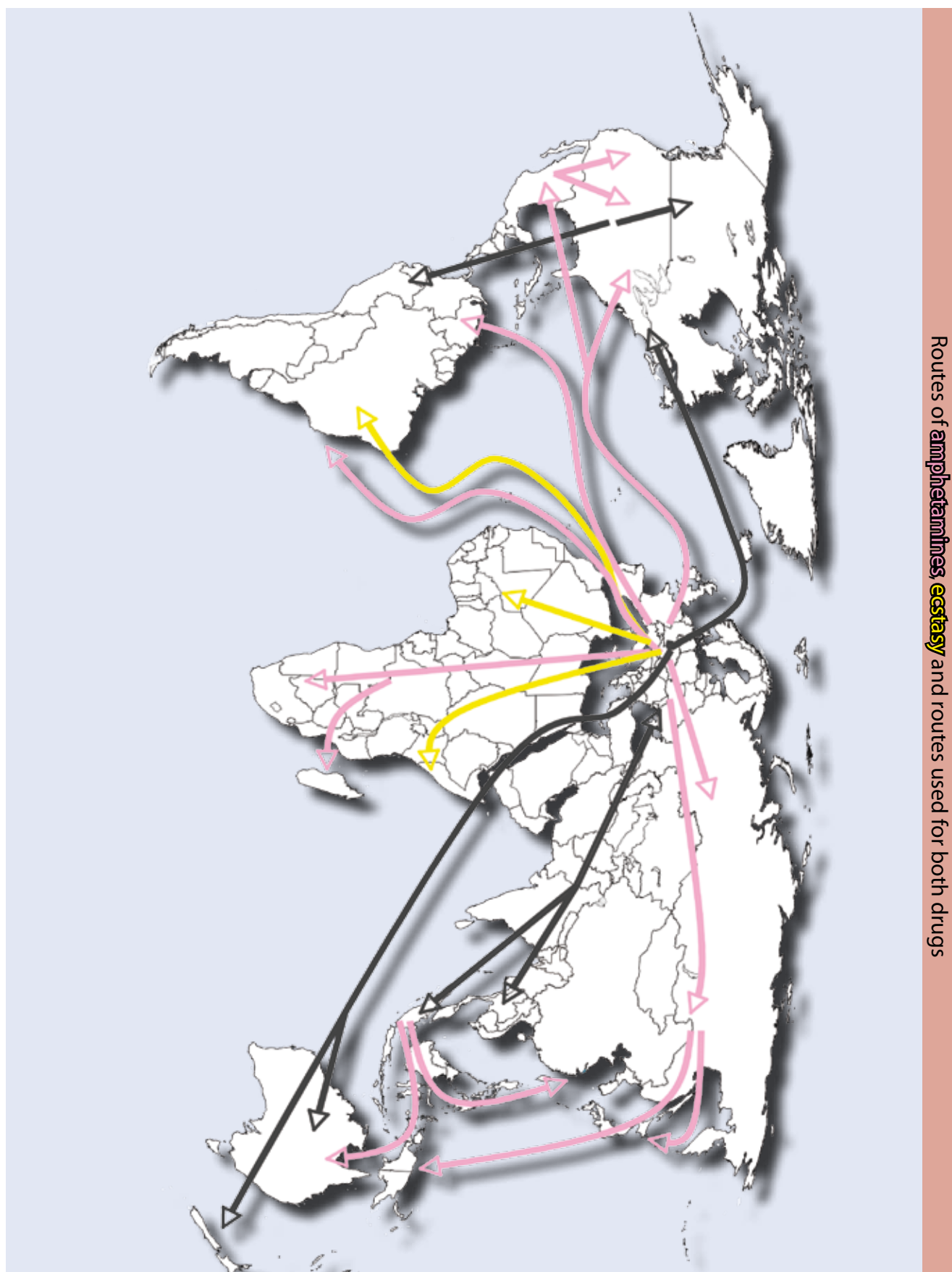
Atlantic route: from Colombia to the U.S.A. via Africa, the drug flow that traditionally affected the European destination market only, at present reaches North America too.

Significant drug flows depart from Africa - where large amounts of cocaine are presumably stored - towards the destination markets.

Sahel Route "desert sides": the Trans-saharan route, called Sahel route, has recently acquired a strategic role. Cocaine arrives in Cape Verde and then to the Mauritania coasts, it crosses Mali and Niger (on board escorted off-road vehicles) with intermediate destinations along the coasts in Algeria, Tunisia and Libya. From here the Arabian and European trafficking organizations forward the drugs to Spain, France and Italy both by sea, through fishing boats, liners and containers, and by air.

CANNABIS DERIVATIVES

From the Asian Republics of the former U.S.S.R. to Europe via Russia or Ukraine: the hashish produced in the former Soviet Union (Russia, Belarus and Ukraine are becoming cannabis producers) passes through Russia and enters the Schengen area from Eastern Europe.



Routes of amphetamines, **ecstasy** and routes used for both drugs

Heroin - The Eastern Mediterranean route



Cocaine - Sahel route "desert sides"



