



Cocaine Smuggling in 2010



Produced for the
OFFICE OF NATIONAL DRUG CONTROL POLICY



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Cocaine Flow toward the United States

The amount of cocaine departing South America decreased in 2010 for a third straight year. Cocaine flow toward the United States declined roughly 20 percent in 2010. This assessment is based on decreases in the amount of Colombian cocaine available to depart South America,¹ the level of documented cocaine movement toward the United States, and estimated U.S. cocaine demand.

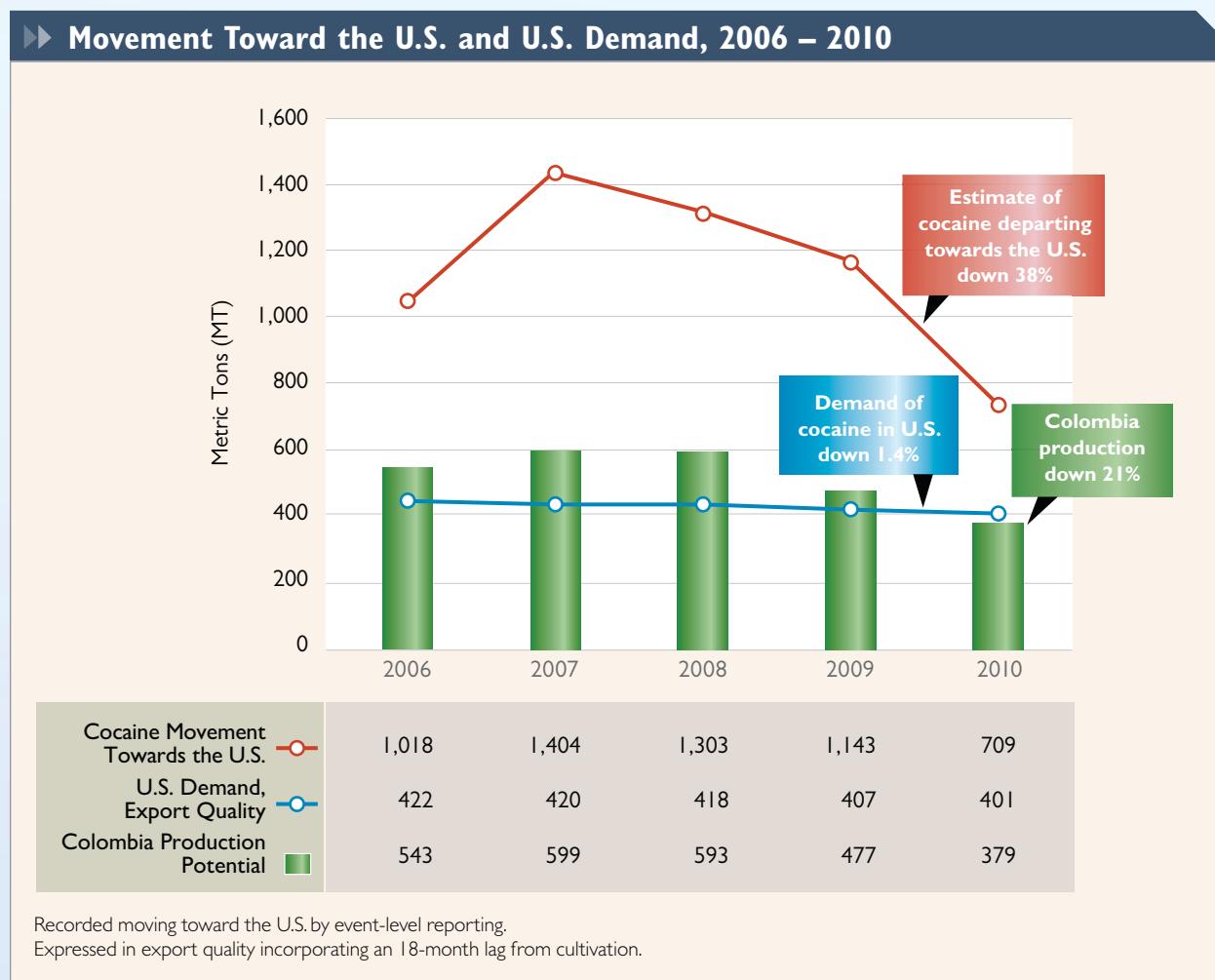


Figure 1. Cocaine data sets trending down.

¹ Cocaine "available to depart" is the estimated amount of cocaine on hand for export after estimated local consumption and seizures.

► Andean Cocaine Threat by Producing Nation, 848 Metric Tons ↓ 5%, 2010

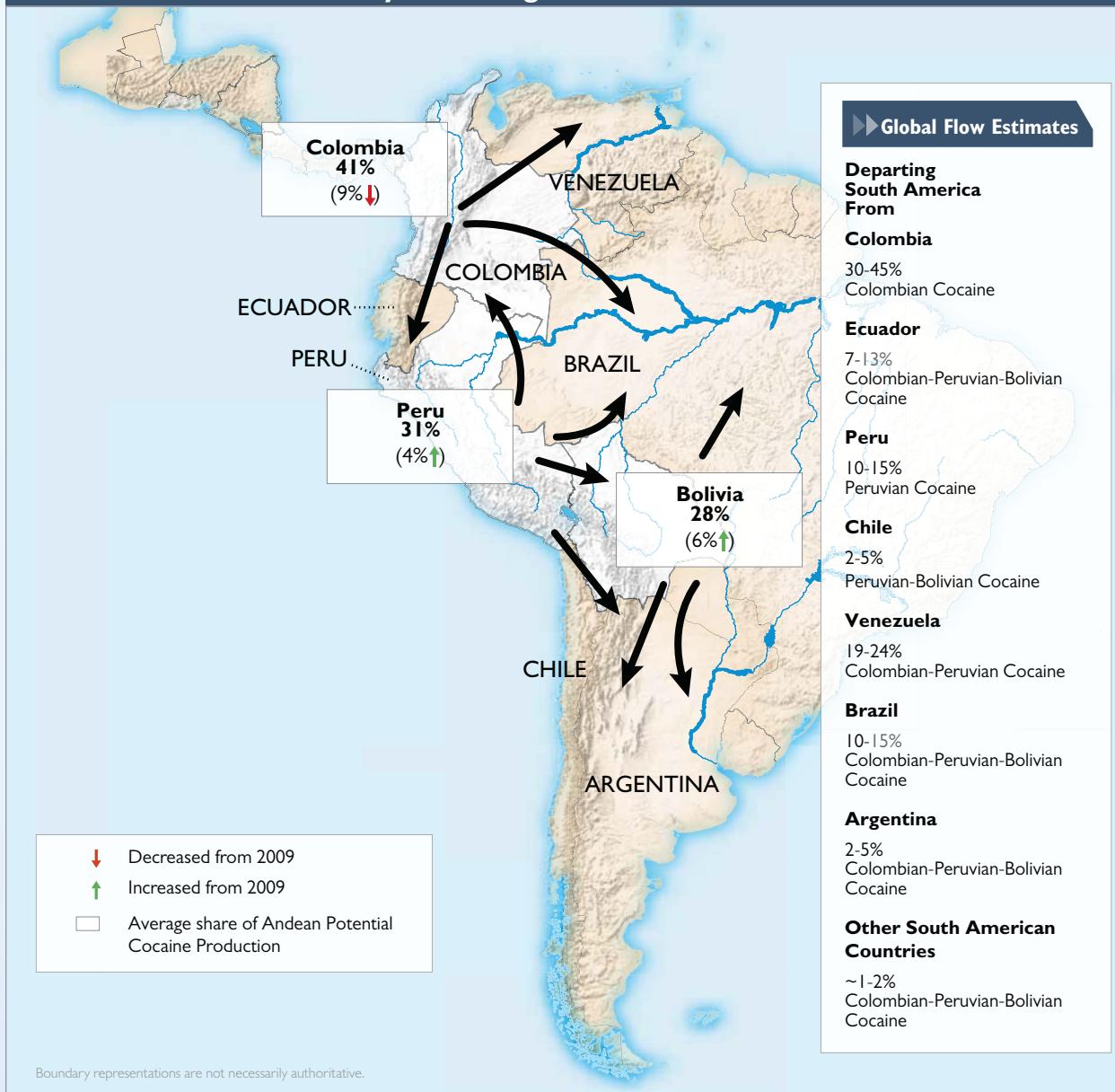


Figure 2. Cocaine flow estimates.

The estimated share of South American cocaine that departed from Colombia to global destinations decreased significantly, from 55 percent in 2009 to about 40 percent in 2010, most of which was destined to the U.S. market. The percentage of cocaine movement toward the United States known to have departed Ecuador and Venezuela increased commensurately, from roughly 20 percent in 2009 to about 30 percent in 2010.

- Colombia's diminished role as a departure country reflects declines in Colombian cocaine production along with increasing movement of Colombian cocaine through Ecuador and Venezuela.

Approximately 95 percent of all cocaine detected moving toward the United States transited the Mexico-Central America region, while the remainder moved through the Caribbean region. As has been

the case since 2008, detected cocaine shipments moved increasingly first through the Central American isthmus, rather than directly to Mexico. Moreover, Honduras emerged as a key transshipment center for U.S.-bound cocaine.

- According to interagency estimates, Honduras was the destination for roughly 65 of 80 metric tons of cocaine transported by noncommercial aircraft toward the United States representing 15% of the cocaine threat to the U.S.
- Despite a decrease in the volume of cocaine moving to Honduras via noncommercial maritime means, such shipments still accounted for about 13 percent of the total movement toward the United States.

Within the Mexico-Central America region, the relative share of cocaine movement via Pacific routes continued the decrease first noted in 2009, while the relative share of cocaine moving via the Caribbean Sea increased commensurately.

- The proportion of cocaine moving through the Pacific declined from 65 percent in 2009 to 53 percent in 2010 reflecting the sustained decrease in the use of semi-submersible vessels. The arrests of key traffickers and successful interdiction in 2009 were probably responsible for reducing the use of such conveyances by more than 70 percent in 2010.

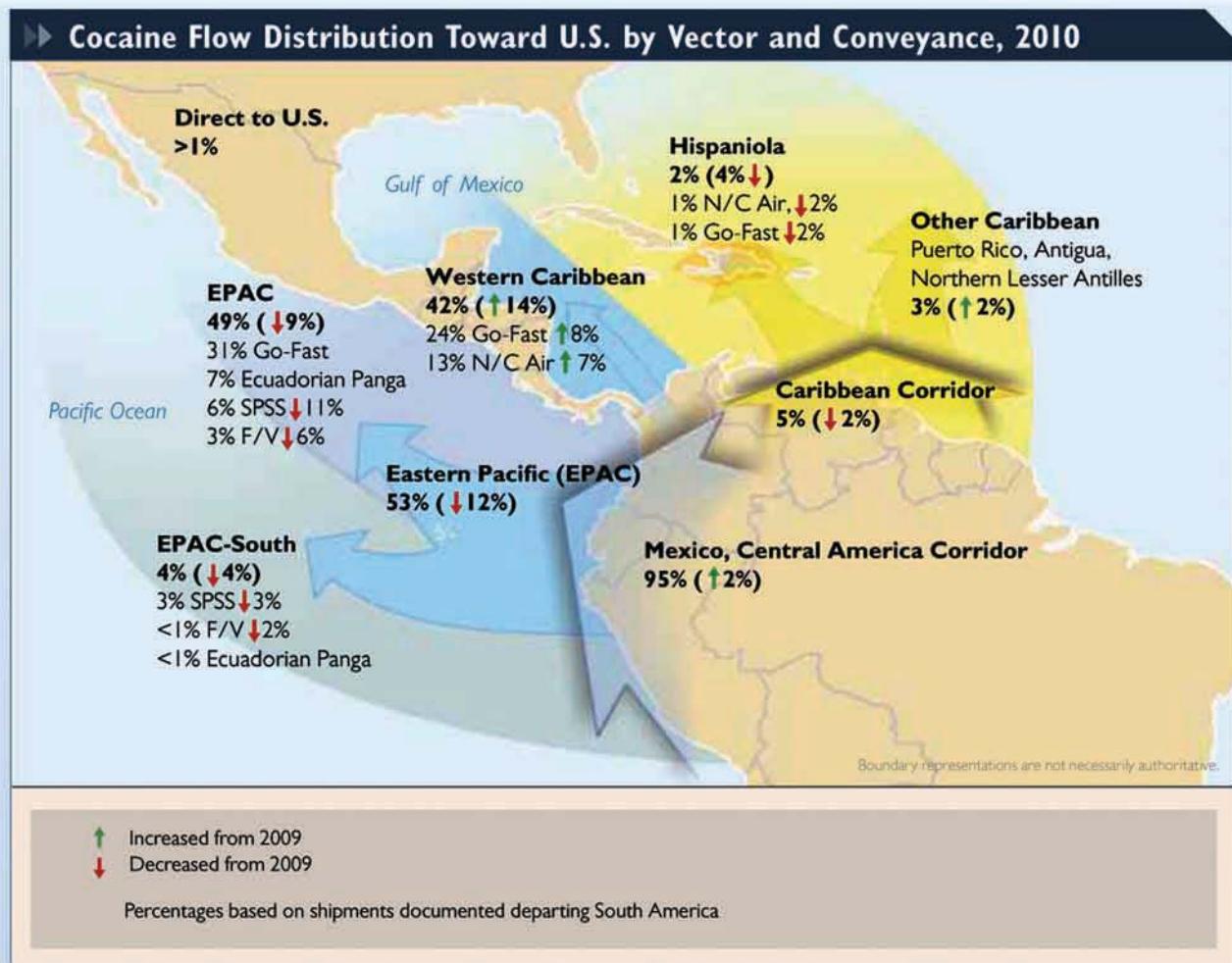


Figure 3. Cocaine threat departing South America.

► Central America Increases its Role as Preferred Transshipment Region for Primary Cocaine Movement, 2010

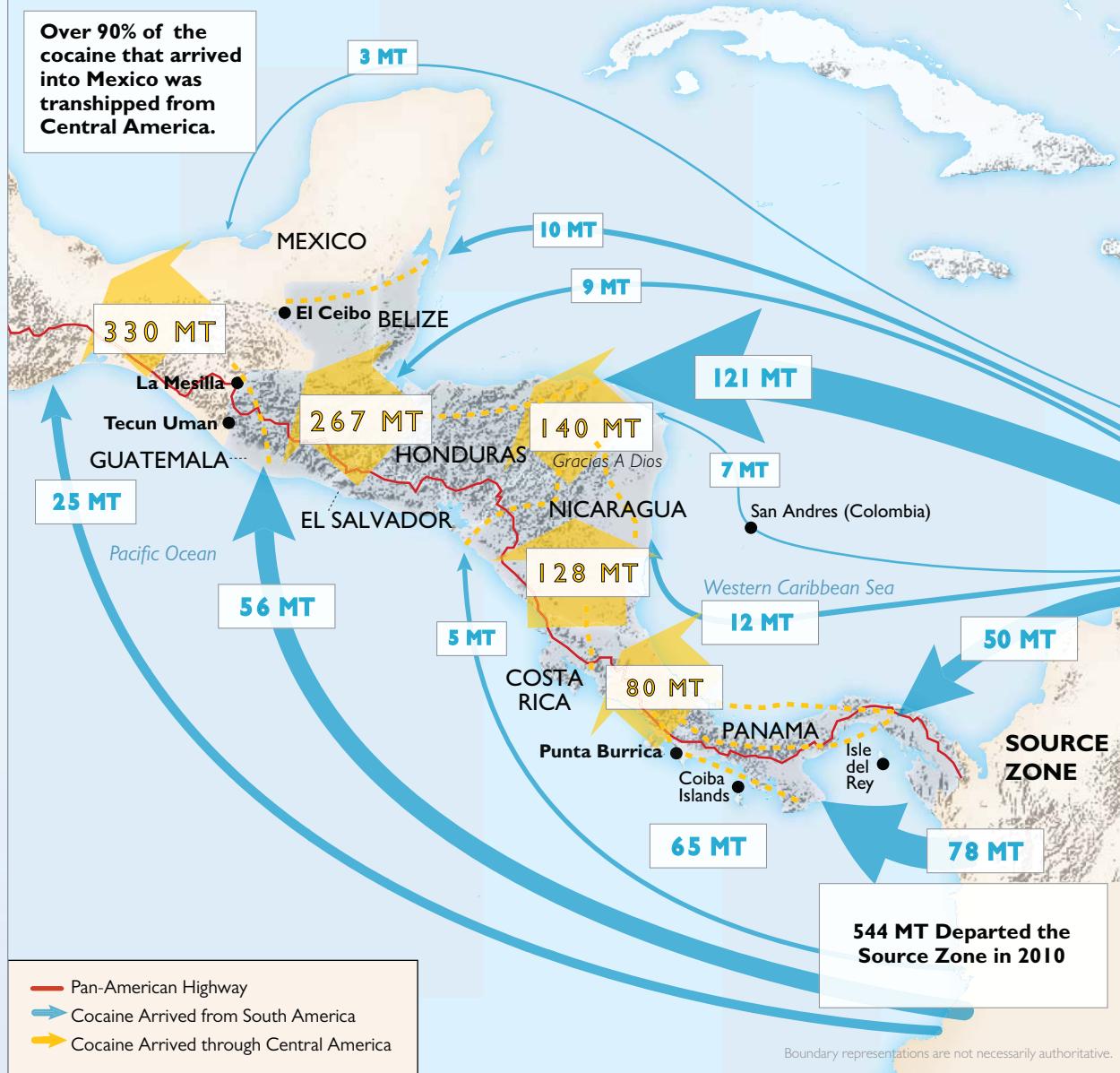


Figure 4. Cocaine threat to Central America.

The volume of cocaine documented transiting the Caribbean decreased slightly in 2010, in keeping with the overall decrease in cocaine movement toward the United States. The relative share of cocaine flow toward the United States through the Caribbean, however, increased from 28 percent in 2009 to 42 percent in 2010.

In July 2010, Ecuadorian authorities seized an almost-completed self-propelled fully submersible on its coast near the Colombian border. This event demonstrates continued trafficker efforts to evade interdiction forces.

U.S. Arrival Zone

All available indicators suggested the diminished availability of cocaine, which began in 2007, continued in 2010. Decreased availability was evidenced by diminished abuse, higher prices, lower purity, and lower seizure amounts when compared to 2006 figures.

The amount of cocaine seized in the United States declined slightly from 2009 to 2010. The drop in cocaine seizures on the southwest border, which consistently account for roughly 80 percent of all cocaine seized as it enters the United States, since 2006 is consistent with changes in other availability indicators since 2007 and suggests a decline in actual cocaine movement over the U.S.-Mexico border.

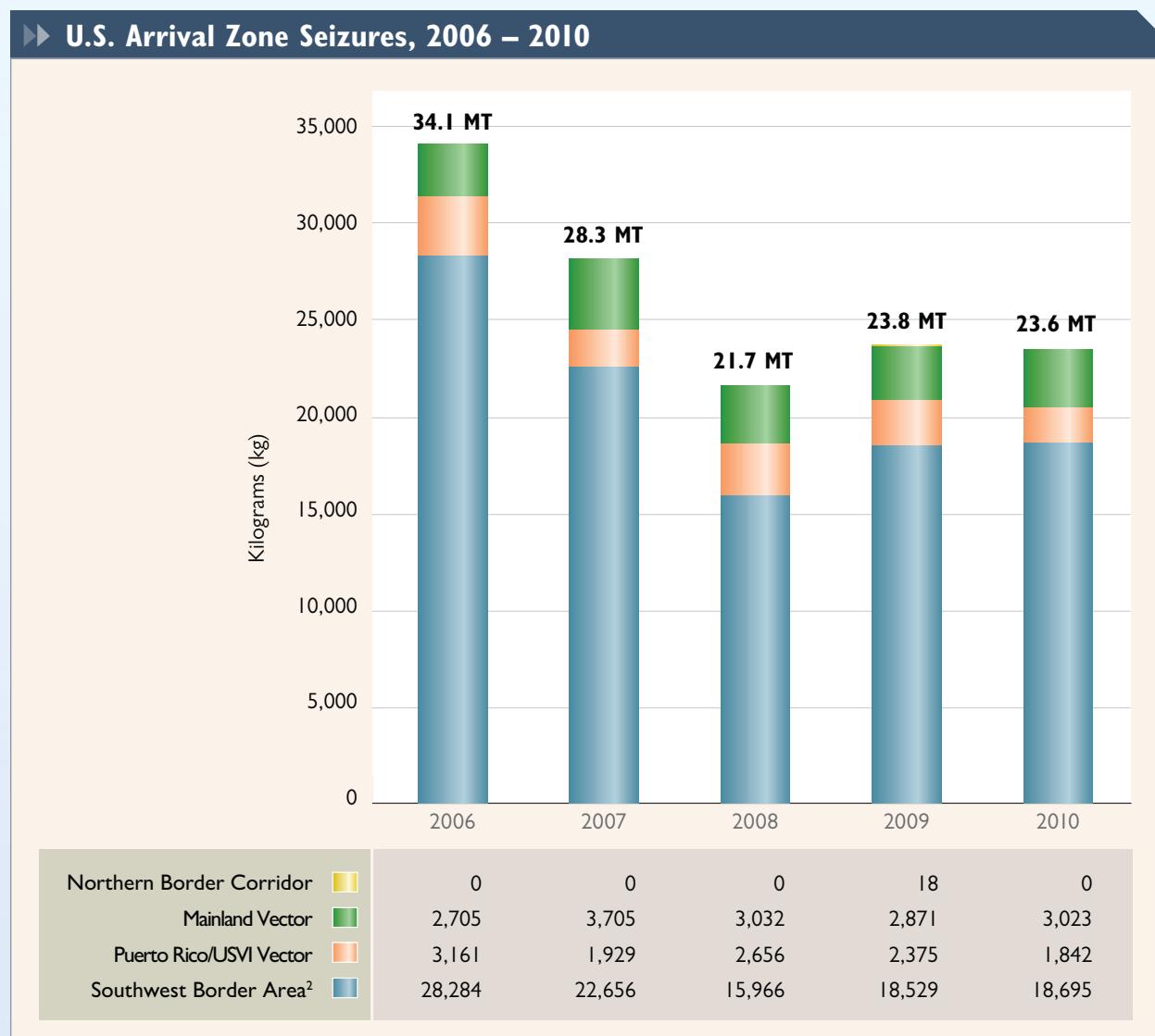


Figure 5. Cocaine seized entering the United States.

² The southwest border area includes the land area of any Arizona, California, New Mexico, or Texas county that is at least partially within 150 miles of the U.S.-Mexico Border.

The amount of cocaine seized in Puerto Rico, the U.S. Virgin Islands, and other U.S. entry points fluctuated slightly over the past 5 years but remained relatively stable in 2010.

The sustained reduction in domestic cocaine availability is probably due to a combination of decreasing Colombian cocaine production, Mexican anticrime efforts, and increased violence among Mexican drug trafficking organizations. Available data suggests that the overwhelming majority of cocaine that reaches the United States is of Colombian origin.

Cocaine Flow Toward Non-U.S. Markets

Several indicators suggest an increase in the amounts of cocaine available to non-U.S. markets. Inter-agency estimates indicated that the volume of Bolivian and Peruvian cocaine available to depart South America increased by a combined 15 percent from 2009 to 2010. The relative share of cocaine available to depart South America that originated in Bolivia and Peru increased from 53 percent in 2009 to 61 percent in 2010. Available information suggests that some Bolivian and Peruvian cocaine is consumed in South America, but most is destined for Europe. Bolivian cocaine moves into or through Brazil, and to a lesser extent Argentina, Chile, and Ecuador for onward shipment to Europe. Seizures of cocaine bound for Europe have increased (see textbox) and demand for cocaine in non-U.S. markets has steadily increased from 2006.



Figure 6. Cocaine concealed inside structures.

Maritime conveyances remain the primary mode of transatlantic cocaine movement. Commercial containers reach key distribution hubs in Europe. Seizures from transatlantic or Europe-bound commercial maritime containers have increased significantly since 2008, likely reflecting but not deterring increased containerized cocaine movement. Spain is the primary entry point for documented Europe-bound cocaine.

Maritime Container Movement

In 2010, authorities around the world seized approximately 60 metric tons of cocaine from commercial maritime containers, up from 43 metric tons in 2009. The increase was most pronounced among containers destined for or seized in Europe, which accounted for 40 of the 60 metric tons.

Although estimates of European cocaine consumption remained relatively stable from 2009 to 2010, the increase in cocaine production in countries that primarily serve non-U.S. markets and the increase in container seizures linked to ports that primarily serve non-U.S. markets clearly indicate expanded transatlantic flow via commercial maritime container.

Traffickers exploit close trade and travel ties between the Caribbean, South America and Europe, largely stemming from historic colonial links, to facilitate cocaine smuggling by maritime and air conveyances. Analysis of seizures suggests that seaports and airports in Spain, Belgium, The Netherlands, Portugal, Germany, and the UK are leading destinations. Specifically, there are noted links from Colombia to Spain, the Dominican Republic to the UK and the Netherlands Antilles to the Netherlands. Separately, the French overseas territories of Martinique and Guadeloupe have increased in significance as transit areas for cocaine trafficking to Europe.

Non-U.S. Arrival Zone

The amount of cocaine seized in Europe increased from 25 metric tons in 2009 to 32 metric tons in 2010; roughly 30 percent of the cocaine was seized in Spain. Separately, the amount of cocaine seized in or en route to Africa increased from 2 metric tons in 2009 to 6 metric tons in 2010, suggesting increased flow into the region. The amount seized in the Atlantic en route to Europe decreased slightly from 9 metric tons in 2009 to 8 metric tons in 2010.

Asia, Australia, and Oceania are estimated to account for less than 5 percent of the world's total cocaine consumption. Demand for cocaine is well below that for amphetamine-type stimulants and opiates. Australia is the largest consumer and interdictor of cocaine in the Asia-Pacific region.

Global Seizures and Losses

There were 448 metric tons of documented cocaine seizures and losses in 2010, down 15 percent from 2009. The most notable decreases in seizure totals occurred in the eastern Pacific high seas and in Colombia. In 2010, for the first time in the last decade, most of the cocaine seized in South America was seized in countries other than Colombia.

Traffickers relied heavily on go-fast operations in the littoral waters of Central America, enduring a high rate of disruption along the eastern Pacific and western Caribbean coastlines. Approximately 58 percent

► Worldwide Cocaine Seizures/Losses, 2006 – 2010

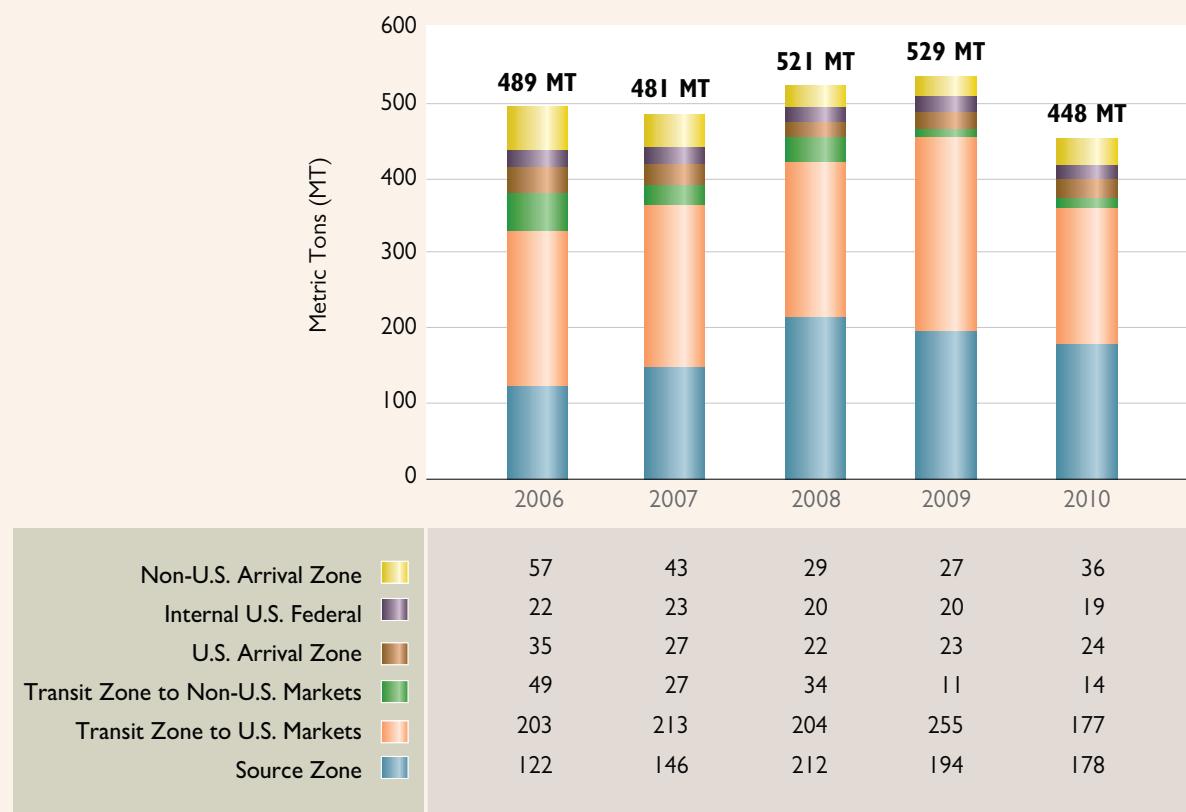


Figure 7. Worldwide Seizures and Losses. The amount of cocaine disrupted in 2010 was down 15 percent.

of worldwide disruptions in 2010 involved maritime conveyances; at 21 percent, go-fasts were the most frequently disrupted conveyance, followed by containerized shipments at 14 percent. Notably, however, commercial vessels were the only conveyance to experience an increase in disrupted tonnage, which jumped from 47 metric tons in 2009 to 60 metric tons in 2010.

In 2010, the amount of cocaine seized from go-fast vessels in the western Caribbean moving toward the United States exceeded the amount seized in the eastern Pacific for the first time since 2006. On average, seizures in the western Caribbean were much larger than in the eastern Pacific, due to the increased use of smaller *pangas*, or motorboats moving 250-300 kilogram loads, in the eastern Pacific. The increased disruption rate in the western Caribbean principally reflected additional seizures from go-fasts in the littoral waters off Panama and Nicaragua.

Seizures in Central America decreased from 80 metric tons in 2009 to 75 metric tons in 2010. For the third straight year, Panama led Central America in seizure totals, increasing from 42 metric tons seized in 2009 to 49 metric tons in 2010.

In 2010, 14 metric tons of cocaine was disrupted on the high seas bound for non-U.S. markets, an increase from 11 metric tons in 2009. However, this was still the second lowest seizure total for this vector since 2002.

Cocaine Demand

The estimate for global demand remains unchanged from 2009 at roughly 860 metric tons of export quality (76 percent) cocaine. Since 2000, 10 countries, led by the United States, have accounted for roughly 80 percent of global demand. As of 2010, the United States accounted for roughly 45 percent of global demand. However, U.S. demand has decreased every year since 2006, when it accounted for roughly 50 percent.

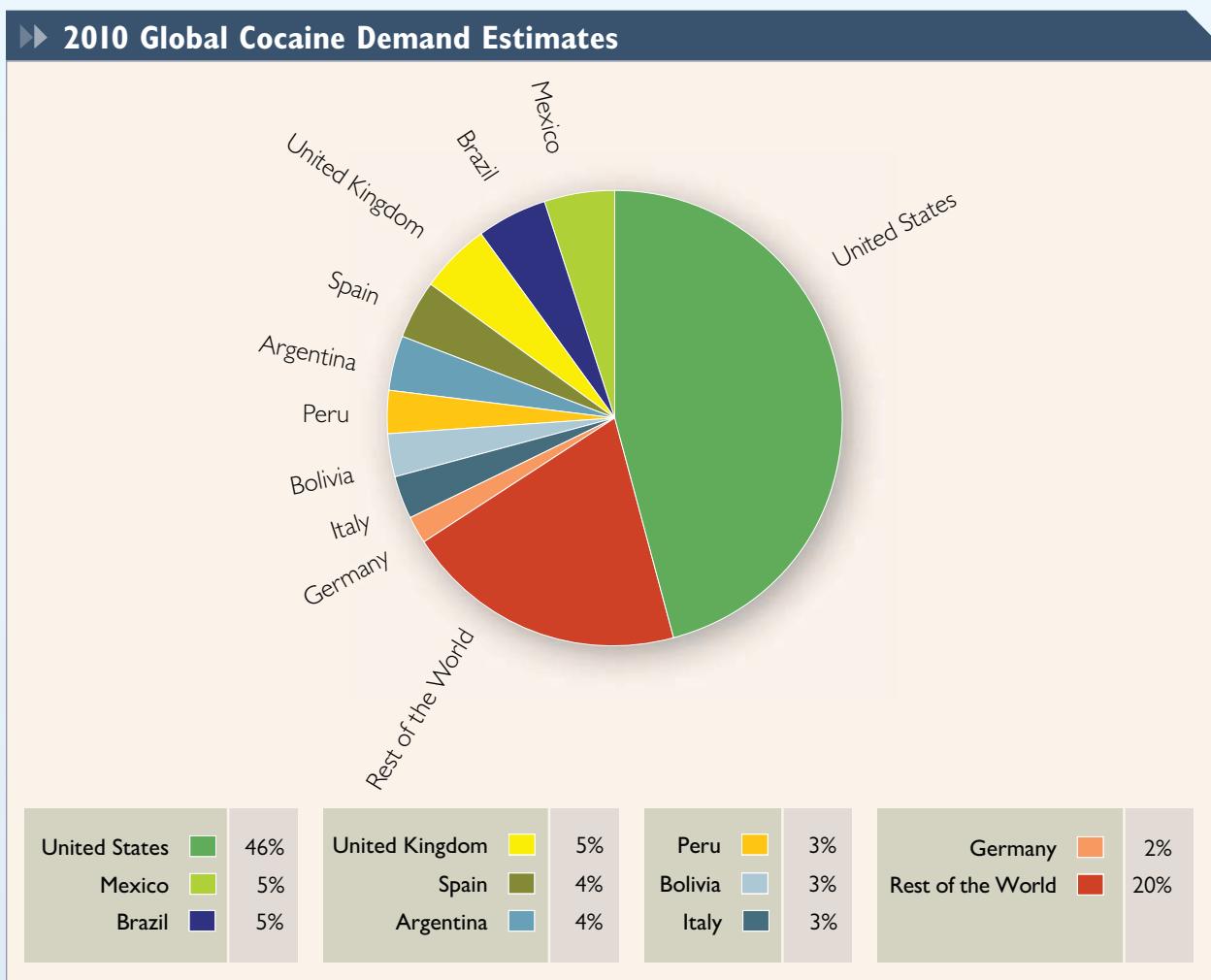


Figure 8. Global Demand for Cocaine. Globally, 10 countries account for 80 percent of all cocaine demand.



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