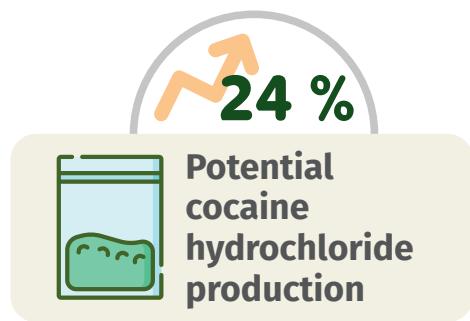


Monitoring of Territories with Presence of Coca Cultivation, 2022

The trend in increasing potential cocaine production continues as a result of more hectares planted with coca and coca fields at more productive ages located in areas with higher yields

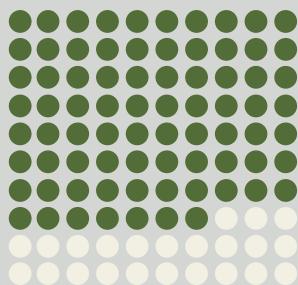


2021
204,000 ha
2022
230,000 ha



2021
1,400 mt
2022
1,738 mt

For the second year in a row, coca cultivation reached a **historical maximum** in Colombia.



77 %
of the net increase was concentrated in Putumayo (about 20,000 ha).

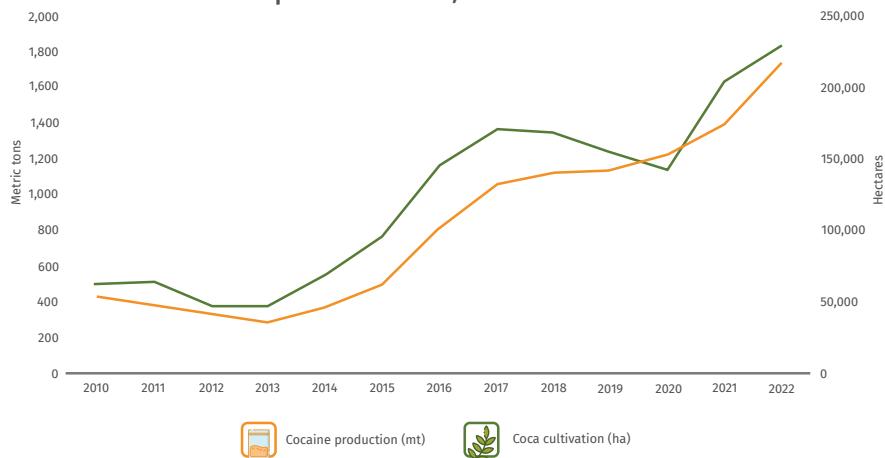


The coca cultivation area in the rest of the country increased, excluding Putumayo.

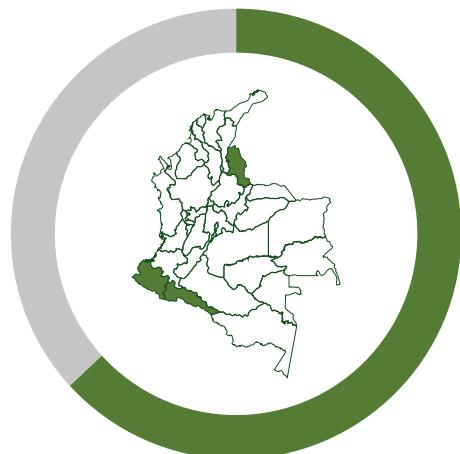


2021
1,134,700 mt
2022
1,410,600 mt

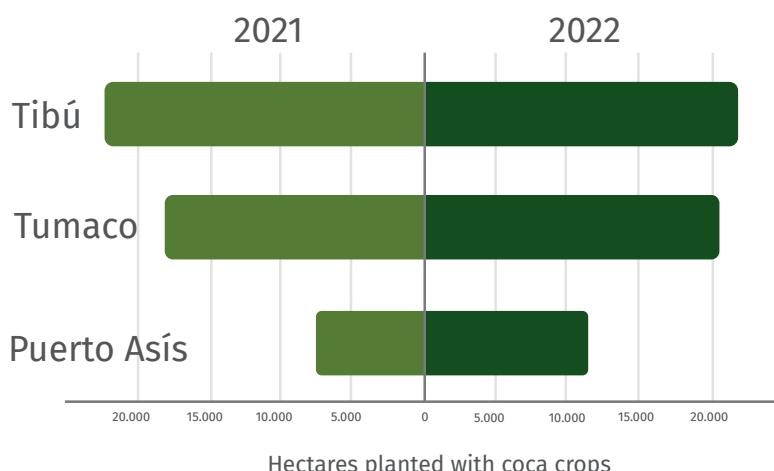
Historical time series of coca cultivation area and potential cocaine hydrochloride production, 2010-2022



The concentration trend continues



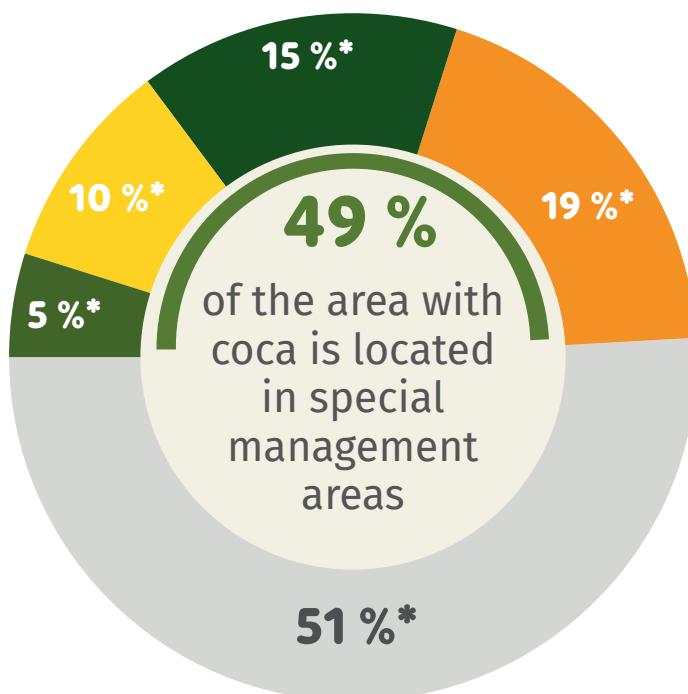
65 %
of crops are concentrated in Nariño, Norte de Santander and Putumayo.



185 municipalities of the existing 1,122 municipalities had coca cultivation, **4 more than in 2021.**

In 2022, **88 % of the world's coca** concentrated in permanently affected areas.

The municipality of **Tibú** held first place with close to 22,000 ha, a relative stability compared to 2021; **Tumaco and Puerto Asís** followed it, increasing their coca area by **over 6,500 ha jointly in the last year.**



National Natural Parks
↗ 21,5 %**



Indigenous Reservations
↗ 18 %**



Land of Black Communities
↗ 4 %**



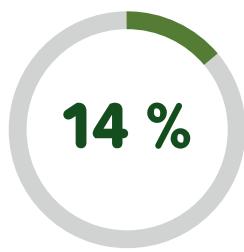
Forest Reserves according to Law 2 of 1959
↗ 2 %**



Outside of special management areas

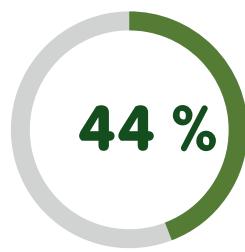
* Concentration with respect to the national total
** Variation with respect to 2021

By 2022, **15 productive hotspots** were consolidated, in which the area with coca increased by 5 % with respect to 2021. These occupied:



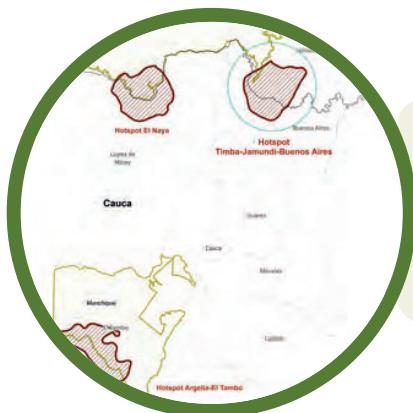
of the territory with coca cultivation

and hold



of potential production of fresh coca leaf

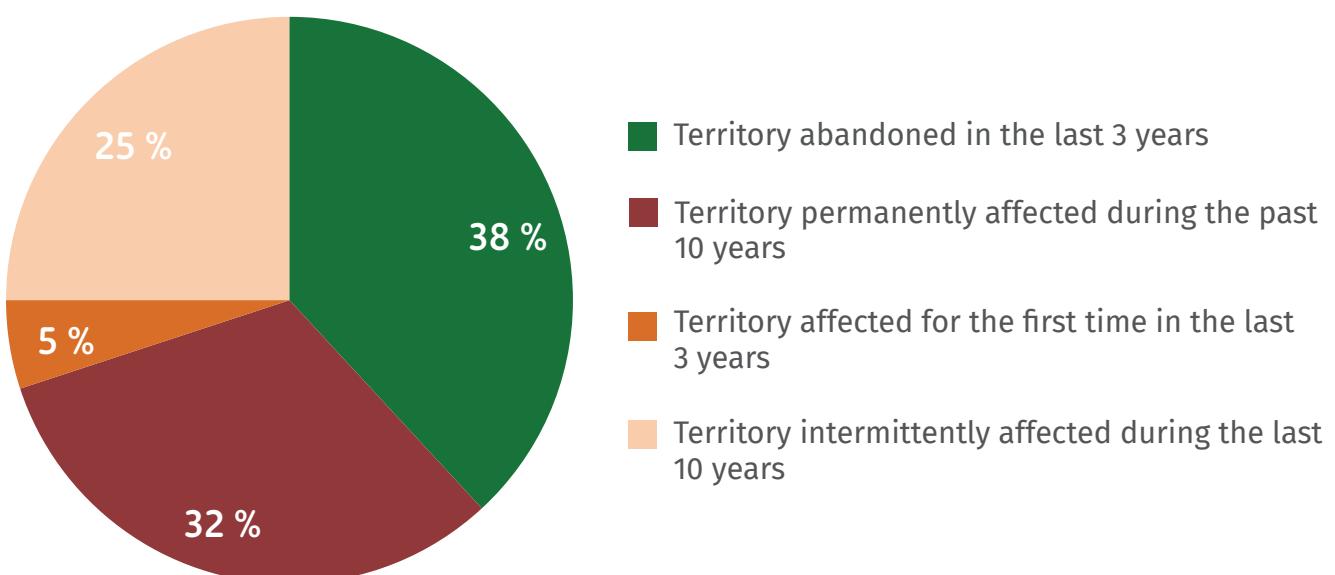
Catatumbo was the hotspot with the largest area of cultivated coca, registering close to 28,000 ha. This represents **30 % of total hotspots and 12 % of the national total**.



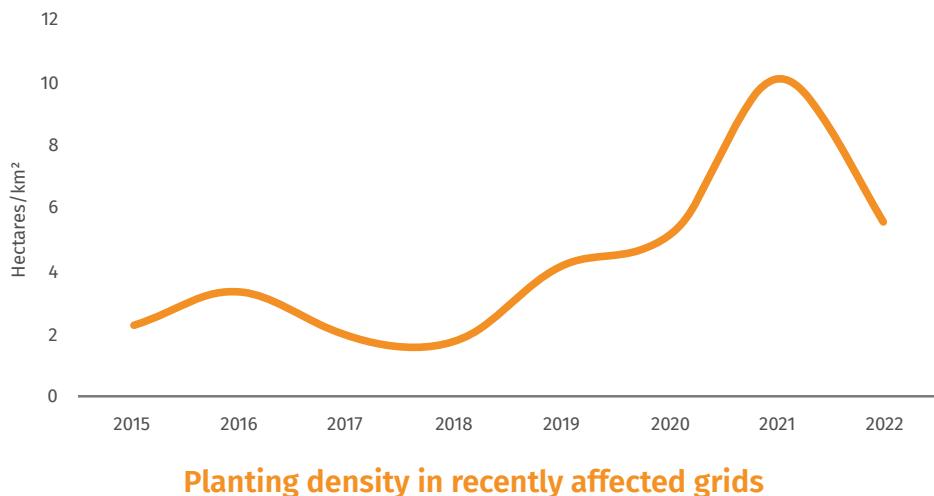
By 2022, a new productive hotspot, **Timba-Jamundí-Buenos Aires** (1,436 ha), located between the Cauca and Valle del Cauca borders, was consolidated.

New areas with coca appeared, some with high densities

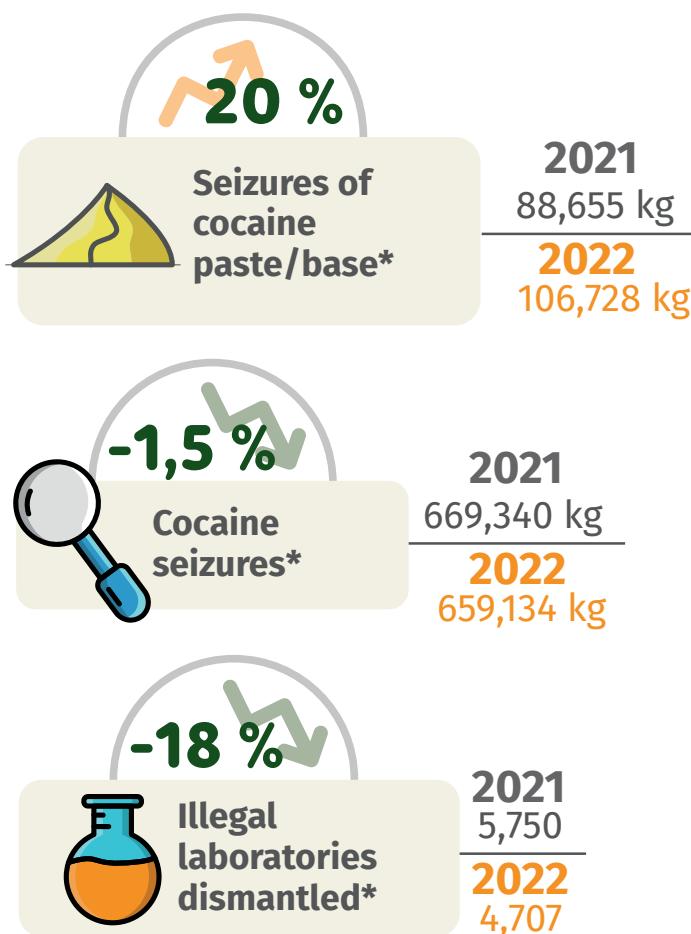
Dynamics of the permanence of coca cultivation, 2013-2022



In the affected territories, **for the first time in the last three years**, there has been an increase in the area under coca cultivation between 2018 and 2012, coca grew 3.4 times. The new areas are no longer scattered, with a low planting density. Antioquia, Cauca, Chocó and Putumayo are the departments with the largest number of territories in this category. Although their planting density is mostly less than 4 ha/km², some areas appeared with densities of greater than 10 ha/km².



Interventions to control the supply reported by the National Government

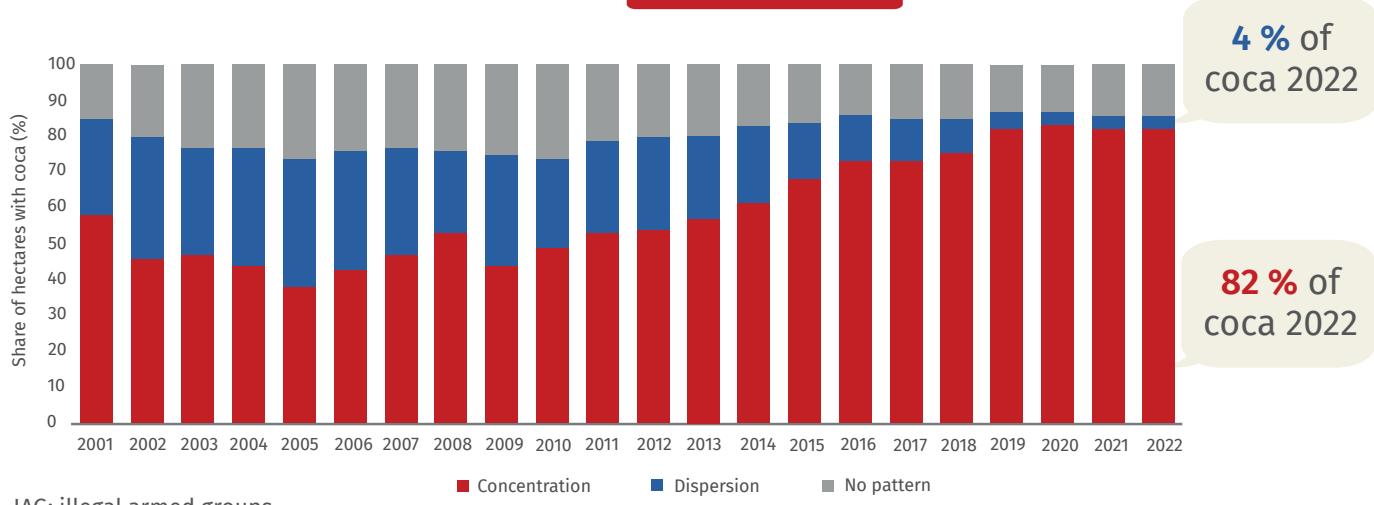
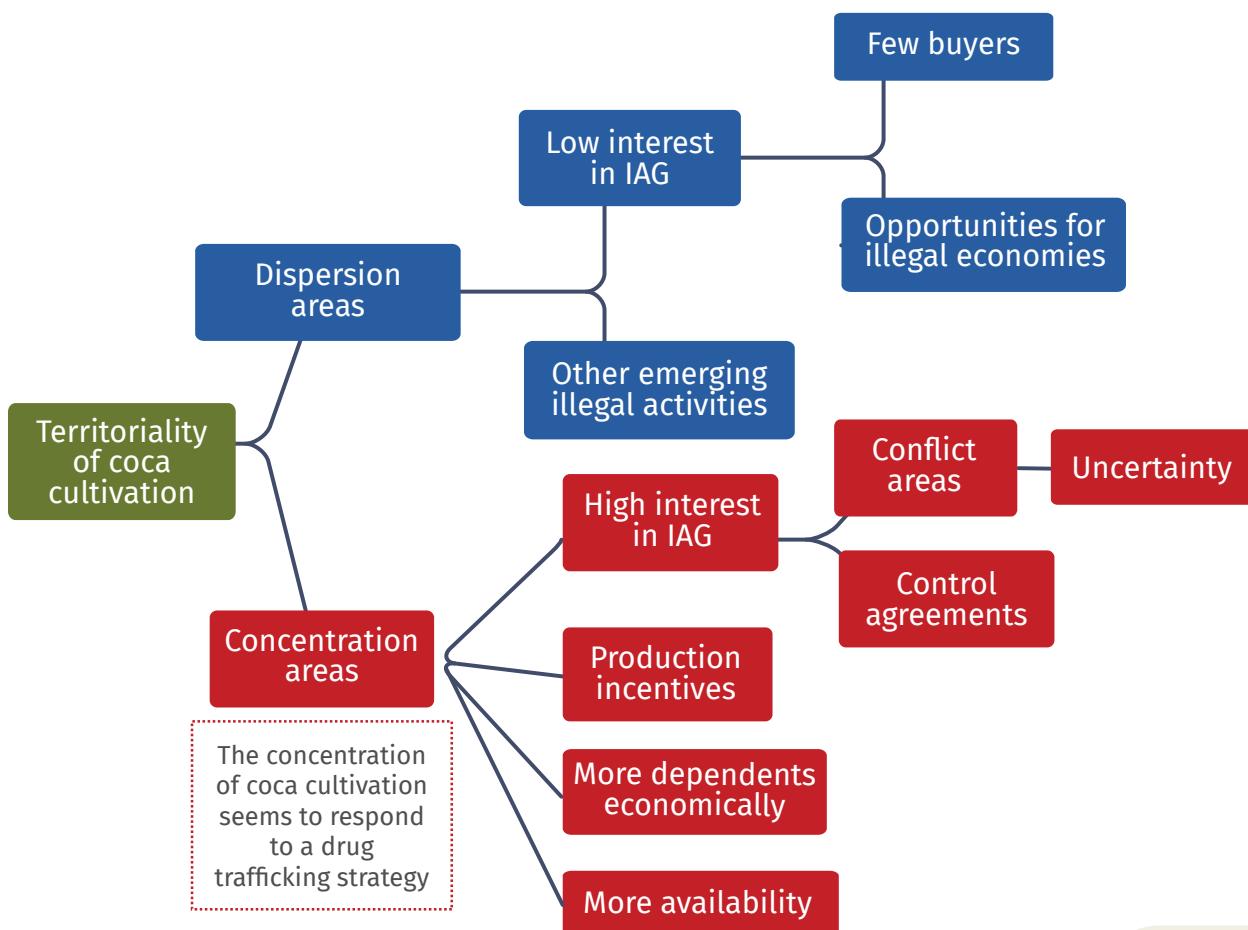


Some reports on participation in the development of the Drug Policy

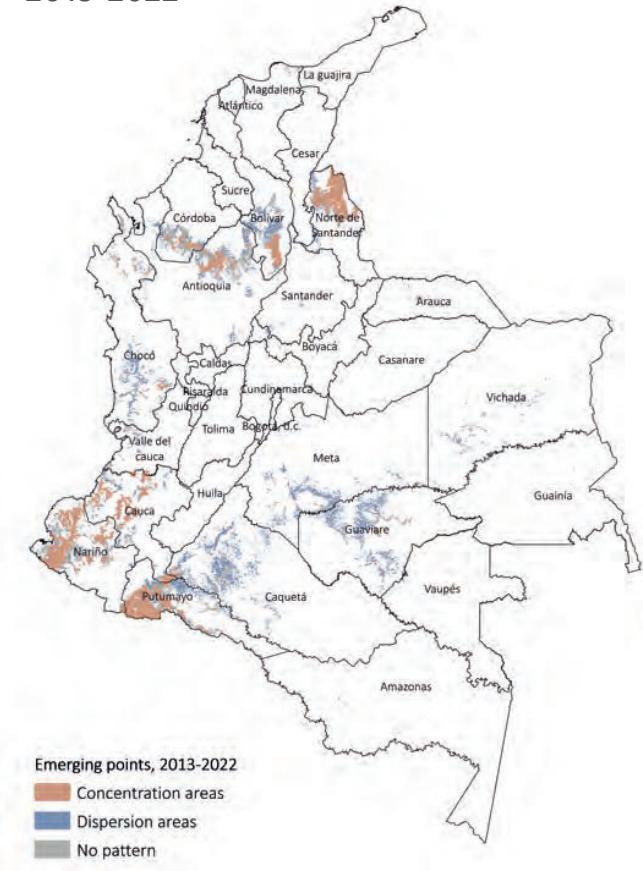


Key Messages

The **territoriality of coca cultivation** allows identifying two types of areas: **coca concentration** and **coca dispersion**; in which particular traits of territorial dynamics and incentives for coca-cocaine production can be recognized, which should be incorporated into the implementation of public.



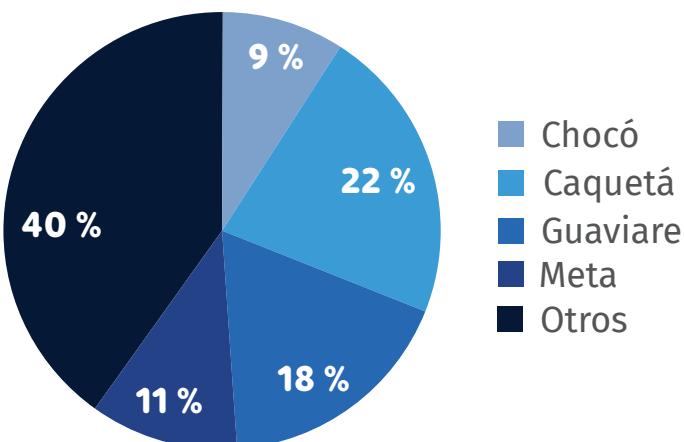
Concentration and dispersion areas,
2013-2022



1

The **dispersion areas** occupied 35% of the territory with coca between 2013-2022 and made up 4% of the area with coca in 2022. A 20% increase was registered compared to 2021.

Caquetá, Guaviare, Meta and Chocó make up 60% of the territory in this category.



In dispersion areas:

A. There is a perceived low level of interest from illegal armed groups in drug trafficking.



A lack of buyers that can stimulate local markets in areas with coca cultivation, mainly affecting new and small producers.

B. Other illegal activities are likely to emerge as substitutes or complements to coca cultivation.



There may be a greater possibility of negotiation and community participation in substitution scenarios in dispersion areas, since there are fewer groups in dispute over the territories.



There may be less dependence on illegal cultivation in dispersion areas. In addition, other types of illegal activities are becoming the main source of income, which could lead these areas to move towards a sustainable reduction.



Changes in the dynamics in the coca market are an opportunity for sustainable abandonment processes, by promoting alternative legal economies in the territories.

2

The **concentration areas** occupied 35 % of the territory with coca between 2013-2022 and made up 82 % of the area with coca in 2022. A 12 % increase was registered compared to 2021.

The **productive hotspots** are **part of the concentration areas**. These are a challenge for intervention because they require integral support from the institutions and international cooperation to offer competitive alternatives that favor a sustainable reduction of coca cultivation.

In concentration areas:

A. Local conditions exist to maintain the coca-cocaine market.



Strategic geographic location

Access to rivers, key traffic routes, the procurement of supplies and proximity to borders define the hotspots strategic positions.



Institutional weakness

Indicators of poverty, informal labor and the presence of illegal regulations reinforce the consolidation of illegal economies.



Dominance of illegal armed groups

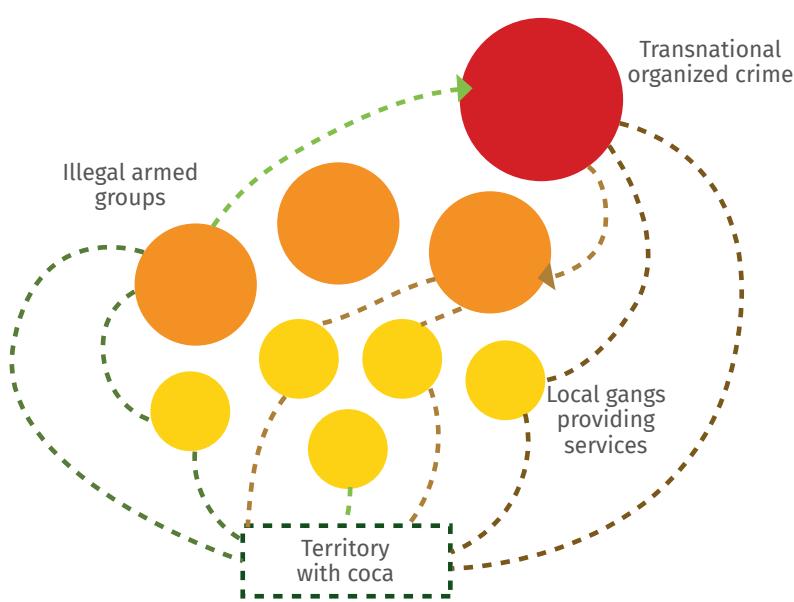
Illegal armed groups strengthen their dominance within the hotspots, managing all stages of the production process: cultivation, processing, trafficking and access to supplies.



Improvements in production processes

High levels of efficiency and a complete production chain: from high-yield lots to PAC specialization.

B. Illegal armed groups have a heavy interest in the drug trafficking business.

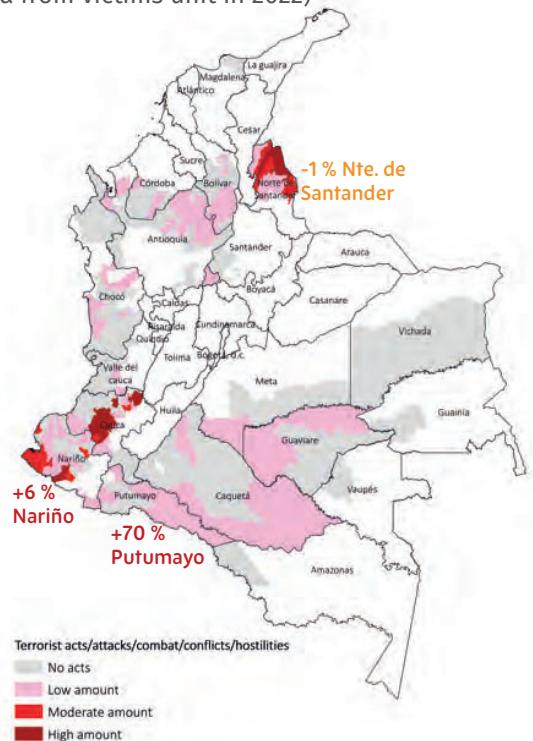


As the need to stabilize territorial control increases, in order to guarantee the economic benefits of drug trafficking, violent confrontations between intermediate-level criminal organizations (regional coverage) are very likely to increase, as well as a progressive reduction of these organizations due to the elimination of opponents.

The **higher-level criminal organizations** buyers or drivers of improvements in the production and transformation processes, favoring a **high availability of financing resources** and productive specialization in concentration areas. They have established **service outsourcing networks** at regional and municipal scales, which have led to the growth of small criminal organizations in municipalities.

C. Where there is coca, there is violence; but there is not necessarily more violence where there is more coca.

Terrorist acts/attacks/combat/conflicts/hostilities in municipalities with coca cultivation, 2022 (last available data from victims unit in 2022)



Coca market segmentation among multiple criminal organizations persists:

10 national illegal armed groups*

Coca crops continue fueling organized crime:

1,6 illegal armed groups on average*

3.6 times higher than in municipalities without coca in the same year

* Municipalities with coca cultivation for illegal armed groups. Indepaz, 2021.

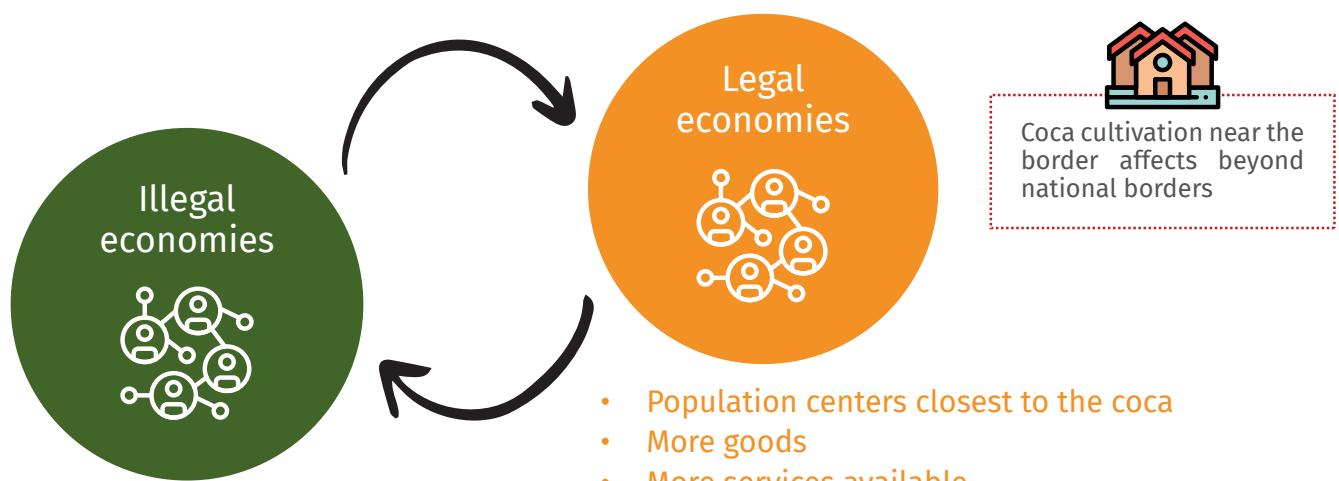
Between 2017 and 2022, in the **municipalities with coca cultivation**, the civilian population experienced **2.8 times more threats** and **4.3 times more homicides** with respect to municipalities without coca (Indepaz, 2021).



Territorial control vacuums caused by demobilization agreements with criminal organizations are very likely to be filled by other emerging criminal organizations involving second-tier members of the original organizations.

D. The coca economy is interrelated with the legal economies in the population centers closest to coca fields.

Actors in the chain, from cultivation to processing and trafficking, as well as suppliers of goods and services, may be affected by local coca-cocaine dynamics.



Coca areas that integrate cultivation, processing and trafficking.

E. Buyers in the towns closest to the coca fields continue absorbing the increased production.



Increased product availability in the domestic coca-cocaine market*



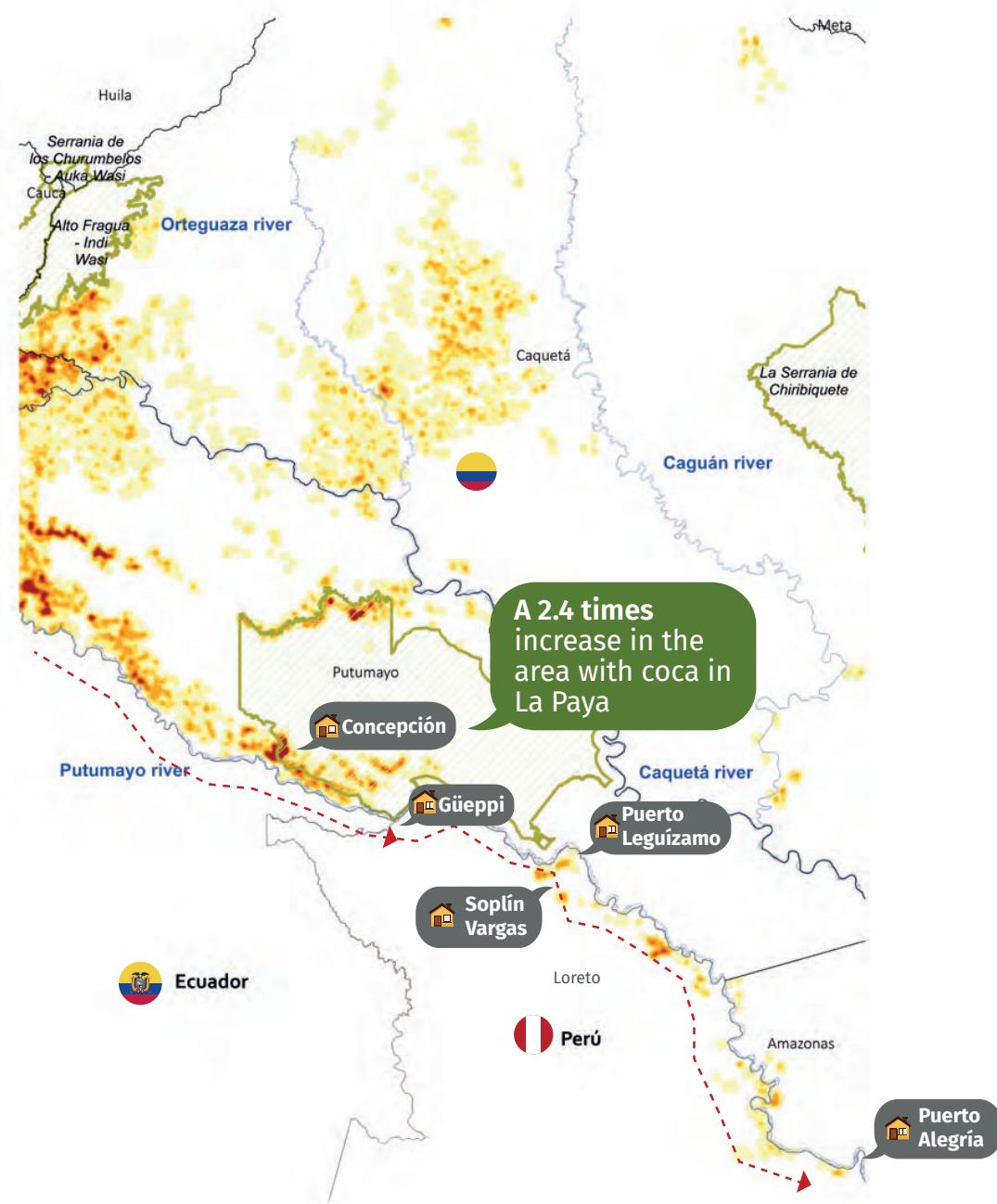
Traffickers are preferring purchases within the hotspots because of better product conditions (quality, availability, homogeneity and proximity to shipping/trafficking area)**

* Open secondary sources

** Source: Ministry of Justice and Law and the United Nations Office on Drugs and Crime (UNODC). Characterization of productive hotspots, 2021 and 2022, and characterization of the infrastructure and dynamics of illegal cocaine hydrochloride production, 2021.

Cocaine production puts pressure on border areas and threatens more countries

According to the *UNODC World Drug Report 2023*, around 296 million people consumed drugs worldwide in 2021, a 23 % increase over the previous decade. This especially highlights that drug trafficking accelerates environmental devastation and crime in the Amazon basin.



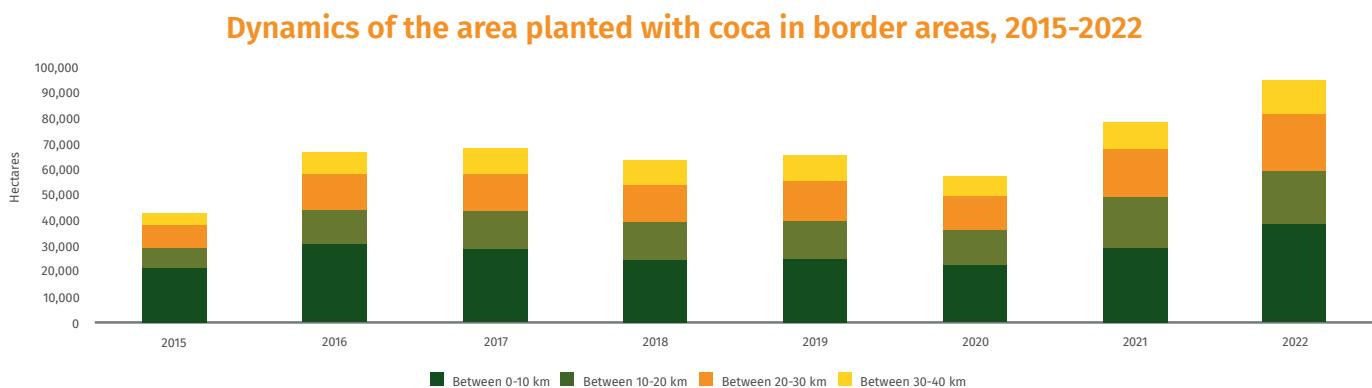
Coca crops in the department of **Putumayo** in Colombia increased their area with coca **1.8 times**, and for the department of **Loreto** in Perú it was **1.5 times** between 2018 and 2022.

"The river itself provides a lot of dynamics for the exchange with Ecuador. Indeed, many supplies come from there because it is impossible to enter from the middle of the country."

Source: Putumayo Social Actor

Cocaine trafficking through Colombia's southern border continues growing. While coca crops in the area closest to Colombia's southern border doubled since 2020, cocaine seizures in Ecuador increased from 88 tons in 2019 to 201 tons in 2022, and the expansion of crops on the San Miguel and Putumayo rivers are beginning a relationship of continuity with the coca nucleus on the Peruvian side in the department of Putumayo.

A strong increase of coca cultivation dynamics is registered in Putumayo



In border areas (0-40 km), there is a 21% variation in planted area, but **in those closer to the border** (0-10 km) **nearly 50 %** of the net increase is concentrated.