



# Cocaine Smuggling in 2012

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Produced for the  
OFFICE OF NATIONAL DRUG CONTROL POLICY

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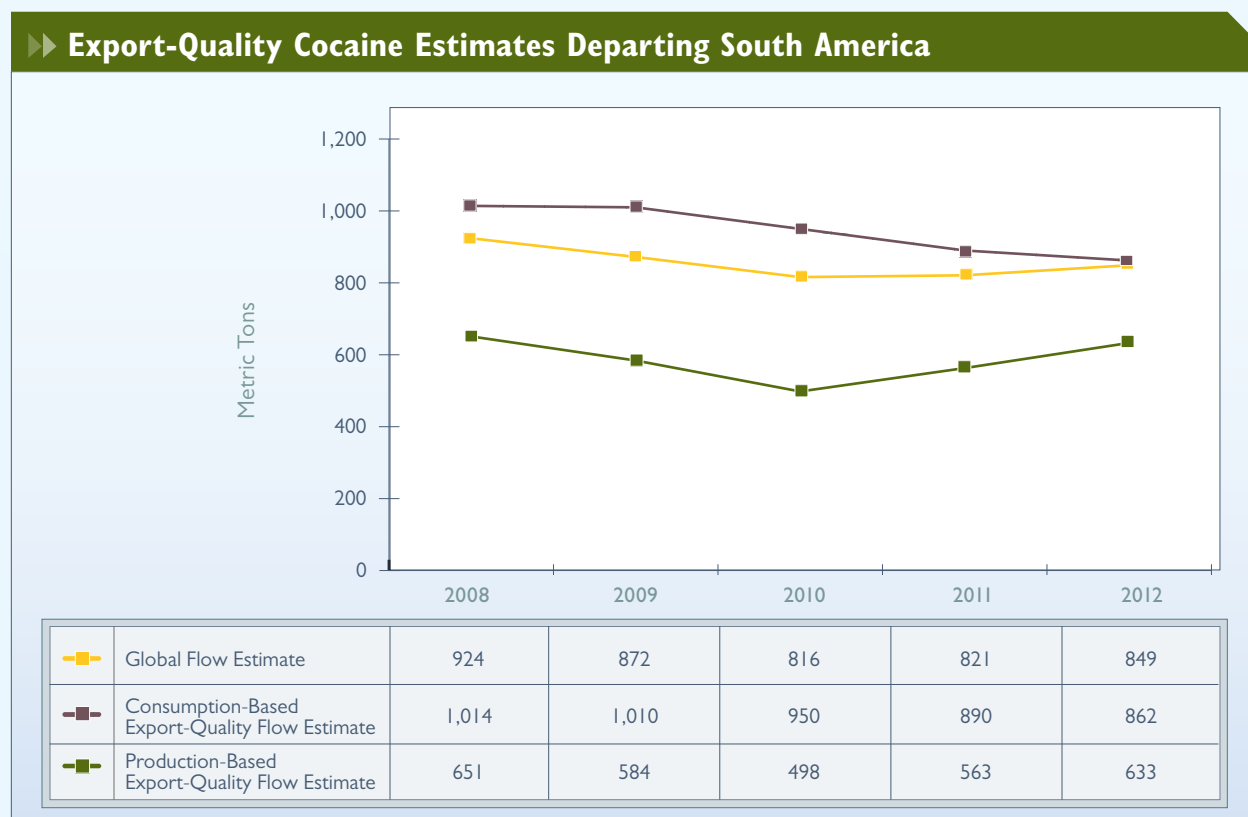
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## Cocaine Flow to Global Markets

The amount of export-quality cocaine<sup>1</sup> departing South America remained relatively steady from 2011 to 2012; an estimated 849 metric tons departed South America in 2012 and 821 metric tons departed in 2011, based on analysis of production-, movement-, and consumption-based cocaine flow data sets.

Despite very modest increases in our global flow estimate—which merges all three data sets—our production-based flow estimate suggests that in 2012 more cocaine was available to depart South America to global destinations than since at least 2009. The increase in the production-based flow estimate is partly attributable to reduced quantities of cocaine seized in South America in 2012. The amount of cocaine seized in South America in 2012 was the lowest since at least 2008.



**Figure 1.** An estimated 849 metric tons of cocaine departed South America for global markets in 2012, which remained relatively steady from the previous year. Flow estimates presented in this figure do not include consumption within South America.

<sup>1</sup> The purest form of cocaine HCl that departs from South America. It typically reflects only the impurities introduced in the cocaine production process.

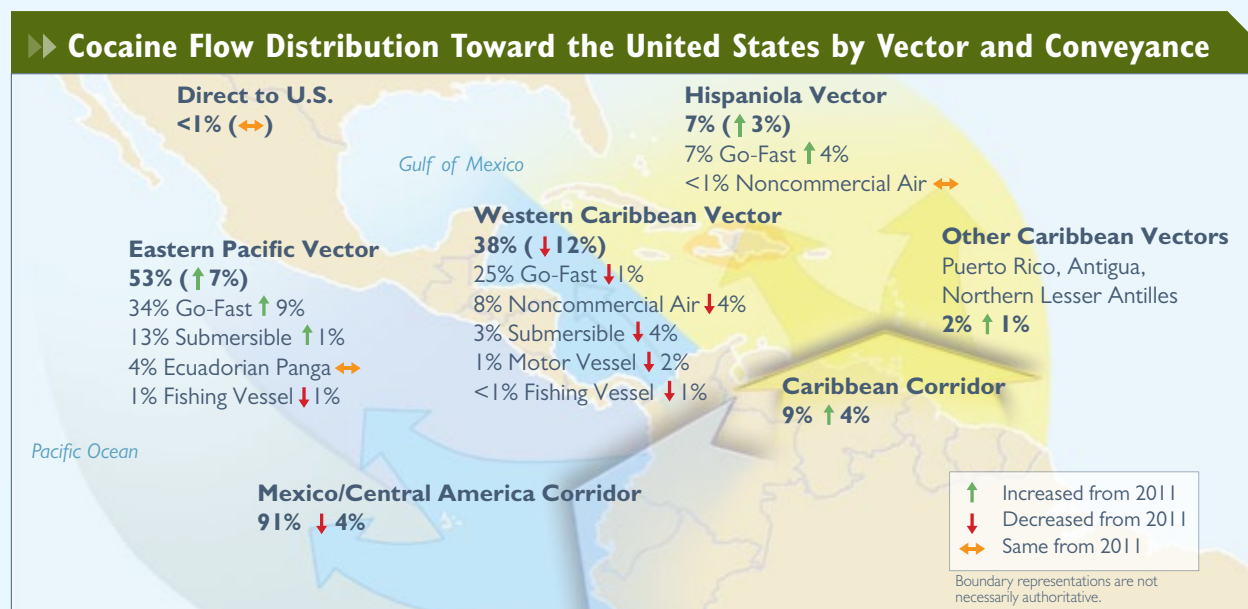


## Cocaine Flow From South America

Colombian cocaine accounted for about 32 percent of the cocaine available for export from South America in 2012. The amount of cocaine available from Peru accounted for 45 percent, and Bolivia accounted for 23 percent. The amount of cocaine available to depart a source country each year is based on several factors: estimated production, purity, a time lag to account for processing and transportation delays after harvest,<sup>2, 3</sup> seizures, and in-country consumption. Most Colombian production is destined for the U.S. market, and most Peruvian and Bolivian cocaine is consumed in South America or transported to markets in the Eastern Hemisphere, primarily in Europe. The amount of Colombian cocaine available for export in 2012 decreased about 20 percent from 2011 levels, and Peruvian and Bolivian cocaine available for export increased 18 percent.

## Cocaine Flow Toward the United States

The overall flow of cocaine from South America toward the United States decreased in 2012 because of decreased cocaine production in Colombia and declining U.S. consumption. Traffickers moved almost 70 percent of all U.S.-bound cocaine on go-fast vessels,<sup>4</sup> more than in almost any other year on record. Although traffickers altered arrivals, departures, routes, and conveyances in 2012 to evade air and maritime interdiction, the Mexico/Central America Corridor (which includes the waters of the eastern Pacific Ocean and western Caribbean Sea) remained the primary avenue of approach for U.S.-bound cocaine. Cocaine flow into the Caribbean Corridor (which includes the waters of the central and eastern Caribbean Sea, along with the Caribbean islands) nearly doubled to account for 9 percent of flow toward the United States in 2012.



**Figure 2.** Mexico and Central America continued to account for most of the cocaine movement toward the United States. Go-fasts accounted for almost 70 percent of the conveyances used.



<sup>2</sup> Ehleringer, J.R., Casale, J.F., Barnette, J.E., Xu, X., Lott, M.J., & Hurley, J.M. (2011). Carbon 14 analyses quantify time lag between coca leaf harvest and street-level seizure of cocaine. *Forensic Science International*, 7-12.

<sup>3</sup> Ehleringer, J.R., Casale, J.F., Barnette, J.E., Xu, X., Lott, M.J., & Hurley, J.M. (2011). Carbon 14 analyses calibration curves for modern plant material from tropical regions of South America. *Radiocarbon*, 53(4), 585-594.

<sup>4</sup> See Figure 3 for maritime conveyance definitions.

## Cocaine Movement Through Central America and Mexico

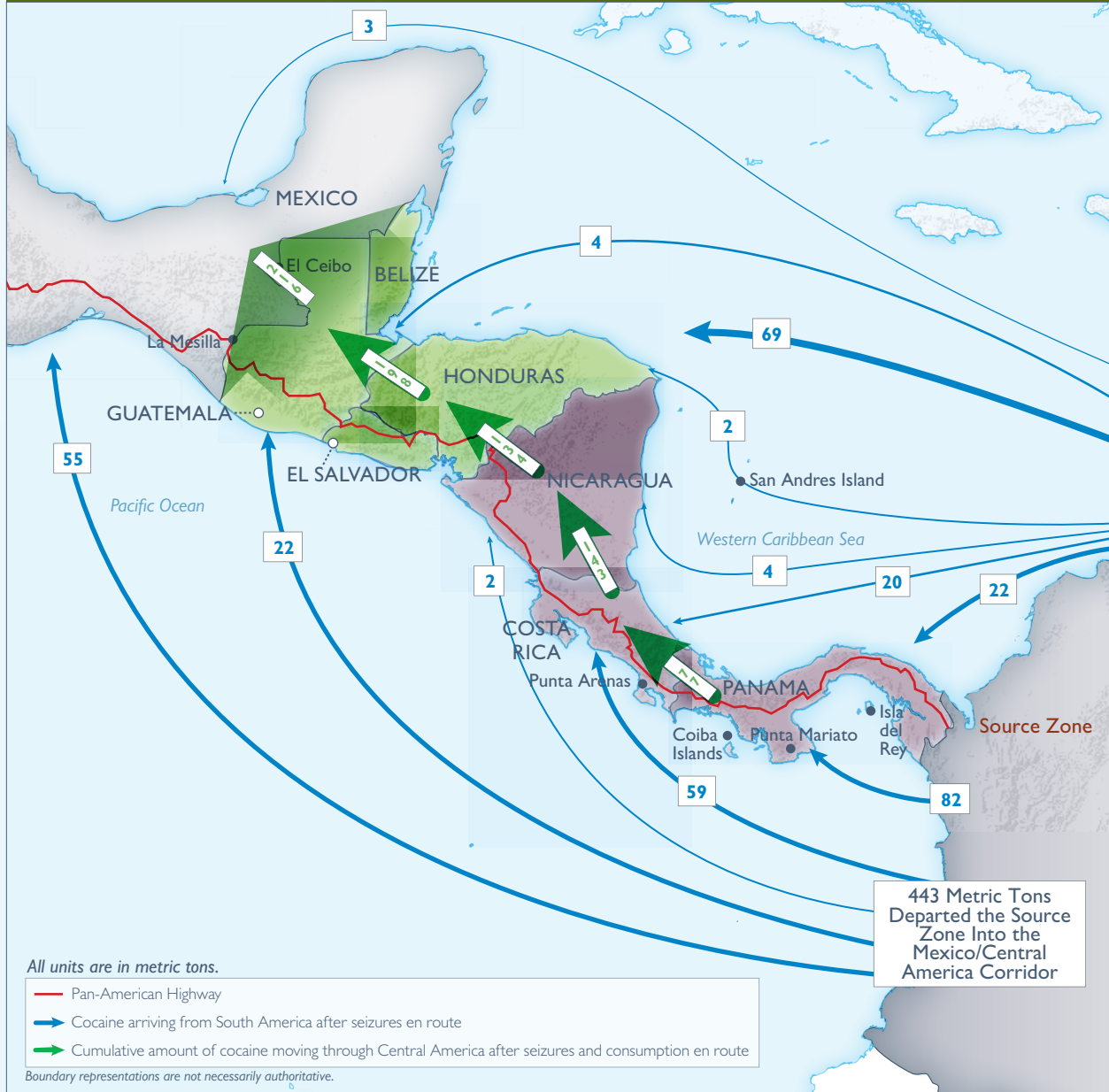
The Mexico/Central America Corridor remained the primary avenue of approach for U.S.-bound cocaine. However, cocaine traffickers made operational and tactical adjustments to cocaine shipments through the Mexico/Central America Corridor in 2012. These adjustments were in response to international pressure against littoral maritime trafficking along the Central American Isthmus and the air threat from South America to Honduras. The traffickers altered arrivals, departures, routes, and conveyances to evade air and maritime interdiction. Panama, Costa Rica, and Honduras were the main transshipment destinations for cocaine moving from South America toward the United States. Traffickers also increasingly moved loads directly to Mexico aboard go-fasts and self-propelled semisubmersibles.

▶▶ Maritime Conveyance Definitions	
	<b>Self-Propelled Semisubmersibles (SPSSs)</b> use internal combustion engine(s), employ rudimentary buoyancy control (e.g. ballast tanks), and operate on the surface with minimal visible mass above the water. An SPSS's hull is designed as a displacement hull, like a sailing vessel.
	<b>Go-fasts</b> are a type of maritime craft, typically a 28- to 45-foot open-hull boat with one or more high-powered outboard motors, capable of operating in excess of 25 knots in shallow waters; a go-fast can typically carry up to 2 metric tons of cocaine.

**Figure 3.** Traffickers increasingly moved loads directly to Mexico aboard go-fasts and self-propelled semisubmersibles in 2012.

Central America continued to serve as a major transshipment point for cocaine moving toward the United States through Mexico, accounting for 76 percent of U.S.-bound flow. In 2012 only 21 percent of the cocaine arriving in Mexico came directly from South America; the remaining 79 percent of cocaine arriving in Mexico transited Central America, crossing from Guatemala into Mexico mostly via overland routes.

## ▶▶ Central America Is Preferred Transshipment Region for Primary Cocaine Movement



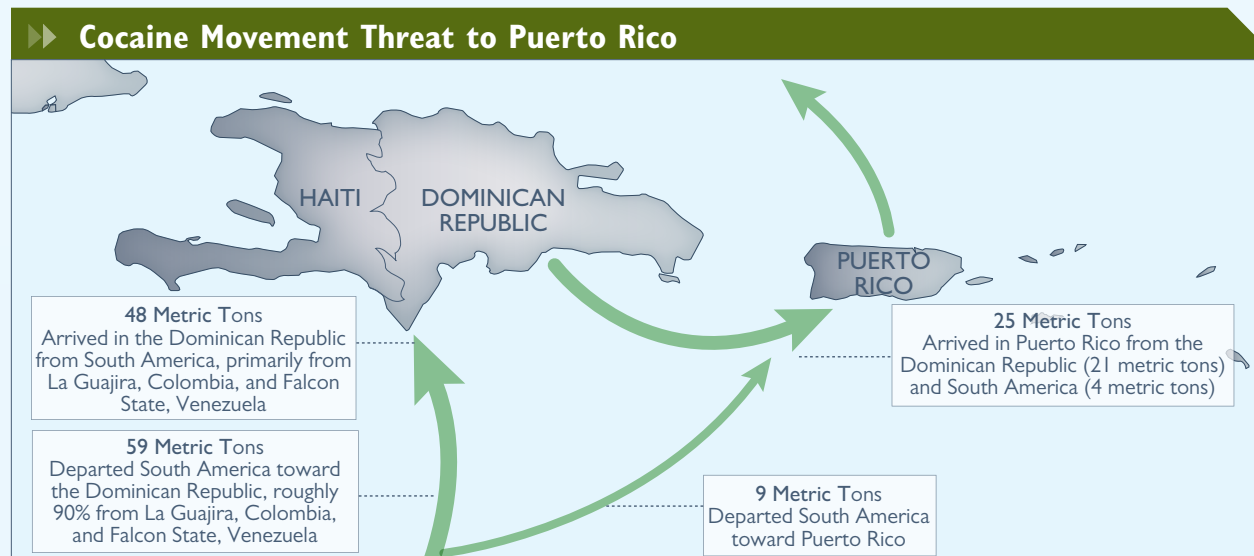
**Figure 4.** Panama was the main transshipment destination for cocaine departing South America, primarily aboard go-fast vessels.



## Cocaine Movement Through the Caribbean

The Caribbean Corridor accounted for 9 percent of cocaine flow in 2012, an increase from 4 percent in 2011. Most activity consisted of go-fasts departing Colombia's La Guajira Peninsula and moving toward the Dominican Republic. Cocaine loads are then dispersed into smaller maritime shipments destined for Puerto Rico and transatlantic destinations. In the past 5 years, an assessed 40 percent of shipments departing the Dominican Republic were destined for Puerto Rico.

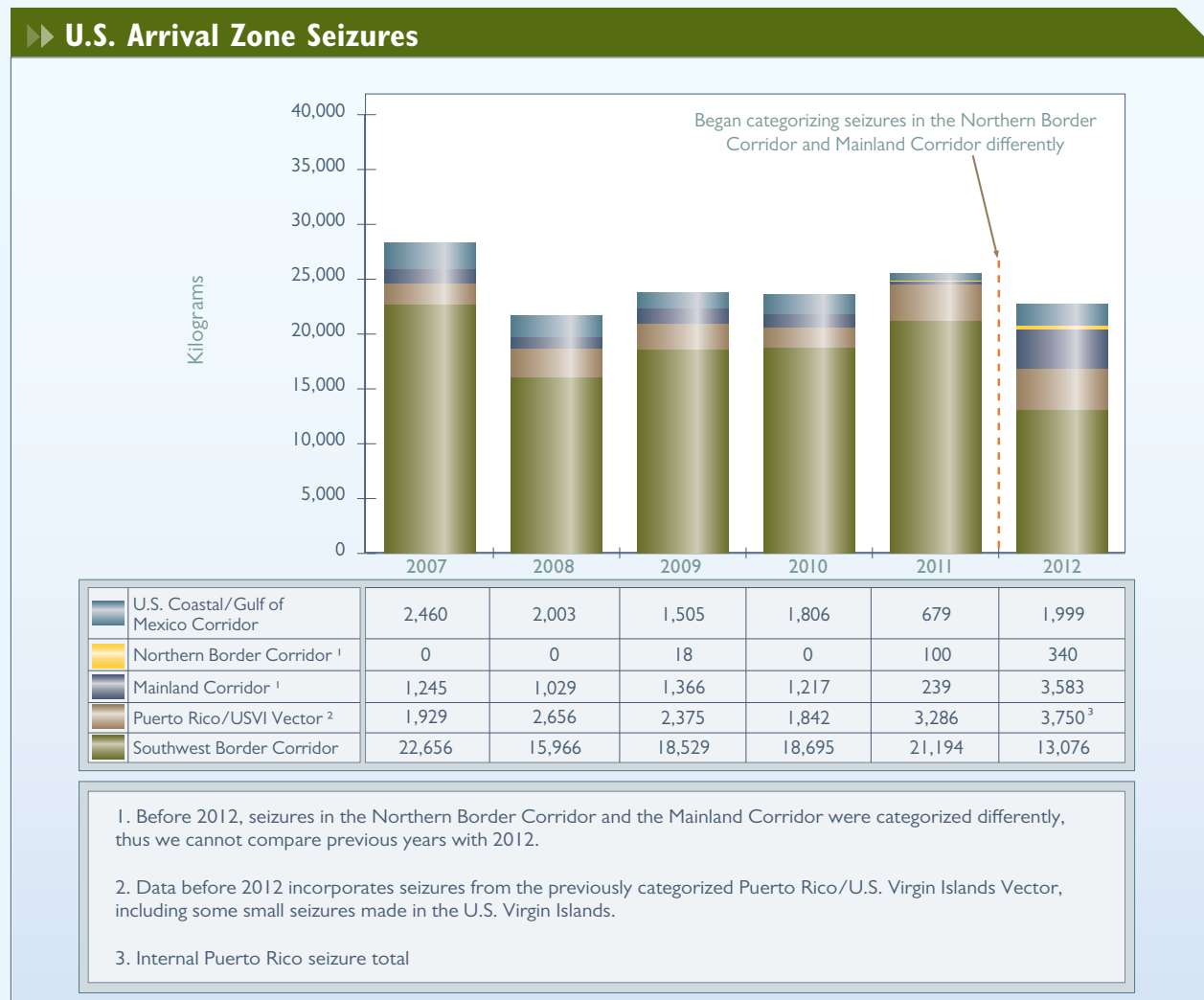
Slightly greater than 1 percent of cocaine movement transited the other islands and nations in this region. The majority of cocaine shipments departing South America traveled via maritime vessels.



**Figure 5.** The amount of cocaine that arrived in Puerto Rico more than doubled in 2012. An estimated 25 metric tons of cocaine arrived in Puerto Rico in 2012, up from 11 metric tons in 2011. Traffickers are likely routing more cocaine through Puerto Rico to access the continental U.S. market.

## U.S. Arrival Zone Traffickers Continue to Prefer U.S. Southwest Border

The U.S. Southwest border remained traffickers' principal entry point for moving cocaine into the United States. However, the modest decrease in cocaine seized and documented in the U.S. Arrival Zone<sup>5</sup> overall in 2012 and increase in cocaine seized in other U.S. Arrival Zone vectors and corridors—notably, in the Puerto Rico Vector—may signal that less cocaine is arriving at the border.



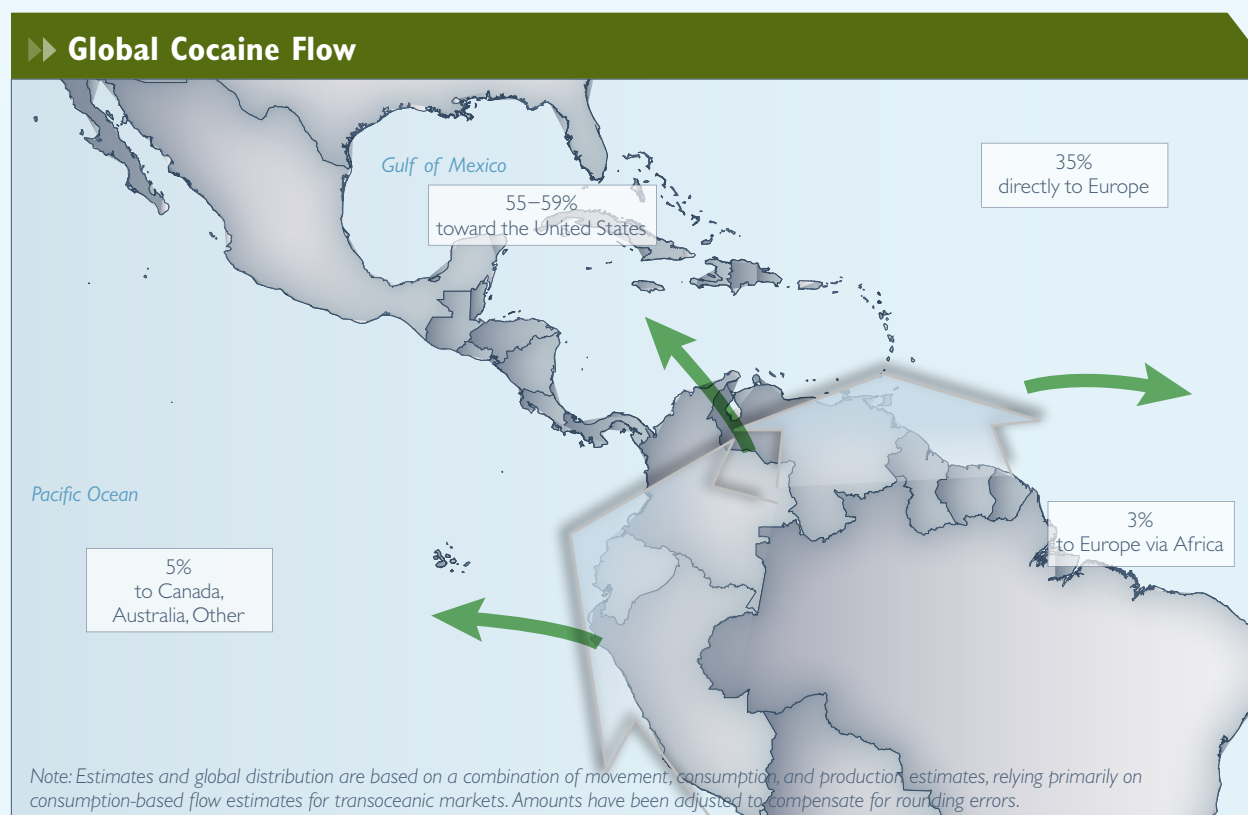
**Figure 6.** In 2012 the amount of cocaine seized in the Southwest Border Corridor accounted for 57 percent of the amount seized in the U.S. Arrival Zone.

<sup>5</sup> The U.S. Arrival Zone is a general category of cocaine movement into the United States from a foreign source. This zone includes the following corridors: Southwest Border, Puerto Rico, Mainland, U.S. Coastal/Gulf of Mexico, and Northern Border. Cocaine movement into this zone encompasses land, air, and maritime entry points along the borders of and within the United States.

## Cocaine Flow Outside the Americas

The amount of cocaine departing South America to markets outside the Americas increased in 2012, based on increasing cocaine production in Peru and Bolivia in 2010 and 2011 as well as near-record seizure totals of cocaine in or destined for Europe and Oceania. Traffickers transported more than 75 percent of all cocaine documented departing South America for destinations outside of the Americas in commercial maritime container vessels. The remaining 25 percent was moved through either commercial air or other maritime means such as fishing vessels and yachts.

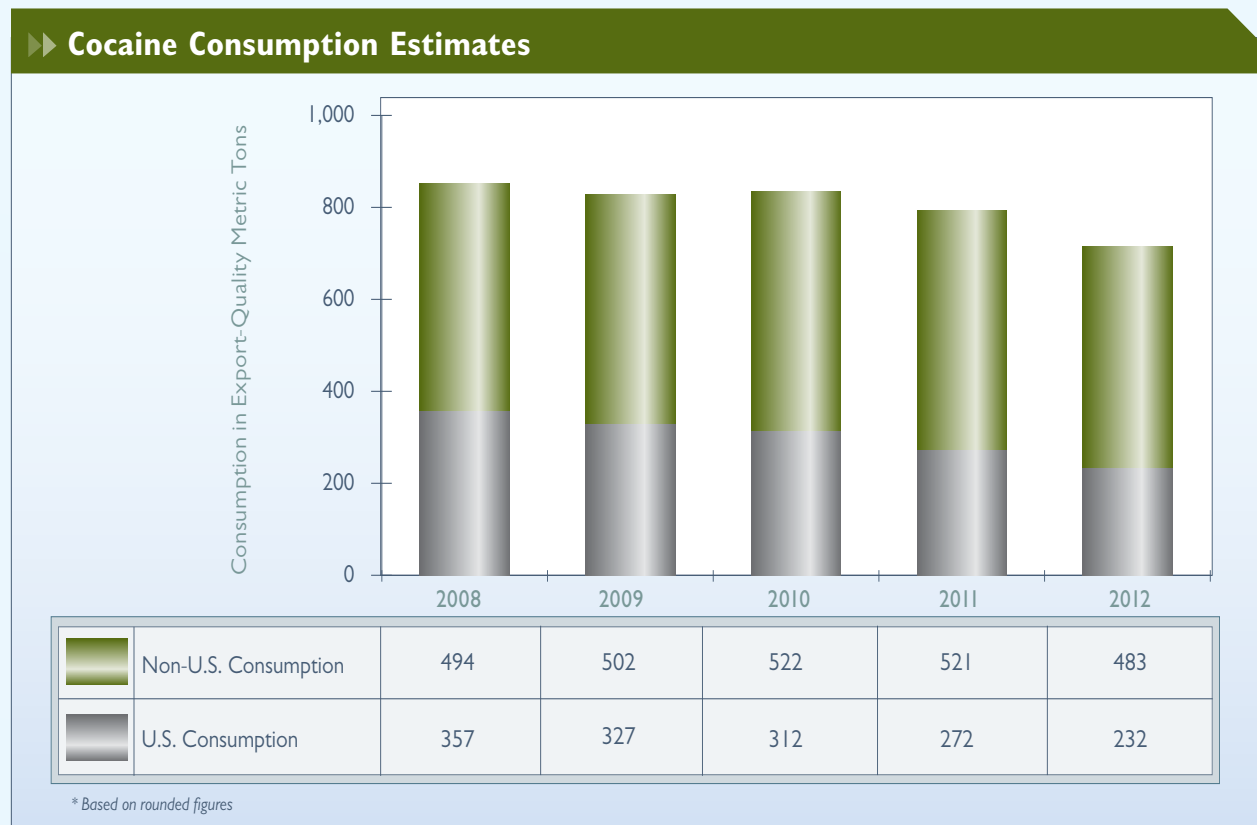
According to estimates based on production data, the amount of export-quality cocaine available to depart South America for destinations outside of the Americas in 2012 increased by 12 percent to 633 metric tons (approximately 42 percent of global demand). This increase was principally because of significant increases in Peruvian and Bolivian cocaine production in 2010 and 2011, most of which departed South America in 2012. According to forensic analysis, very little Peruvian and Bolivian cocaine is reaching the United States—almost all cocaine seized in the United States is of Colombian origin.



**Figure 7.** An estimated 849 metric tons of cocaine departed South America for global destinations, 55 to 59 percent of which went toward the United States. Thirty-eight percent moved toward Europe and Africa, and 5 percent moved toward Asia and Oceania.

## Less Consumption in the United States, Larger Share Outside of the Americas

Our estimates suggest the amount of export-quality cocaine consumed in the United States<sup>6</sup> in 2012 decreased by 15 percent from 272 metric tons in 2011 to 232 metric tons in 2012. The consumption of cocaine in countries outside of the Americas accounted for a larger share of global demand in 2012, which was satisfied increasingly by Peruvian and Bolivian production.

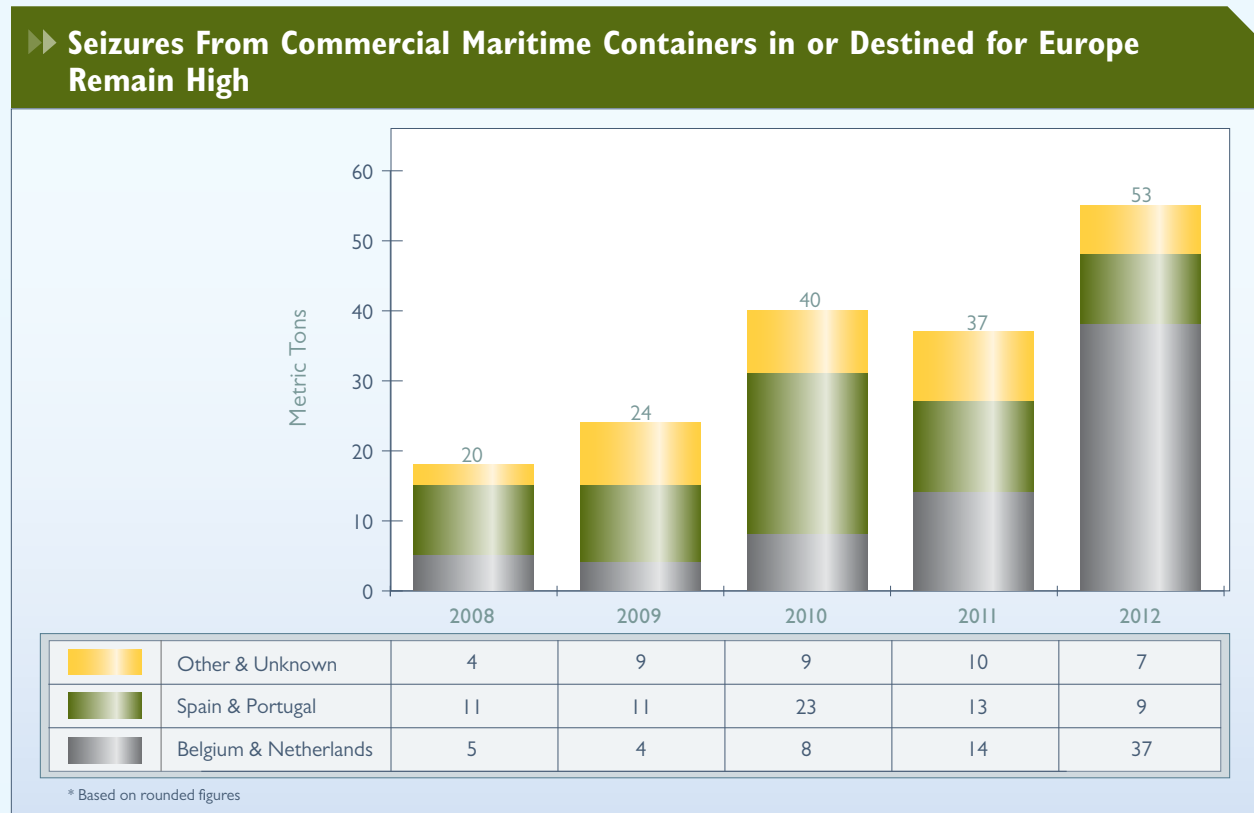


**Figure 8.** The share consumed by markets outside the United States in 2012 increased as U.S. consumption decreased.

<sup>6</sup> A given year's U.S. consumption estimates are based on the previous year's prevalence rates from the National Survey on Drug Use and Health (NSDUH) (i.e. 2012 consumption estimates are based on 2011 NSDUH prevalence rates).

## Direct Shipment From South America to Europe is Preferred Transatlantic Route

Direct shipments to Europe from South America primarily via maritime containers were the principal cocaine trafficking threat to the European market in 2012. Although the amount of cocaine seized in northern Europe increased and trafficking to this area surpassed trafficking to the Iberian Peninsula for the first time, the Iberian Peninsula continued to be an attractive entryway for cocaine entering Europe because of its strategic location.



**Figure 9.** Traffickers sent large cocaine loads to Europe, primarily to Belgium and the Netherlands, from South America.



## Increased Seizures and High Prices in Australia Continue

Asia/Oceania continued to be an important arrival area for cocaine shipments because of the high price of cocaine and increasing consumption in Australia. Australia also has one of the highest reported cocaine use prevalence rates in the world at 2.1 percent—we estimate it is responsible for consuming more than 40 percent of the cocaine in the region. The amount of cocaine seized in or en route to Australia in 2012 exceeded the amount seized in any year over the past decade.

## Cocaine Losses Worldwide

In 2012, 443 metric tons of cocaine was documented as losses,<sup>7</sup> a relatively stable amount compared with the losses documented in 2011 but down from the 2009 high of 521 metric tons. Cocaine losses in the U.S. Transit Zone,<sup>8</sup> particularly on the high seas, increased by 18 percent in 2012. Cocaine losses in South America (the Source Zone) decreased from 176 metric tons in 2011 to 149 metric tons in 2012 but still accounted for more than 33 percent of cocaine losses worldwide. In 2012, 56 metric tons of cocaine was removed in the non-U.S. Transit and Arrival Zones, which is an increase from the 50 metric tons removed in 2011. Of the total amount removed, 48 metric tons was seized in Europe.

Most of the cocaine losses continued to be from maritime conveyances, which accounted for approximately 65 percent of worldwide losses, up from 53 percent in 2011. A record amount of cocaine was removed from go-fasts—115 metric tons—up from 67 metric tons in 2011. Seizures from commercial maritime containers also increased from 48 metric tons in 2011 to 72 metric tons in 2012, 16 metric tons of which was seized at Belgian ports alone.

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<sup>7</sup> Cocaine “losses” include amounts seized by interdiction forces and amounts observed or reported as potentially jettisoned and not recovered by traffickers or interdiction forces. Cocaine losses also can occur aboard a vessel or aircraft that is scuttled or destroyed during interdiction operations.

<sup>8</sup> A 42-million-square-mile-area that includes the Caribbean Sea, Gulf of Mexico, eastern Pacific Ocean, and Pacific Ocean land masses, including Central America, Mexico, and the Caribbean (except the U.S. Virgin Islands and Puerto Rico).

## Worldwide Cocaine Losses



**Figure 10.** Global losses remained relatively stable in 2012.



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