




Cocaine Smuggling in 2011



Produced for the
OFFICE OF NATIONAL DRUG CONTROL POLICY

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Cocaine Flow to Global Markets

The amount of cocaine departing South America remained fairly level in 2011, from 833 metric tons of cocaine in 2010 to 847 metric tons in 2011. Most of this cocaine, 64 percent, was likely destined for the United States. Global cocaine flow is calculated by combining movement-based, consumption-based, and production-based cocaine flow estimates. Go-fasts¹ were the leading transportation method used to move

►► **2011 Top Ten Cocaine Consuming Countries, Ranked by Prevalence**

	Estimated Numbers of Cocaine Users ¹	Country-Reported Annual Prevalence Rate ²	Change in Prevalence Rate from 2007
 Spain	823,515	2.6%	↓ 0.4
 Argentina	690,430	2.6%	↔
 United Kingdom	1,037,008	2.5%	↓ 0.1
 Mexico	1,779,649	2.4%	↑ 0.2
 United States	5,332,584	2.2%	↓ 0.8
 Italy	884,827	2.2%	↑ 0.1
 Peru	258,922	1.4%	↔
 Bolivia	139,214	0.8%	↓ 0.9
 Germany	484,609	0.9%	↑ 0.2
 Brazil	954,338	0.7%	↔

¹ The number of users is calculated by adding the number of hardcore and moderate users who were assumed to have used in the past month and recreational users who were assumed to have used in the past year, but not in the past month.
² The annual prevalence rate is a United Nations estimate of the percentage of a country's population who were users of cocaine in the past year. Prevalence rates for Peru and Mexico are obtained from alternative sources.

Figure I. The United States continues to be the top cocaine consumer nation worldwide, but the percentage of the U.S. population assumed to have used cocaine regularly has decreased since 2007.

¹ 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.

cocaine out of South America to Central America and the Caribbean Sea, for transshipment. Traffickers predominantly used private vehicles to transport cocaine onward through Central America and Mexico to the United States. Cocaine destined for areas other than the United States was primarily smuggled on commercial maritime containers.

In 2011 cocaine consumption in the United States declined for the fourth consecutive year, whereas consumption in Africa, Eastern Europe, and Asia slightly increased. The United States accounted for 46 percent of global cocaine consumption, followed by Mexico and Brazil, each of which accounted for 5 percent.

Cocaine Consumption

The Americas accounted for roughly 70 percent of the world's cocaine consumption in 2011. North America continued to account for more than half of global consumption; the United States is the primary consumer even though its consumption has decreased considerably since 2007. In 2011, Mexico tied Brazil as the second-largest consumer of cocaine. The remainder of the cocaine outside of the Americas was largely consumed in Western Europe.

Cocaine Source Zone: South America

Colombian cocaine accounted for almost 41 percent of the cocaine available for export to other countries in 2011. The amount of cocaine available from Peru accounted for 35 percent, and Bolivia accounted for 25 percent. The amount of cocaine available to depart a source country each year is based on several factors: estimated production, purity, a time lag based on DEA findings^{2,3} to account for processing and transportation delays after harvest, 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 2011 decreased about 5 percent from 2010 levels, and Peruvian and Bolivian cocaine available for export increased 16 percent.

² 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.

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

► Cocaine Threat by Producing Country, 2011



Figure 2. An estimated 847 metric tons of export-quality cocaine⁴ departed South America to external markets in 2011.

⁴ Export-quality cocaine is the average purity of cocaine HCl that departs from South America. It typically includes impurities from the production process and possibly adulterants added after the production process is complete.

Cocaine Flow Toward the United States

The estimated amount of cocaine available for export from South America toward the United States decreased by roughly 4 percent in 2011 from 2010, continuing a downward trend that began in 2008; this 4-percent decrease is based primarily on Colombian cocaine production data that is consistent with a 5-year trend line of cocaine movement toward the United States. Cocaine production in Colombia, which remains the major source country for the United States, has decreased over the past 4 years. This trend is consistent with declines in U.S. cocaine consumption, decreased by 5 percent from 2007 to 2011. Despite these trends, in 2011 the United States remained the largest cocaine consumer country in the world, accounting for an estimated 46 percent of the world's cocaine consumption.

The amount of Colombian cocaine available for export decreased in 2011 for the third consecutive year to the lowest level since 2000. The purity levels of cocaine produced in Colombia were also at record lows, suggesting traffickers augmented the decreased Colombian cocaine supply with additives. In 2011 Colombian cocaine was 73-percent pure, the lowest purity level on record for the second consecutive year. In addition to the lower purity levels, fewer seizures of cocaine in Colombia parallels the decrease in Colombian production: in 2011 less cocaine was seized in Colombia than in any year since 2002.

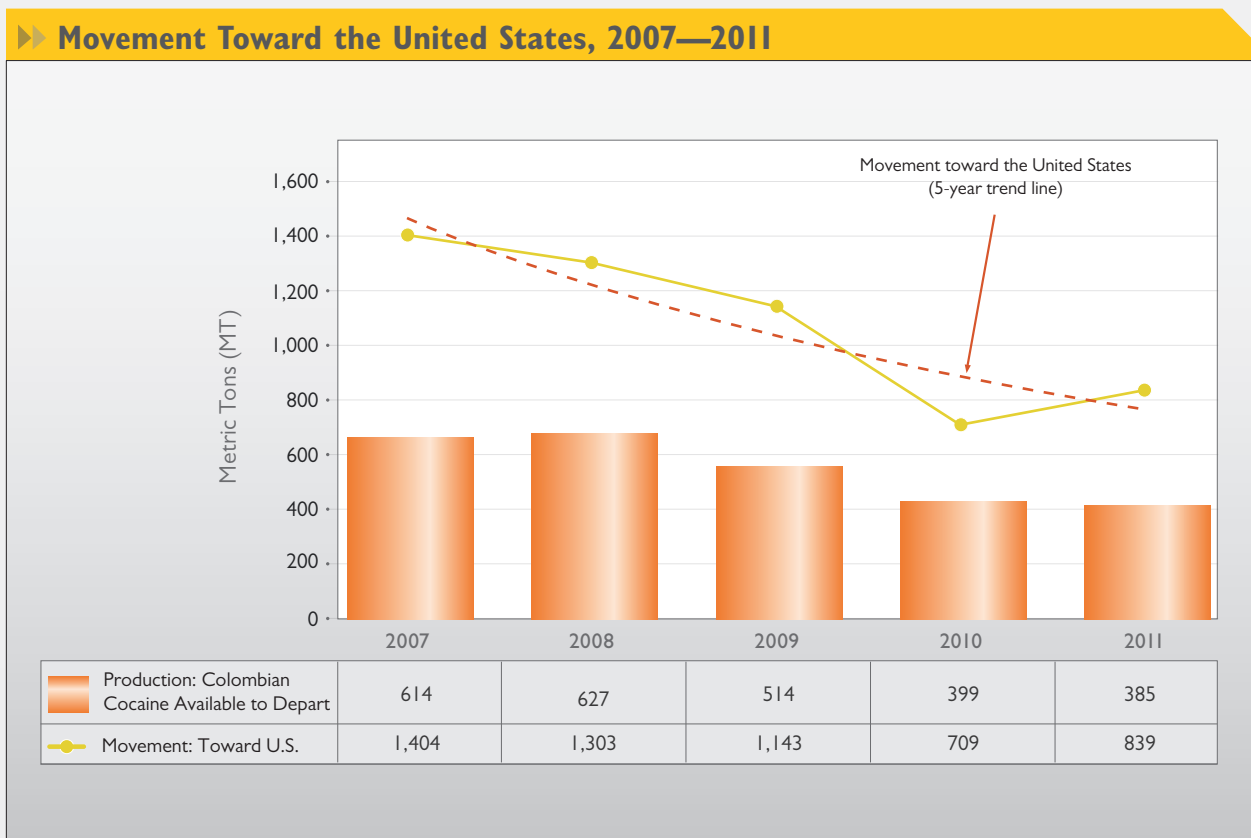


Figure 3. Indicators of export-quality cocaine departing South America toward the United States have decreased for the past 5 years.

Departing South America Toward the United States

In 2011 the Western Caribbean emerged as the preferred path for U.S.-bound cocaine departing South America, surpassing the Eastern Pacific for the first time since 1996. The Guajira Peninsula emerged as a major area for maritime departures moving cocaine to Central America. Honduras continued to be the main transit hub for noncommercial air and maritime movements in the Western Caribbean.

In addition to using go-fast vessels, traffickers used noncommercial aircraft and submersible vessels to ship cocaine toward the United States. The amount of cocaine documented departing into the Caribbean from the Gulf of Uraba, which straddles Colombia's Choco and Antioquia Departments, and from Colombia's La Guajira Department, near the Venezuelan border, increased significantly in 2011.

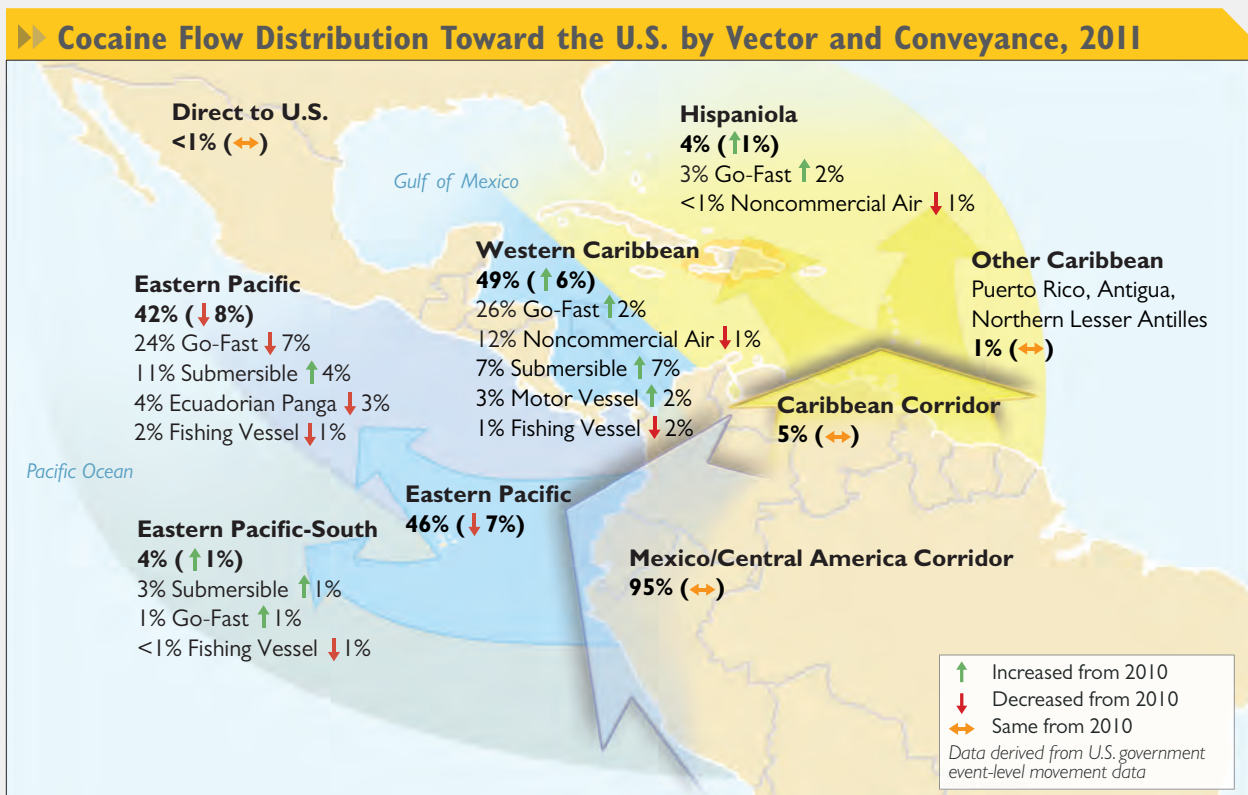


Figure 4. Traffickers increased their use of Western Caribbean routes to move cocaine toward the United States in 2011.

Cocaine Movement Through Central America

Northern Central America is the primary transshipment area for cocaine moving toward the United States. In 2011 up to 329 metric tons of cocaine arrived in northern Central America, mostly Honduras, from South America and southern Central America. A vast majority of the cocaine transshipped along southern Central America's Pacific coast is transferred from maritime vessels to vehicles in Costa Rica for overland movement through Nicaragua. Most cocaine that arrives along the Caribbean coast of southern Central America continues to Honduras on go-fast vessels. Negligible amounts of cocaine arrive along the Pacific coasts of El Salvador or Nicaragua.

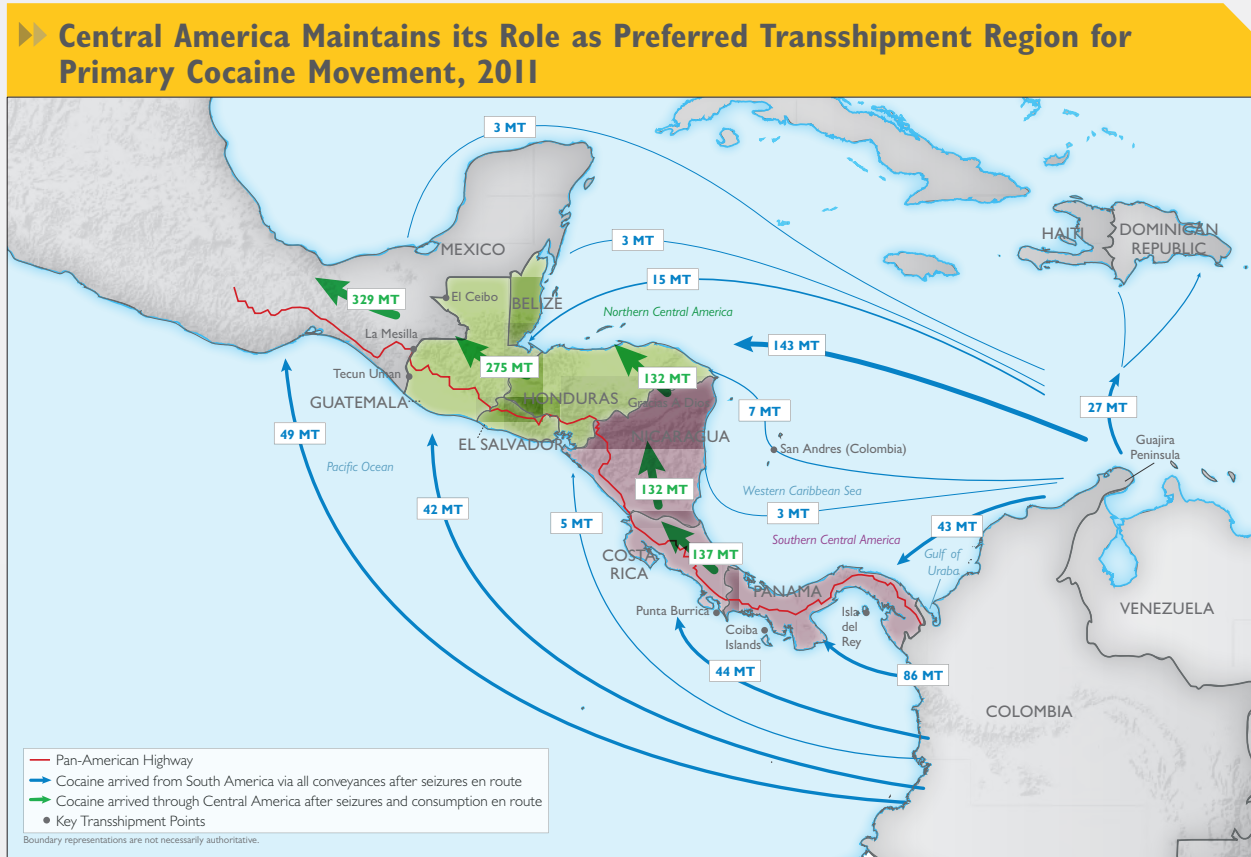


Figure 5. Honduras was the main destination of cocaine movement from South America and the primary transit country for subsequent movement from other Central American countries en route to the U.S.-Mexico border.

U.S. Arrival Zone

The amount of cocaine seized on arrival in the United States increased by 7 percent in 2011, mostly because of increased seizures in California. An estimated 25.4 metric tons of cocaine was seized in the U.S. Arrival Zone, an increase from about 24 metric tons in 2010; of that total, about 10 metric tons of cocaine was seized in California in 2011, up from about 6 metric tons in 2010.

The amount of cocaine available for purchase in major cities in the United States remained steady between 2009 and 2011 but was less than amounts available before 2006, a peak year for cocaine seizures and availability. U.S. cocaine availability declined starting in mid-2007, resulting in higher cocaine prices, lower cocaine purity, and reduced demand. The decline from 2006 levels stemmed from multiple causes: the Mexican government’s anticartel efforts, significant seizures, high levels of violence among Mexican drug trafficking organizations, and diminished cocaine production in Colombia.

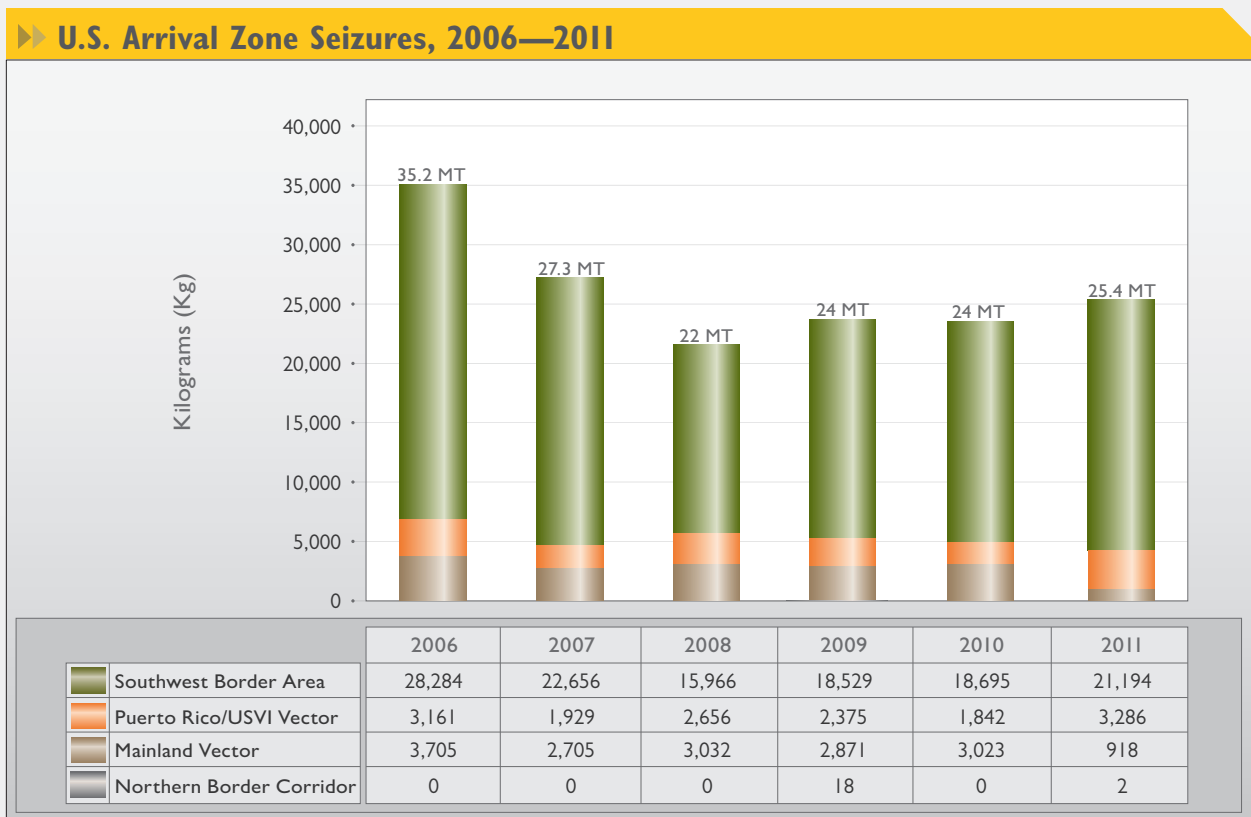


Figure 6. During each of the past 3 years, about 25 metric tons of cocaine has been seized as it arrived in the United States.

Transoceanic Flow

The amount of cocaine departing South America to destinations outside of the Americas increased in 2011. Peru and Bolivia are the main cocaine source countries for cocaine consumption outside of the Americas. Elevated cocaine production in Peru and Bolivia correlates with increased consumption in Europe, Asia, and Africa.

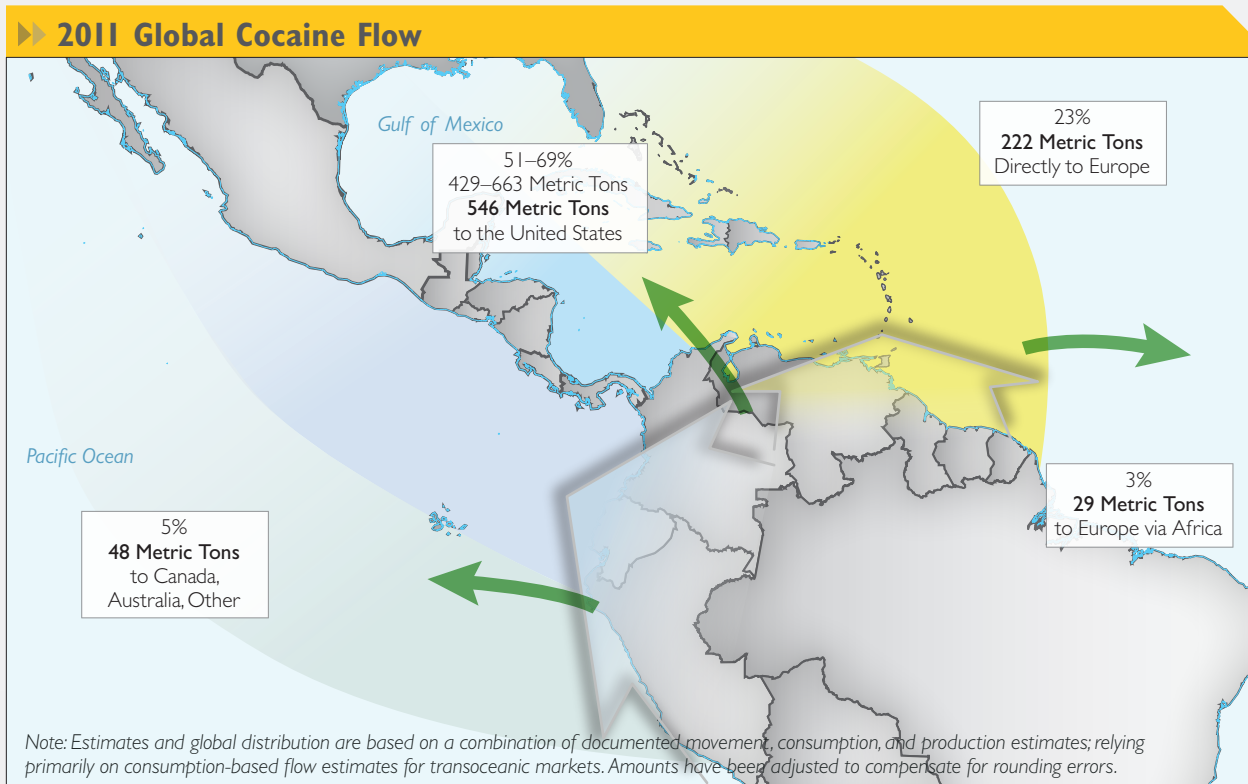


Figure 7. Global Cocaine Flow. An estimated 847 metric tons of export-quality cocaine departed South America to global markets in 2011.

Transatlantic Movement

Venezuela is a major transshipment country for both U.S. and Europe-bound cocaine. Twenty-five percent of global cocaine flow departed from Venezuela in 2011; 15 percent of that cocaine headed toward the United States and 10 percent headed toward Europe. An estimated 25 percent of all transatlantic cocaine movement in 2011 departed Venezuela, primarily aboard fishing vessels or pleasure craft.

Ecuador has remained an important departure country for U.S.- and Europe-bound cocaine shipments. It accounted for the largest share of seizures of cocaine destined for Europe of any country—most of this cocaine was being shipped in commercial maritime containers. Notably, Ecuador's Port of Guayaquil emerged in 2011 as a transshipment hub for cocaine loads destined for European markets.

Transpacific Movement

Although the demand for cocaine in Australia is still relatively small compared with other global markets (consumption in Asia/Oceania accounts for less than 3 percent of the world's total cocaine consumption),

it is growing. Australian officials are countering the growth in cocaine consumption by increasing border enforcement. As a result, seizures more than doubled from 2007 to 2011. Several high-profile, multihundred-kilogram seizures in recent years, along with an exorbitant price for cocaine (\$250,000 a kilogram—the highest in the world), suggest a continued increase of trafficking to the island continent.

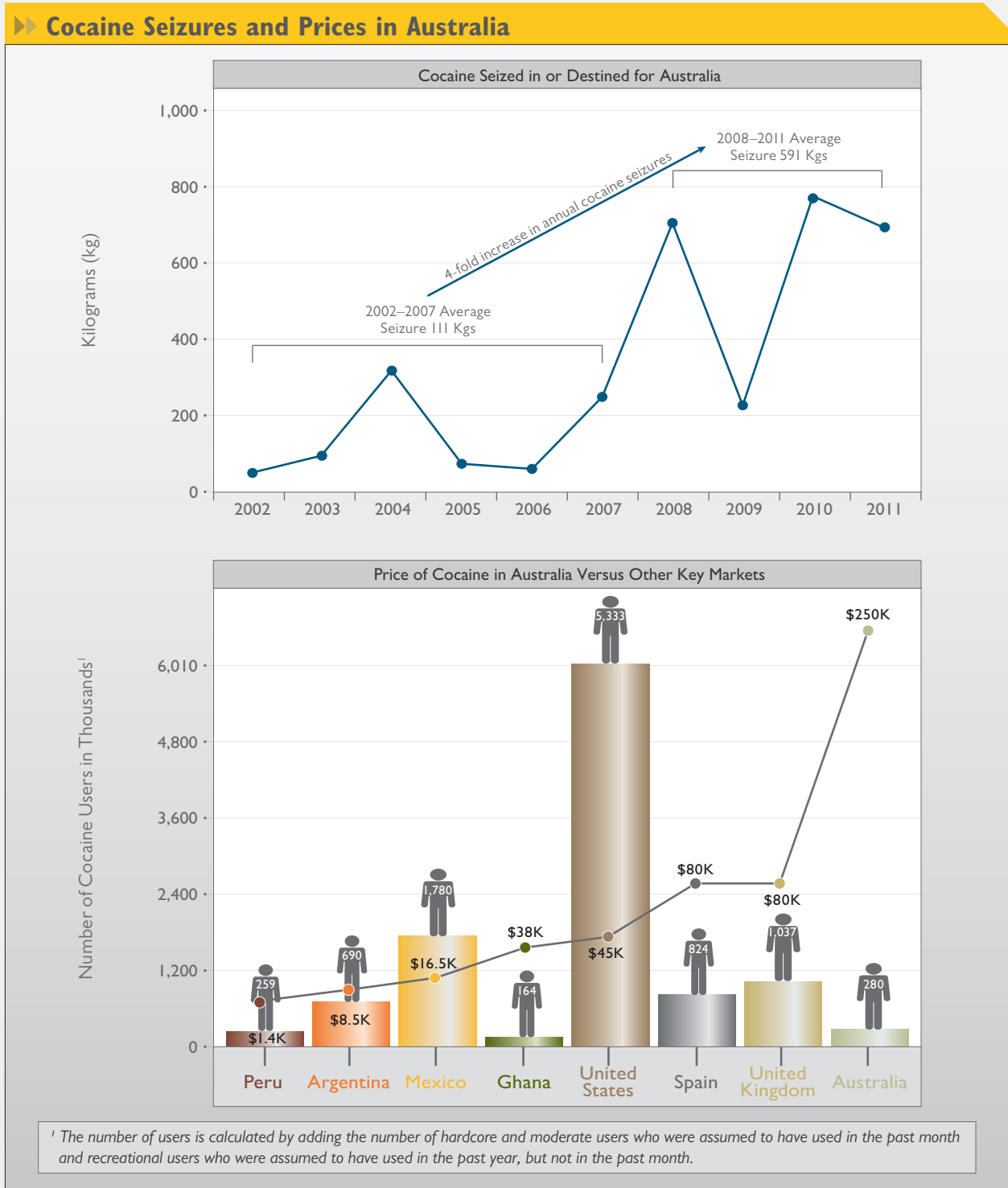


Figure 8. The high price of cocaine in Australia likely is a magnet for increased shipments. Increased seizures correlate with a growing user population in Australia.

Cocaine Losses Worldwide

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.

There were 420 metric tons of cocaine losses documented in 2011, continuing a downward trend from the 5-year high of 518 metric tons in 2009. Overall in 2011, the U.S. Transit Zone accounted for the largest decrease in the amount of documented cocaine lost, a 10-percent decrease, principally due to fewer seizures in the Pacific. Cocaine losses in South America (the Source Zone) decreased by 5 percent from 2010. While the amount of cocaine seized in the non-U.S. Transit and Arrival Zones decreased, the amount of cocaine seized in South America destined for non-U.S. markets increased over the previous year.

Losses from maritime conveyances accounted for approximately 53 percent of the amount of cocaine shipments disrupted worldwide.⁴ Cocaine disruption from submersibles increased more than disruptions from any other transport method, nearly triple the amount of 2010. Cocaine disrupted from fishing vessels and go-fasts decreased from 2010, although at 17 percent of all disruptions, go-fasts still accounted for most of the cocaine disrupted from maritime vessels. Containerized shipments accounted for 12 percent of disruptions.

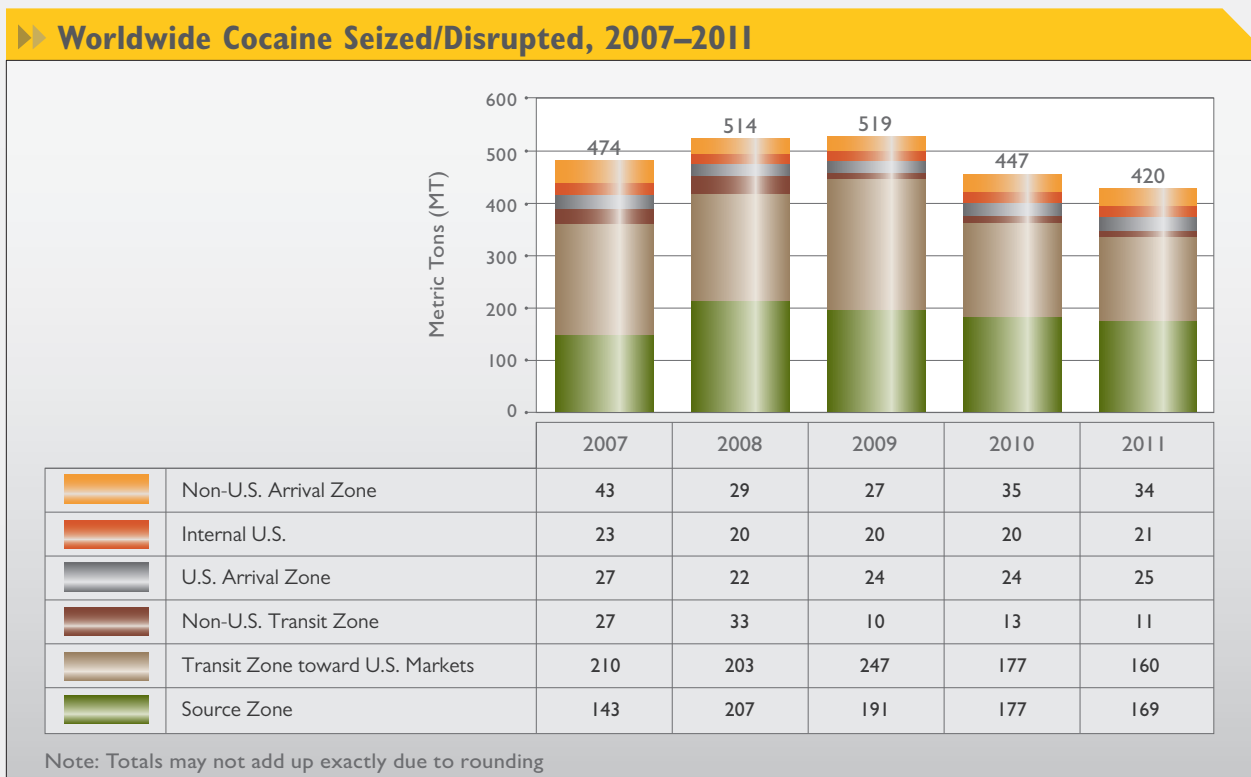


Figure 9. The amount of cocaine seized and disrupted continued to decline in 2011.

⁵ Drugs that are jettisoned and not recovered or drugs that are believed to be destroyed or otherwise removed from the cocaine supply chain. In addition to cocaine seizures, disruptions are a component of cocaine “losses.”



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