

# COCAINE SMUGGLING

in **2013**



2013 Yearend Review

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**Note:** *This edition supersedes all previous editions. Information is derived from cocaine production, movement, and consumption data sets. Because the data sets used in this publication are dynamic in nature and are regularly updated and corrected, the estimates in this edition cannot be compared with previously published estimates.*

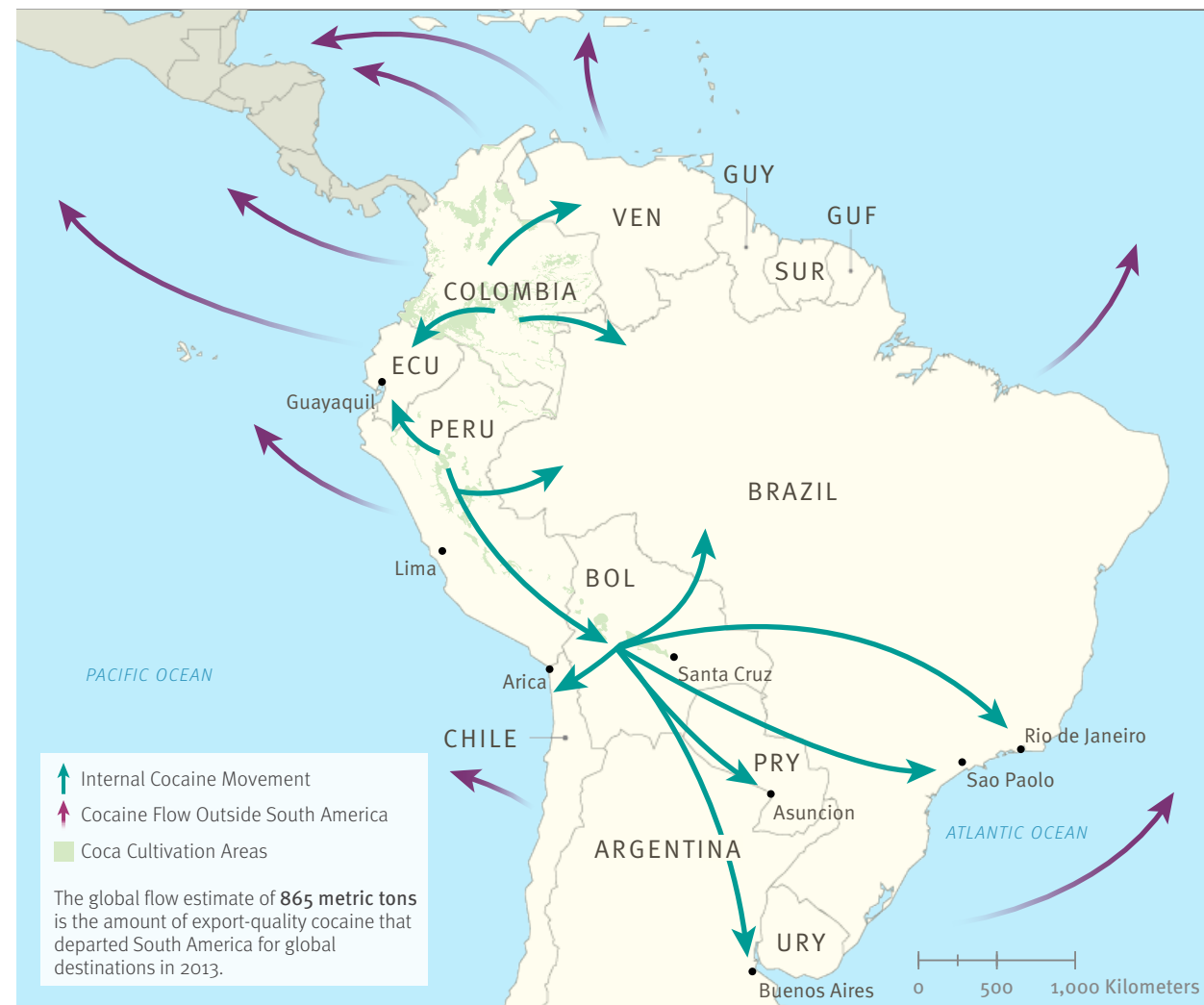
# Cocaine Flow to Global Markets

The amount of export-quality cocaine departing South America for global destinations—the global flow estimate—remained relatively stable from 2012 to 2013; an estimated 865 metric tons departed South America in 2013 and 844 metric tons departed in 2012, based on a combination of cocaine production-, movement-, and consumption-based data sets. Because there are inherent challenges in examining an illicit market, these data sets are leveraged together to mitigate uncertainty in each data set and create a more robust estimate of cocaine departing South America toward the United States.

In 2013, trends in the cocaine production, movement, and consumption data sets varied. The production-based estimate suggested that the estimated amount of cocaine available to depart the three major coca-producing countries had decreased. Additionally, there were noted decreases in the movement-based estimates even though estimated U.S. consumption slightly increased during the same time period. Bringing these estimates together indicated relative stability in the global flow estimate though some trends differed. The production estimates used in these analyses provide an indication of trends, but their magnitudes are routinely much lower than the movement or consumption estimates.

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Figure 1: Cocaine Flow for Global Markets, 2013



The estimated amount of cocaine available depart South America toward global markets remained relatively stable from 2012 to 2013. Estimates are based on a combination of cocaine production-, movement-, and consumption-based data sets. Arrows in the above graphic depict notional routes of cocaine movement within South America and outside the continent toward global markets.

# Cocaine Flow Toward the United States

The overall flow of cocaine from South America toward the United States remained relatively stable in 2013; however, decreased removals<sup>i</sup> have resulted in more cocaine available to enter market coupled with an estimated slight increase in U.S. consumption. Approximately 482 metric tons of cocaine was destined for the United States in 2013, which is similar to the 2012 estimate of 485 metric tons. This estimate of U.S.-bound flow is based on combining production-, movement-, and consumption-based data sets and accounts for cocaine removals and consumption en route.

In 2013, traffickers moved almost 75 percent of all documented U.S.-bound cocaine on go-fast vessels,<sup>ii</sup> more than in almost any other year on record.

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Figure 2: Cocaine Flow Distribution Toward the United States by Vector and Conveyance, 2013



Mexico and Central America accounted for the primary arrival area for most of the cocaine movement from South America toward the United States in 2013.

# Cocaine Flow Outside the Americas

Estimated cocaine flow to markets outside the Americas increased slightly in 2013 as the amount of cocaine seized in or destined for Europe and Oceania continued to rise, and consumption-based flow estimates, or the estimated amount needed to supply non-U.S. markets, to markets outside the United States and Latin America increased from 359 metric tons in 2012 to 384 metric tons in 2013. This suggested that traffickers intended to ship more cocaine to markets outside of the Americas.

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

<sup>ii</sup> Go-fasts are a type of maritime craft, typically a 28- to 45-foot open-hull boat with multiple high-powered outboard motors, capable of operating in excess of 25 knots in shallow waters.

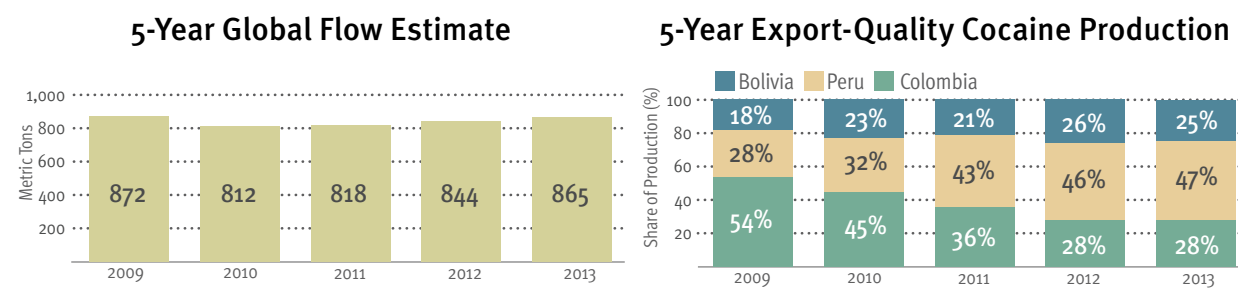
## Production-based Estimate: Less Cocaine Available to Depart South America

Colombian cocaine accounted for roughly 28 percent of the cocaine available for export from South America in 2013. Peru accounted for roughly 47 percent, and Bolivia accounted for roughly 25 percent in 2013. These shares are similar to those in 2012.

The estimated amount of cocaine available to depart South America for global destinations in 2013 decreased by 27 percent from the previous year's estimate. The production-based flow estimate accounts for time lags in the cocaine supply chain<sup>iii</sup> as well as consumption and seizures within South America.

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**Figure 3: Global Cocaine Flow Estimates and Export-Quality Cocaine Production**



Peru accounted for the largest share of South American cocaine in 2013, and the global flow estimate increased from 844 metric tons in 2012 to 865 in 2013 (a 2-percent increase).

Increased cocaine consumption within South America and increased seizures in the continent, contributed to a decrease in our production-based estimate. Revised Brazilian consumption estimates indicate that Brazil is the largest cocaine consumer in South America. Seizures within South America accounted for over 40 percent of the documented worldwide amount. These factors combined decrease our production-based estimate for 2013t.

<sup>iii</sup> J.R. Ehleringer, et al., Carbob 14 analysis quantify time lag between coca leaf harvest and street-level seizure of cocaine, Forensic Science International (2011) doi: 10.1016/j.forsciint.2011-05-003.

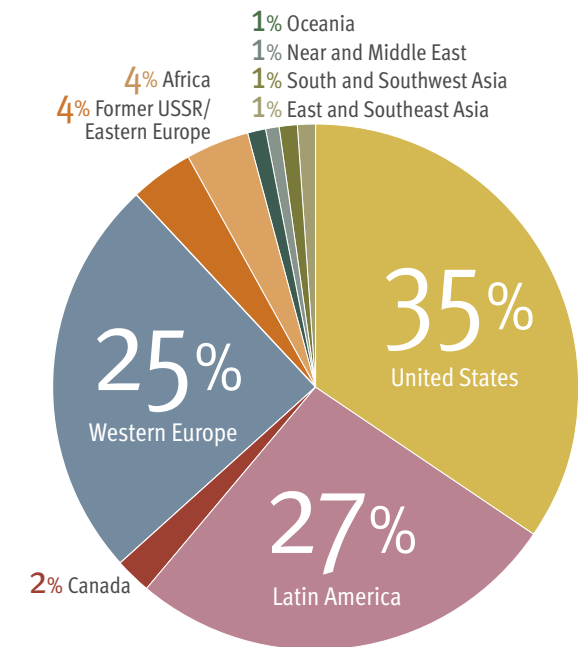
## Consumption-based Estimate: U.S. Consumption Increased Slightly, Markets Outside U.S. Grew

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The amount of cocaine consumed in the United States increased in 2013 to 300 metric tons of cocaine from 232 metric tons in 2012. The U.S. cocaine prevalence rate, reported by the National Survey of Drug Use and Health, on which we base our U.S. consumption estimates,<sup>iv</sup> increased.

The United States remained the largest consumer of cocaine worldwide, accounting for 35 percent of the volume of global cocaine consumption in 2013. Cocaine consumption in Latin America appeared to be growing, more or less on par with European consumption. Most Colombian cocaine was destined for the U.S. market, whereas non-U.S. markets probably were increasingly satisfied by Peruvian and Bolivian production, based on growing production trends from these countries.

**Figure 4: Share of Worldwide Cocaine Consumption by Region in 2013**

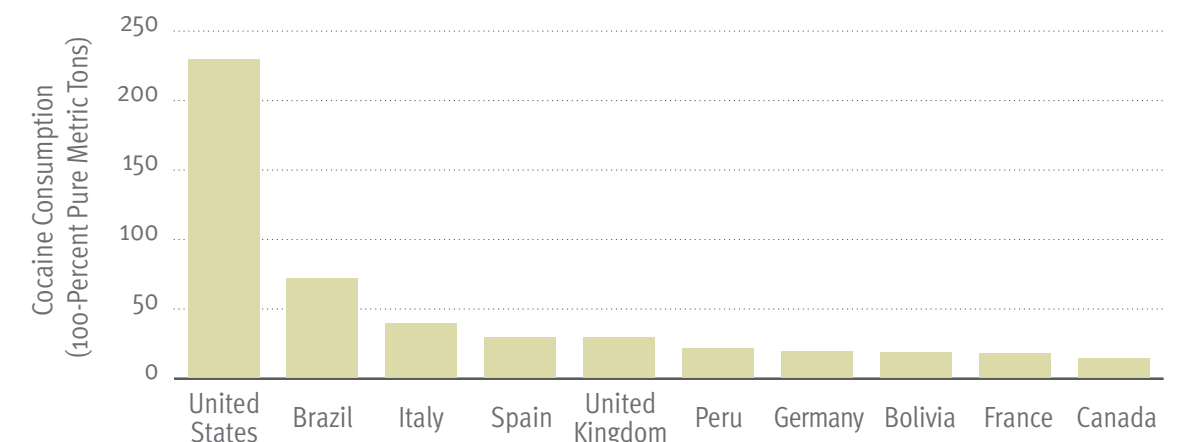


Note: Values may not add to 100 percent because of rounding.

Although the United States was the primary consumer of cocaine in the world in 2013, consumption in other consumer markets, such as Western Europe and Latin America, has grown in recent years.

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**Figure 5: Top 10 Cocaine-Consuming Countries in 2013**



Major cocaine consumers outside the United States include Brazil, Italy, Spain, and the United Kingdom. Cocaine consumption calculations are based on population estimates and annual prevalence rates reported to the United Nations.

<sup>iv</sup> A given year's U.S. consumption estimates are based on the previous year's prevalence rates from the National Survey of Drug Abuse and Health (NSDUH) (i.e. 2013 consumption estimates are based on 2012 NSDUH prevalence rates).

## Movement: Cocaine Transit Flow Increasing from Non-Coca-Producing Countries

Colombia remained the primary South American departure country for U.S.-bound cocaine. Ecuador grew in its role as a transit country in 2013, especially for Europe-bound cocaine shipments, most of which departed Ecuador aboard maritime conveyances. Of note, Ecuador seized a record-breaking 41 metric tons in 2013, an amount surpassed only by Colombia's 67 metric tons of seized cocaine. Ecuador likely has grown as a transit location because its proximity to cocaine sources, dollarized economy, and robust maritime industry are attractive to traffickers.

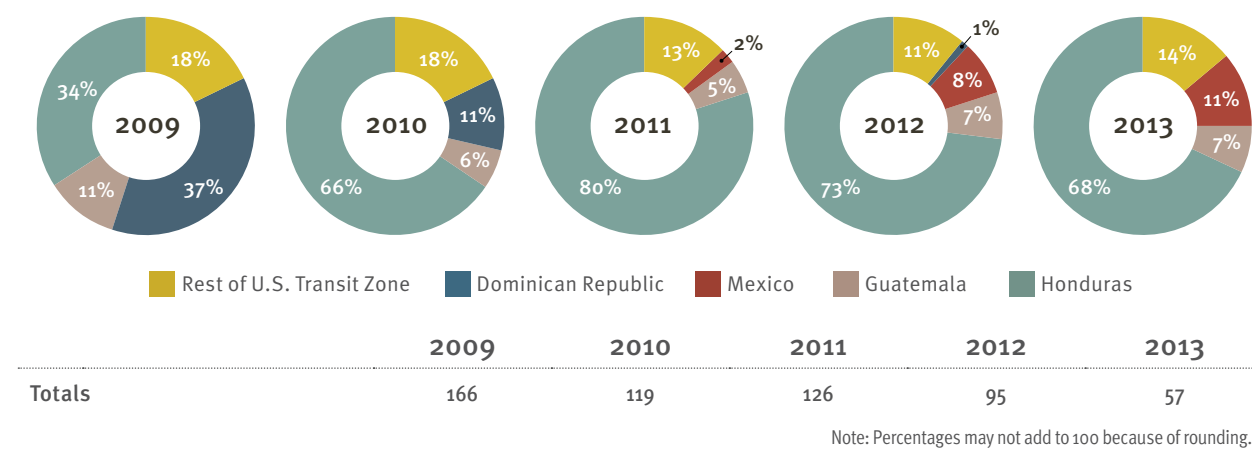
Brazil also grew as a departure point for predominantly Europe-bound cocaine. The amount of cocaine seized in Brazil or after departure from the country more than doubled from 2012 to 2013. Brazil is also the second-largest cocaine consumer nation by volume after the United States and experiences an increase in crime and violence associated with the rise in crack cocaine and other cocaine derivative drugs use.

## Movement: Mexico and Central America Still Primary Corridor for U.S.-Bound Cocaine; Activity in Caribbean Corridor Increasing

The Mexico/Central America Corridor remained the primary avenue of approach for U.S.-bound cocaine in 2013, accounting for 84 percent of cocaine flow. Within this corridor, the Eastern Pacific Vector<sup>v</sup> remained the principal route, accounting for 44 percent of flow, whereas the Western Caribbean Vector comprised 40 percent of cocaine flow. Go-fast vessels were the conveyance of choice for traffickers in both the Eastern Pacific and Western Caribbean Vectors. The number of illicit air flights into the Mexico/Central America Corridor, mostly to Honduras, declined 35 percent in 2013 from 2012.

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**Figure 6: Noncommercial Illicit Air Shipments Into the U.S. Transit Zone by Destination (in Percentage Share)**



The number of shipments by noncommercial illicit air decreased significantly in 2013. Honduras remained the primary destination of these flights within the U.S. Transit Zone.<sup>vi</sup>

v The Eastern Pacific and Western Caribbean Vectors refer to general maritime transit areas, respectively through the Pacific Ocean and the Caribbean Sea, for drug shipments departing South America toward the United States, where first landfall is in Central America or Mexico.

vi The U.S. Transit Zone is 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).

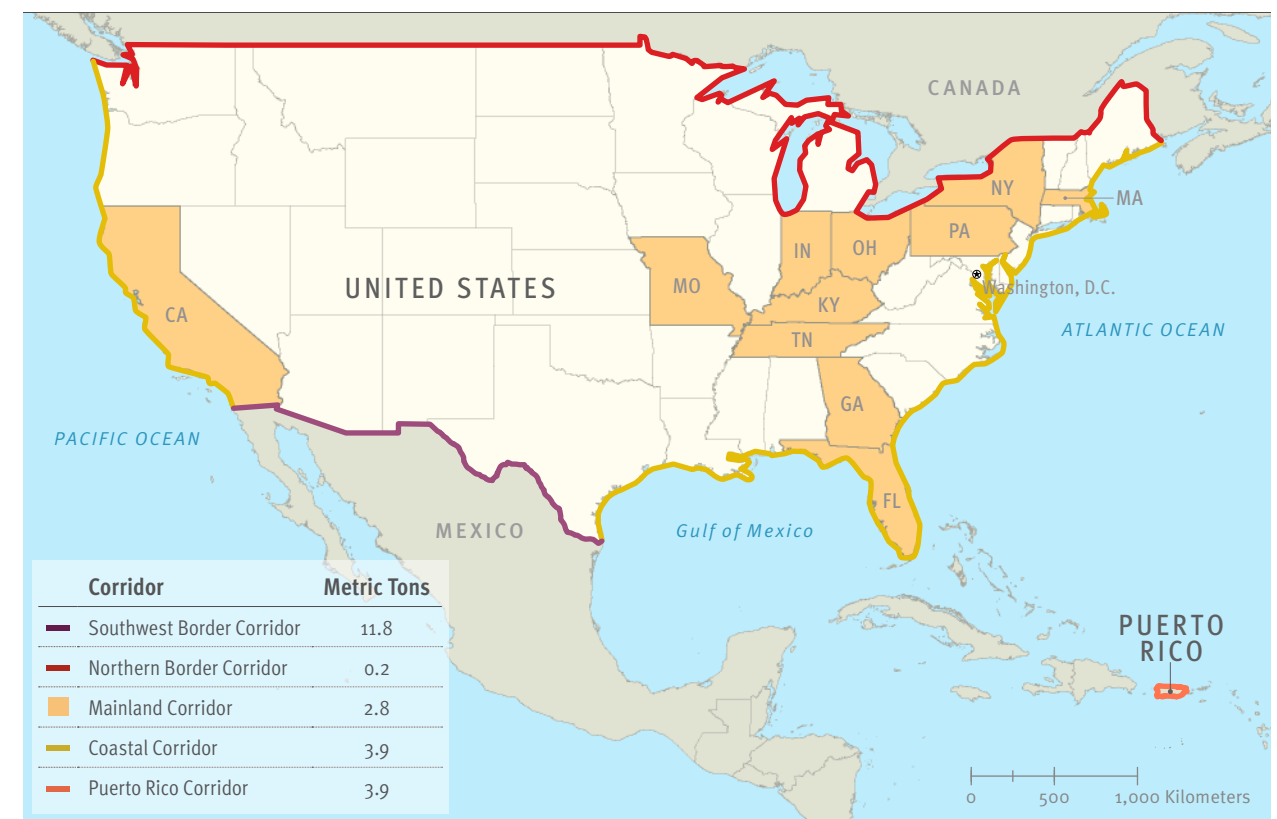
The amount of cocaine documented moving through the Caribbean Corridor almost doubled in 2013, accounting for 16 percent of U.S.-bound flow. Within the Caribbean Corridor, most cocaine departed South America aboard go-fasts directly for the Dominican Republic, followed by direct movement from South America to Puerto Rico.

## Movement: 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, despite increased flow into the Caribbean Corridor. Cocaine seized at the U.S. Southwest border decreased 10 percent in 2013 but still accounted for 52 percent of the seizures in the U.S. Arrival Zone.<sup>vii</sup> Once cocaine reaches the continental United States, it is transshipped primarily in private or commercial vehicles along major highways.

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**Figure 7: Cocaine Seizure Amounts in the U.S. Arrival Zone in 2013**



The Southwest Border remained the primary entry point of cocaine loads into the United States in 2013.

vii 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, Coastal, and Northern Border. Cocaine movement into this zone encompasses land, air, and maritime entry points along the borders of and within the United States.



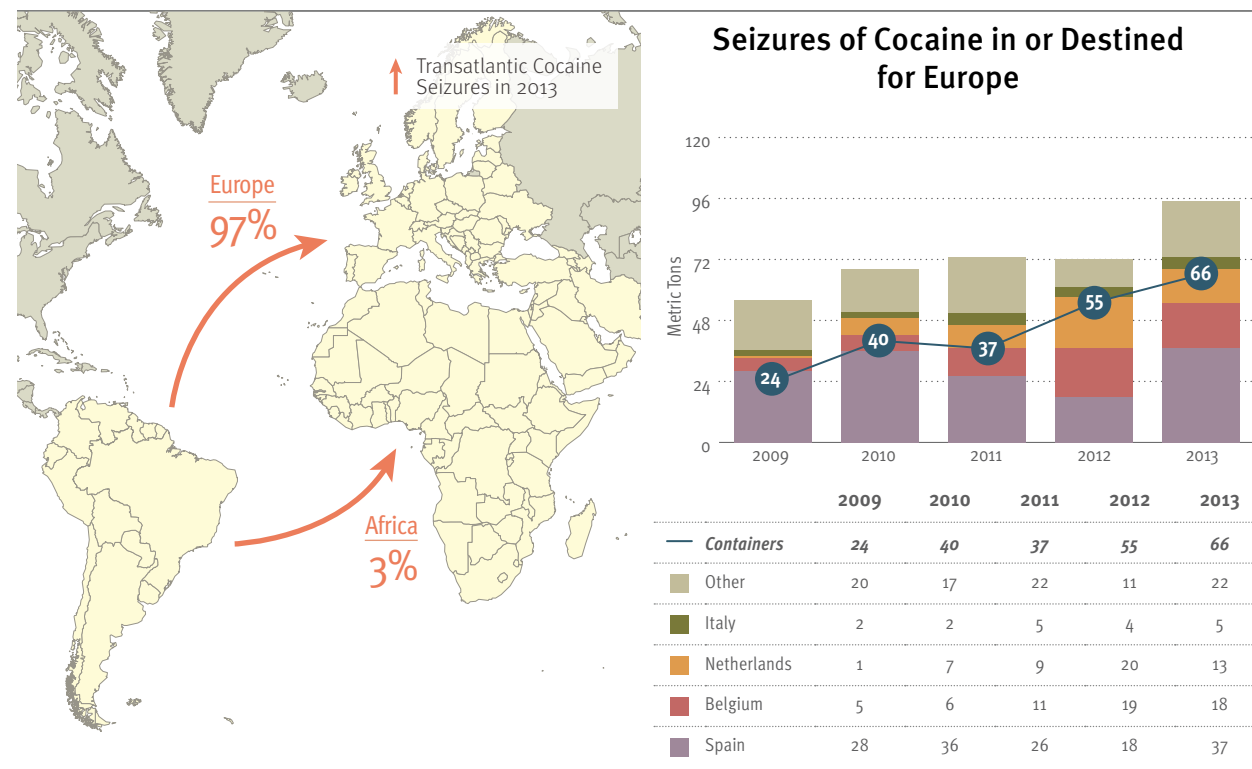
## Movement: Direct Shipments to Europe are Predominant Transatlantic Route From South America

Direct shipments to Europe from South America were the principal threat to the European Vector in 2013. Most of this cocaine crossed the Atlantic by commercial maritime means as rip-on/rip-off<sup>viii</sup> loads and entered via Spain, which provides a strategic location and well-established transportation network for traffickers to further move cocaine through Europe.

Spain, Belgium, and the Netherlands remained the primary arrival countries for Europe-bound cocaine, and Ecuador increased in prominence as one of the primary departure points for Europe-bound cocaine. Ecuador accounted for nearly half of the Europe-bound cocaine seizures in South America in 2013.

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Figure 8: Transatlantic Destinations Based on Seizures, 2013



Cocaine seizures in or destined for Europe increased roughly 32 percent from 2012. These shipments occurred primarily by commercial maritime means.

viii A method of transporting cocaine via commercial maritime containers in which the customs seal is compromised and replaced. Traffickers introduce luggage or duffel bags containing packages of cocaine into sealed containers carrying legitimate cargo, often unbeknownst to the shipping company.

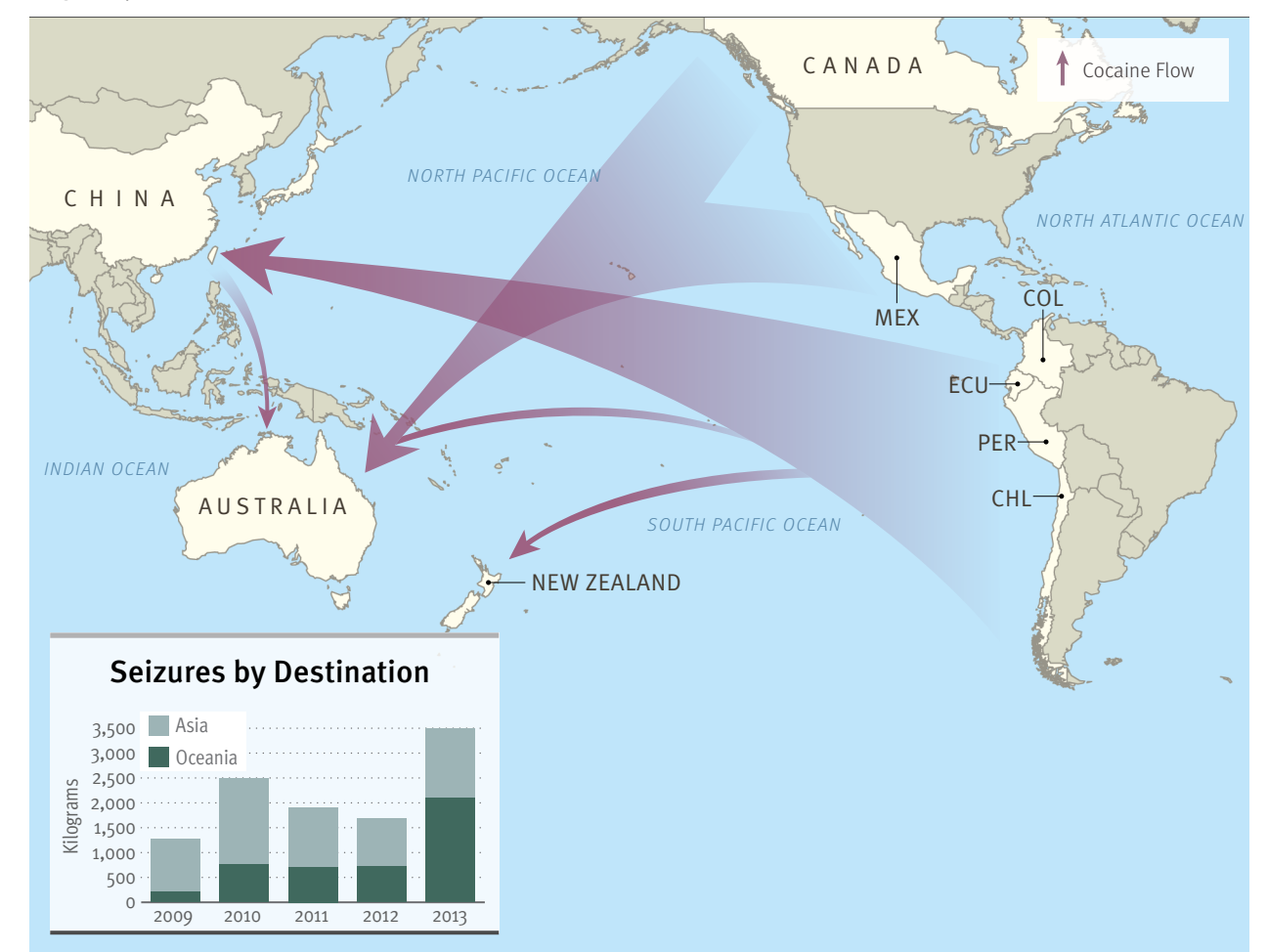
## Movement: Australia Primary Market in Asia/Pacific Region

The growing economies of Asia/Oceania and high cocaine prices in the region continued to provide lucrative markets for cocaine traffickers in 2013. Australia remained the region's largest consumer of cocaine by volume and has one of the world's highest prevalence rates. Australia was estimated to have consumed less than 10 metric tons in 2013, much lower than other nations. The combined cocaine demand in Asia and Oceania probably accounted for more than their estimated 3 percent of global consumption. Prevalence rates from countries such as China and India were too dated to include in the estimated 2013 demand for this region, and slight shifts in those countries' user populations would greatly change consumption estimates.

The majority of cocaine seizures destined for Asia/Oceania were seized in South America. Ecuador was the origin country for half of the cocaine volume destined for Asia/Oceania. Colombia, Argentina, and Brazil were the South American departure countries for smaller amounts.

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Figure 9: Cocaine Movement Toward Asia and Oceania in 2013



Until 2013, most seizures in this region occurred in or were destined for countries in Asia, primarily from small parcel shipments originating from South America.

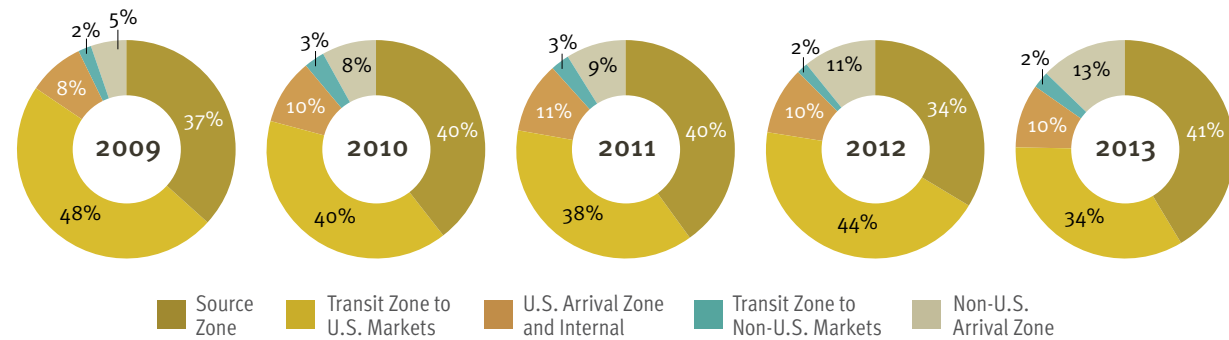
# Cocaine Removals Worldwide

In 2013, 446 metric tons of cocaine was documented as removals,<sup>ix</sup> a stable amount compared with 2012, but down from the 2009 high of 521 metric tons. Cocaine removals in the U.S. Transit Zone decreased by 21 percent in 2013, reaching their lowest levels on record since 2003. This decrease was largely because of decreased high-seas removals in both the Eastern Pacific and Western Caribbean Vectors within the Mexico/Central America Corridor.

Although removals on the Mexico/Central America Corridor high seas were down significantly from previous years, removals from the Caribbean Corridor high seas increased 36 percent from 2012 to 2013. Cocaine removals in South America (the Source Zone) increased from 149 metric tons in 2012 to 185 metric tons in 2013, accounting for 41 percent of worldwide removals. In 2013, 67 metric tons of cocaine was removed in non-U.S. Transit Zone countries, arrival countries, and on the high seas, which is an increase from the 55 metric tons removed in 2012 and the highest level since 2006. Most of those removals, 54 metric tons, were made in Europe, and another 8 metric tons was removed on the high seas in transit to Europe.

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**Figure 10: Worldwide Cocaine Removed (in Percentage Share)**



Note: Numbers may not add up because of rounding.

*In 2013, the percentage share of removals worldwide increased in the Source Zone and Non-U.S. Arrival Zone (e.g. Europe and Oceania). As a share, removals within the U.S. Transit Zone decreased by 21 percent from 2012.*

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



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