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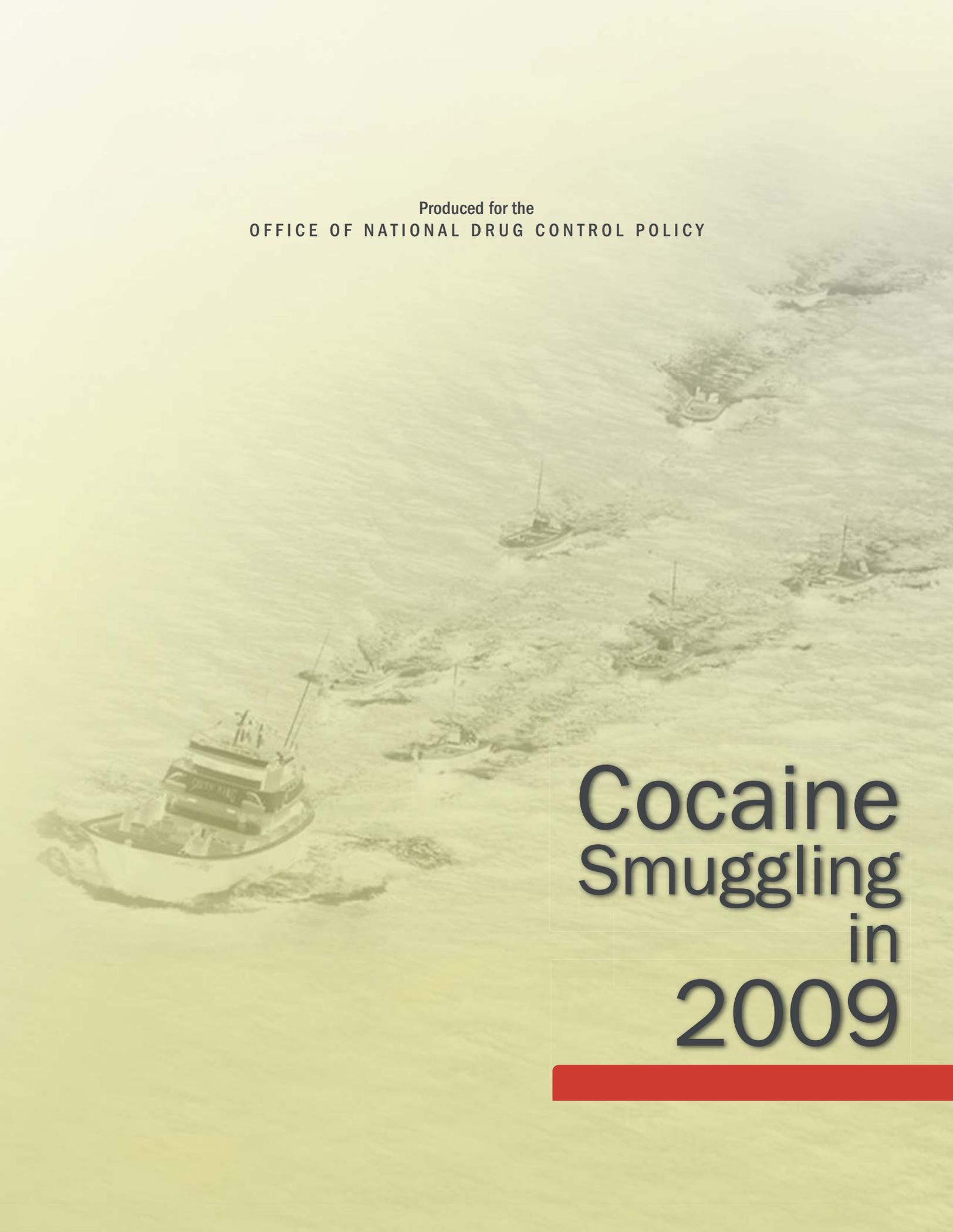


# Cocaine Smuggling in 2009





Produced for the  
OFFICE OF NATIONAL DRUG CONTROL POLICY



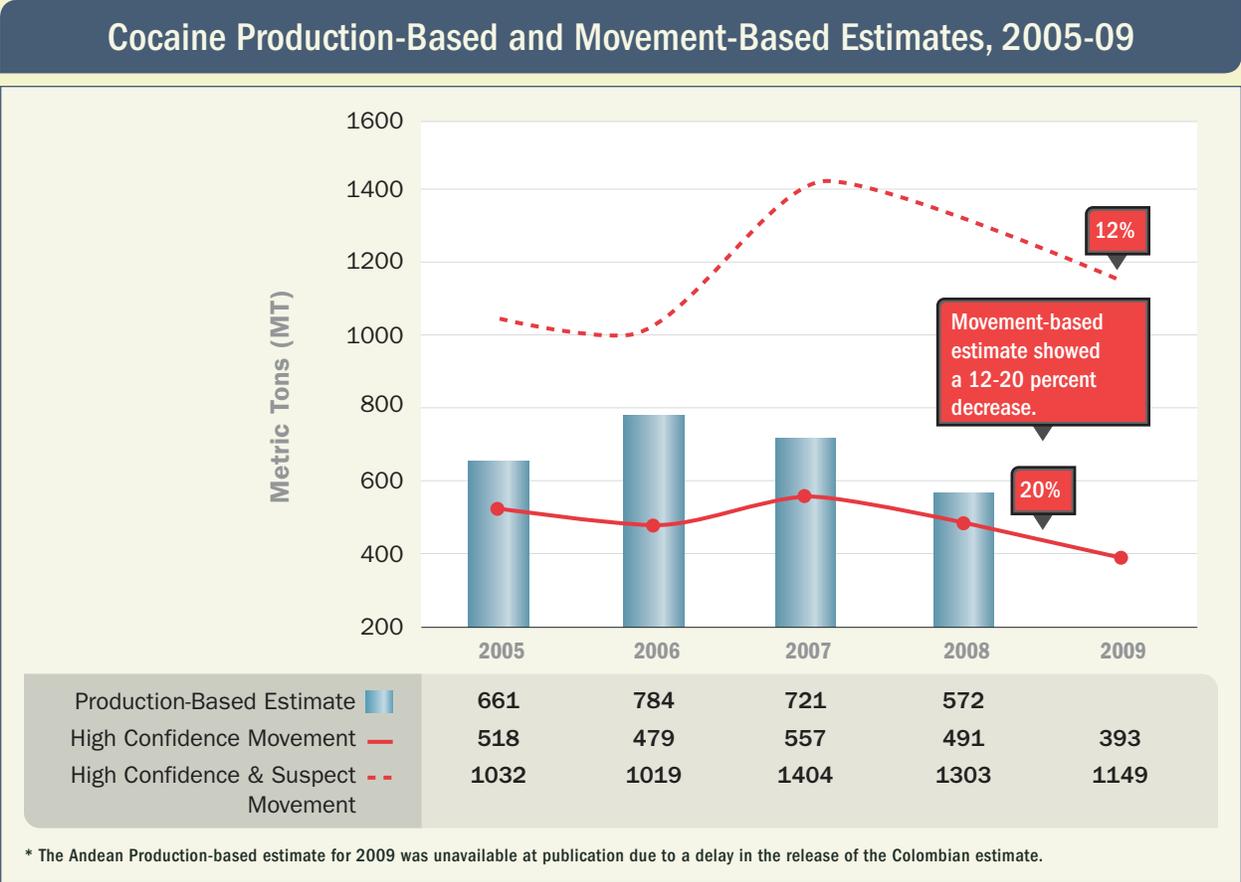
# Cocaine Smuggling in 2009



# Global Cocaine Flow

For the second year in a row, the amount of cocaine departing South America continued to decrease. Nonetheless, drug trafficking organizations continued to move large quantities of cocaine.

- Data from the US Government interagency Consolidated Counterdrug Database that documents the movement of cocaine suggest a 12-20 percent decrease in the amount departing South America toward the US in 2009.
- However, production-based flow estimates, which calculate the amount of cocaine available to depart South America, showed a more modest 3 percent decrease. Estimates of potential cocaine production in the Andean region, expressed in metric tons, showed a significant decrease of 14.5 percent in 2008—the most recent year for which data was available. Furthermore, the purity of bulk cocaine shipments dropped to a record low of 76 percent, indicating extensive use of cutting agents to bulk up the cocaine in South America prior to departure and mitigating the impact of the decreased production on the gross volume of product available for export.



**Figure 1. General Cocaine Flow Based on Production and Movement, 2005-2009.** Broad ranging movement estimates indicate a 12-20 percent drop in cocaine that departed South America toward the US in 2009. Meanwhile, production-based estimates indicated a smaller 3 percent decrease in the amount of export quality cocaine available to depart South America.

Increased disruption of cocaine movements transiting towards the US contributed to the continued suppression in the availability of cocaine in the United States. Meanwhile, insecurity in the West African region may have contributed to reduced cocaine availability in Europe by discouraging traffickers from transiting that volatile area.

## Cocaine Flow toward the United States

Cocaine movement data suggests a 12-20 percent reduction in the amount departing South America toward the US in 2009, compared to 2008.

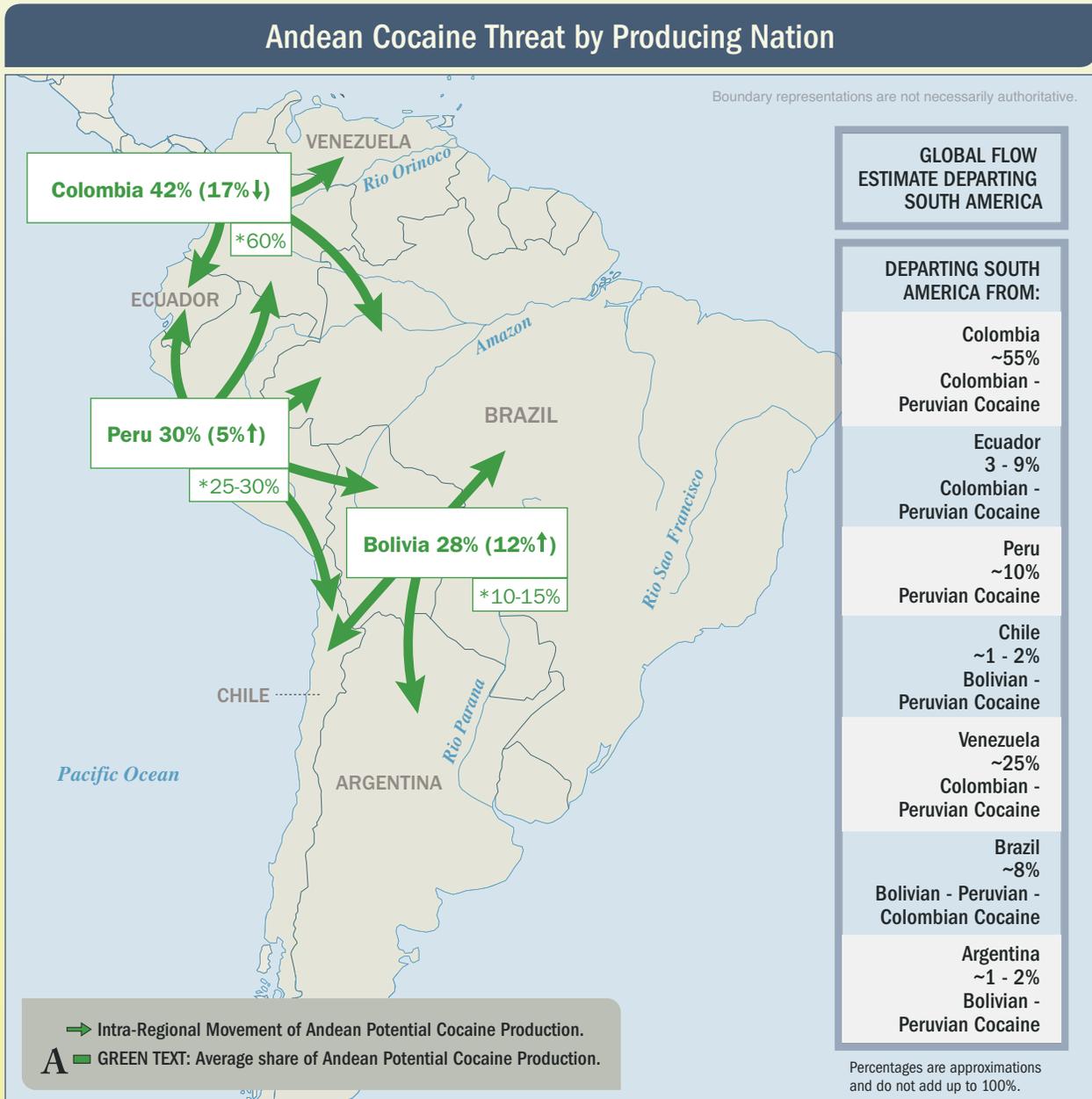


Figure 2. Assessment of Cocaine Departing South America to Global Markets, by Departure Country.

## Cocaine Smuggling in 2009

Ecuador's increasing importance as a departure country for cocaine shipments to international markets, primarily the United States, marked a key shift in trafficking patterns in South America. Record cocaine seizures in, and documented movements out of, Ecuador underscored its growing role. Ecuador was the only country in South America to increase its internal seizure totals in 2009, although cocaine seizures in Colombia remained relatively high. Substantial decreases in seizures in Peru and Venezuela led to a decrease in South America's seizure totals by 8 percent in 2009.

In 2009, Venezuela remained the preferred departure point for noncommercial air shipments, primarily toward the United States via Honduras and other Central American destinations.

The importance of Central America as a transshipment point for cocaine moving toward the United States continued to grow in 2009. Traffickers moved an estimated 93 percent of the cocaine departing South America toward the United States through the Central American region and Mexico, up from 91 percent in 2008. Changes in trafficker tactics, techniques, and procedures may have resulted from notable interdiction successes against low-profile vessels (LPVs), also called self-propelled semi-submersibles (SPSSs), in the first half of 2009; the closure of the US Forward Operating Location in Manta, Ecuador, may have also influenced the changing trafficking patterns.

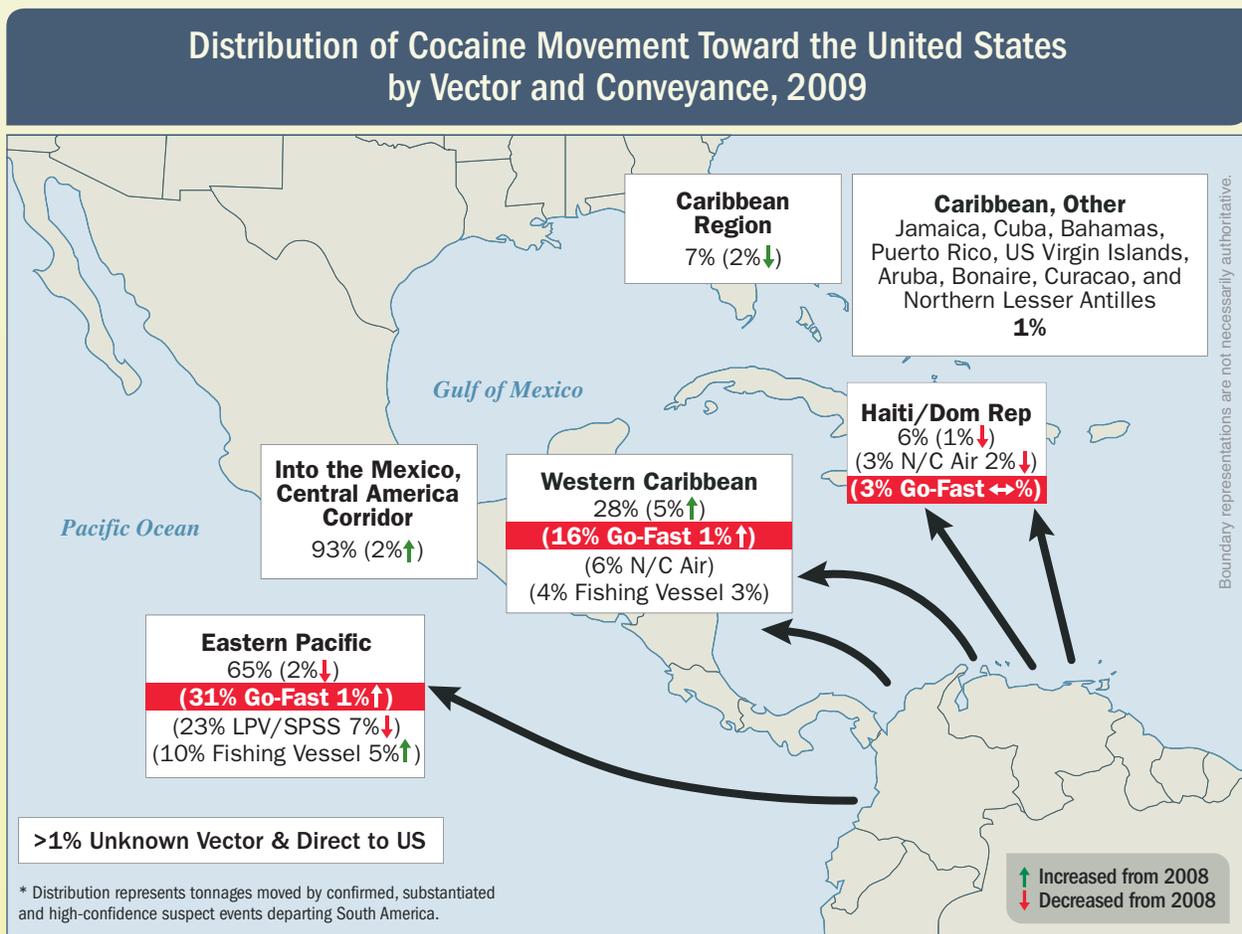
- Traffickers continued to exploit littoral routes throughout 2009, relying heavily on go-fast boats to move cocaine along the coastlines of Central America.
- Traffickers also shifted toward moving smaller, more frequent loads along littoral and deep sea routes.
- The number of documented events involving Ecuadorian fishing vessels—using routes both north and south of the Galapagos Islands—increased, and the amount of cocaine moved on such vessels tripled, underscoring their increasing importance as a conveyance.
- Trafficker use of western Caribbean routes to move cocaine toward Central America and Mexico for onward transit toward the United States increased from 23 percent of the total documented movement in 2008 to 28 percent in 2009, the largest increase of any transit region.
- Honduras emerged as the primary destination for western Caribbean maritime and noncommercial air shipments from South America.



**Figure 3. Ecuadorian Fishing Vessel Tactics.** An increasing number of Ecuadorian fishing vessels were noted towing multiple pangas that they can release and scatter when threatened with interdiction. Only one or two of the pangas carry the now smaller consignments of cocaine.

Traffickers moved the remaining 7 percent of the total flow through eastern and central Caribbean routes toward the United States; this was a marginal decrease from 8 percent in 2008.

- The Dominican Republic and Haiti were the preferred transshipment points, accounting for a majority of the flow in the region. Cocaine moved equally by go-fast boats and noncommercial aircraft.
- Since 2007, all suspect noncommercial air activity in the Caribbean Corridor has originated in Venezuela.



**Figure 4. Role of Conveyances to Move Cocaine Toward the US, 2009.** Traffickers continued to use go-fasts as their primary conveyance, moving 50 percent of the cocaine toward the US. In the eastern Pacific, the use of low profile self-propelled semi-submersible vessels (LPV/SPSS) decreased, while the use of fishing vessels increased.

## Cocaine Smuggling in 2009

# Cocaine Movement toward Non-US Markets via the Atlantic Ocean

There were two notable shifts in cocaine flow across the Atlantic in 2009.

- The documented role of African transshipment sites appeared to decrease slightly; just less than half of the cocaine documented moving across the Atlantic from South America in 2009 transited Africa. At the same time, however, traffickers used larger aircraft to exploit transit areas beyond West Africa, which is still believed to be the preferred transshipment region.
- The use of maritime container shipments to Europe increased to about a third of the total flow toward non-US destinations in 2009, up from only 18 percent in 2008.

Venezuela continued to be the preferred departure country for trans-Atlantic cocaine movement, although the role of Colombia and Southern Cone nations in trans-Atlantic movement of cocaine increased in 2009.

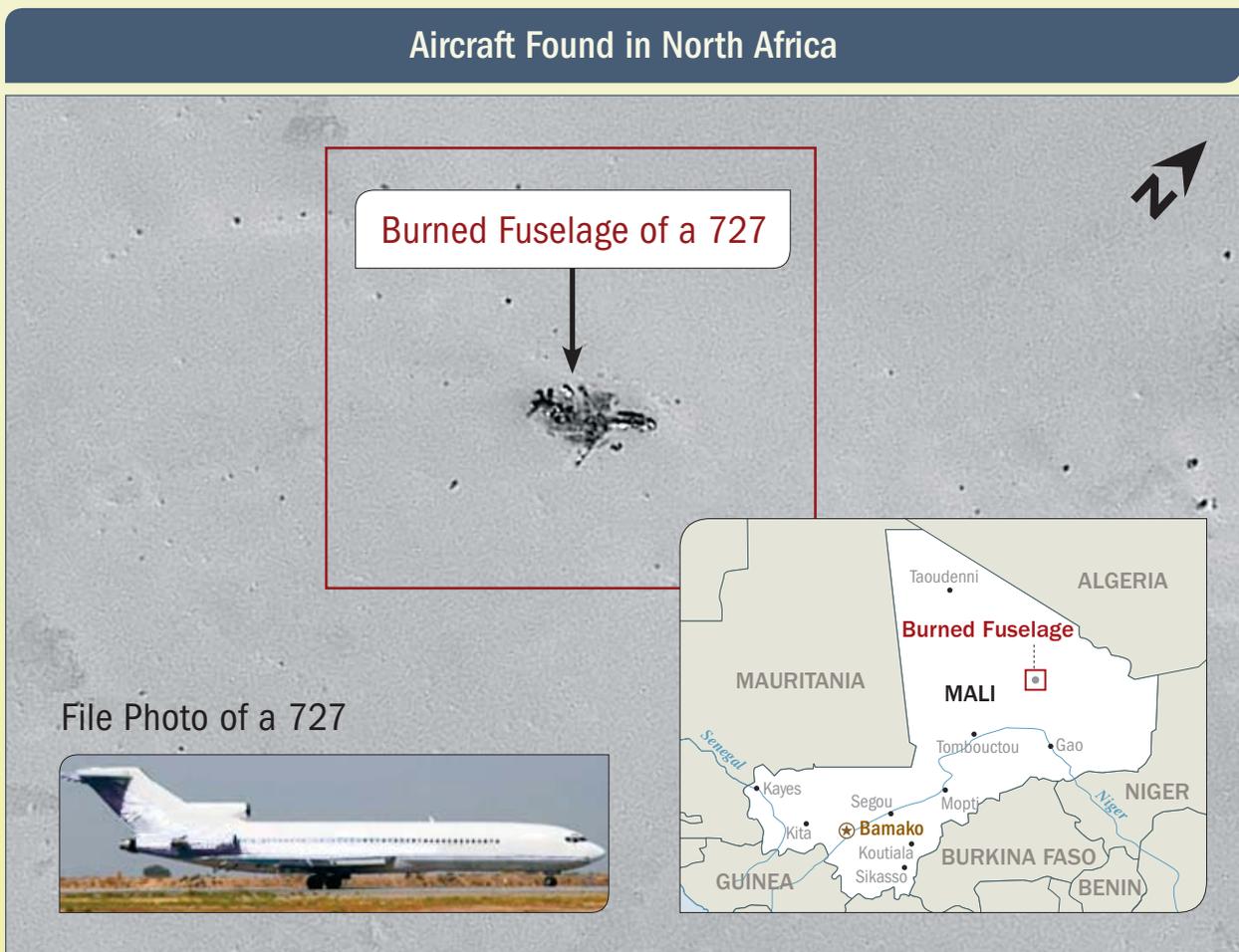


Figure 5.

# Cocaine Movement toward Non-US Markets across the-Pacific Ocean

Cocaine usage in Asia, Australia and Oceania is still estimated to account for less than 5 percent of the world's cocaine consumption, although the number and size of recent shipments toward Asia, Australia, and Oceania suggest growing demand in the region. For the second consecutive year, counterdrug authorities interdicted a vessel with a large cocaine shipment loaded in Ecuador and destined for China, suggesting the possibility of a nascent trade between traffickers in the two countries.

## Cocaine Seizures and Disruptions

The amount of cocaine seized in 2009 worldwide was relatively stable. The estimated amount of cocaine leaving South America and moving toward the United States, based on cocaine movement data, decreased by a more significant 10 to 20 percent in 2009.



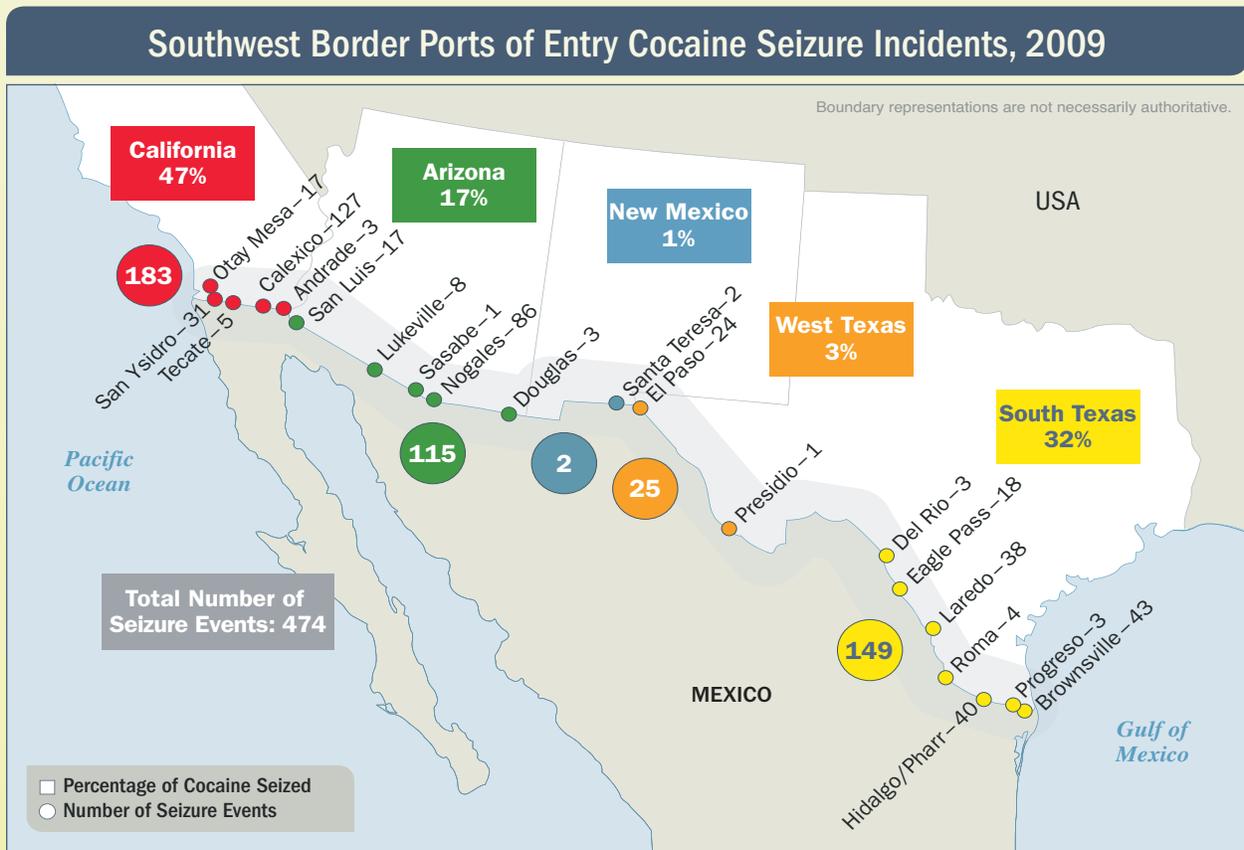
**Figure 6. Worldwide Cocaine Seizures/Losses.**

## Cocaine Smuggling in 2009

# Cocaine Movement into the United States

Multiple datasets continue to indicate that cocaine movement into the United States has remained depressed when compared to movement prior to 2006. Reports of reduced street-level availability in many cities, higher prices and lower purity, and indications of decreased abuse support the judgment that the downward trend in cocaine availability, first noted in mid-2007, continues.

Seizures in the United States increased slightly to 23 metric tons in 2009, compared to 22 metric tons in 2008. Nonetheless, US seizure totals remain much lower than those seen prior to 2007. In 2007, US seizures amounted to 28 metric tons, contrasted with 34 metric tons in 2006.



**Figure 7. Southwest Border Ports of Entry Cocaine Seizure Incident Totals.**

## *Cocaine Movements to non-US Destinations*

The amount of cocaine seized as it arrived in Europe decreased for the fourth consecutive year. The Iberian Peninsula continues as the primary gateway into Europe, although increasing amounts of cocaine arrived in the Balkans and Italy.

Cocaine markets in the Asia-Pacific region are still only secondary markets compared to the US and Europe. China's growing middle class has increased its role as an emergent market. Cocaine is reportedly now preferred in some areas of China over methamphetamine tablets or heroin.





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