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Evolution of estimated coca cultivation and cocaine production in South America (Bolivia, Colombia and Peru) and of the actors, modalities and routes of cocaine trafficking to Europe

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Evolution of estimated coca cultivation and cocaine production in South America (Bolivia, Colombia and Peru) and of the actors, modalities and routes of cocaine trafficking to Europe (c. 2010–2014)

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Executive summary

In the period 2010-2014, the South American cocaine markets have witnessed some change in comparison to previous years, particularly with respect to (a) the estimated areas under coca bush cultivation and the potential volume of cocaine hydrochloride production; and (b) the organization and governance of the illegal business and the constellation and type of the actors involved in transnational cocaine trafficking.

The available UN data suggests that in 2012 and 2013 Peru had larger areas under coca cultivation than Colombia, though in 2014 Colombia witnessed again a stark rise in cultivation while Peru saw a significant drop. Not considering the Colombia data for 2014 and with data for 2014 for Bolivia still to be published, the overall trend in the period 2010-2013 has been a year-on-year reduction of total combined coca cultivation in the three Andean source countries (Bolivia, Colombia and Peru). The picture for the individual countries differs with respect to the year in which the fall in coca cultivation was most pronounced. Furthermore, it should be noted that there are not insignificant differences between UN/Colombian government and U.S. estimates.

The decline in coca cultivation could be reflected in a downward trend in the estimated potential production of cocaine hydrochloride in the three Andean countries. Both UN/Colombian government and U.S. data suggest that cocaine hydrochloride production fell by significant margins; according to U.S. data, Peru also overtook Colombia has the largest potential producer of cocaine hydrochloride in the period 2010-2012. However, with respect to Colombia there are large discrepancies between Colombian government, UN and U.S. estimates. This is not surprising as these discrepancies have existed since illicit crop and drug monitoring began in earnest some fifteen years ago.

With respect to the actors involved in cocaine trafficking from South America to Europe, there appears to be a trend toward the further fragmentation, horizontalization and expansion of the cocaine production and trafficking networks; some of the larger Colombian and Mexican trafficking outfits are employing a 'franchise model' where they are selling their 'brand names' and 'operating licenses' to smaller criminal groups and even individuals that are not part of their organizations. Mexican traffickers seem to have made inroads into the shrinking Andean cocaine supply markets, expanding their local networks with the aim of cutting out intermediaries. While they are also striving to expand their activities in Europe, particularly in Spain, some European criminal groups appear to be building a more permanent presence in South America, possibly aiming to enhance their strategic position in what is an ever more crowded and competitive illegal market.

Despite these developments there is no evidence that would point to any significant changes in the trafficking modalities and routes to Europe. The bulk of cocaine hydrochloride continues to be hidden inside containers and shipped to European entry ports via the northern transatlantic route. It is furthermore unlikely that a successful conclusion of the peace talks between the government of President Juan Manuel Santos and FARC would have a larger and lasting impact on the Andean and South American cocaine markets. Other criminal groups, including renegade FARC units, Colombia's 'emerging criminal gangs' (BACRIM) and Mexican trafficking outfits would seek to fill –

probably with some difficulties - any voids left by the insurgent's (partial) exit from the illegal business.

Overall the outlook for Europe is therefore not rosy. The mentioned developments stand to add another layer of complexity to European counter-drug efforts. The significant drop in the overall volume of potential Andean cocaine hydrochloride production in the past five years does not necessarily indicate that there will be an equally significant reduction in the availability of cocaine in the European Union. In effect, the gains on the production end could be offset by the adaptations and changes that are occurring with respect to the organization and governance of the transatlantic cocaine trade and the multiplication of the involved criminal actors.

1. Estimated coca cultivation and cocaine hydrochloride production in Bolivia, Colombia and Peru (2010-2013/14)

1.1. Coca crops

In the period 2010-2013, coca cultivation remained centred on three Andean countries: Bolivia, Colombia and Peru, with Peru overtaking Colombia in 2012 as the country with the largest estimated area under coca cultivation, according to UNODC and Colombian government data.[2] However, UNODC's 2015 coca crop monitoring surveys for Colombia and Peru indicate that this situation changed again in 2014 with Colombia seeing coca cultivation increase significantly from 48,000 ha (2013) to 69,000 ha (2014), while in Peru crops continued to decline. UNODC data for Bolivia for 2014 is not yet available.

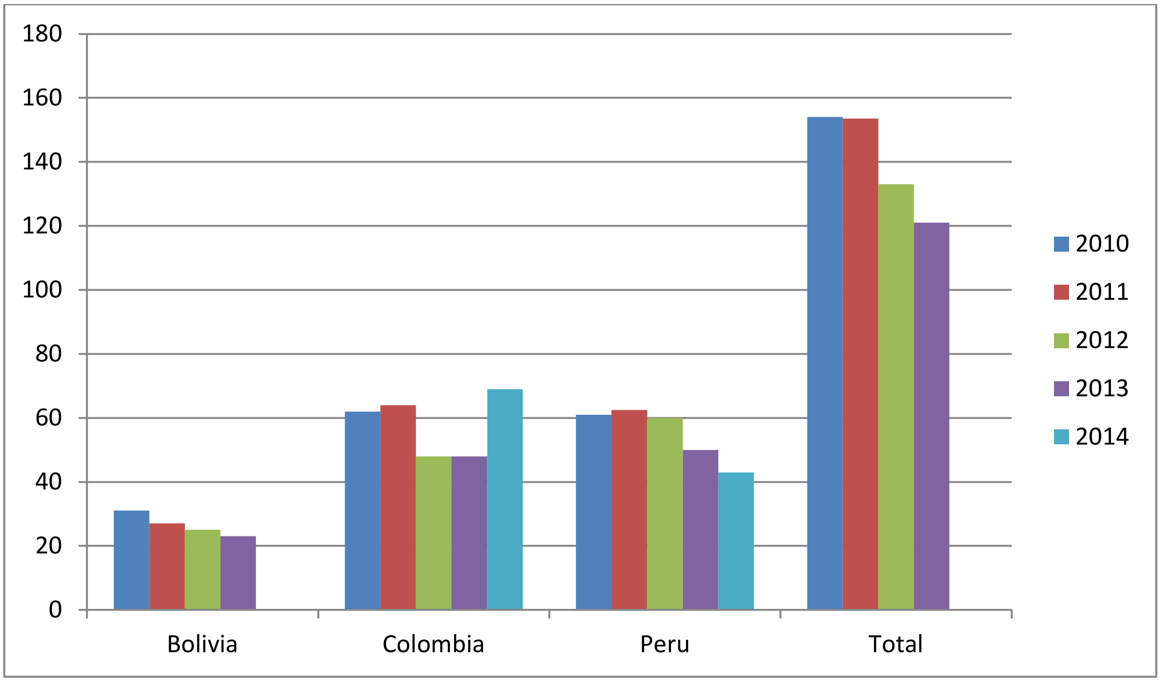
The trend in total Andean coca cultivation in the period 2010-2013 was a year-on-year reduction. According to two data sets used for this assessment (UNODC and U.S. Department of State), in 2010 total cultivation in the three Andean countries was at 154,000/182,000 hectares, respectively, whereas in in 2012 it stood at 133,000/153,500 hectares (see charts 1 and 2 below and tables 1 and 2 in the appendix). For 2013, UNODC reported a total area under coca cultivation of 121,000 hectares (see chart 1 below and table 1 in the appendix).

According to UNODC and Colombian government data (see charts 1 and 3 below and tables 1 and 3 in the appendix), in Colombia the reduction in area under coca cultivation was most pronounced in 2011-2012; in Peru and Bolivia the most pronounced drops were observed in in 2012-2013 and 2010-2011, respectively, according to UNODC data (see charts 1 below and table 1 in the appendix). However, according to data from the U.S. Department of State cultivation spiked again in Peru in 2013 while Colombian government data shows a very slight increase in Colombia in that year (see charts 2 and 3 below and tables 2 and 3 in the appendix).

[2] While the UN and Colombian government data are largely congruent, the data provided by the U.S. Department of State show some not insignificant differences. This can be explained by the different survey methodologies used by the UN and Colombian government on the one hand and the U.S. government on the other. All coca crop cultivation data used in this report has been rounded up or down.

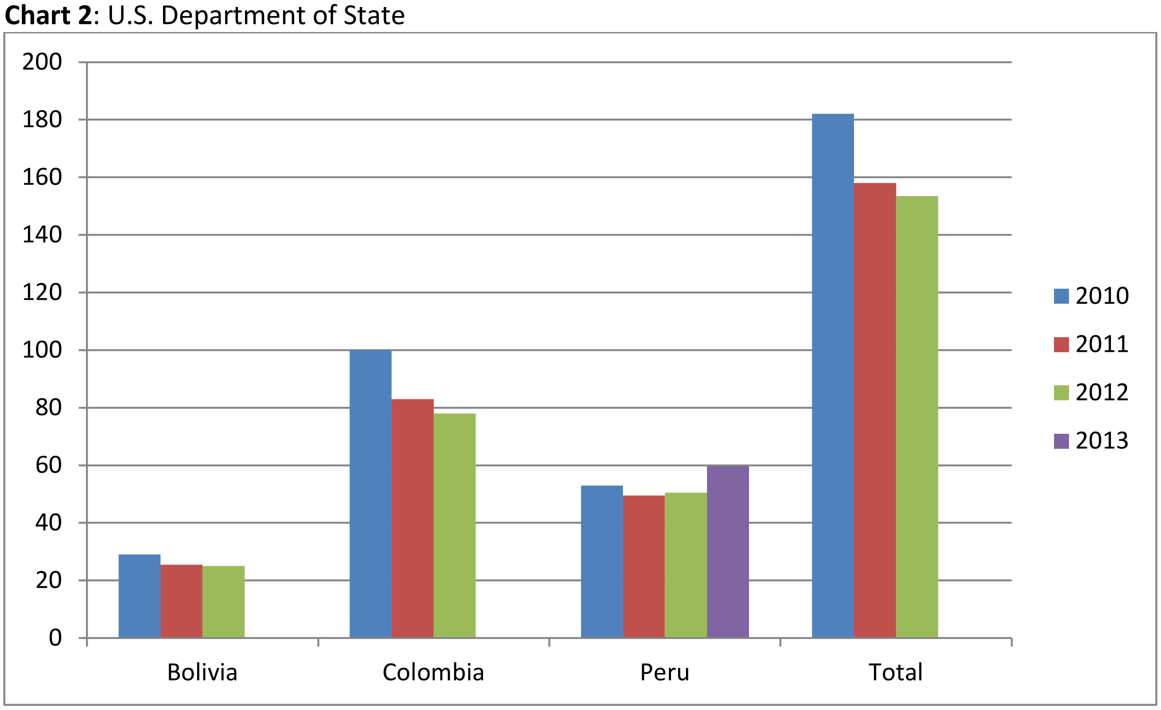
1.1.1. Estimated coca cultivation in Bolivia, Colombia and Peru, 2010-2013/14 (in thousands of hectares)

Chart 1: UNODC



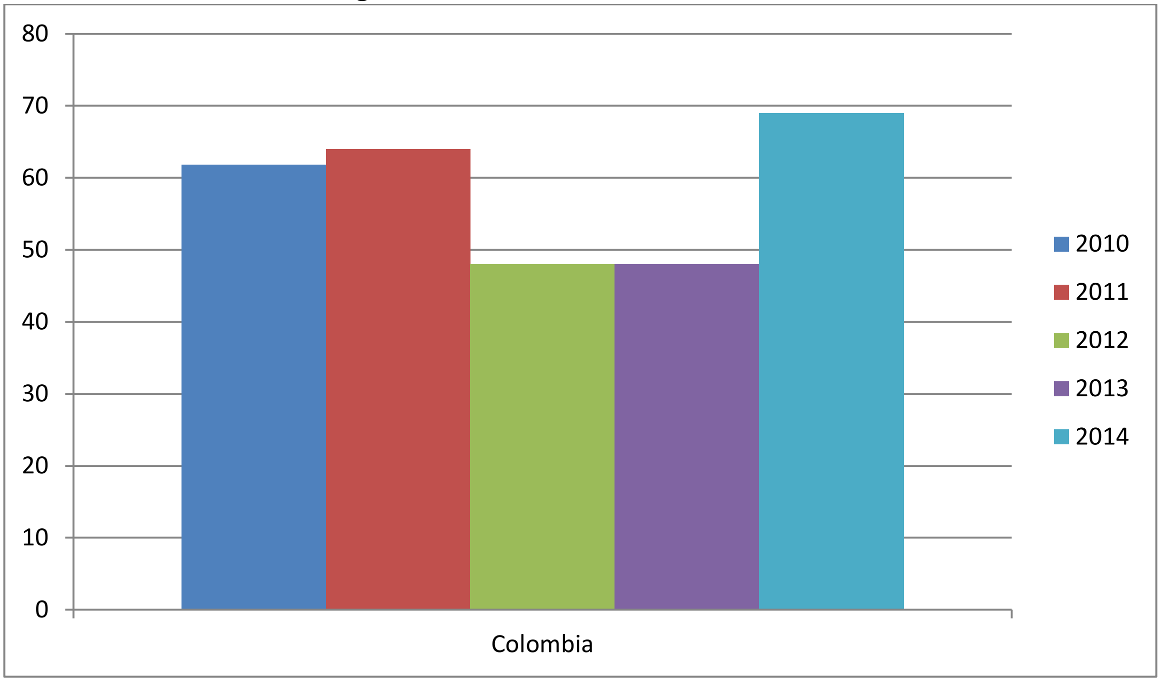
Source: UNODC, Monitoreo de Cultivos de Coca, 2011-2013/14 en Bolivia, Colombia y Perú; at: http://www.unodc.org/documents/crop-monitoring/

Chart 2: U.S. Department of State



Source: U.S. Department of State, International Narcotics Control Strategy Reports 2010-2014, at: http://www.state.gov/j/inl/rls/nrcrpt/2014/vol1/index.htm

Chart 3: Observatorio de Drogas de Colombia



Source: Observatorio de Drogas de Colombia at: http://www.odc.gov.co/

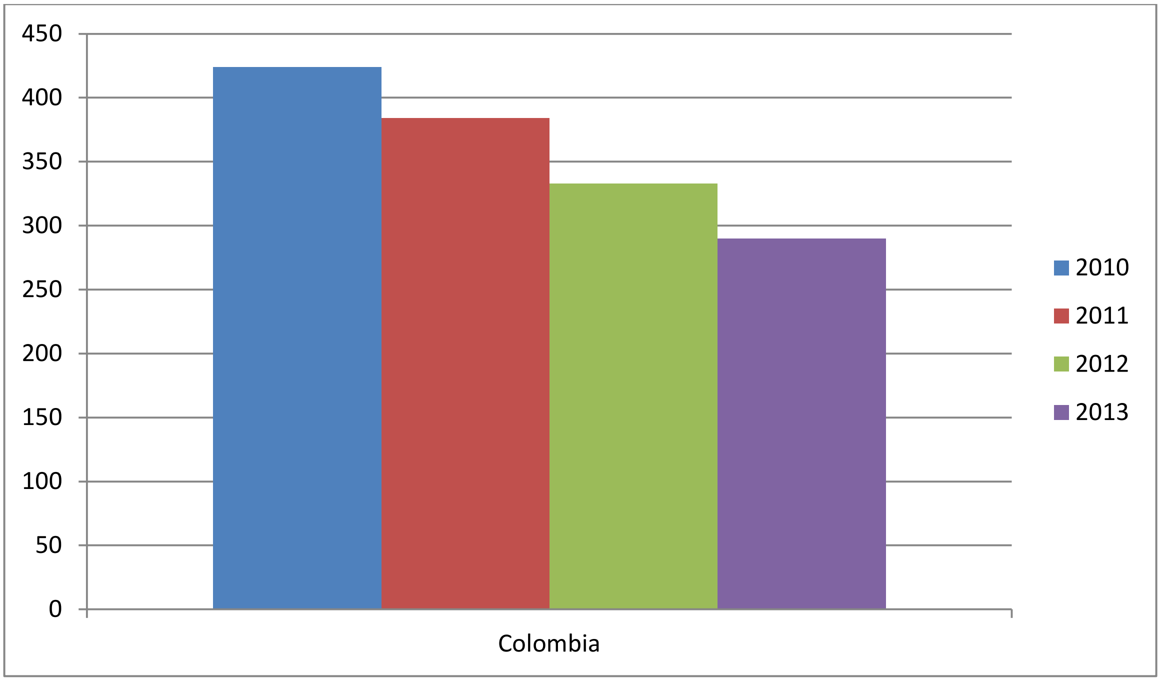
1.2. Cocaine hydrochloride

The reduction in the total area of coca cultivation in Bolivia, Colombia and Peru in the period 2010-2013 appears to be reflected in the trend in the estimated potential production of cocaine hydrochloride in the three Andean countries. Although the data are patchy, UNODC reports a steady drop in Colombia from 424 metric tons in 2010 to 290 metric tons in 2013. Data from the U.S. Department of State does not contradict this overall trend showing that estimated total potential cocaine hydrochloride production in the period 2010-2012 fell from 740 to 620 metric tons, with all three countries witnessing year-on-year declines (see charts 4 and 5 below and tables 4 and 5 in the appendix). As of this writing, no data is available with respect to the performance of potential cocaine hydrochloride production in Colombia in 2014, when the country witnessed a significant increase in coca crop cultivation (see section 2.1. above).

It is noteworthy that data from the U.S. Department of State indicate that Peru by far outstripped Colombia in the reporting period as the largest potential cocaine hydrochloride producer in the Andean region and hence the world (see chart 5 below and table 5 in the appendix). This finding would point to a significant change in the illicit Andean cocaine market. However, the U.S. data cannot be corroborated by data from the UNODC, which does not provide any estimates for Bolivia and Peru in the period 2010-2013. Furthermore, Colombian government data on potential cocaine production in Colombia are much lower than UN and U.S. government estimates (see chart 6 below and table 6 in the appendix).

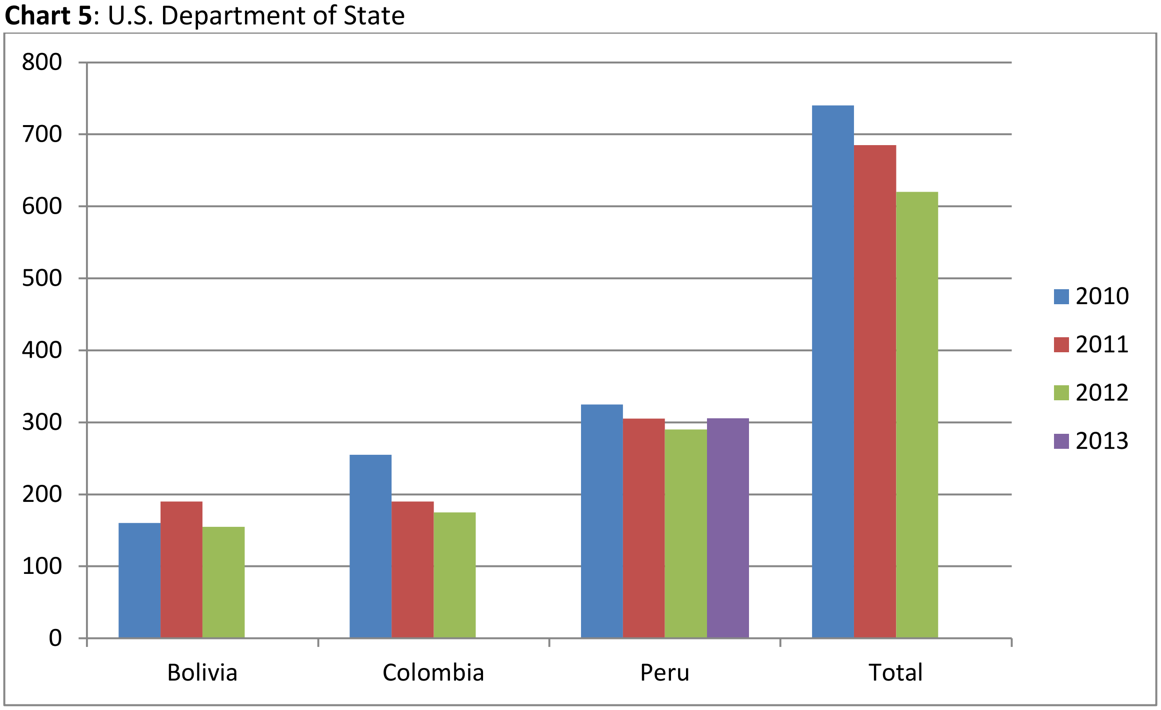
1.2.1. Estimated potential cocaine hydrochloride production in Bolivia, Colombia and Peru, 2010-2013/14 (in metric tons)

Chart 4: UNODC



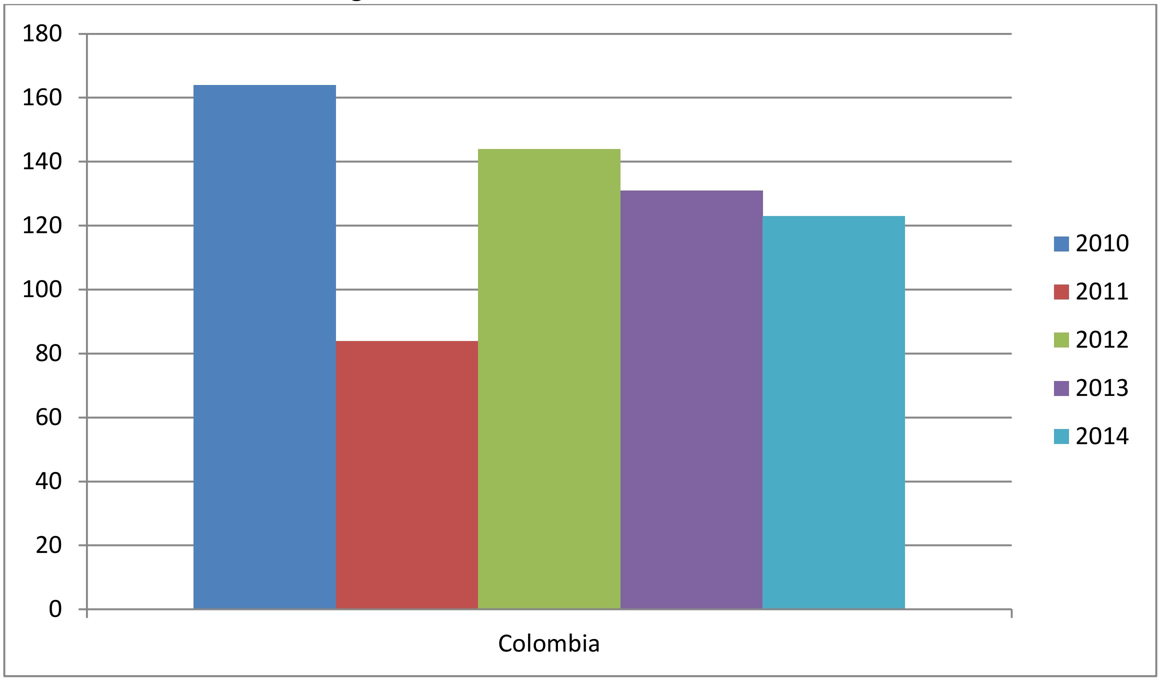
Source: UNODC, Monitoreo de Cultivos de Coca, 2011-2014 en Colombia; at: http://www.unodc.org/documents/crop-monitoring/

Chart 5: U.S. Department of State



Source: U.S. Department of State, International Narcotics Control Strategy Reports 2010-2014, at: http://www.state.gov/j/inl/rls/nrcrpt/2014/vol1/index.htm

Chart 6: Observatorio de Drogas de Colombia



Source: Observatorio de Drogas de Colombia, at http://www.odc.gov.co/

2. Cocaine trafficking from South America to Europe: actors, modalities and routes

In the period 2010-2014, Latin American cocaine trafficking has evolved. While there have been few reported changes with respect to the trafficking modalities and routes, other than temporary adjustments due to counter-drug measures, the organization and governance of the illegal business and the constellation of actors involved in it have seen shifts that require attention. Colombian trafficking outfits continue to play a significant role in South and Central America as well as in Europe, often acting as managers, brokers and game-makers for other, more amorphous and local groups in countries such as Bolivia, Peru and Argentina (Chalk 2011). But they are under increasing law enforcement pressure at home, where they are also facing mounting competition from Mexican groups. These developments reflect the continuing fragmentation, horizontalization and expansion of the cocaine production and trafficking networks. Some of the larger Colombian and Mexican trafficking outfits are selling 'franchises' to smaller groups and even individuals. It is possible that some European criminal actors who are building a presence in South America are participating in this 'franchise economy' or are performing as subcontractors of Latin American criminal groups.

2.1. Colombia's BACRIM

Following the demobilization of the United Self-Defense Forces of Colombia (Autodefensas Unidas de Colombia, AUC), a paramilitary umbrella organization, during the government of President Alvaro Uribe (2002-2010), Colombia witnessed the spread of so-called 'emerging criminal gangs' (bandas criminales emergentes, BACRIM in Spanish). The appearance of BACRIM, such as Urabeños, Ejército Revolucionario Popular Antisubversivo de Colombia (ERPAC) and Paisas, was closely linked to the demobilization, in the period 2003-2006, of more than 30,000 paramilitaries grouped under the AUC. While the Uribe administration portrayed these groups as mere 'criminal gangs', Colombian and international analysts have contested this interpretation highlighting the intimate relationship between BACRIM and demobilized paramilitary groups with a notorious record of involvement in drug-trafficking.[3]

Among the predecessors of BACRIM are the large, hierarchically-structured Cali and Medellin 'cartels', which were dismantled in the first half of the 1990s, and hundreds of small drug-trafficking organizations ('baby cartels') as well as some larger federations, such as the Norte del Valle cartel, that emerged in the wake of the big cartels' demise. The 'baby cartels' adopted a notably lower profile than their 'grand' predecessors and resorted less to violence in the attempt to avoid attracting the attention of the Colombian and U.S. counter-narcotics and law enforcement agencies (Bagley 2011). With the Colombian cocaine market fragmenting, the smaller groups gradually began ceding control over coca cultivation and drug processing to the insurgent Revolutionary Armed Forces of Colombia (FARC) and National Liberation Army (ELN) as well as the United Self-Defence Forces of Colombia (AUC).[4]

BACRIM are considered to represent the latest, third generation of Colombian drug-trafficking outfits (McDermott 2014a) and they are central pieces in the Colombian and Latin American cocaine-trafficking puzzle. They manage a diversified business portfolio and work through networks rather than hierarchies. Some FARC and ELN units are part of these networks, providing trafficking services across the borders with Ecuador and Venezuela where the presence of the Colombian state remains weak (Garzón 2013). It is estimated that BACRIM derive about half of their income from drug-trafficking and the other half from criminal activities ranging from extortion to illegal gold mining, gambling and human trafficking. Moreover, being relatively small outfits (in comparison to the large cartels and paramilitary groups of the past but also the FARC and even the ELN) most BACRIM seem to prefer negotiation over violent confrontation with their underworld competitors, including other BACRIM but also the insurgents and foreign trafficking groups.[5]

According to Colombian police intelligence data, there are currently seventy-eight active Colombian drug-trafficking groups, of which twenty run international operations, twenty are active at the regional level and thirty-eight are engaged in local trafficking (Klein et al. 2015:6). In this fragmented, horizontal 'open-market' scenario there are not a few big players who seek to

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[3] Many of the paramilitary groups that formed part of the AUC were deeply involved in drug-trafficking. IN effect, after the conclusion of the negotiations between the Uribe administration and the AUC almost the entire AUC leadership was extradited to the U.S. on drug-trafficking charges. Only a few BACRIM did not grow out of the former paramilitary structures. One such 'independent' group is Rastrojos.

[4] On FARC's and ELN's participation in drug-trafficking see section 3.3 below.

[5] This does not mean, of course, that BACRIM do not also resort to violence. To the contrary, the government estimates that 25-40 per cent of all homicides that are committed yearly in Colombia could be the responsibility of BACRIM. But in contrast to the large cartels and other older generation trafficking outfits only a fraction of this violence is directed against the state, law enforcement and the heads of competing criminal groups, who are far less visible today than still a decade ago. Selective, contracted killings of competing lower-end traffickers and social leaders in the *barrios* and *comunas* of Colombia's cities seem to be more the norm today (Verdad Abierta 2014).

control most of the activities and enforce compliance with the established rules, but there is a large variety of groups who sell or purchase specific goods and services (cocaine base, cocaine hydrochloride, control of parts of a trafficking route, transborder contacts, and so on) in a market that rewards stealth, business efficiency and coordination among many players and provides less room for few actors seeking to control all or most echelons of the trafficking chain. Some larger Colombian BACRIM, such as Urabeños, are selling 'franchises' to smaller groups and even individuals or are subcontracting them for specific tasks.

The significantly enhanced law enforcement and counter-drug capacities and capabilities of the Colombian state, which it acquired in the past decade mostly with U.S. support, has led to a criminal diaspora from Colombia emerging in other parts of Latin America (notably Bolivia, Brazil and Argentina but also Ecuador and Central America) and Europe (Spain) (Klein et al. 2015:7; McDermott 2014a). Interestingly, it is also reported that increasing numbers of European traffickers are arriving in Colombia (and possibly other Andean countries), where they 'negotiate on price and make their own purchases, where in previous years Colombians would have brokered sales' (Klein et al. 2015:7).

2.2. The Mexicans

Mexican drug-trafficking organizations, notably the Sinaloa and Gulf cartels, are today undisputed in their preponderant role as the principal exporters to, and wholesalers of cocaine hydrochloride in, the U.S. market.[6] In effect, the Sinaloa cartel is considered to be one of the most powerful and best-resourced drug-trafficking outfits in the world. There are mounting indications that Mexican groups have increased their activities in recent years and expanded their presence in Central American and other transit countries as well as in the Andean region, especially in Colombia and Ecuador.[7]

Cocaine traffickers are today operating in a business environment in which the overall size of the 'cake' is estimated to be shrinking (see the coca and cocaine hydrochloride production data presented in section 2 above). In a bid to maintain their preeminent position it is not implausible that Mexican groups would be reinforcing their efforts to take advantage of the fragmentation of the cocaine markets in the Andean source countries. Making apt use of the expanding illegal networks and subcontracting local groups and individuals they could be seeking to cut out as many intermediaries as possible, including BACRIM and other trafficking outfits in the Andes and Central America.

This supposition is based on media stories about individual Colombian traffickers who are not part of a BACRIM or other group, including FARC, but are today selling cocaine hydrochloride directly to Colombia-based Mexicans or their select middlemen after having purchased it at the lowest price in the local market. In effect, it appears that these individuals operate under a kind of 'mini franchise', where they pay BACRIM or other trafficking groups a percentage of their profits so as to be able to conduct their direct business with the Mexican groups (El País 2013).

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[6] According to the Organization of American States, Mexican groups control the bulk of the cocaine wholesale market in the U.S. (OEA c. 2013).
[7] Ibid.

It bears noting, however, that it is not clear whether this Mexican penetration in the Andean region and South America more widely reflects a strategy to increase their share in the European cocaine market or whether it is mostly driven by the fierce competition between Mexican groups over the U.S. market. While some of them (Sinaloa and associates) could be seeking to consolidate their position in the U.S., others (Gulf and associates) could be trying to gain a stronger foothold in Europe in order to make up for losses in the U.S – which, however, would likely be met with resistance from Colombian groups who have traditionally controlled key segments of the European market, especially in Spain, a crucial European transshipment point (Bargent 2013; UNODC 2011b; Wells 2013).

2.3. The FARC factor

There can be no doubt that FARC is at present a significantly smaller and less hierarchically-structured and more fragmented insurgent organization than it still was a decade ago (McDermott 2014b). Due to sustained military pressure from the Colombian state (with significant support from the U.S.) the insurgents have been driven into remote regions of the country and have largely lost their capacity to launch offensive strikes against the government forces (Prieto et al. 2014). This strategic scenario has not been altered to any significant extent by the peace talks that the administration of Juan Manual Santos is undertaking with FARC in Havana, Cuba. The negotiations started in late 2012 and are taking place while the armed confrontation between the two parties continues.[8] The issue of illicit drug-trafficking and FARC's participation in it is on the negotiation agenda. A pre-accord on the topic was reached in mid-2014 but it would be premature to assume that its provisions will become effective due to the guiding principle of the negotiations that 'nothing is agreed until everything is agreed'.

FARC's involvement in the cocaine business was historically limited to 'taxing' coca farmers and traffickers in the regions of Colombia where the insurgents exercised some kind of territorial and social control. Another way of obtaining money from the trade has been by charging trafficking groups a toll for using strategically important drug shipment routes from Colombia to Ecuador and Venezuela, for instance. Yet due to the government's mounting military pressure on the insurgent organization in the past decade FARC has lost cohesion and some units have deepened their direct participation in drug export (International Crisis Group 2008; McDermott 2014b). Several FARC units operating in the south and south-east of Colombia became actively involved in trafficking cocaine across international borders, particularly those with Brazil and Ecuador.

Until the mid to late 2000s, this involvement was still more or less controlled by the organization's high command, the secretariat. But with the increasing fragmentation of the organization under government military pressure it appears that some FARC units are in the process of autonomously deepening and expanding their participation in the illegal business, including by selling cocaine hydrochloride directly to Mexican buyers (McDermott 2014b; OEA c. 2013). This could indicate that in the case that a final peace accord were signed not all FARC units would be willing to disarm and demobilize, with some of them choosing to continue as cocaine trafficking and criminal outfits in what they would likely perceive as an uncertain and risk-laden post-agreement scenario.

[8] One of the guiding principles of the negotiations has been that hostilities would only cease once a final peace accord is reached. This notwithstanding, on several occasions FARC has declared 'unilateral ceasefires', which were not fully upheld, though. The government has also made concessions in this respect by, for instance, temporarily ceasing aerial bombardments of FARC base camps and units.

It is not unreasonable to assume that there is little that the FARC secretariat could do to prevent this scenario from materializing. Even in the (remote) case that most FARC units, including those involved in drug-trafficking, would lay down their weapons and seek reintegration into civilian life, there are few if any indications that the illegal business would see a fundamental transformation and gradually peter out. Such a scenario is unlikely because of the above-discussed adjustments and changes Colombian and South American drug-trafficking has seen in the past years. The transnationalization of the 'franchise model' and the appearance of a multiplicity of different and new actors on the scene, including Mexican groups in Colombia and South America, would enable a new generation of criminal entrepreneurs to fill any voids left by FARC traffickers.[9]

2.4. Trafficking modalities and routes

Whereas the different criminal actors involved in cocaine production and trafficking, the relationships between them, and the ways in which they organize and manage illegal business transactions have witnessed some, potentially far-reaching changes in the past years, the same cannot be said for the trafficking modalities and routes. It is well understood that the modalities and routes that are used to smuggle illicit drugs and other high-value commodities are in good part a function of the effectiveness of law enforcement. Since counter-drug operations in South America, particularly in Colombia, have tended to become more biting, traffickers are constantly adjusting. However, the bulk of Andean cocaine continues to be shipped out of the region by vessel (mostly hidden inside containers), with a much smaller quantity leaving the region by plane. Interestingly, 'for the first time in a long time large shipments are [being loaded again] onto pleasure craft off the Colombian coast' (Klein et al. 2015:7). While post-Chávez Venezuela remains a primary transit point for Colombian cocaine hydrochloride destined for Europe (InSight Crime n.d.), Bolivian, Colombian and Peruvian cocaine is also trafficked to Europe through Brazil and Argentina via West Africa, with Argentina more recently increasing its significance as a trafficking hub on the South America-West Africa route.[10]

3. Outlook

While it is presently estimated that overall the size of the South American cocaine market is shrinking, with both coca cultivation and cocaine hydrochloride production witnessing steady downward trends, the illegal business and its actors are at the same time adapting to change. This

[9] Here it bears noting, however, that while it is reasonable to assume that other trafficking outfits would seek taking opportunity of FARC's (partial) exit from the cocaine business, it is not quite clear how this process would unfold in practice. Due to its long-time presence in rural coca-growing areas of Colombia and its particular relationship with coca farmers who work at the lowest echelon of the value and trafficking chain FARC cannot be substituted for easily by other trafficking groups, especially by foreign ones, which do not have the same leverage and influence as the insurgents. It may therefore be assumed that FARC's substitution is likely to take some time and may well depend on some renegade FARC units continuing in the business.

[10] In this respect it is unclear what the current status of the South America-West Africa cocaine route is. In the mid-2000s, this route saw an increase in its participation in cocaine trafficking to Europe. It is believed that after a few years the flow subsided once again but the available information is contradictory (EMCDDA and Europol 2013; Schultze-Kraft 2014; UNODC 2012; UNODC 2014; UNODC 2015). On Argentina's increasing role as a hub serving the South America-West Africa route see Semana, '¿Argentina es el nuevo paraíso para el narcotráfico?', 15 June 2014.

evolution is of relevance for Europe as a prime destination for Andean cocaine hydrochloride. The further fragmentation, horizontalization and expansion of cocaine production and trafficking networks and the use of a 'franchise model' by some of the larger Colombian and Mexican criminal groups in which a multiplicity of latest generation Latin American, European and other criminal groups and actors participate, could indicate that efforts to stem the flow of cocaine hydrochloride from South America to Europe will continue to face significant challenges. The fact that Mexican trafficking outfits are today positioning themselves more actively in the Europe-bound export of illicit drugs could point to the possibility of an imminent step-change and intensification of the transatlantic flow of cocaine. It is hard to see that this trend would be reversed by a successful conclusion of the negotiations between the Colombian government and FARC, which, of course, is to be hoped for.

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Appendix

Table 1: UNODC

Country/year	2010	2011	2012	2013	2014
Bolivia	31,000	27,000	25,000	23,000	N/A
Colombia	62,000	64,000	48,000	48,000	69,000
Peru	61,000	62,500	60,000	50,000	43,000
Total	154,000	153, 500	133,000	121,000	N/A

Source: UNODC, Monitoreo de Cultivos de Coca, 2010-2014 en Bolivia, Colombia y Perú; at: http://www.unodc.org/documents/crop-monitoring/

Table 2: U.S. Department of State

Country/year	2010	2011	2012	2013
Bolivia	29,000	25,500	25,000	N/A
Colombia	100,000	83,000	78,000	N/A
Peru	53,000	49,500	50,500	59,500
Total	182,000	158,000	153,500	N/A

Source: U.S. Department of State, International Narcotics Control Strategy Reports 2010-2014, at: http://www.state.gov/j/inl/rls/nrcrpt/2014/vol1/index.htm

Table 4: Observatorio de Drogas de Colombia

Country/year	2010	2011	2012	2013	2014
Colombia	62,000	64,000	48,000	48,000	69,000

Source: Observatorio de Drogas de Colombia at: http://www.odc.gov.co/

Table 5: UNODC

Country/year	2010	2011	2012	2013
Bolivia	N/A	N/A	N/A	N/A
Colombia	424	384	333	290
Peru	N/A	N/A	N/A	N/A

Source: UNODC, Monitoreo de Cultivos de Coca, 2010-2014 en Bolivia, Colombia y Perú; at: http://www.unodc.org/documents/crop-monitoring/

Table 6: U.S. Department of State

Country/year	2010	2011	2012	2013
Bolivia	160	190	155	N/A
Colombia	255	190	175	N/A
Peru	325	305	290	305
Total	740	685	620	N/A

Source: U.S. Department of State, International Narcotics Control Strategy Reports 2010-2014, at: http://www.state.gov/j/inl/rls/nrcrpt/2014/vol1/index.htm

Table 7: Observatorio de Drogas de Colombia

Country/year	2010	2011	2012	2013	2014
Colombia	164	84	144	131	123

Source: Observatorio de Drogas de Colombia, at http://www.odc.gov.co/