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EXECUTIVE SUMMARY REPORT ON DRUG SUPPLY IN THE AMERICAS



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2021

EXECUTIVE SUMMARY

**Organization of American States (OAS)
Inter-American Drug Abuse Control Commission (CICAD)**

EXECUTIVE SUMMARY

There is no single drug that defines drug supply in the Americas. The primary drug of concern varies by country, reflecting the variety of illegal drug supply across the region.

Nevertheless, cannabis stands out as the only drug whose illicit supply was mentioned by all OAS member states that provided data for this report.¹ The data provided indicates that trends in cannabis seizures by sub-region appear to be changing. Historically, North America has reported larger total seizures of cannabis, driven mainly by seizures in the United States; however, between 2016 and 2019 (the reporting period), cannabis seizures fell in this sub-region, while remaining stable for the Caribbean and Central America. Declines in the United States accounted for most of the decrease in North America, but Mexico also reported a decrease—from approximately 900 metric tons (MT) to 200 MT over the reporting period. In South America, by contrast, the trend is less clear, with seizures increasing from 694 MT in 2016 to over 1,600 MT in 2017, then dropping to 1,000 MT in 2019.

Similarly, when measured by average weight, seizures of cannabis were larger than those of all other illicit drugs in the Americas during the reporting period. Sub-regionally, the Caribbean reported the largest average cannabis seizure weight, almost 10 kg. South America had the next largest average seizure weight, about 5 kg.

Cannabis eradication declined between 2016 and 2019, with the most prominent decline in North America. Qualitative data regarding cannabis highlighted the importance cannabis production plays in the Caribbean, the rise of transnational cannabis trafficking in South America, innovations in cannabis trafficking in Central America, and a decrease in marijuana seizures in North America.

Regarding coca, eradication increased in Colombia from approximately 18,000 hectares in 2016 to over 94,000 in 2019. Peru reported eradicating approximately 30,000 hectares in 2016, a total that decreased

¹ The following OAS member states provided data for this report: Antigua and Barbuda, Argentina, The Bahamas, Barbados, Belize, Bolivia (Plurinational State of), Canada, Chile, Colombia, Costa Rica, Dominica, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Honduras, Jamaica, Mexico, Paraguay, Peru, The Federation of Saint Kitts and Nevis, Saint Lucia, Suriname, Trinidad and Tobago, United States of America, and Uruguay.

slightly in subsequent years to an annual average of 26,000 hectares between 2017 and 2019. Bolivia reported stable eradication totals at an annual average of about 9,000 hectares during the reporting period.

With respect to production of coca-based drugs, qualitative data from Colombia indicate that productivity increased due to changes in processing and use of different varieties of coca with longer productive lives. Peru also reported changes to cultivation practices.²

Qualitative data identified cocaine as a drug of concern throughout the Americas and highlighted trafficking patterns. Several countries reported domestic consumer markets for cocaine or crack cocaine, and many countries reported on the high prevalence of containerized shipments of cocaine destined for North American and European markets.

Total cocaine seizures rose from about 800 MT in 2016 to nearly 1,000 MT in 2019. South America reported the greatest share of seizures in the region, rising from about 590 MT in 2016 to nearly 650 MT in 2019. In North America, seizures rose from approximately 220 MT to slightly over 270 MT during the same period.

Average cocaine seizure weights varied. The largest average seizure weights were in Central America, at around 25 to 30 kg. South America followed, with average seizure weights rising from about two to 10 kg over the same four-year period. Average seizure weights in North America remained below 10 kg each year. The Caribbean had the most fluctuation, with annual seizure weights ranging from just over 1.5 kg to nearly 16 kg.

Qualitative data from Colombia noted the use of enhanced cocaine processing methods, especially those closer to population centers. The data from Colombia also indicated increased lab capacity, reductions in processing time, access to chemical precursors, and an uptick in the number of labs used to manufacture precursor chemicals for cocaine production, including sulfuric acid and potassium permanganate.³ Qualitative data from Peru also indicated changes in cocaine processing methods.⁴

Quantitative data on heroin came primarily from North America. The United States and Mexico reported significant seizures, while Canada reported marginal amounts of seized heroin. Data also suggested a decline in poppy cultivation during the reporting period. Only three countries—Guatemala, Mexico, and the United States—mentioned heroin or poppy as a drug of concern. While Colombia, the Dominican Republic, and Ecuador documented low prevalence of heroin use, a relatively small number of countries in the region identified it as a major drug supply concern. The heroin trade in the Americas is mainly intra-regional, with very little heroin produced in the region shipped to markets in Europe or Asia.

2 All qualitative data contained in this report was derived via interviews with governmental experts identified by member states.

3 Examples of methods used to enhance cocaine hydrochloride production in Colombia include the use of new methods of dilution of the base, which reduces processing time; recycling and reuse of solvents to optimize processing; and the use of specialized, handcrafted equipment.

4 Peru indicated that lime and acids have been replaced by cement and common salt in the drying and refinement states of cocaine hydrochloride production.

Information on fentanyl came only from North America. The trafficking of illicit fentanyl and other opioids into the United States and Canada has fueled an epidemic with fatal consequences. Fentanyl is difficult for law enforcement to detect because its high potency means it is trafficked in small quantities and usually mixed with other drugs or sold under the name of another drug. In 2019, fentanyl seizures in North America were approximately 3,580 kilograms. While this total weight is low compared to other drugs seized, the impact of fentanyl in North America is high in terms of overdose deaths and it remains one of the primary drugs of concern in Canada and the United States.

Only the United States and Mexico reported methamphetamine trafficking, and their data showed a clear upward trend. At the same time, the number of reported clandestine labs declined, indicating manufacture and processing methods may have become more efficient. In qualitative reporting, only the United States and Mexico mentioned methamphetamine as a concern. Both nations indicated that production has moved from the United States to northern Mexico, while product continues to be sold primarily in the United States. While data from countries in other sub-regions is sparse, increased trafficking of methamphetamine means it is important for other countries to be aware of this drug's potential threat.

Trends in arrests related to the production and trafficking of illicit drugs were stable for most substances but may represent underreporting. Fewer than half of OAS member states reported arrest totals for cannabis or cocaine. Arrests involving cannabis across the Caribbean, Central America, and North America did not surpass 10,000 per year in each subregion. Arrests for cocaine in the same three subregions rarely surpassed 3,000 per year. South America showed an upward trend in arrests, due largely to a sharp increase in Argentina, where annual cannabis-related arrests increased from 26,000 to 99,000 between 2016 and 2019, and annual cocaine-related arrests increased from 11,000 to 28,000 during the same period.

The median prices of drugs at the wholesale and retail levels followed normal patterns for most drugs studied, meaning that wholesale prices were lower than retail prices, with the notable exceptions of methamphetamine and smokable cocaine.

This analysis of supply data shows diversity with respect to the production, cultivation, and trafficking of illicit drugs in the Americas. Data quality and availability varies from country to country, and according to some countries, the pandemic had a negative impact on the availability of 2020 data. Nonetheless, enough information was provided to identify some clear trafficking patterns, as well as emerging innovations in drug cultivation and production.

The CICAD Executive Secretariat (ES-CICAD), guided by the Hemispheric Plan of Action on Drugs 2021-2025, will continue working with its member states to expand and enhance the collection and dissemination of information on illicit drug supply through strengthening drug information networks. Similarly, ES-CICAD will continue to assist countries with establishing early warning systems, one of the most effective tools for responding to emerging drugs in the Americas today, and to encourage countries to contribute national data to the CICAD-led Early Warning System for the Americas, known by its Spanish-language acronym, SATA.



**Inter-American Drug Abuse Control Commission (CICAD)
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