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REPORT ON DRUG SUPPLY IN THE AMERICAS

2022

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

Report on Drug Supply in the Americas 2022



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The national drug authorities in each above-listed member state either participated in the Technical Working Group on Drug Supply Indicators (TWGDSI) or facilitated access to local agencies involved in the drug supply control area. These agencies served as the main sources of quantitative data for this analysis. ES-CICAD wishes to also thank national drug observatories in those countries that facilitated follow-up qualitative interviews with local experts. This qualitative data provided the context necessary to better understand and analyze the situation with respect to drug supply and was invaluable to this exercise.

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Comments on the report are welcome and can be sent to:

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FOREWORD

The OAS Hemispheric Drug Strategy 2020 affirms that the drug problem in the Americas is an increasingly complex, dynamic, and multi-causal phenomenon. This constantly evolving problem has ramifications in terms of adverse effects on health, social cohesion, citizen security, the integrity of democratic institutions, development, and economic activities in the countries of the Americas.

The Strategy's corresponding Hemispheric Plan of Action on Drugs 2021-2025 takes this further by directing member states to strengthen the scientific data that underpin sound evidence-based drug policy: "[Member states should] expand and enhance the collection and dissemination of information on illicit drug production, trafficking, and related issues, through the use of sound, systematic data collection practices, scientific research, and standardized methodologies."

Since 1986, the Inter-American Drug Abuse Control Commission (known by its Spanish language acronym, CICAD) has assisted OAS member states by gathering and analyzing drug-related information, as well as disseminating publications in an effort to provide evidence for the design of public policies.

The Report on Drug Supply in the Americas 2022, the latest publication of CICAD's Executive Secretariat, provides an overview of trends and patterns in drug supply across the Hemisphere. The report has received input and collaboration from the majority of OAS member states and includes new and innovative analyses on drug supply in the Western Hemisphere. It represents the outcome of a wealth of expert collaboration with our member states together with the support of CICAD's Technical Working Group on Drug Supply Indicators.

While there is still work to be done to improve the quantity and quality of drug supply data in the region, the Report on Drug Supply in the Americas 2022 gives us a clear view of the potential for data gathering and cross-national analysis in the Hemisphere.

Together with CICAD's Report on Drug Use in the Americas 2019, which provided a snapshot of drug consumption across the Americas and unique, valuable information on trends in use, these publications provide a holistic picture of the drug situation in the Americas.

I would like to thank our member states for their commitment to this report, and national drug observatories for their active support and collaboration. I would also like to recognize the work of CICAD's Inter-American Observatory on Drugs and Supply Reduction Unit for their coordination of this report.

We are delighted to present the Report on Drug Supply in the Americas 2022, and hope that it lays the groundwork for evidence-based drug policies, strategies, and plans of action across the Hemisphere, as well as serving as the basis for furthering international dialogue and commitments to address the drug problem in the Americas and beyond.



Ambassador Adam E. Namm
Executive Secretary
Inter-American Drug Abuse Control
Commission (CICAD)

PREFACE

The Secretariat for Multidimensional Security (SMS) facilitates cooperation among member states of the Organization of American States (OAS) as they assess, prevent, and respond to threats to security in the Americas. Drug trafficking is characterized by its international and multifaceted nature, and the challenges faced are increasingly complex. For example, we are observing the deadly consequences of the opioid crisis in some parts of our region, along with all-time highs in the production of cocaine hydrochloride and methamphetamine in others. In addition, the use of more efficient production techniques as well as the misuse of chemical precursors have led to an increase in the quantity, potency, and harmfulness of some drugs.

Threats to multidimensional security in the region are increasingly complex and are facilitated by rapid technological change and increased global connectivity. Serious crimes are perpetrated by transnational organized criminal groups. Among them, those that affect public, port, border, and tourist security stand out, including drug trafficking, terrorism, money laundering, cybercrime, human trafficking, antipersonnel mines, arms trafficking, smuggling of counterfeit products, and illegal mining, among others.

These trends are generating high profits for criminal groups, which are increasingly specialized, resilient, and adaptable. We must, therefore, continue to strengthen the capacities of OAS member states to counter the illicit supply of drugs; this includes law enforcement as well as judicial and other governmental systems that play a key role in combatting transnational criminal organizations.

To this end, I am pleased that the Executive Secretariat of the Inter-American Drug Abuse Control Commission (ES-CICAD), which falls under SMS, has produced this Report on Drug Supply in the Americas 2022 using quantitative and qualitative data provided by OAS member states. The Report should serve as an important reference for all in the Western Hemisphere who work to reduce the production and trafficking of illicit drugs.



Luis Fernando Lima Oliveira
Secretary for
Multidimensional Security
Organization of American States

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. In some countries, opioids, particularly fentanyl, are the major drugs of concern, while in others, cocaine predominates. In other countries, synthetic drugs such as methamphetamine are a major issue.

Nevertheless, there are some common trends across the region. Cannabis stands out as the only drug whose illicit supply was mentioned by all OAS member states that provided data for this report. The data provided indicate 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 2020, cannabis seizures fell in this sub-region. In contrast, seizures increased notably in South America and slightly in Central America and the Caribbean.

Cannabis eradication declined between 2016 and 2019, with the most prominent decline in North America. Experts interviewed noted that decriminalization of the possession of small amounts of cannabis may have impacted eradication trends, especially in the Caribbean. 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 leaf, Colombia reported a notable increase in eradication from approximately 18,000 hectares in 2016 to over 130,000 hectares in 2020. Peru reported decreases in coca leaf eradication from approximately 30,000 hectares in 2016 to 6,272 in 2020. Bolivia also reported a notable decrease in the number of hectares eradicated from 6,577 in 2016 to 2,177 in 2020.

Countries noted changes to production and cultivation 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 aimed at increasing yield.

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

Total cocaine seizures in the Hemisphere rose from about 911 metric tons (MT) in 2016 to 1,091 MT in 2020. South America reported the greatest share of seizures in the region, rising from 630 MT in 2016 to 838 MT in 2020. In North America, 220 MT were seized during 2016, rose steadily to 270 MT in 2019, and decreased to 170 MT in 2020. The Caribbean also showed a decrease in seizures, from 13 MT in 2016 to 9 MT in 2020. In Central America, seizures rose steadily from 51 MT in 2016 to slightly over 71 MT in 2020.

Qualitative data from Colombia noted the use of enhanced cocaine processing methods, especially in areas closer to population centers. The data from Colombia also indicated increased lab capacity, reductions in processing time, access to chemical precursors, an increase in productivity, and an uptick in the number of labs used to manufacture precursor chemicals used in the production of cocaine, such as sulfuric acid and potassium permanganate.¹ Qualitative data from Peru also indicated changes in cocaine processing methods.²

Quantitative data on heroin is scarce and came primarily from North America. The United States and Mexico reported significant seizures, while Canada reported marginal amounts of seized heroin. Qualitative data also suggested a decline in poppy cultivation in Mexico 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 within the region, with very little heroin shipped to markets in Europe or Asia.

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 2020, fentanyl seizures in North America were approximately 3,600 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. One of the most significant trends reported by the United States is the substantial increase in counterfeit pills that contain fentanyl, referred to as ‘fentanyl-laced.’

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 manufacturing may have moved 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, and that product continues to be sold primarily in the United States. While data from countries in other subregions 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 up to 2020, when a decrease in the number of arrests was registered. Nevertheless, arrest data may be underreported; only 15 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.

1. 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.

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

Arrests related to cannabis are higher than arrests related to cocaine, particularly in South America where the number is double. There is scarce information on gender with respect to drug trafficking, although male arrests are higher than female arrests for all drugs in the Americas.

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 exception of smokable cocaine. For example, for cocaine HCl, the median price per gram at retail is US\$14.15, whereas the median price per gram at wholesale is US\$9.99. In contrast, the median retail price of smokable cocaine is US\$4.20 per gram, and for wholesale, it was US\$9.04.

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. Additionally, the pandemic posed a challenge to 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 collaborating 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 ES-CICAD-led Early Warning System for the Americas, known by its Spanish-language acronym, SATA.

BACKGROUND AND DATA COLLECTION

Improving the collection and dissemination of information on illicit drug production, trafficking, and related issues is a key objective of CICAD's Hemispheric Plan of Action on Drugs 2021-2025. Specifically, the Plan of Action calls for member states to strengthen their drug information systems and improve data collection and analysis mechanisms, as well as share information to inform the development of evidence-based drug policies and strategies.

Between June, 2019, and September, 2021, ES-CICAD convened a series of four meetings of the Technical Working Group on Drug Supply Indicators (TWGDSI). All member states were invited to participate in the TWGDSI.³ During those meetings, the TWGDSI performed a comprehensive review of drug supply indicators, data collection, and systematization methods and agreed upon the scope of a report on drug supply in the Americas.

In accordance with the recommendations of the TWGDSI, ES-CICAD carried out a call for data on drug supply between January and June, 2021, and again between March and July, 2022, which requested both quantitative⁴ and qualitative data.⁵ Quantitative data were collected from the national drug observatories in the form of Excel spreadsheets, and qualitative data were collected via interviews with experts in the drug supply field identified by member states. The TWGDSI performed a technical review of the ES-CICAD's initial statistical analysis in September, 2021. An updated analysis was performed by the ES-CICAD in June, 2022, in order to incorporate the additional data collected in 2022.

The analysis presented in this report focuses on trends in drug supply for the period 2016 to 2020 as that period had the most complete data from the largest number of countries. Note that 2020 data reported by member states tends to exacerbate or deviate from preceding trends. This is likely due to the effect of the first year of the COVID-19 pandemic on law enforcement activities as well as on data collection activities. The majority of countries submitted aggregate measures on drug production, eradication, seizures of drugs, prices, seizures of precursors, destroyed drug processing labs, and arrests involving drug law offenses.⁶ Data was requested for the time period 2016 to 2020, and only those indicators for which there was sufficient data were included in the analysis.

3. The following OAS member states participated in at least one TWGDSI meeting: Antigua and Barbuda, Argentina, The Bahamas, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Dominica, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Saint Lucia, Saint Vincent and the Grenadines, Trinidad and Tobago, United States, and Uruguay.

4. The following OAS member states provided quantitative data for this report: Antigua and Barbuda, Argentina, The Bahamas, Barbados, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Dominica, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Honduras, Jamaica, Mexico, Nicaragua, Paraguay, Peru, Saint Kitts and Nevis, Saint Lucia, Suriname, Trinidad and Tobago, United States, and Uruguay.

5. The following countries provided qualitative data: Antigua and Barbuda, Argentina, The Bahamas, Barbados, Belize, Chile, Colombia, Costa Rica, Dominica, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Honduras, Jamaica, Mexico, Paraguay, Peru, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago, United States, and Uruguay.

6. Arrest data include all arrest events involving drugs as opposed to trafficking arrests only.

The analysis in this report reflects the drug supply situation based on the data shared by member states. Table 1 displays the number of countries that reported on each indicator. The variability in data, differences in reporting practices, and diverse national systems make direct comparisons between countries difficult.

Table 1. Number of countries reporting, by indicator

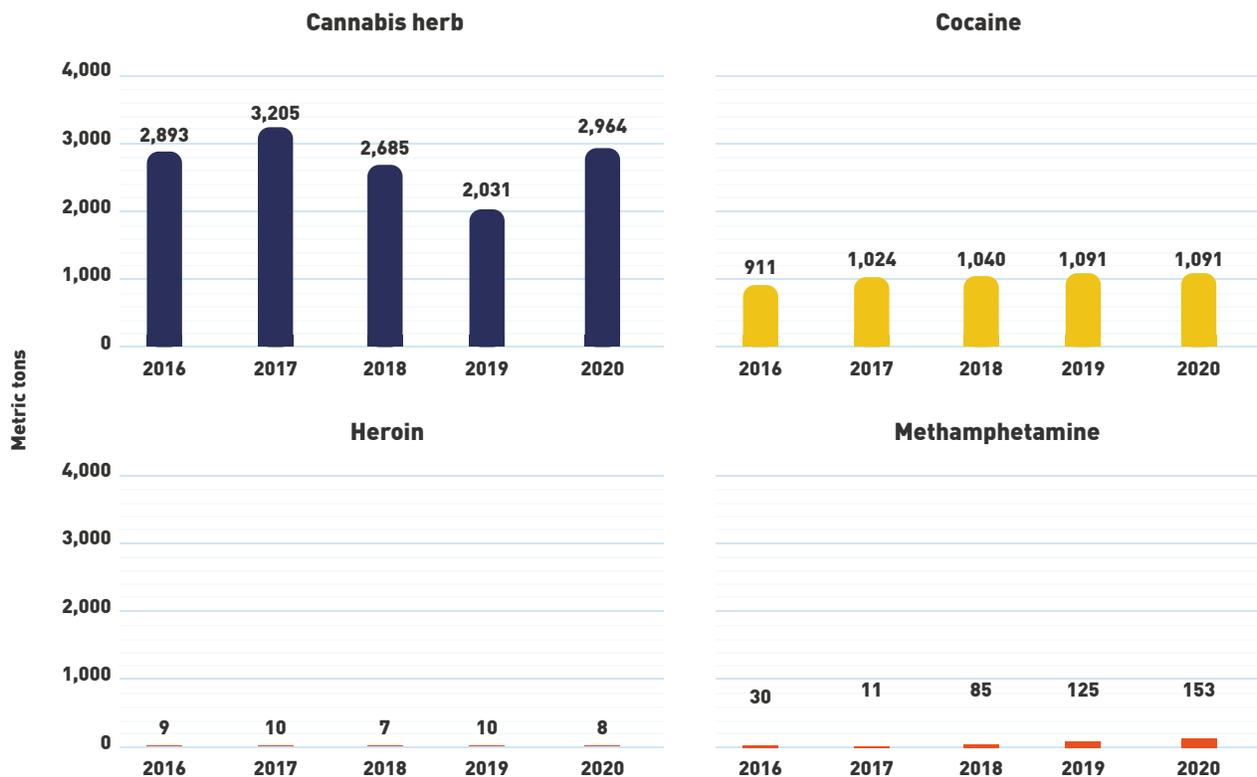
Definition of indicators	Number of countries that responded
Arrests (1) – Number of persons arrested and charged for any drug offense during a calendar year, by sex and by type of drug.	23
Arrests (2) – Number of persons arrested and charged for drug trafficking during a calendar year, by sex and by type of drug.	22
Convictions (1) – Number of persons convicted of any drug offense during a calendar year, by sex and by type of drug.	18
Convictions (2) – Number of persons convicted of drug trafficking during a calendar year, by sex and by type of drug.	12
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Price and Purity (1) – Typical wholesale and retail price and purity of drugs, by type of drug.	20
Price and Purity (2) – Information on the national systems used to monitor the price and purity of drugs.	22
Laboratories – Number of drug manufacturing laboratories seized, by type of drug.	11
Production – Estimated annual production of drugs.	8
Eradication – Total area of illicit cultivation eradicated by drug.	15

TRENDS

Data reflect the unique drug situation in each country; nevertheless, some common trends can be discerned. Most countries reported quantitative and qualitative measures for cannabis and cocaine, while only a few reported on synthetic opioids, heroin, or methamphetamine. There was more information available on cannabis and cocaine trafficking and law enforcement trends; therefore, the analysis primarily focused on these two drugs, with some analysis on heroin and methamphetamine seizures included.

Graph 1 shows the quantity of drugs seized in the Americas, in metric tons, by year. The greatest quantity of seizures throughout the Americas are for cannabis and cocaine, while methamphetamine and heroin are seized in lower quantities.

Graph 1. Seizures in the Americas by drug, by year, in metric tons

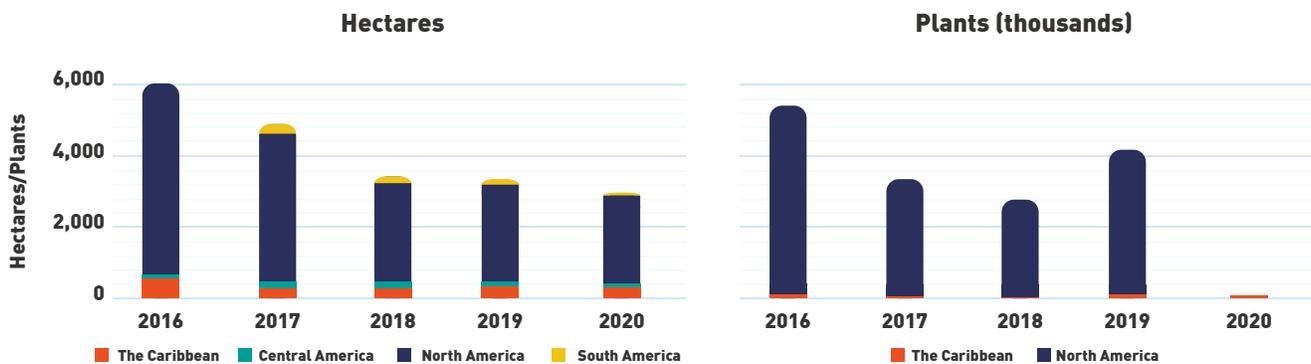


CANNABIS

Eradication

Fourteen countries reported on cannabis eradication. Of those fourteen, eleven reported cannabis eradication by area,⁷ and three reported eradication by number of plants.⁸ For both measures, eradication declined between 2016 and 2020, as shown in Graph 2. Countries using hectares as their metric reported a decline of about 50%. Countries using number of plants as their metric reported a cumulative decline between 2016 and 2018 -- from approximately five million plants to just under three million plants -- and then an increase to approximately four million plants by 2019. Eradication trends for cannabis were primarily driven by North America, with Mexico reporting in hectares eradicated, while the United States reported on plants eradicated. Eradication trends for the countries that reported from the Caribbean, South America, and Central America showed less change over time than North America.

Graph 2. Eradication of cannabis, by subregion and year

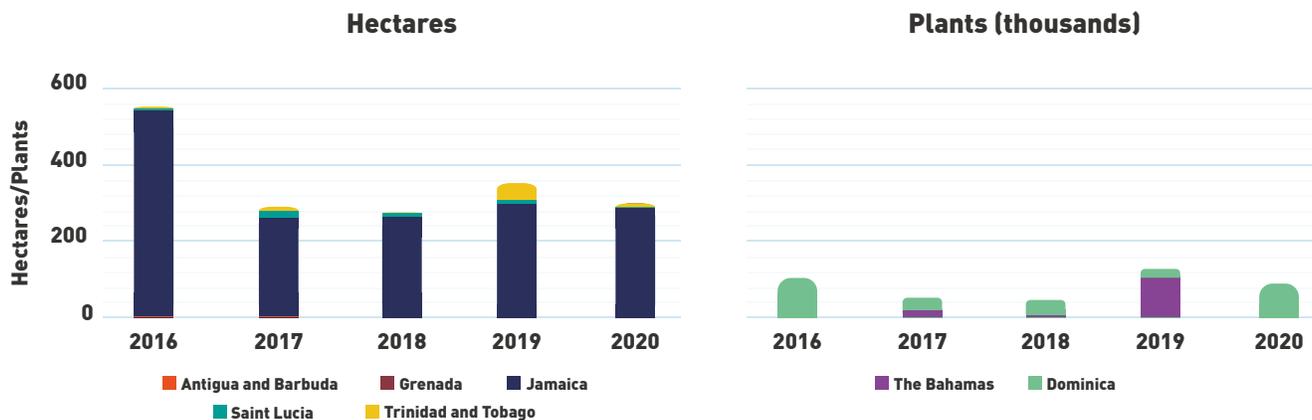


All countries that provided qualitative data reported the existence of domestic cannabis markets and, in many cases, growing domestic cultivation of cannabis. Experts interviewed noted that decriminalization of the possession of small amounts of cannabis may have impacted eradication trends, especially in the Caribbean. In some instances, countries in the Caribbean reported increased cultivation related to changes in laws that reduced penalties for cannabis-related offenses; for example, Jamaica in 2015 began to allow up to five plants to be grown for reasons such as personal use or religious sacrament. In the case of Antigua and Barbuda, since November 2018, up to four cannabis plants per property are allowed. That said, there do not appear to be any substantial changes in the numbers of plants or hectares eradicated for most reporting countries in the Caribbean throughout the time series (Graph 3). There was one notable reduction: Jamaica eradicated over 500 hectares in 2016 but eradicated about half that amount in the following years, which may reflect changes in Jamaican law. In contrast, The Bahamas and Trinidad and Tobago reported a notable increase in eradications during 2019.

7. In order to standardize measures, cannabis eradication by area was converted to hectares.

8. The Bahamas, Dominica, and United States reported eradication by number of plants

Graph 3. Eradication of cannabis in the Caribbean, by country and year

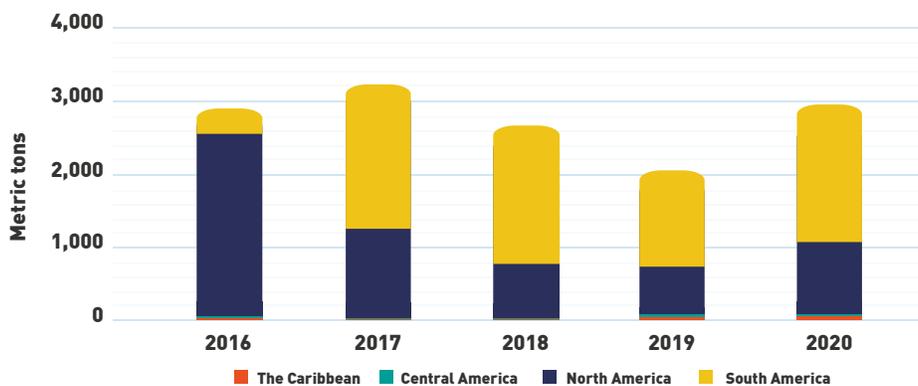


Note: Countries reported either in hectares or plants, exclusively. The Bahamas and Dominica reported the number of plants eradicated while all other countries reported hectares eradicated. Not appearing in the plot area of the graph are Antigua and Barbuda and Grenada because, on average, only 0.97 and 0.32 hectares, respectively, were reported annually.

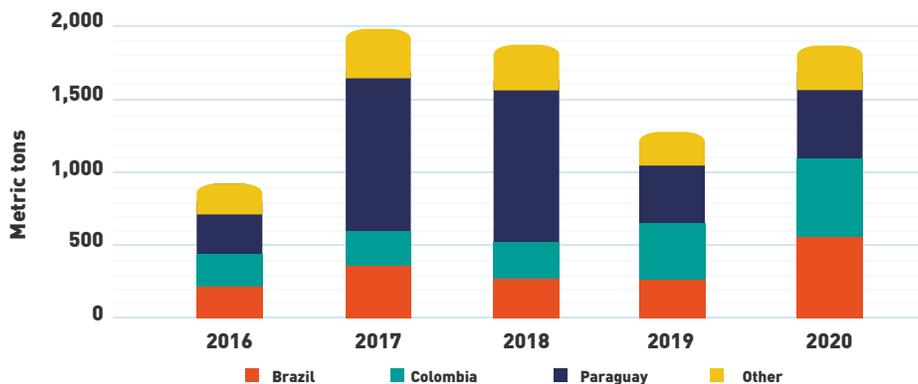
Seizures

Cannabis seizures remain the largest, by weight, of all drugs seized in the Americas. Graph 4 shows that seizure amounts fell dramatically in North America during 2018 and 2019 then rose again in 2020, while remaining stable in the Caribbean and Central America. There was a substantial increase in the weights of seizures in South America between 2016 and 2020 overall.

Graph 4. Metric tons of cannabis herb seized, by subregion and year



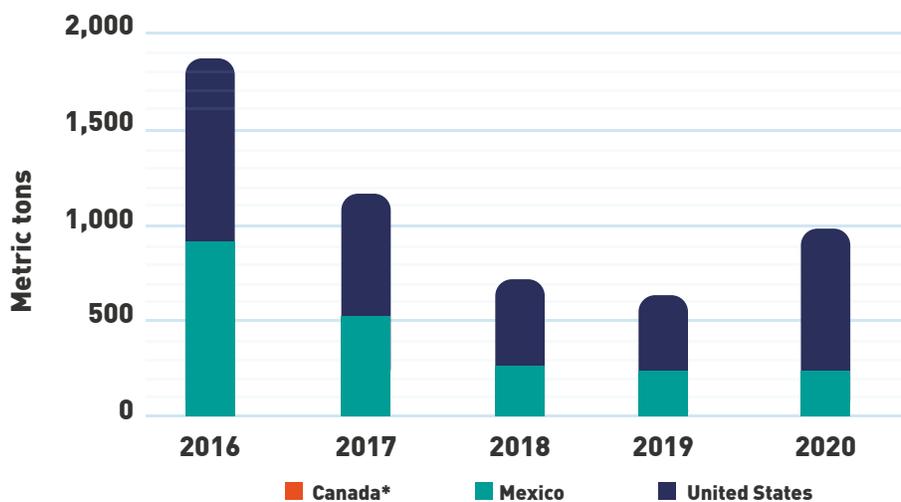
Graph 5. Metric tons of cannabis herb seized in South America, by country and year



Note: The category “Other” includes Argentina, Bolivia, Chile, Ecuador, Guyana, Peru, Suriname, and Uruguay.

Seizures in South America surpassed those in North America during the reporting period. Graph 5 shows that seizures increased from 928 MT in 2016 to over 1,960 MT in 2017, dropped to 1,290 MT in 2019 and increased again to 1,875 MT in 2020. Seizures in South America during the entire period were dominated by Paraguay, with 3,232 MT, followed by Brazil with 1,679 MT, and Colombia with 1,608 MT. In 2016, Brazil and Paraguay combined seized 512 MT of cannabis. Colombia’s seizures increased considerably between 2016 and 2020, while Brazil remained stable up to 2020, when it almost doubled its cannabis seizures. In contrast, Paraguay’s seizures fell dramatically during 2019 and 2020 (after reaching its high in 2017 and 2018). Seizure trends for cannabis in North America were primarily driven by the United States; however, in the case of Mexico, there was a sharp fall from just over 900 MT seized to less than 200 MT in 2020 (Graph 6). Seizures of cannabis in Canada were negligible.

Graph 6. Metric tons of cannabis herb seized in North America, by country and year



*Canada’s reported seizures from 2016 to 2018 were less than 1 MT. In 2019 Canada surpassed 1 MT and in 2020 seizures increased considerably to over 4 MT.

Qualitative data noted the rise of transnational cannabis trafficking in South and Central America. Several countries reported the increased prevalence of a more potent strain of cannabis from Colombia, known as “creepy.”⁹ Qualitative data from Peru and Chile mentioned that “creepy” was appearing in domestic markets and, in some cases, displacing the longstanding domination of Paraguayan-sourced cannabis. Guyana also highlighted the appearance of a strain of cannabis from Venezuela known locally as “poppy” or “creppy” that was becoming very popular in the local market. Similarly, The Bahamas expressed concern about the presence of “creepy” in other parts of the Caribbean. The rise in seizures of cannabis in South America could reflect increased trafficking of cannabis from regional producers, more effective interdiction by the security forces, and/or a greater focus by law enforcement agencies on cannabis.

Most of the Caribbean countries that provided qualitative data highlighted the subregion’s role in the illegal production and trafficking of cannabis, although it may be important to note that some of that trafficking was within the Caribbean. Eight countries¹⁰ in the Caribbean noted that cannabis cultivation and trafficking were increasing, while Jamaica noted that its cannabis is regarded as superior quality, with high demand internationally. Information from Caribbean countries also suggests that the decrease in seizures in the region might reflect changes in cannabis laws. There have been legal efforts throughout the region to reduce penalties for minor possession. For example, possession of up to two ounces has been decriminalized in Jamaica since 2015. In Antigua and Barbuda, the possession of up to 15 grams of cannabis is considered for personal use and does not result in criminal sanctions.

9. The emergence of “creepy” has also been reported by the CICAD Early Warning System for the Americas, (SATA, by its Spanish-language acronym). See: <http://www.cicad.oas.org/oid/pubs/Bolet%C3%ADn%20ENG.pdf>

10. Antigua and Barbuda, The Bahamas, Dominica, Jamaica, Saint Kitts and Nevis, Saint. Lucia, Saint Vincent and the Grenadines, and Trinidad and Tobago.

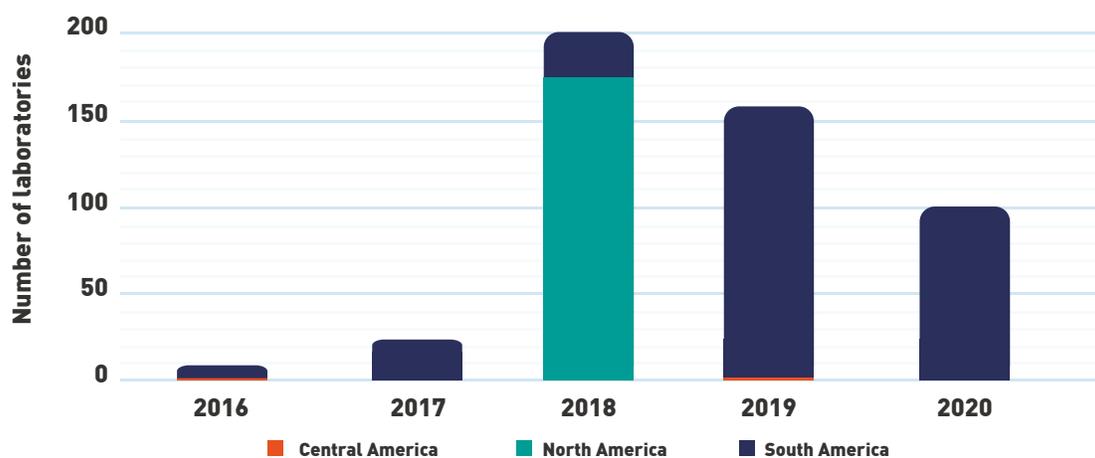
Therefore, seizure data from the Caribbean may increasingly reflect only wholesale seizures as retail-level amounts of cannabis may not be a priority for law enforcement.

Qualitative data from Central America reported innovative forms of cannabis trafficking, such as liquid marijuana or marijuana suspended in wax. In Honduras, cannabis seizures are more widespread, and are reported in all 18 departments of the country. In addition, traffickers have been more creative in efforts to conceal the drug, for example, by disguising sacks of cannabis as passengers in vehicles. The United States and Mexico described distinct situations concerning cannabis. According to data from Mexico, the decrease in marijuana seizures is due to an increase in synthetic drug trafficking. At the same time, the ‘Golden Triangle’¹¹ area has increased marijuana cultivation. In the United States, marijuana possession and trafficking are given little investigative attention unless in conjunction with a serious crime such as money laundering.

Laboratories

Graph 7 refers to the number of cannabis lab seizures, mostly cannabis processing facilities that extract tetrahydrocannabinol (THC) for manufacture into resin or concentrate. It shows a sizeable one-off year of seizure events in North America for 2018 (all in the United States) and a considerable rise in the number of labs seized in South America; seizures of labs in Argentina steadily rose from six to 24 between 2016 and 2018 before jumping to 154 in 2019. Nevertheless, data reported in 2020 showed a decrease of more than 50% in lab seizures in South America.

Graph 7. Number of cannabis processing laboratories seized, by subregion and year



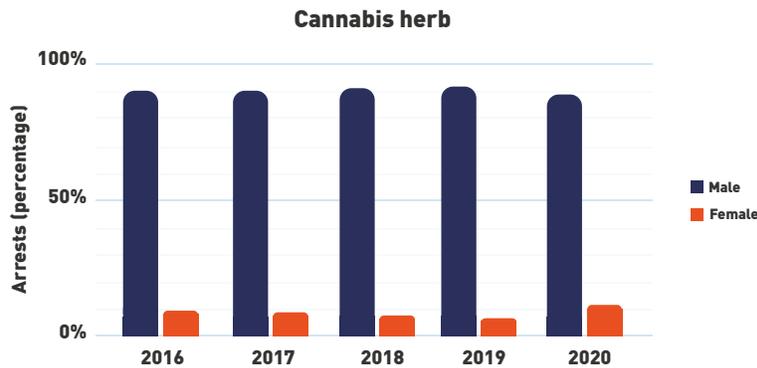
Note: There were no reports of labs seized in the Caribbean subregion during the reporting period.

11. “The region where Sinaloa comes together with the states of Chihuahua and Durango is a drug-growing area sometimes called Mexico’s ‘Golden Triangle’ after the productive area of Southeast Asia by the same name. In this region, a third of the population is estimated to make their living from the illicit drug trade.” Congressional Research Service. Mexico: Organized Crime and Drug Trafficking Organizations; June 7, 2022. <https://sgp.fas.org/crs/row/R41576.pdf> Accessed: 09/19/2022.

Arrests

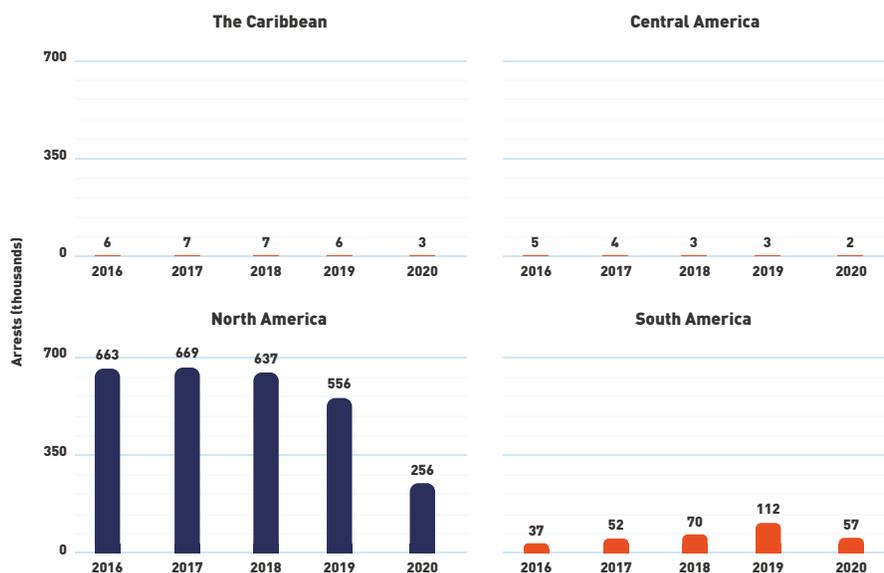
Only 15 member states reported arrest totals for cannabis, thus the data likely under-report the total number of arrests for drug supply in the Americas. It is worth noting that there is insufficient information on the role that gender plays in the trafficking of drugs. Male arrests are higher than female arrests for all drugs in the Americas including cannabis (Graph 8). At the same time, the proportions of female and male arrests appear to be stable over time.

Graph 8. Number of persons arrested for cannabis herb-related offenses, by sex and year



As shown in Graph 9, there were very few arrests for cannabis across the Caribbean and Central America, with counts never surpassing 10,000 in a year. South America stands out for both the quantity of arrests and for the increasing number of cannabis-related arrests. This upward trend is driven entirely by increases in cannabis arrests in Argentina, which nearly quadrupled from 26,502 to 98,775 between 2016 and 2019.¹² Considering rising lab seizures in Argentina,¹³ it is possible that the illegal cannabis market has been growing in recent years. A sizable number of arrests are reported in North America, driven by arrests in the United States (Graph 10). While the overall trend in the Hemisphere decreased between 2019 and 2020, the number of arrests for cannabis remains high in comparison to other drugs.

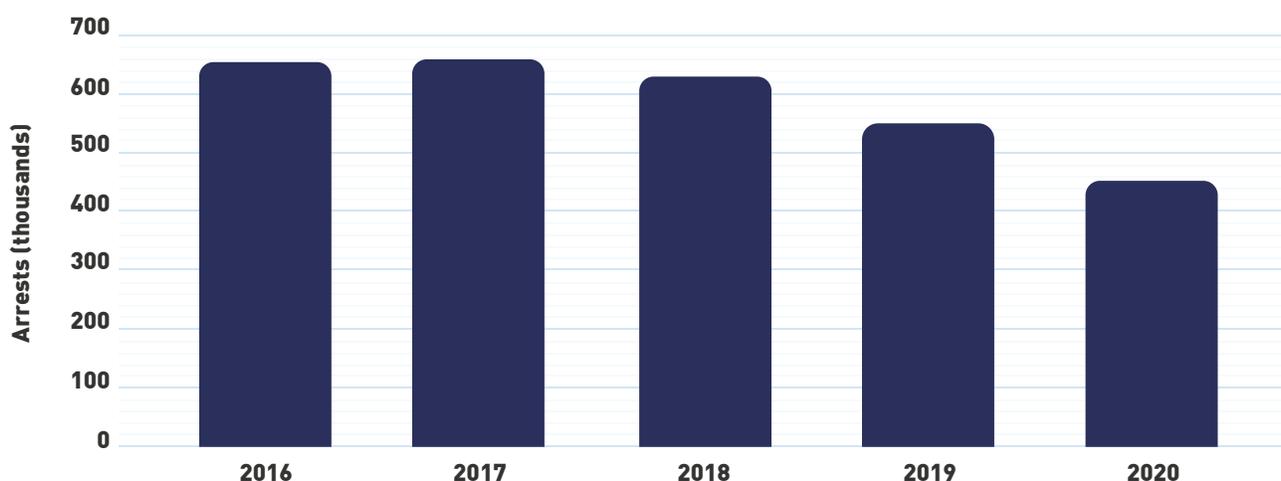
Graph 9. Number of persons arrested and charged for cannabis herb-related offenses, by subregion and year



12. Argentina reported that the method for collecting arrest data changed in 2017. According to the experts interviewed, this explains the exponential increase of the arrests related to cannabis.

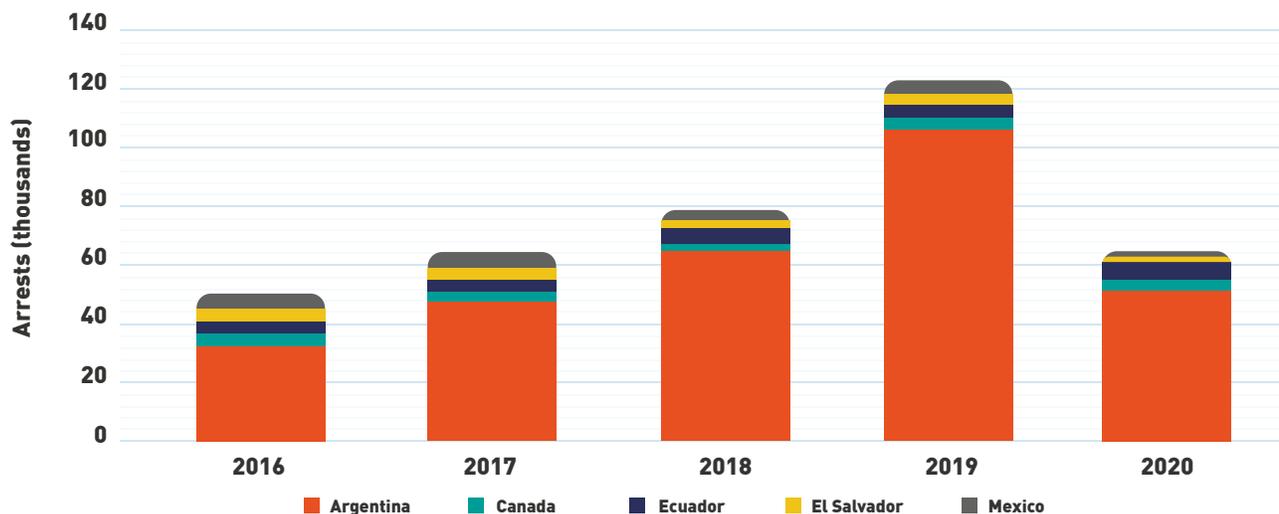
13. According to qualitative data obtained from Argentina, the concept “Illegal Processing Center (Spanish acronym, CPI)” is used to refer to “laboratories.” Illegal facilities in which cocaine HCl (or other drugs such as ecstasy-type substances, amphetamine-type stimulants or LSD) are produced, as well as facilities in which the substances are adulterated, stretched, cut, or conditioned for sale, are all counted as laboratories.

Graph 10. Number of persons arrested and charged for cannabis herb-related offenses in the United States, by year



The United States reported the largest number of arrests for cannabis in the Americas, with a noticeable downward trend (Graph 10), followed by Argentina, Ecuador, Mexico, Canada, and El Salvador, as shown in Graph 11.

Graph 11. Top five countries in the Americas with the highest number of persons arrested and charged for cannabis-related offenses, by year (excluding the United States)



Note: Data for the United States is presented in Graph 10.

In the case of Argentina, which saw a large increase in the number of arrests over time, it is worth noting that the country applied a new definition of arrest in 2017, which includes anyone who had contact with police through a notification, a traffic stop, or a detention, regardless of the judicial outcome of the action. Additionally, even though drug trafficking is a federal offense and federal forces are responsible for reporting arrests, drug-related minor offenses are the responsibility of the provinces, and these provincial-level figures were included in the national quantitative data provided by the country. As such, 'arrests' in Argentina has a much broader definition than in most other countries.

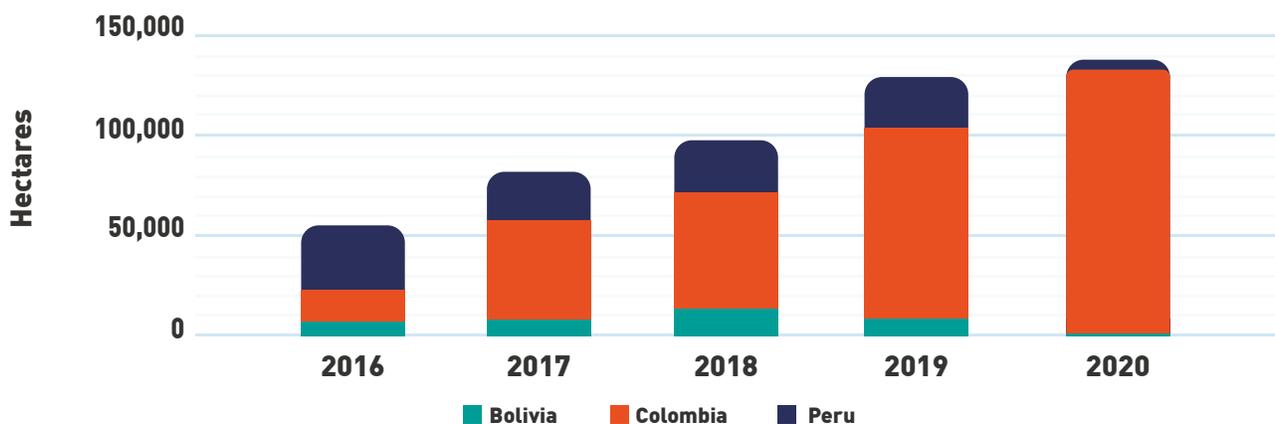
COCAINE

Coca Eradication

The three largest cocaine producing countries -- Bolivia, Colombia, and Peru -- all reported on coca eradication (Graph 12). The majority of eradication occurred in Colombia, where numbers jumped from around 18,000 hectares in 2016 to over 130,100 in 2020. Peru reported eradicating approximately 30,000 hectares in 2016, a total that decreased slightly in subsequent years to an annual average of 26,000 hectares between 2017 and 2019, then decreased to 6,272 in 2020. Bolivia reported eradication of about 6,500 hectares in 2016, increasing, to over 11,100 in 2018, and then decreasing in the subsequent two years, to 2,177 in 2020.

Qualitative data from Bolivia and Peru suggested that the COVID-19 pandemic has deepened the trend related to the decrease in coca eradication. Experts indicated that the pandemic made it difficult to control illegal crops and to conduct eradication exercises. This is because security forces were often re-directed to perform different tasks, and new pandemic-related safety protocols slowed standard eradication operations.

Graph 12. Eradication of coca in Bolivia, Colombia, and Peru, by country and year



Note: Not shown in this graph, Guatemala reported the eradication of nearly 40 hectares in both 2018 and 2019.

The qualitative data for Colombia noted a sharp increase in coca eradication and continued cocaine interdiction efforts since 2017. In addition, the qualitative data contextualized the nature of coca cultivation, noting the use of enhanced cocaine processing methods. The data from Colombia also indicated increased lab capacity, access to precursor chemicals, and an uptick in the number of labs used to locally manufacture precursor chemicals such as sulfuric acid and potassium permanganate that are used for cocaine production. Colombia cited examples of methods used to enhance cocaine hydrochloride (HCl) production, such as new methods to dilute base that reduce processing time; recycling and reusing solvents to optimize processing; specialized, handcrafted equipment; and using different varieties of coca, some of which have longer productive lives. Colombia also expressed concern about the rising number of processing facilities, especially those closer to population centers, such as Bogota. Qualitative data from Peru also indicated changes in cocaine processing methods, an example being the replacement of lime and acids with cement and common salt in the drying and refinement stages of cocaine HCl production.

Guatemala reported coca eradication for 2018, 2019, and 2020 of 0.9, 37.3, and 24.4 hectares, respectively. Qualitative data from Guatemala, Honduras, and Mexico documented the discovery of small coca plantations in recent years, with cultivation occurring near natural water sources. Cocaine processing labs have also been discovered near some of these new coca growing areas.

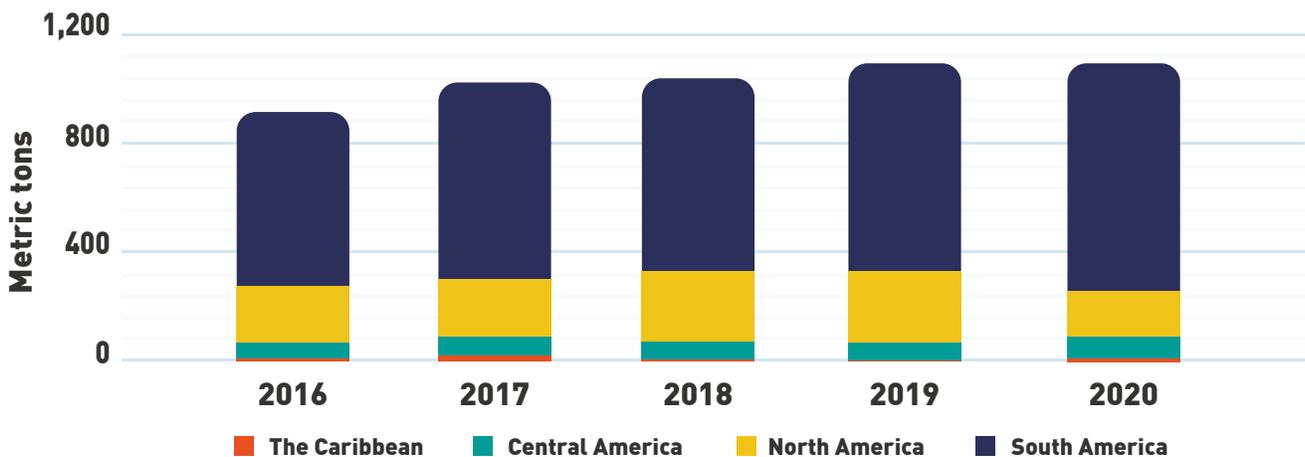
Seizures

Countries that provided qualitative data reported cocaine as a primary drug of concern in addition to cannabis. Most reported international cocaine trafficking, with some countries also reporting domestic consumer markets for cocaine (or crack), including The Bahamas, Guatemala, Honduras, Trinidad and Tobago, and the United States. Overall, countries noted containerized or cargo shipping of cocaine destined for North American or European markets remains the preferred trafficking method. Brazil has one of the largest consumer markets for cocaine due to its size, and it serves as a major transshipment hub for cocaine going to Europe.¹⁴

The majority of countries reported cocaine seizure data. Total seizures rose from 911 MT in 2016 to 1,091 MT in 2019 and 2020 (Graph 13). South America, the region where this drug is produced in the largest quantities, reported the greatest proportion of seizures throughout the period. In South America, seizures rose from around 630 MT to nearly 838 MT between 2016 and 2020. Colombia’s seizures went from 408 MT in 2016 to 581 MT in 2020, while Bolivia’s seizures decreased about 50% during the same period, from around 30 MT to around 16 MT. Brazil reported an increase in seizures, rising from 41 MT in 2016 to 105 MT in 2019 and then falling slightly to 91 MT in 2020. Ecuador’s seizures decreased from 97 MT in 2016 to 57 MT in 2019, then rose again to 92 MT in 2020.

During the entire period 2016 to 2020, Colombia seized the vast majority of cocaine, with seizures of 2,425 MT, followed by Ecuador, Brazil, and Bolivia, which reported seizures of around 410, 365, and 97 MT, respectively.

Graph 13. Metric tons of cocaine seized, by subregion and year



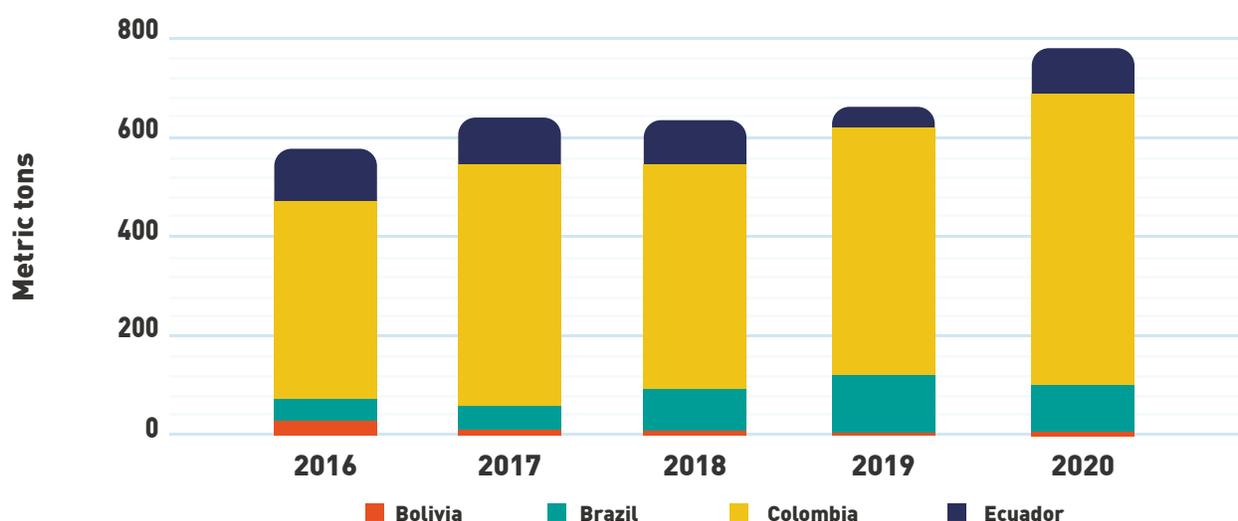
North American seizures (almost all in the United States) rose from approximately 220 MT to slightly over 270 MT between 2016 and 2019. In 2020, however, seizures decreased to 170 MT in this subregion.

14. Governo Federal do Brasil, Ministério da Justiça e Segurança Pública, Secretaria Nacional de Políticas sobre Drogas e Gestão de Ativos. II Relatório Brasileiro sobre Drogas, Brasília, 2021. <https://repositorio.unifesp.br/handle/11600/63024> Accessed: 09/19/2022.

The Caribbean reported a decrease in seizures, from 13 MT in 2016 to 9 MT in 2020. In Central America, seizures rose steadily from approximately 51 MT in 2016 to slightly over 71 MT in 2020.

Graph 14 shows the South American countries leading cocaine seizures, two of which are among the main producers (Bolivia and Colombia) and two among the principal transit countries for markets both within and outside the Americas (Brazil and Ecuador).

Graph 14. Metric tons of cocaine seized in South America, by country and year



Larger seizures in Central America reflect the region’s importance as a transshipment point for cocaine traveling from South America to North America and Europe. Qualitative data noted the use of land, air, and sea-based routes of transit, including non-commercial vessels as well as commercial vessels. Nevertheless, containerized shipments remain the preferred method in cocaine trafficking.

Laboratories

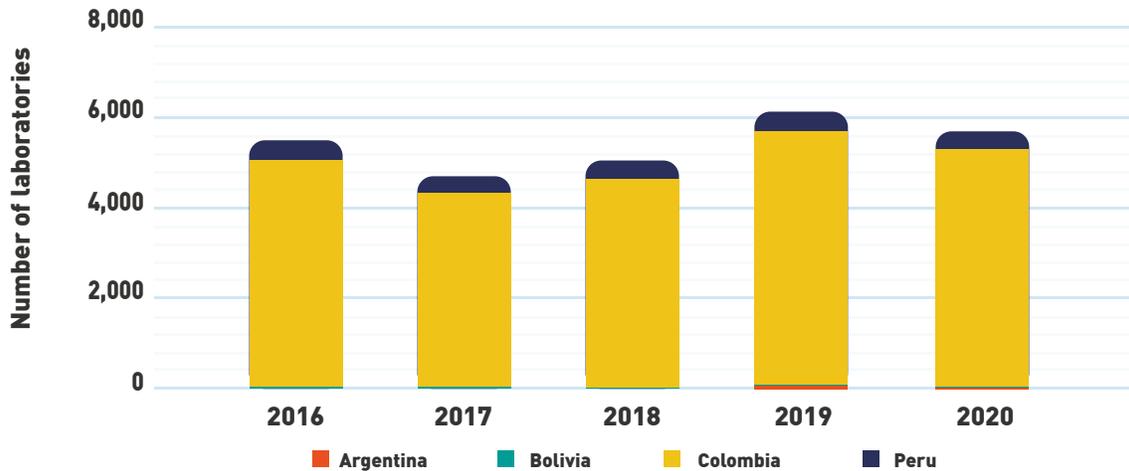
The majority of countries reported seizures of cocaine processing labs through 2020.¹⁵ As shown in Graph 15, most cocaine lab seizures were in Colombia, and grew in that country from 4,820 in 2016 to 5,226 in 2020. These figures include all labs that process cocaine base or paste as well as cocaine HCl. Lab seizures decreased in Bolivia from 68 to 36, and Peru reported a marked decrease from 629 to 327, both decreases during the reporting period. Argentina’s lab seizures quintupled, from 21 lab seizures in 2016 to 126 in 2019.¹⁶ Several countries in Central America, such as Guatemala and Honduras, also reported annual lab seizures, though counts were mostly in the single digits.

Colombia’s qualitative data indicated the use of enhanced processing methods, especially in those labs that are closer to population centers. The country’s data also highlighted the increased capacity of labs given their larger footprint, reductions in processing time, and increased access to precursors. There has also been a growth in labs that manufacture precursor chemicals used in cocaine production, including sulfuric acid and potassium permanganate.

¹⁵ All cocaine types were grouped together: crack, base or paste, and hydrochloride.

¹⁶ Argentina reported that in 2017 its definition for lab seizures was changed to include facilities where cocaine is packaged for sale in the retail market

Graph 15. Number of cocaine processing laboratories seized, by country and year

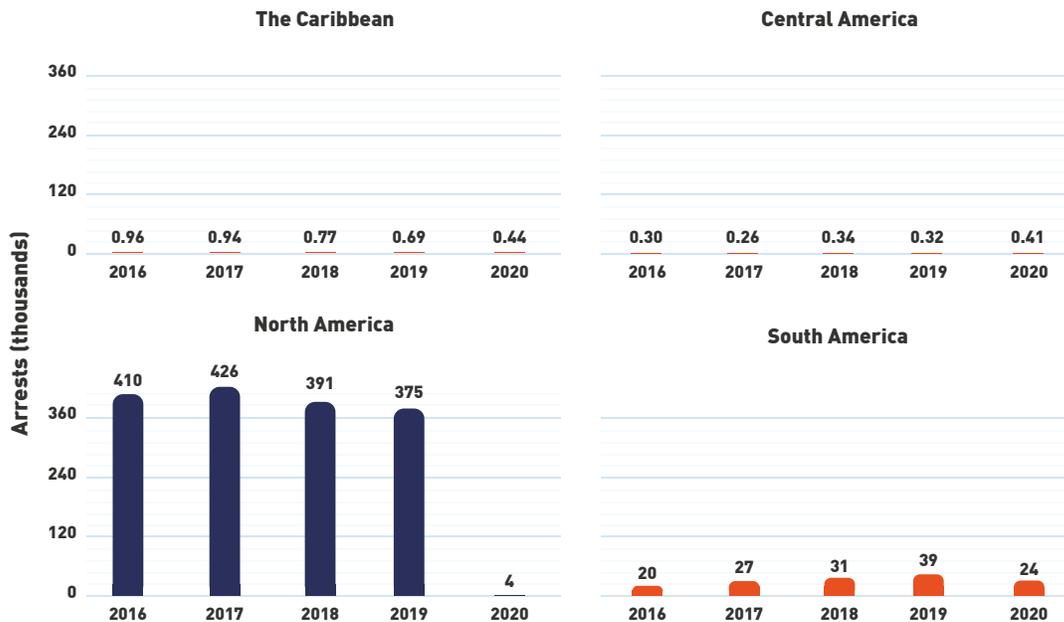


Note: The number of labs seized per year in Argentina ranged from 21 to 126, and in Bolivia from 36 to 68.

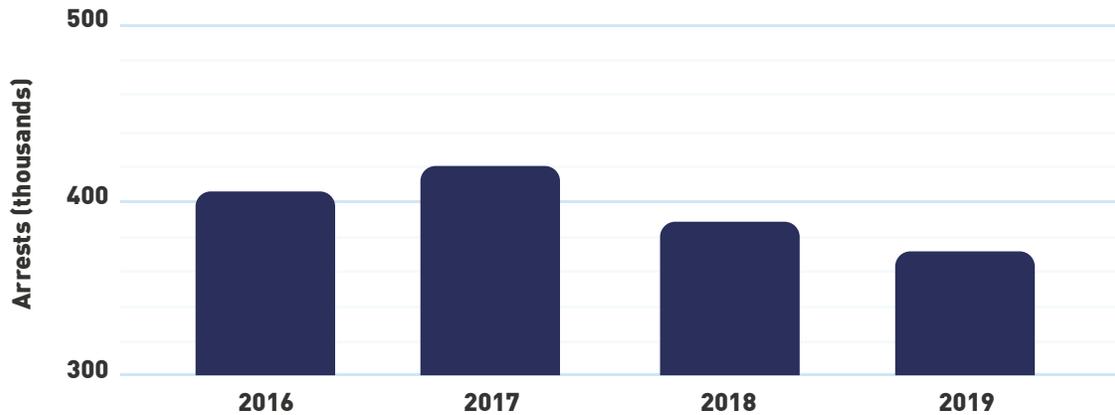
Arrests

Thirteen countries reported cocaine-related arrest totals for cocaine. Thus, the data presented may under-represent the total for the region as a whole. As shown in Graph 16, there were very few arrests for cocaine across the Caribbean and Central America, with numbers rarely surpassing 3,000 in a year. North America, driven by the considerable number of arrests in the United States (Graph 17), reached more than 400,000 between 2016 and 2019. In South America, Argentina and Ecuador reported the largest number of arrests for cocaine. Graph 18 shows the top five countries in the Americas based on number of arrests for cocaine. Argentina’s cocaine arrests nearly tripled, from 10,549 to 27,780 between 2016 and 2019. Arrests in Ecuador involving cocaine remained relatively stable over time at around 5,000 per year, followed by Canada, Mexico and Trinidad and Tobago, which averaged 1,843, 947, and 500 arrests per year, respectively.

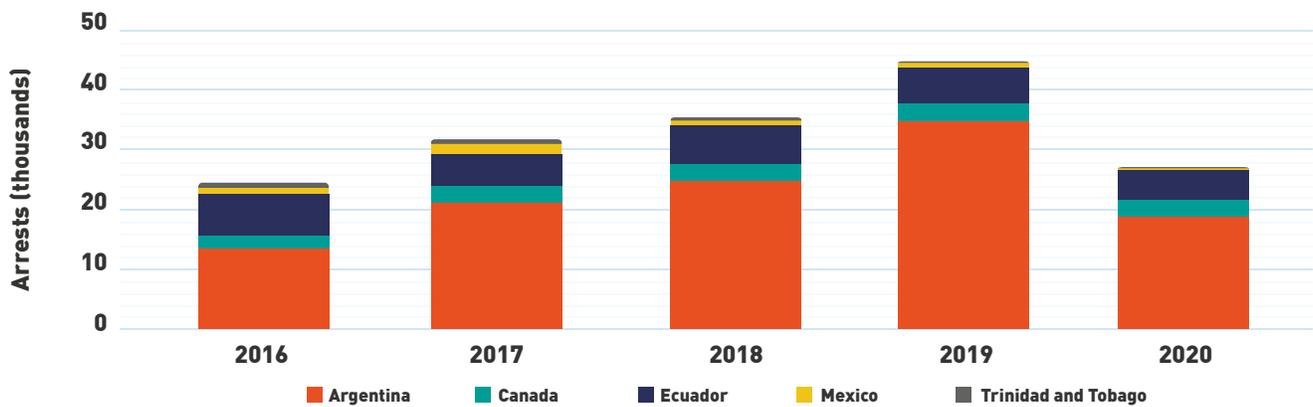
Graph 16. Number of persons arrested and charged for cocaine-related offenses, by subregion and year



Graph 17. Number of persons arrested and charged for cocaine-related offenses in the United States, by year



Graph 18. Number of persons arrested and charged for cocaine-related offenses, by year (top five countries excluding the United States)



Note: Data for the United States are presented in Graph 17.

FENTANYL AND OTHER SYNTHETIC OPIOIDS

Trafficking of illicit fentanyl and other synthetic opioids into the United States and Canada has fueled national epidemics with fatal consequences. Fentanyl, one of the most dangerous synthetic opioids and the focus of this section, has had by far the greatest impact on these two countries. Fentanyl is trafficked in small quantities, making it difficult to detect. In 2020, fentanyl seizures in North America were about 3,600 kilograms.

The United States reported that opioid overdose deaths were 68,630 for the year 2020,¹⁷ while Canada reported a total of 4,395 opioid overdose deaths in the same year.¹⁸ One of the most significant trends reported by the United States is the substantial increase in counterfeit pills that contain fentanyl, referred to as ‘fentanyl-laced.’ These drugs have not appeared in the licit market for pharmaceuticals, but they are trafficked extensively. The United States has started an awareness campaign on the presence of counterfeit pills and the deadly consequences associated with their use. Canada has produced educational awareness resources for opioids including videos, factsheets, and posters;¹⁹ the End Stigma Campaign and the Opioid Awareness Campaign focus on the need to stop the use of opioids, ask for help and avoid overdoses particularly from street drugs adulterated with fentanyl.

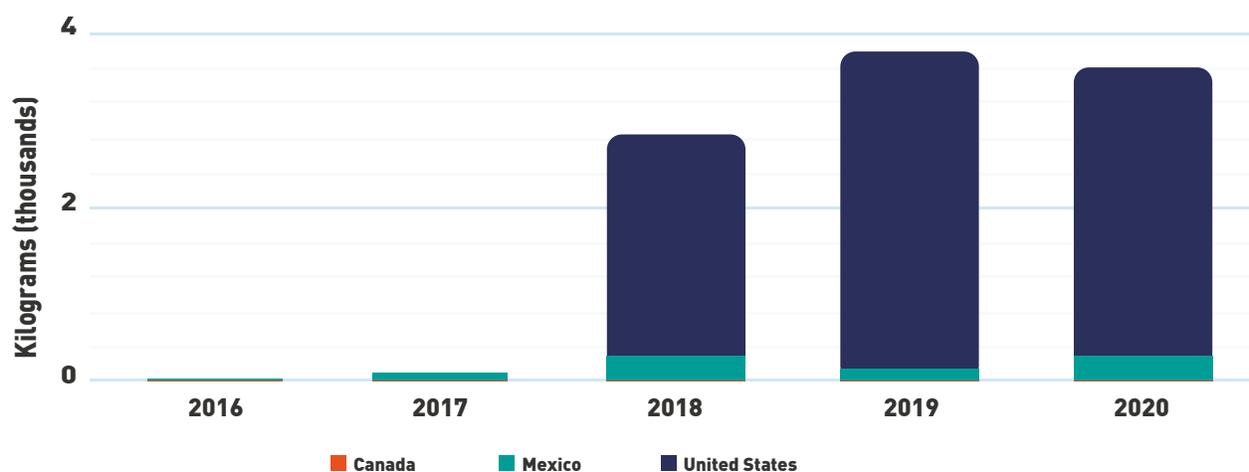
The presence of fentanyl has received a great deal of attention from law enforcement in the United States, which reported two key trends concerning fentanyl and the proliferation of counterfeit pills. First, the price of fentanyl has been dropping. Second, authorities noticed the drug being mixed with other drugs as the price dropped. Fentanyl first appeared on the market mixed with heroin because of their similar effects, and the United States has observed an increase of fentanyl mixed with cocaine. Users have been buying cocaine unaware that the cocaine contains fentanyl, which has driven up overdoses.

17. Centers for Disease Control and Prevention. Overdose Deaths <https://www.cdc.gov/drugoverdose/deaths/index.html> Accessed: 09/21/2022.

18. Government of Canada, Health Canada. *Opioid and Stimulant Related Harms in Canada* <https://health-infobase.canada.ca/substance-related-harms/opioids-stimulants/> Accessed: 02/02/2022.

19. Government of Canada, Health Canada: <https://www.canada.ca/en/health-canada/services/opioids/awareness-resources.html> Accessed: 06/07/2022.

Graph 19. Fentanyl seizures in North America, by country and year



Note: Mexico reported seizures of 13 kg in 2016. Canada reported seizures of 17 kg in 2016, and less than 13 kg per year between 2017 and 2020.

As Graph 19 shows, fentanyl seizures have been increasing since 2017 and remain high, particularly for the United States during 2019 and 2020.

Additional qualitative data from Mexico showed that fentanyl has been produced domestically since 2011; however, it is not considered a public health problem due to its low consumption. The fentanyl produced in Mexico is mainly from Sinaloa, and most is trafficked to Canada and the United States. Separately, organized crime groups in Asian countries such as China and India have taken advantage of Mexico’s geographic position and are trafficking fentanyl to Mexico, also for shipment to Canada and the United States. Several other OAS member states mentioned their concern over how pharmaceutical fentanyl is controlled, even if its presence in drug markets is small.

A 2021 bulletin published by ES-CICAD included a summary of recent studies carried out with the support of ES-CICAD on the presence of opioids in Argentina, Peru, the Dominican Republic, and Uruguay. Although synthetic opioid use is much lower in these countries than in North America, use exists in specific populations. For example, studies in Argentina and Uruguay identified concerning levels of opioid misuse among healthcare workers.²⁰

²⁰ Inter-American Drug Abuse Control Commission (CICAD), Organization of American States (OAS). Information Bulletin No.2: *Summary of Main Findings from the Emerging Threats Project: New Psychoactive Substances, Heroin, Fentanyl, and Other Opioids*, April 2021. <http://www.cicad.oas.org/oid/pubs/BP2%20ENG.pdf> Accessed: 09/19/2022.

HEROIN

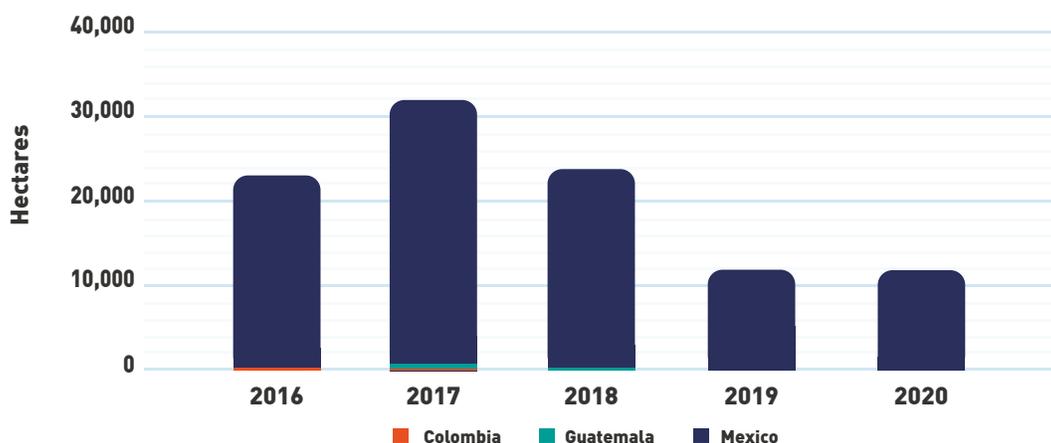
Although the use of fentanyl and other synthetic opioids has become an epidemic in Canada and the United States, most of the quantitative data regarding opioids received for this report concerned heroin. The Dominican Republic, using data from a study supported by ES-CICAD, has reported on local heroin markets since 2013.²¹ Similarly, a study conducted with support from ES-CICAD in Mexico revealed a growing market for heroin (in some cases possibly adulterated by synthetic opioids, including fentanyl) in cities bordering the United States. Guatemala, Mexico, and the United States mentioned heroin as a drug of concern. Colombia, the Dominican Republic, and Ecuador reported a low prevalence of heroin use and did not identify it as a significant drug supply concern. Colombia has reported on opioid seizures since 2019, according to qualitative data collected. While some poppy plant cultivation exists in Ecuador, qualitative data suggests that this may not be a profitable business for producers and traffickers because of the relatively small amounts produced.

Poppy Eradication

Unlike cocaine, heroin trafficking is mainly within the Americas; very little heroin produced in the region goes to markets in Asia or Europe, and very little heroin produced in Asia makes its way to the Western Hemisphere.

Three countries reported poppy eradication in hectares: Colombia, Guatemala, and Mexico. Colombia and Mexico have long been known as source countries for heroin markets in the Americas. Mexico reported the greatest amount of poppy eradicated, with tens of thousands of hectares eradicated per year. As Graph 20 shows, Mexico's eradication efforts peaked in 2017 at just over 30,000 hectares and then declined to approximately 12,000 hectares in 2019 and 2020; this decline may mirror the overall decline in poppy cultivation that has been measured elsewhere.²² Colombia and Guatemala each reported eradicating less than 1,000 hectares in any given year.

Graph 20. Eradication of poppy, by country and year



Note: In each year, Colombia and Guatemala each reported figures that range from less than one hectare to 814 hectares.

21. Gobierno de República Dominicana, Consejo Nacional de Drogas (CND); Comisión Interamericana para el Control del Abuso de Drogas (CICAD). *Estudio de Caracterización de Heroína y otros Opioides en dos Ciudades de la República Dominicana, Informe Final*, diciembre de 2019. <http://www.cicad.oas.org/oid/pubs/Rep%20Dominicana%20-%20Informe%20estudio%20usuarios%20de%20hero%C3%ADna%202019%20-%20FINAL%20-%20DIC%202012%202019.pdf> Accessed: 09/19/2022.

22. Oficina de las Naciones Unidas contra la Droga y el Delito (UNODC); Gobierno de México. *México, Monitoreo de Plantíos de Amapola 2018-2019*. Ciudad de México, 2021. https://www.unodc.org/documents/crop-monitoring/Mexico/Mexico_Monitoreo_Plantios_Amapola_2018-2019.pdf Accessed: 09/19/2022.

Seizures

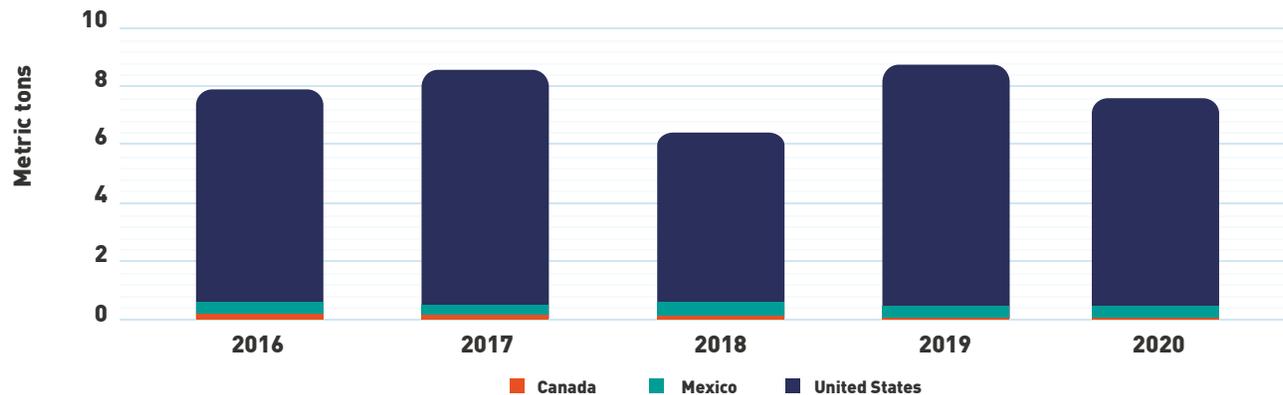
The paucity of heroin supply data outside of North America suggests that most of the heroin trade in the Americas involves a smaller number of countries and routes. Overall, and not surprisingly, heroin seizure totals reported were much smaller than seizure totals reported for cannabis or cocaine. Seizure totals never surpassed 10 MT in the years analyzed (Graph 21). The vast majority of seizures in the Hemisphere occurred in North America and fluctuated between 6 MT and 9 MT during the reporting period. Almost all North American seizures occurred in the United States (Graph 22). South American seizures of heroin did not exceed 1 MT during any year of the reporting period, with Colombia and Ecuador accounting for the majority of the heroin seized. Ecuador reported three times more seizures in 2020 than in 2016. Colombia’s heroin seizures decreased from about 520 kilos in 2016, to around 260 kilos in 2020.

Graph 21. Metric tons of heroin seized, by subregion and year



Note: The Caribbean and Central American regions each reported less than 0.1 tons of heroin seized in all years except 2016, when 0.14 tons were reported by Central America.

Graph 22. Metric tons of heroin seized in North America, by country and year



METHAMPHETAMINE AND OTHER AMPHETAMINE-TYPE STIMULANTS (ATS)

Methamphetamine accounted for the vast majority of quantitative data reported by member states on amphetamine-type stimulants (ATS), although qualitative data suggests markets exist for other synthetic drugs, such as ecstasy-type substances and new psychoactive substances (NPS). In 2020, ES-CICAD reported alerts from Chile and Uruguay through its Early Warning System for the Americas (SATA, by its Spanish-language acronym) on the presence of 3,4-methylenedioxymethamphetamine (MDMA), popularly known as “ecstasy”.²³ In the same information bulletin, Argentina reported the presence of NPS from the group of phenethylamines of the N-methoxybenzyl (NBOMe) type.

Seizures

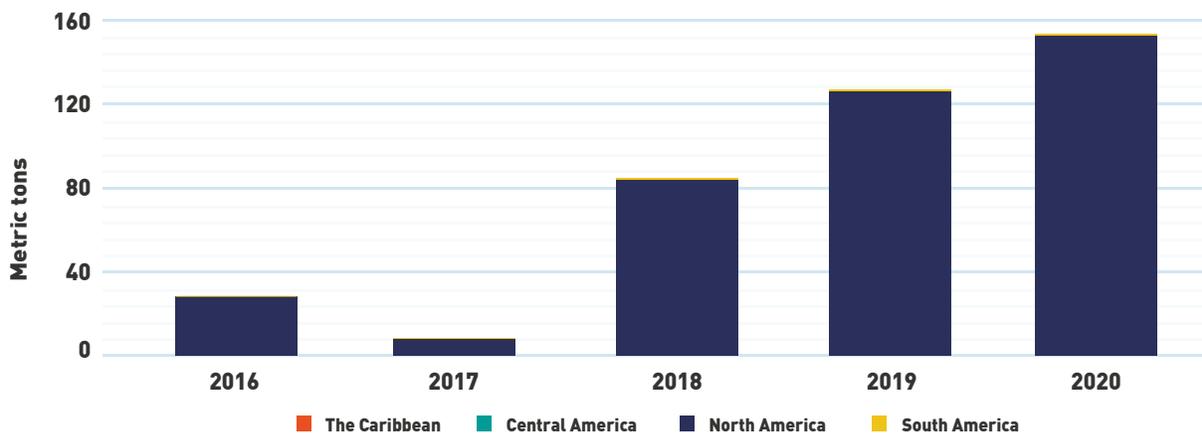
Data on methamphetamine seizures are very sparse. According to the data provided, North America accounts for 99.9% of all methamphetamine seized in the Hemisphere (Graph 23). There is a clear upward trend in seizure totals involving methamphetamine in North America, which rose from 80 MT to 153 MT between 2016 and 2020.

Among the countries that provided qualitative data, only Mexico and the United States mentioned methamphetamine as a major concern, with most seizures reported in the United States. Mexico reported seizure totals ranging from 11 to 30 metric tons per year, and Canada seized less than one metric ton per year (Graph 24). While most of the methamphetamine seizures were in North America, it is important to highlight that Brazil reported a considerable number of seizures of amphetamine, methamphetamine and ecstasy-type substances, the latter reaching a peak in 2017 of more than 750 thousand units.²⁴

23. Inter-American Drug Abuse Control Commission (CICAD), Organization of American States (OAS). *Bulletin No. 1 Data from the Early Warning System for the Americas*, April 2020. <http://www.cicad.oas.org/oid/pubs/Bolet%C3%ADn%20ENG.pdf> Accessed: 09/19/2022.

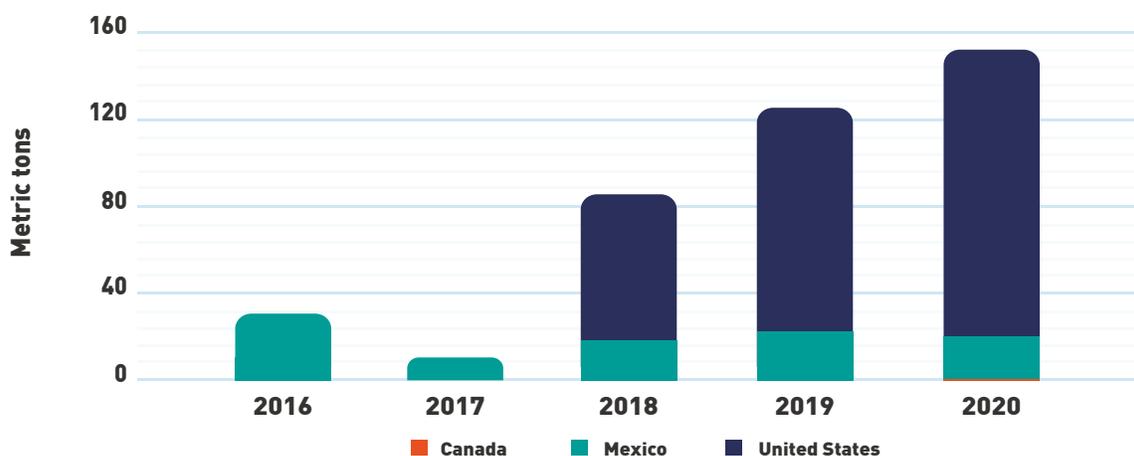
24. Brazil reported its seizures in ‘units’ as opposed to metric tons.

Graph 23. Metric tons of methamphetamine seized, by subregion and year



Note: The Caribbean, Central American, and South American sub-regions each reported less than 0.1 tons of methamphetamine seized in all years.

Graph 24. Metric tons of methamphetamine seized in North America, by country and year



Note: Canada reported seizures of less than 1 metric ton per year.

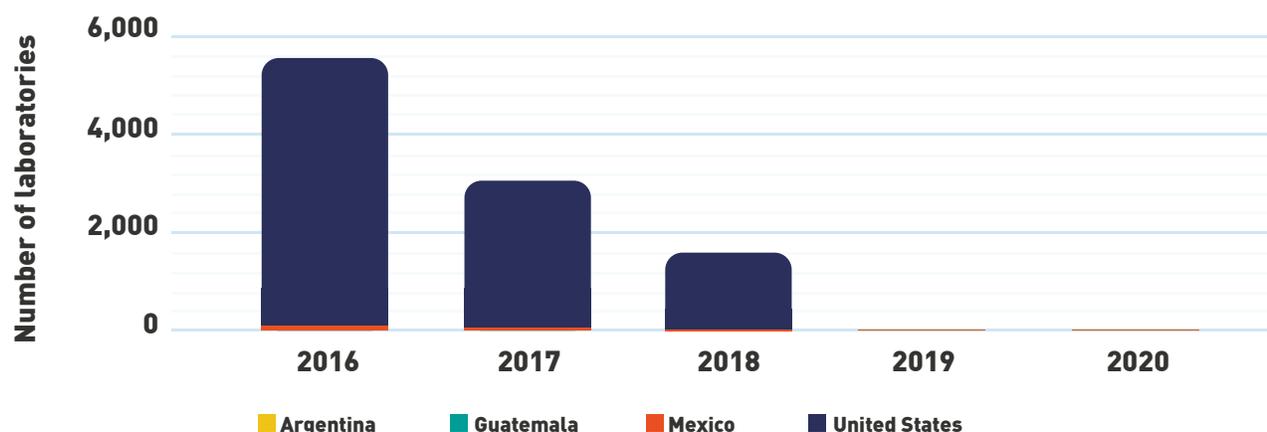
Laboratories

The detection and destruction of clandestine methamphetamine labs were reported by a few countries, but these reports varied substantially based on the number of labs and their multipurpose nature (one lab may be used to produce multiple amphetamine-type stimulants). For example, the United States reported large numbers of seizures of synthetic drug labs, primarily for methamphetamine, while Honduras reported the presence of one methamphetamine lab during the reporting period.

Graph 25 shows a declining trend in total seizures of ATS labs (mostly methamphetamine). This is largely due to the declining numbers of labs in the United States; the numbers of labs fell from 5,601 in 2016 to 1,621 in 2018. Mexico also reported a decline in lab seizures. Argentina reported lab seizures ranging from zero to 19 per year during the reporting period, and Guatemala reported that a single lab was seized in 2016 and another in 2018.

Compared to growing seizure totals for methamphetamine, the inverse relationship between lab seizures and seizures of finished product may suggest limited counternarcotics efforts aimed at production. Alternatively, increases in production efficiency could suggest that individual labs are producing greater amounts of product. Both explanations are possible, and, to some extent, the latter is supported by qualitative data in which the United States reported declines in 'small cook' operations and the increased production capacity of Mexican drug trafficking organizations. Both countries indicated that production has moved from the United States to northern Mexico, while product continues to be sold primarily in the United States.

Graph 25. Number of methamphetamine and other ATS processing laboratories seized, by country and year



Note: ATS laboratories may produce amphetamine, methamphetamine, and ecstasy-type substances; however, methamphetamine was the most common. Argentina reported one lab seized in 2017, 19 in 2019, and five in 2020. Guatemala reported two labs seized: one in 2016, and another in 2018.

DRUG PRICES

An examination of estimated prices of drugs sold at retail and wholesale shows some important variations. Logically, the median prices of drugs at wholesale should be less per gram than at the retail level. This is true for the data on cannabis, cocaine HCl,²⁵ and methamphetamine, but not true for smokable cocaine. Table 2 shows the median price per gram of selected drugs by market level.

Table 2. Median price per gram of selected drugs, by market level

Substance	Retail price (USD)	Wholesale price (USD)
Cannabis	2.30	0.51
Cocaine HCl	14.15	9.99
Heroin	29.25	11.50
Methamphetamine	28.08	9.68
Smokeable Cocaine	4.20	9.04

Several possible explanations exist for the wholesale and retail price discrepancies for smokable cocaine. One possible explanation is that prices reported have not been adjusted based on higher level of purity at the wholesale versus the retail level (a few countries reported the same prices for the wholesale and retail levels).

Qualitative data made clear that most countries do not systematically report price data on drugs, and estimates of the value of drugs seized are law enforcement-informed best guesses. Reported prices vary considerably and are difficult to compare. This is likely due to the presence of drugs of different quality and origin. For example, in the case of cocaine, prices depend not only on the purity of the drug, but also on whether the drug was produced in Bolivia, Colombia, or Peru.

²⁵. Cocaine HCl is used here in the context of prices in order to distinguish from smokable cocaine.



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