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PLANT-BASED DRUGS, CHEMICALS, AND PHARMACEUTICALS
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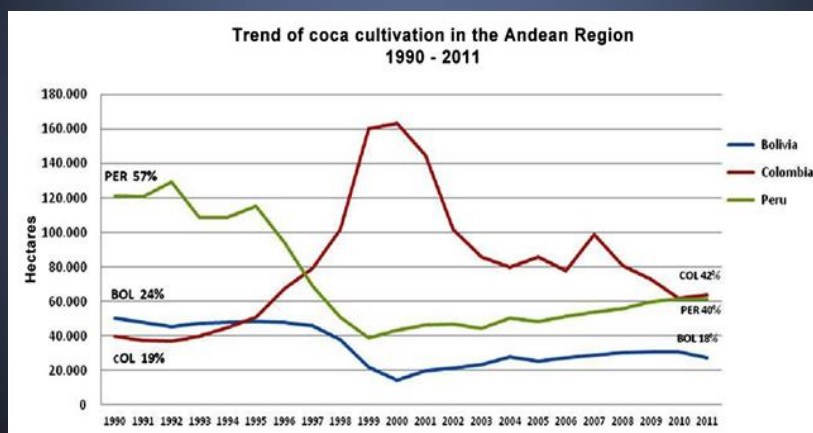
Plant-based Drugs, Chemicals, and Pharmaceuticals

Market, Production Techniques, Consumer Tastes and
Preferences Change Continuously

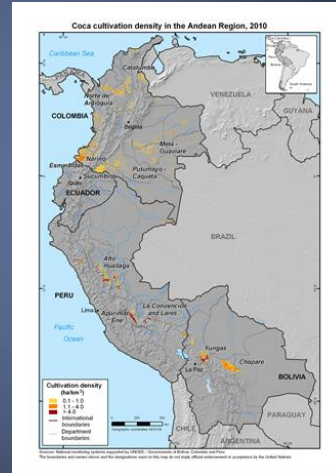
Plant-based Drugs Depend on Lengthy, Complex Supply Chains

- Traditional hemispheric policies focused on plant-based drugs
- Normally grown away from consumer markets in regions underserved by governing institutions and without easy access to legitimate markets
- Trafficking fosters violence and weak institutions in growing and transit countries
- Consuming countries suffer health and social effects and higher levels of crime

Coca Cultivation - Andean Region 1990-2011

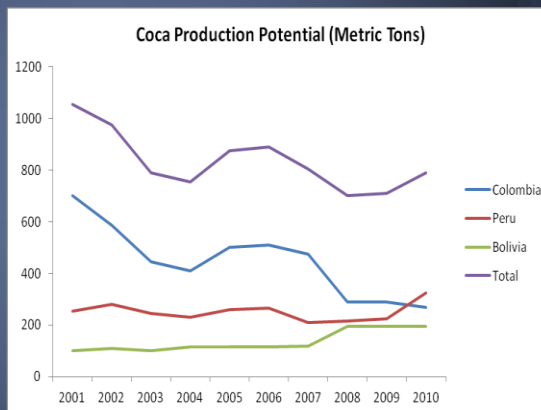


Coca Cultivation 2004 & 2010



Cocaine Production Stable, Market Shifting

- Production has remained at about 800MT/annum in recent years
- Colombian production, US consumption declining slowly
- Peruvian production up, Bolivian production stable
- New markets in Europe and in the region are absorbing increased supply and declining North American consumption



Transit Routes Shifting, Violence Remains Tough to Combat

- North American markets supplied largely through Central America, Mexico; violence, institutional weakening frequently the result
- Caribbean route used largely for European trade, often via West Africa
- Brazil, other South American markets experiencing growing domestic consumption and suffer from transit's effects for cocaine enroute Europe

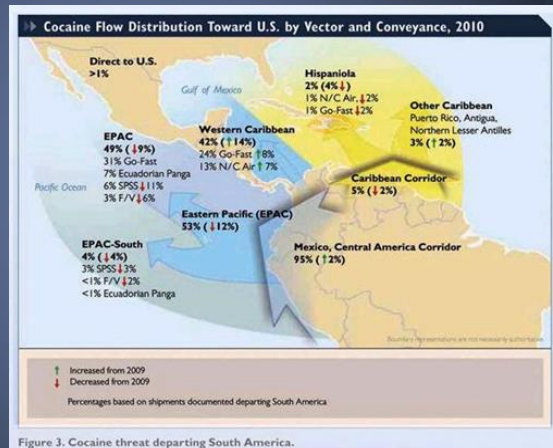


Figure 3. Cocaine threat departing South America.

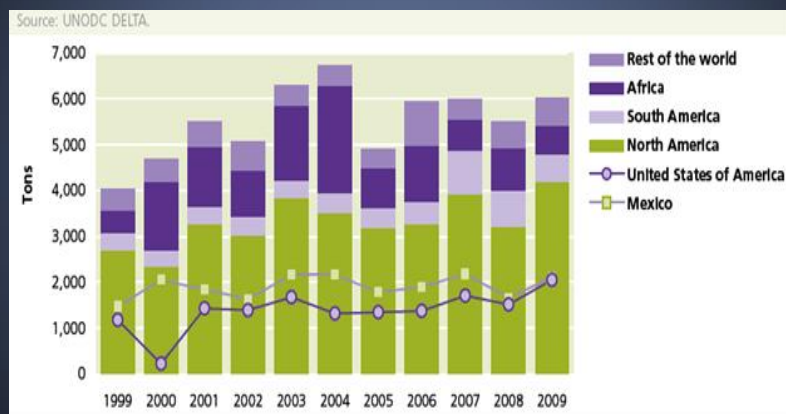
Heroin Production Shifting

- Colombian production declining; production shifting to Mexico and Guatemala
- North American market may be growing, in part stimulated by population addicted to more expensive synthetic opioid pharmaceuticals
- Little evidence of market penetration from Afghanistan, except perhaps in Canada

Cannabis May Be Sui Generis

- Can be cultivated anywhere, even indoors; usually grown very close to consuming markets
- U.S., Canada, Mexico, Colombia, and Paraguay thought to be largest producers, though estimates are unreliable due to ubiquitous growing opportunities
- Mexico thought to supply about half of U.S. market; Paraguay supplies most of southern cone; Caribbean a significant user and exporter

Cannabis Seizures Worldwide 1999-2009



Amphetamine-type Stimulants Growing Challenge

- Labs are easily scalable from the kitchen counter to mobile labs to industrial-scale operations
- Inputs come from global sources
- Precursor controls have made trafficking easier to observe but production science tends to stay ahead of enforcement

Pharmaceutical Diversion Growing Threat

- Worldwide production has increased dramatically in last 20 years
- Prescribing of synthetic opioids and psychoactive pharmaceuticals in North America has increased geometrically
- Significant diversion occurs at the consumer level; opportunities for wholesale trafficking less clear
- Could be significant future threat throughout the hemisphere

Reliable Data Scarce

- Excepting cocaine, production, trafficking, consumption data insufficient
- Clear production, trafficking, and consumption pose continuing threat to the hemisphere's institutions and economies as well as the safety, security, and health of its citizens
- Better data would allow governments to craft more effective, affordable, and politically acceptable policies