

MONITORING OF TERRITORIES WITH PRESENCE OF COCA CROPS

2023

EXECUTIVE SUMMARY



1.



COCAINE MARKETS KEEP GROWING, BOTH ON THE SUPPLY AND THE DEMAND SIDE

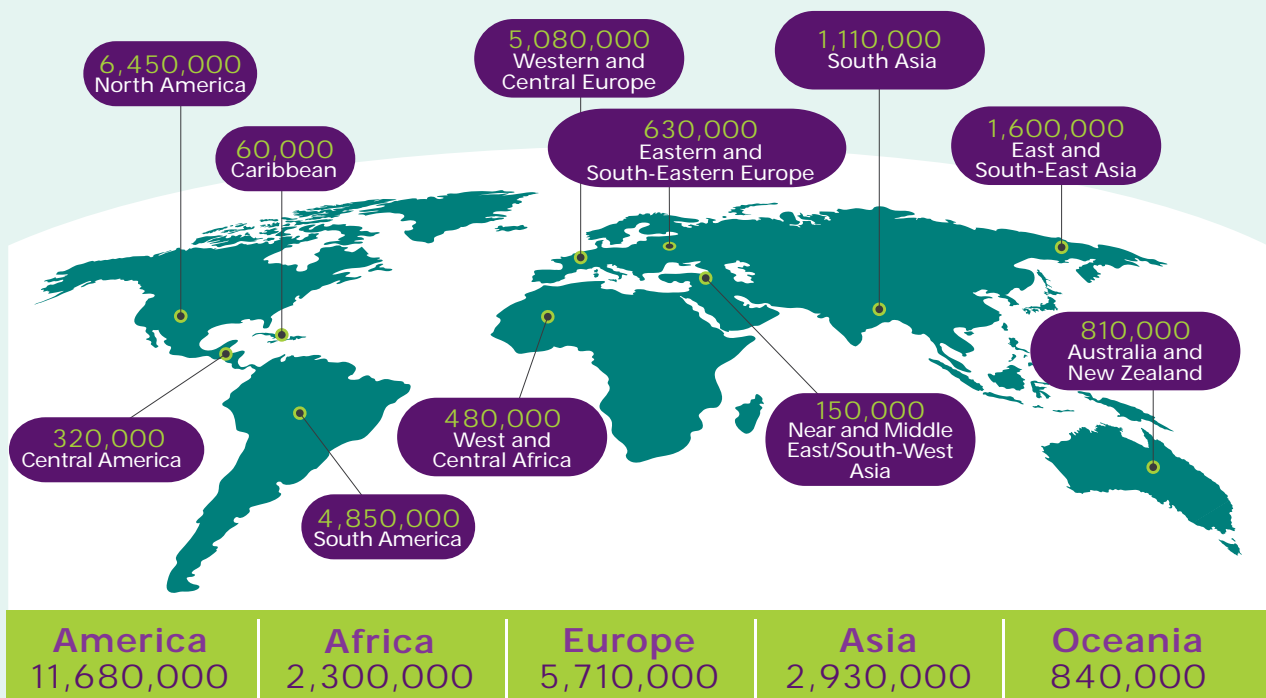
World Drug Report shows more drug users, more problematic use and less access to treatment.



1 of each 11 people has problematic use and lacks treatment

Source: WDR, 2024

Estimated number of persons who used cocaine in the last year, by subregion, 2022

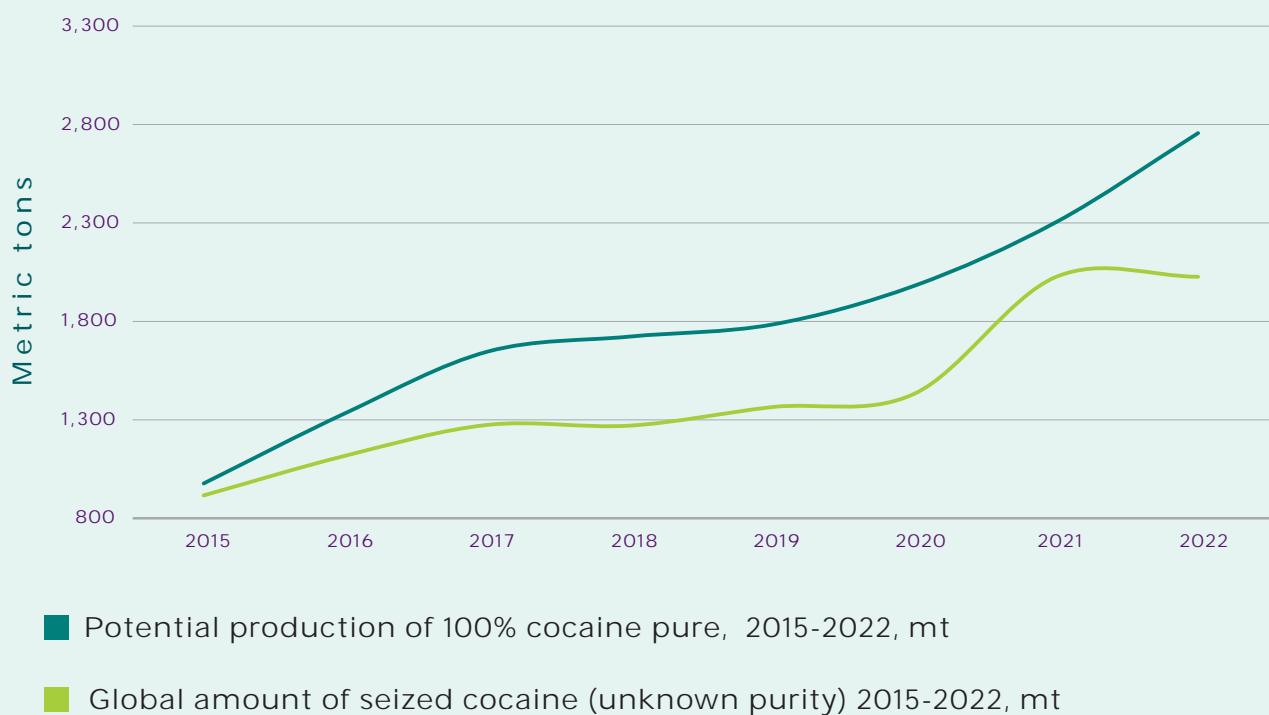


Source: UNODC, responses to the annual report questionnaire.

Although the trend in global demand for cocaine is increasing, consumption patterns vary between regions, possibly related to the following factors:

- There are more cocaine users in the Americas than in any other region, but the percentage of people reporting past-year cocaine use is highest in Oceania, followed by the Americas and Western and Central Europe.
- North America, Western and Central Europe and South America are the largest cocaine markets in terms of the number of users in the past year.

According to the World Drug Report (WDR) 2024 there are other smaller cocaine markets in Africa, Asia, Eastern and South-Eastern Europe. In these so-called emerging markets, there is evidence pointing to their expansion, such as growth in seizures and demand indicators, where data are available. Three elements stand out in this regard: (1) if compared to data available over the last ten years, an increase in cocaine users in Asia is evident in China (according to police records), and in Japan (according to reports of lifetime and past-year prevalence of cocaine use); (2) in Africa there is evidence of an increase in the number of cocaine users seeking treatment, which suggests the presence of an intensive use of the substance in the continent, especially among women; (3) in Turkey, there has been a record increase in treatment demand for cocaine-related drug use in the last ten years.





The current dynamics show a relationship between the expansion of supply, resulting from the trend towards diversification in drug trafficking networks, and increases in the demand for cocaine in its different presentations, generating an increasingly fragmented and complex criminal scenario¹.

Potential cocaine production continues at historic peaks. In terms of supply, Peru reported a slight reduction in the area with coca crops in 2023, and Bolivia completed three years with a stable trend (between 2020 and 2022); however, data on coca leaf yield and efficiency of extraction and transformation to cocaine have not been updated since 2003-2004 and 2005² respectively. Challenging the ability to estimate potential cocaine production.

As of 2022, potential global pure cocaine production is estimated to have reached 2,757 mt, an increase of 20% over the previous year, while global cocaine seizures remained at 2,026 mt, (data not adjusted for purity) according to the World Drug Report 2024³.

By integrating the aforementioned elements, UNODC warns about the growing complexity of the dynamics of the illicit drug supply, given: (i) the agility of traffickers to change drugs, routes and methods; (ii) the interconnection of illicit drug production and trafficking with other crimes; (iii) the opportunities/incentives provided by the drug trade to non-state armed groups/local organized crime to integrate them into the production, trafficking and distribution of illicit drugs⁴.

1- UNODC and EUROPOL, The illicit trade of cocaine from Latin America to Europe – from oligopolies to free-for-all? Cocaine Insights 1, UNODC, Vienna, September 2021 and Global Initiative Against Transnational Organized Crime. The Global Organized Crime Index 2023.

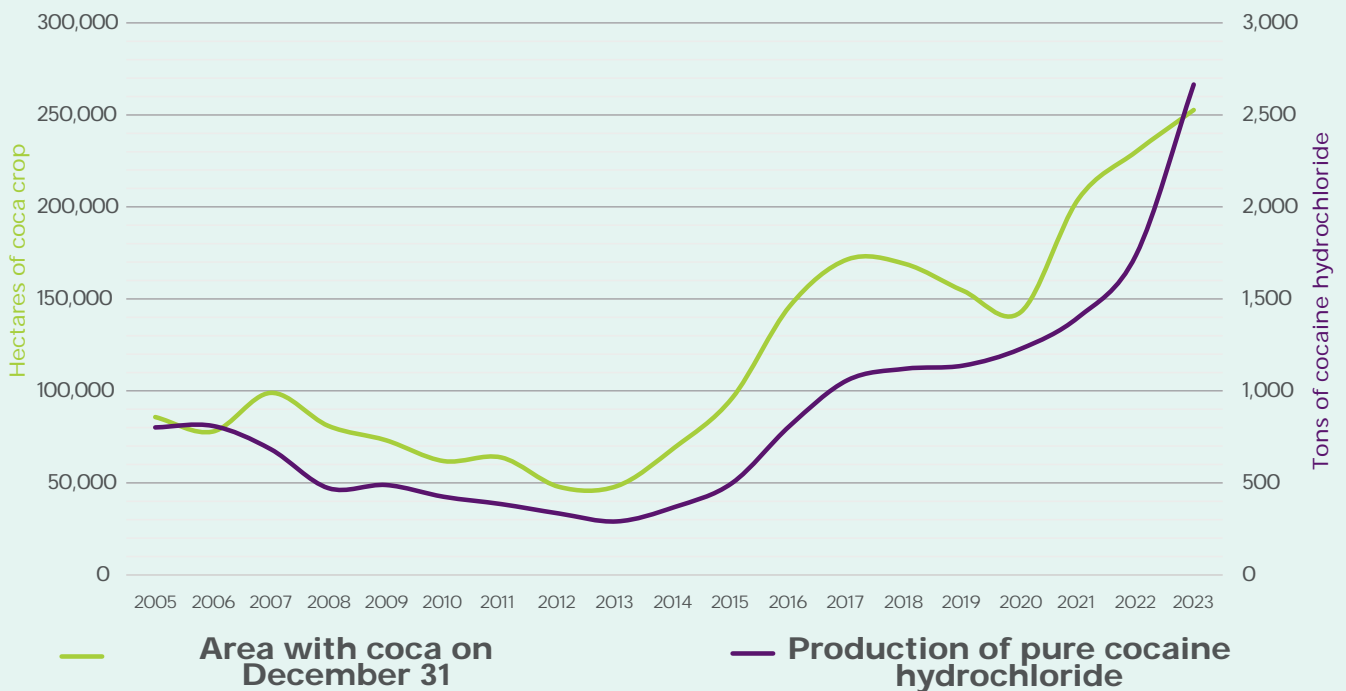
2- For the estimates of potential cocaine production, the yields obtained by UNODC during 2003 - 2004 were used, which are being updated by the Peruvian State in the framework of the new cocaine monitoring model. The annual yield estimates for each area were made based on the results of the area and estimated annual coca leaf production provided in the coca crops monitoring report 2017 (UNODC, 2018). According to the Peruvian Drug Observatory, although DEVIDA has conducted coca leaf yield studies in 2012 and 2013, these have not been considered for this report. For more information, please consult: <https://sistemas.devida.gob.pe/siscod/descargar-Docu?idArchivo=44>

3- UNODC (2024). Reporte Mundial de Drogas 2024 – Anexo Estadístico: Incautaciones de Drogas (2018 – 2022). Disponible en: https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.unodc.org%2Fdocuments%2Fdata-and-analysis%2FWDR_2024%2FAnnex%2F7.1_Drug_seizures_2018-2022.xlsx&wdOrigin=BROWSELINK. Consulta: julio de 2024.

4- UNODC (2024). World Drug Report 2023. Special highlights of the world drug report as of 2024. Available at: https://www.unodc.org/documents/data-and-analysis/WDR_2024/2411140S.pdf

2.

THE AREA SOWN WITH COCA CROPS IN COLOMBIA INCREASED 10% AND THE POTENTIAL COCAINE PRODUCTION INCREASED 53%



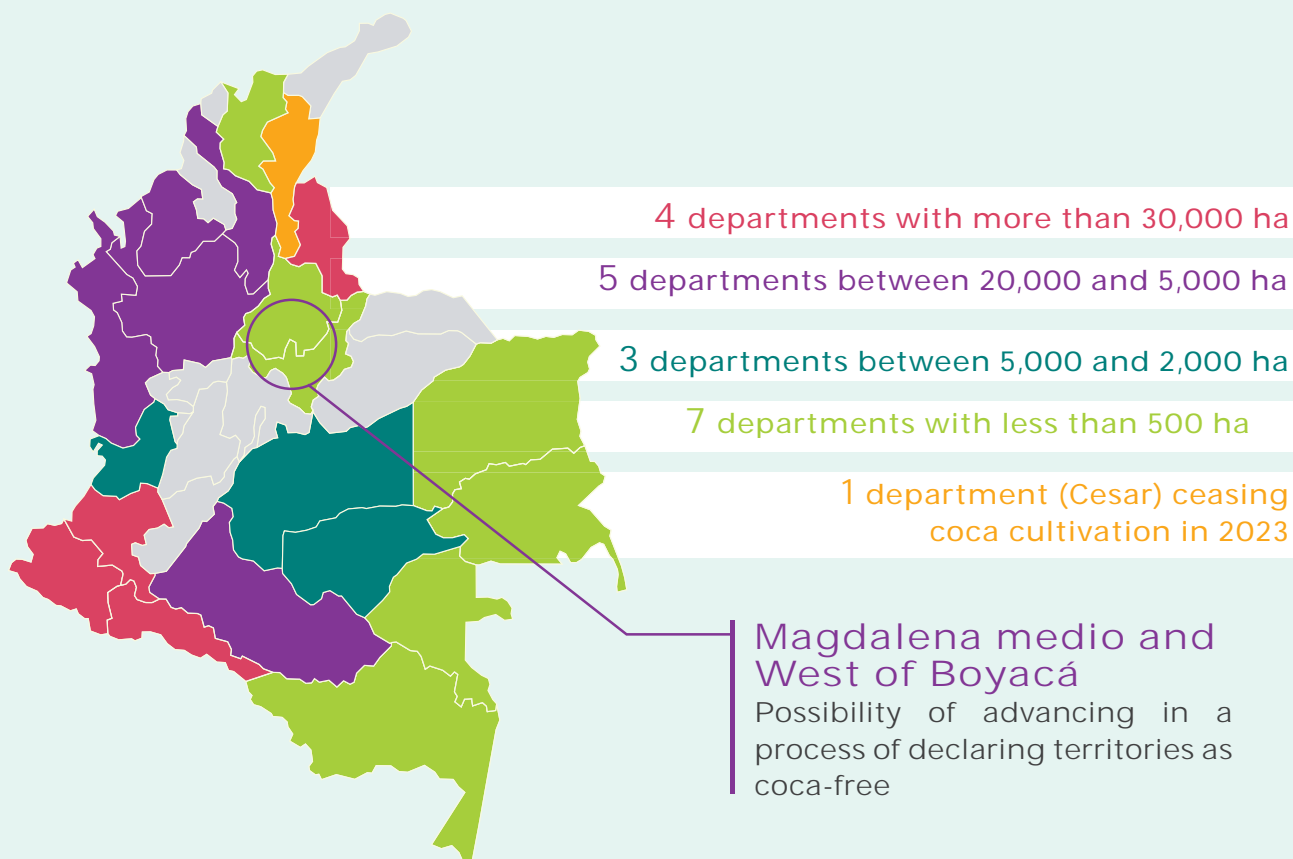
253,000 ha



2,664 tm

In contrast to the increase between 2021 and 2022, which was heavily clustered in the department of Putumayo, in this period the increase was more generalized. Of the 19 departments with coca, 16 showed an increasing trend; Cauca and Nariño were the most affected. The 15 productive hotspots remain, accounting for 39% of the coca crops in only 14% of the territory with coca crops in 2023. Only San Pablo-Taracué reduced its coca crops by 3% compared to 2022.

The report warns about expanding zones (territories wherein the presence of coca crops has only been registered in the last 3 years). 40% of the territories in this category are located in the Pacific region, with Cauca and Chocó the departments reporting the most new fields. Coca plots are not spread out, but rather form cores with densities higher than 12 ha/km². These conditions are comparable to those reported in the productive hotspots, which are highly complex scenarios for intervention.

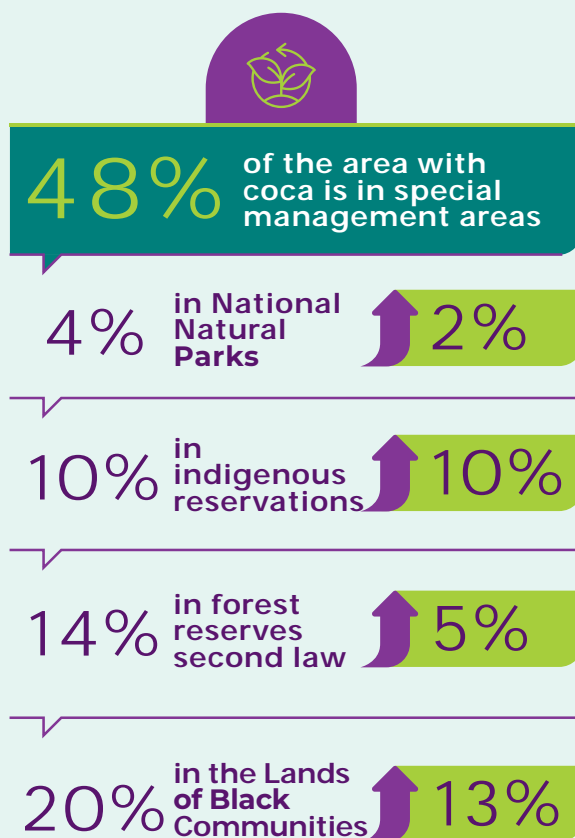


Potential cocaine production reached 2,664 mt. This measurement refers to pure cocaine and is based on the premise that all hectares planted are harvested to produce cocaine; the figure does not discount the 746 mt of cocaine (purity unknown) that were seized by Colombian authorities in 2023⁵.

It is noteworthy that in some regions (mainly outside of hotspots) the sale prices of coca leaf by-products (coca paste and cocaine base) are reaching historically low levels and in others there is even no market due to the absence of buyers, despite this, there is evidence that the vast majority of crops continue to be harvested.

Market restrictions have generated storage of cocaine paste and base, as well as its use as an element of commercial exchange in some regions.

5- Information published by the Colombian Drug Information System (SIDCO) of the Colombian Drug Observatory, administered by the Ministry of Justice and Law. It should be noted that the figures apply as of August 16, 2024. For more information, please visit: <https://www.minjusticia.gov.co/programas-co/ODC/Paginas/SIDCO.aspx>



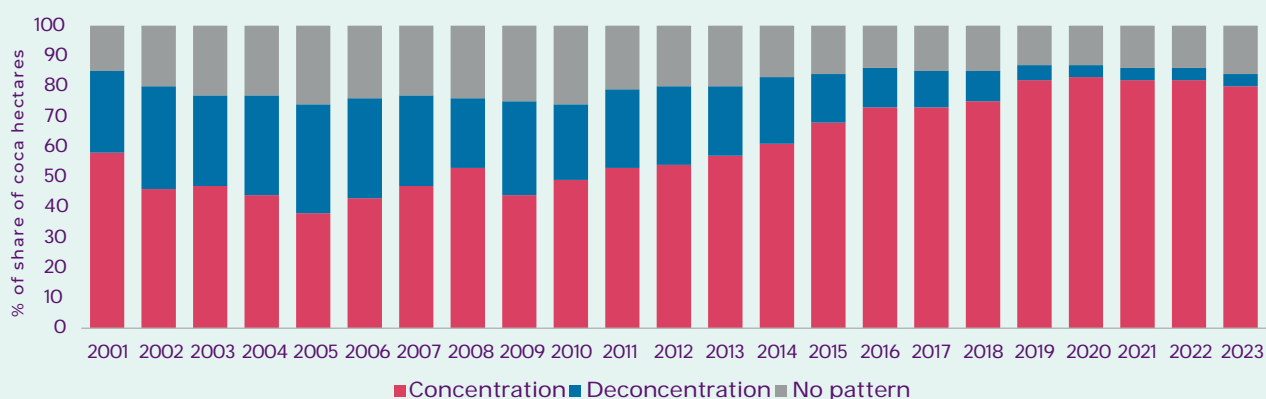
Coca cultivation and cocaine production continue to be a threat to the conservation of biological and cultural diversity

3.

89.5% OF COCA IS LOCATED IN THE SAME TERRITORIES WHERE IT HAS BEEN IN THE LAST 10 YEARS; HOWEVER, THE DISTINCTION BETWEEN AREAS OF CONCENTRATION AND DECONCENTRATION⁶ KEEPS EXPANDING

The geography of coca allows us to locate concentration areas where coca crops reach high planting densities, close to drug trafficking routes and in territories that incentivize the efficiency and prevalence of crops, as opposed to territories where commercialization and markets seem to be dwindling.

Distribution of area with coca crops according to concentration trend behavior, 2001-2023



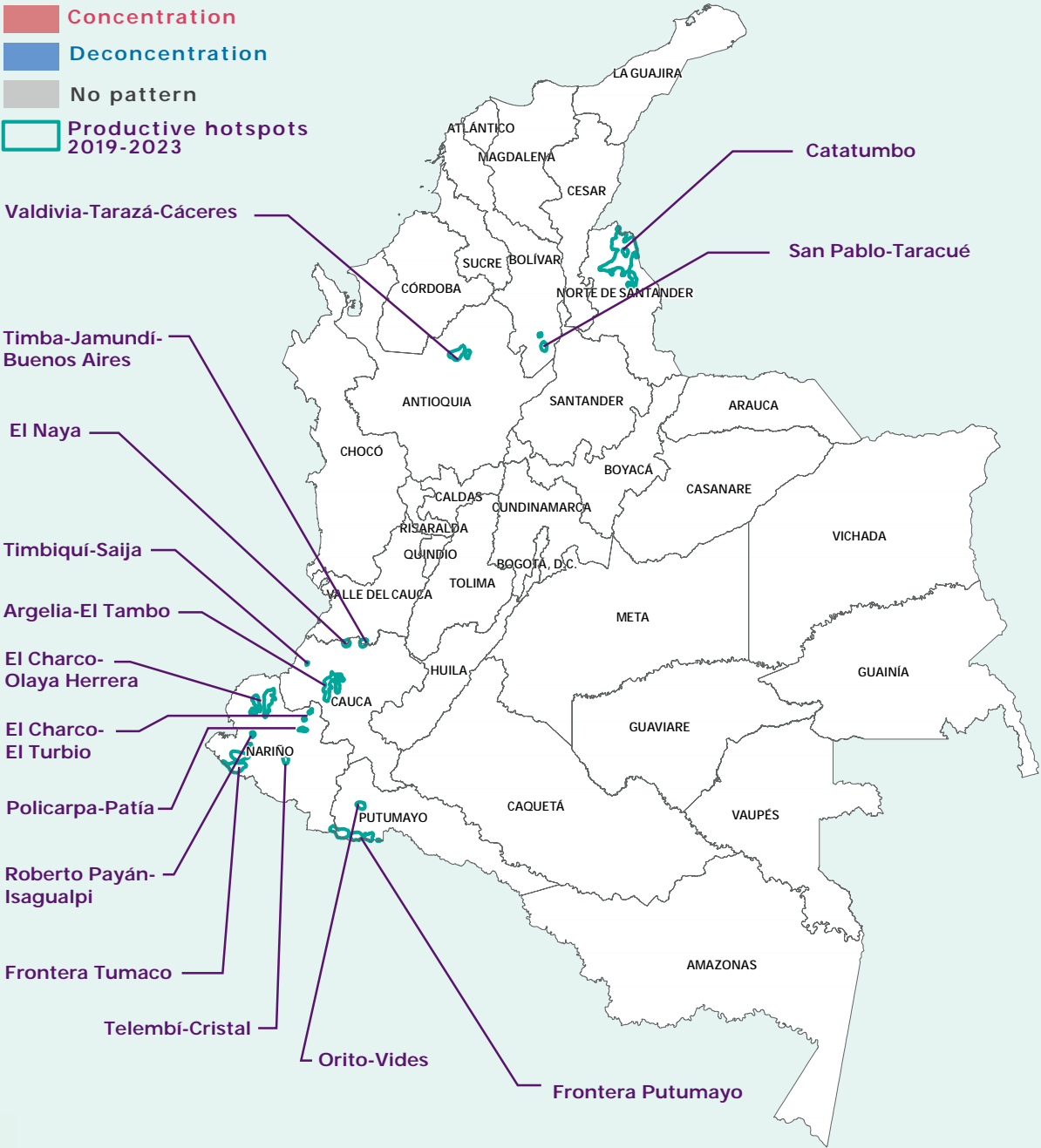
Presently, areas of coca cultivation favor industrial scale where 80% of the coca is found despite the fact that they cover only 50% of the land under coca crops. Half of the coca is found in specialized production enclaves where there has been an ongoing improvement in the leaf yield per hectare and agro-industrialization of both the growing phase and the extraction phase.

The areas with more coca crops represent a challenge for intervention and strengthening of institutional order. It is estimated that the demand for chemicals in the concentration areas is 997,560 cubic meters of liquid inputs and 192,980 tons of solid inputs. On average, these zones are estimated to use 82% of the total chemicals in the whole market.

6- The concentration and deconcentration areas represent a territorial approach to understand, based on a geostatistical analysis of the historical series (2013-2022), the composition of territories with a trend to reduce or increase the area grown, as well as those territories wherein it is not possible to define a predominant behavior (no pattern).

Although some growers reported difficulties in marketing their products, these situations have not been constant.

In the deconcentration areas there is still coca, but with more scattered, less productive fields and with problems for commercialization at large. The deconcentration areas are also located in territories far from borders and exit routes.



TERRITORY

CONCENTRATION

DECONCENTRATION



Hectares with coca crops in 2023

202,200 ha

10,700 ha

MONITORING OF TERRITORIES WITH PRESENCE OF COCA CROPS | 2023



	TERRITORY	CONCENTRATION	DECONCENTRATION
	Percentage of the territory with coca 2023 they occupy*	52%	14%
	Share of the territory occupied by coca in 2023	80%	4%
	Average interpreted per plot	1.44 ha	0.97 ha
*No pattern: Territories where there is no consolidated trend in the area with coca crops in 2013-2022. (Concentration+desconcentration+no pattern=total area with coca crops)			
	Prevailing seeding density	4-8 ha/km ² in 35% of the territory	0.1-1 ha/km ² in 55% of the territory
	Greater range of seeding density	12 ha/km ² in 25% of the territory	12 ha/km ² in less than 1% of the territory
	Presence in border areas (0-40 km)	36% of coca as 2023	3% of coca as 2023
	Location in productive hotspots	15	0
	Validated forced manual eradication 2023	78% of the total	4% of the total
	9,320 ha with EVOA (Evidence of Alluvial Gold Exploitation) 2022 in territories with coca crops 2023	34%	18%
	11,829 ha deforested 2022-2023 in territories with coca crops 2023	47%	18%
Source: Deforestación (IDEAM), 2023			

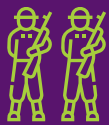




TERRITORY

CONCENTRATION

DECONCENTRATION



Municipal presence of at least one illegal armed group in 2023

98% of the municipalities

84% of the municipalities

Source: JEP, 2024



Percentage of the municipalities that recorded at least one combat between Public Forces and an illegal armed group in 2023

42% of the municipalities

24% of the municipalities

Source: JEP, 2024



Percentage of municipalities that registered cases of homicides against people who exercise a social leadership role in 2023

42% of the municipalities

21% of the municipalities

Source: JEP, 2024



Reduction of forced displacements in the context of the armed conflict between 2022 and 2023

34%

44%

Source: UARIV, 2024



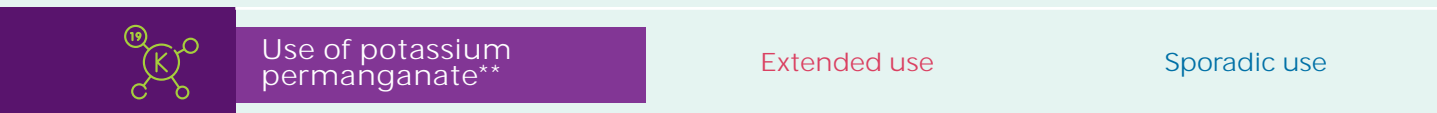
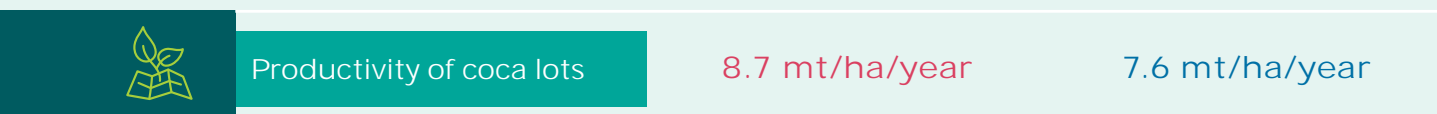
Number of extortions per 100 thousand inhabitants on average in 2023

18

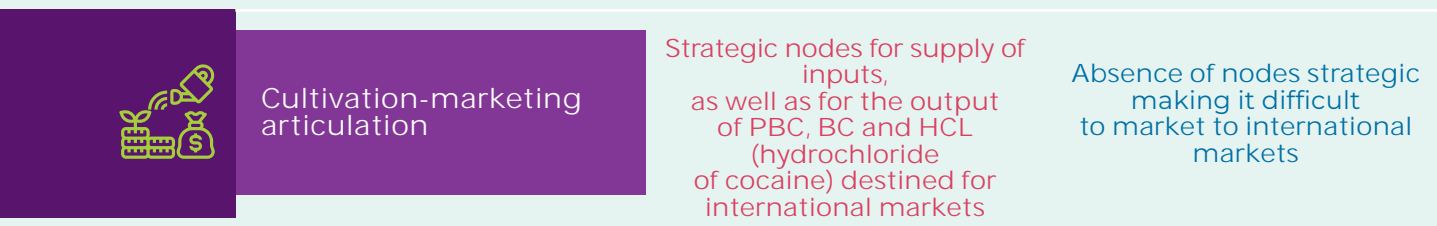
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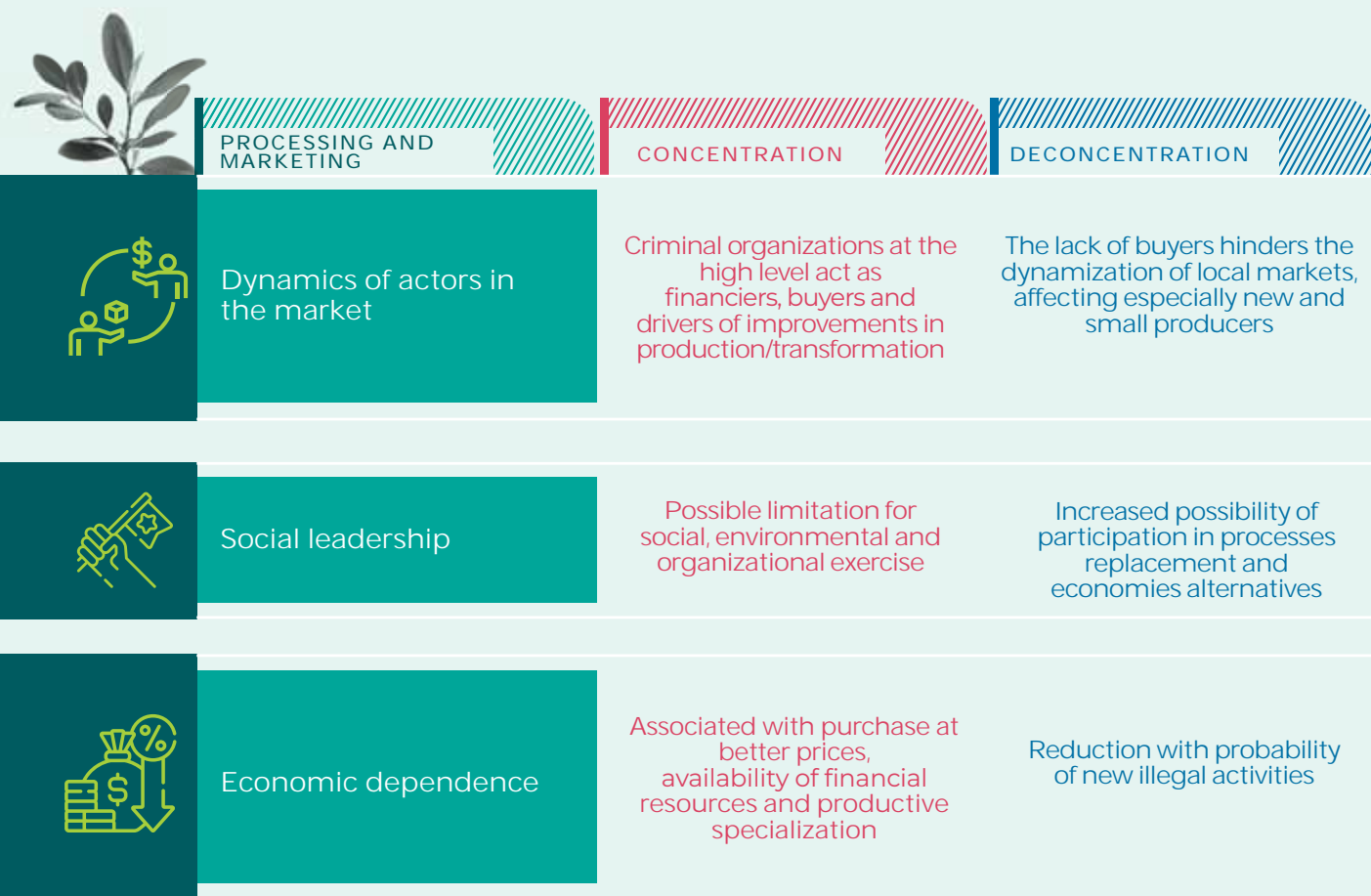
Source: PONAL, 2024





***Potassium permanganate in the production process is used to oxidize non-cocaine alkaloids, namely, to remove impurities.*





4.

THE INTERACTION OF ILLEGAL ECONOMIES WITH LEGAL ECONOMIES IS INCREASING

The population centers closest to the coca fields⁷ are the primary convergence points between the economy associated with the cocaine production phase and the goods and services associated with the legal economies. Although other illegal economies exist in coca crop areas, cocaine production is one of the main activities.

7- The population centers closest to coca crops are identified by calculating the Euclidean distance from each population center to the 1 square kilometer grids with coca crops in 2023.

The population centers closest to the coca crops have different categories.



In 2023, there are 43 population centers located within productive enclaves, of which 1 has the category of municipal capital, El Tarra (North of Santander).

The amount of hectares with coca crops within 12 km of a population center increased from about 189,000 ha in 2022 to about 209,000 ha in 2023. In 2013 it was about 37,000 ha.

Amount of coca crops in the range of 0-12 km from a populated center

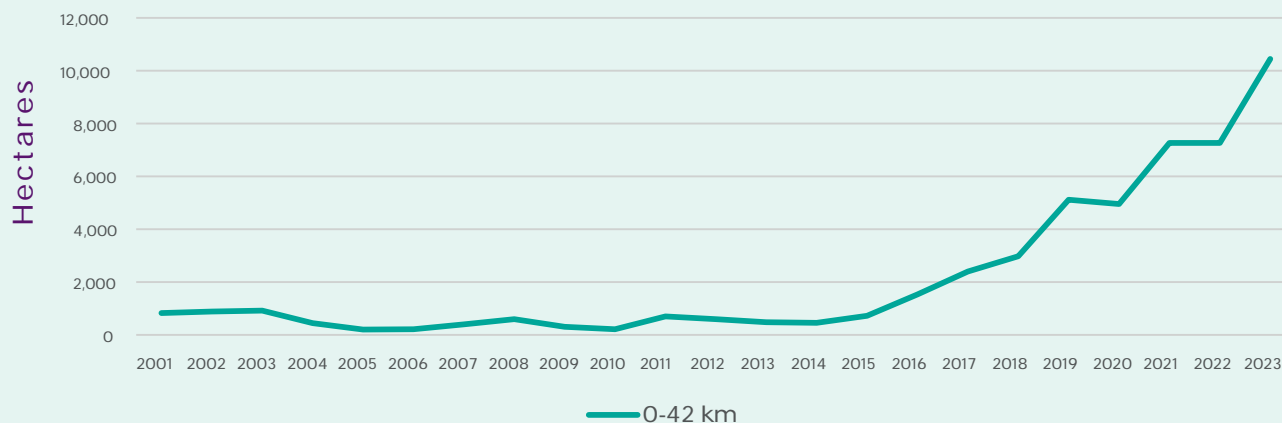


Although most of the coca crops are still far from market centers in territories with high vulnerabilities and limited access, about 10,500 ha of coca crops are less than 42 km from a metropolitan market center⁸.

If a 42 km strip around the market centers is considered, coca crops have increased 22 times in the last decade.

8- The metropolitan centers were defined as the 12 main cities in Colombia: Medellín, Barranquilla, Cartagena, Manizales, Popayán, Santa Marta, Ibagué, Santiago de Cali, Pereira, Bucaramanga, Cúcuta, Bogotá.

Quantity of coca crops in the range 0-42 km from a metropolitan market center



The relationship between coca and population centers is important not only because of the dependence of legal economies on the resources generated by illegal activities, but also because of the diversification of goods and services that become available; this may be generating powerful incentives to maintain illegal activities in the territory. It is also an opportunity to implement sustainable alternative development projects.

There are municipalities wherein the illegal market economy represents more than **42%** compared to the legal economy

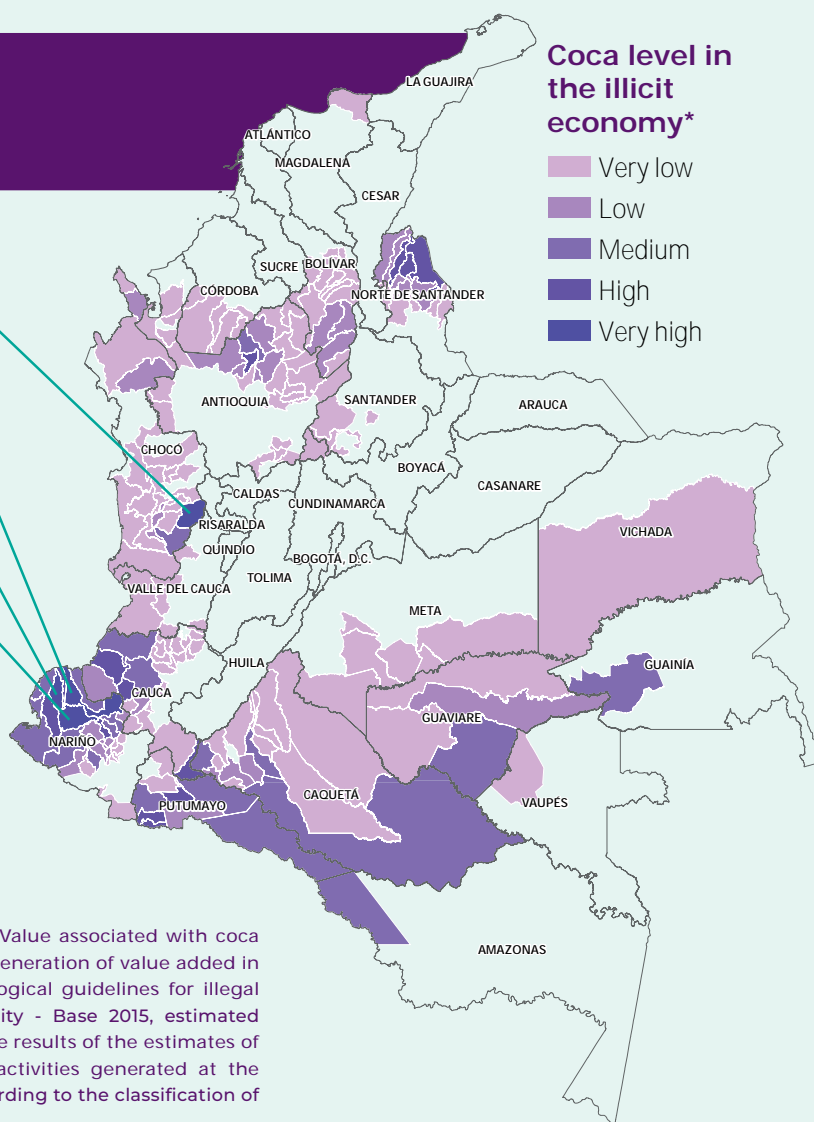
San José del Palmar

El Charco

Olaya Herrera

Magüí

*- The scope of the indicator is defined as the ratio of the value added generated at the municipal level by (the sale of coca leaf, cocaine base paste and cocaine base within the UPAC) and the value added by legal economic activities for each municipality. 2: Value added: Defined as the value of production minus the value of intermediate consumption and is a measure of the contribution to GDP made by a unit of production, industry or sector. 3. Value associated with coca crops, as a proxy variable for estimates of the generation of value added in Colombian pesos, according to the methodological guidelines for illegal financial flows. 4: Value Added by municipality - Base 2015, estimated variable published by DANE, which provides the results of the estimates of the value added of the different economic activities generated at the municipal level at current prices of 2022p, according to the classification of national accounts.



5.

THE IMPACT OF TRANSNATIONAL CRIME ON THE COCAINE MARKET REMAINS PREVALENT IN THE REGION

In Colombia, violence persists in the post-Peace Agreement period, as groups such as the ELN, EPL, AGC and FARC-EP dissidents continue to be active and involved in transnational organized crime⁹, focusing on cocaine production and trafficking. This situation has turned some regions with concentration zones into strategic points for illegal activities, intensifying conflicts in areas affected by drug trafficking, illegal mining and human trafficking, displacing small coca growers, which damages the local economy and hampers efforts to control drug trafficking.

Interactions between illegal armed groups and transnational organized crime¹⁰ are generating structural changes in power relations, leading to a high availability of financing and productive specialization in strategic areas. This phenomenon reinforces cocaine production and trafficking networks and could contribute to armed disputes in certain regions.



9- Global Organized Crime Index. Colombia Report. 2023. [chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://ocindex.net/assets/downloads/2023/spanish/ocindex_profile_colombia_2023.pdf](https://ocindex.net/assets/downloads/2023/spanish/ocindex_profile_colombia_2023.pdf)

10- Infobae. April 30, 2023. Coca crisis in Colombia: an opportunity in the midst of a reorganization of drug trafficking. <https://www.infobae.com/colombia/2023/04/30/crisis-de-la-coca-en-colombia-an-opportunity-in-the-middle-of-a-reorganization-of-drug-trafficking/>

*- Secondary information collected by SIMCI from open sources: Ombudsman's Office, Insightcrime, Europol, Financial Action Task Force (FATF). Force (FATF); among which are: Mexican Cartels, Brazilian Groups, European Criminal Organizations (Ndrangheta, Italian), Balkan Organized Crime Groups, the Dutch-Moroccan Mafias, West African Criminal Organizations, Asian Criminal Groups, Venezuelan Cartels and Israeli Criminal Gangs; see document chapter 3 for further explanation.

** - About 14 organized armed groups - GAO, residual organized armed groups - GAO-r, and organized criminal groups - GDO, according to the JEP, organized criminal groups - OAGs, according to the JEP.

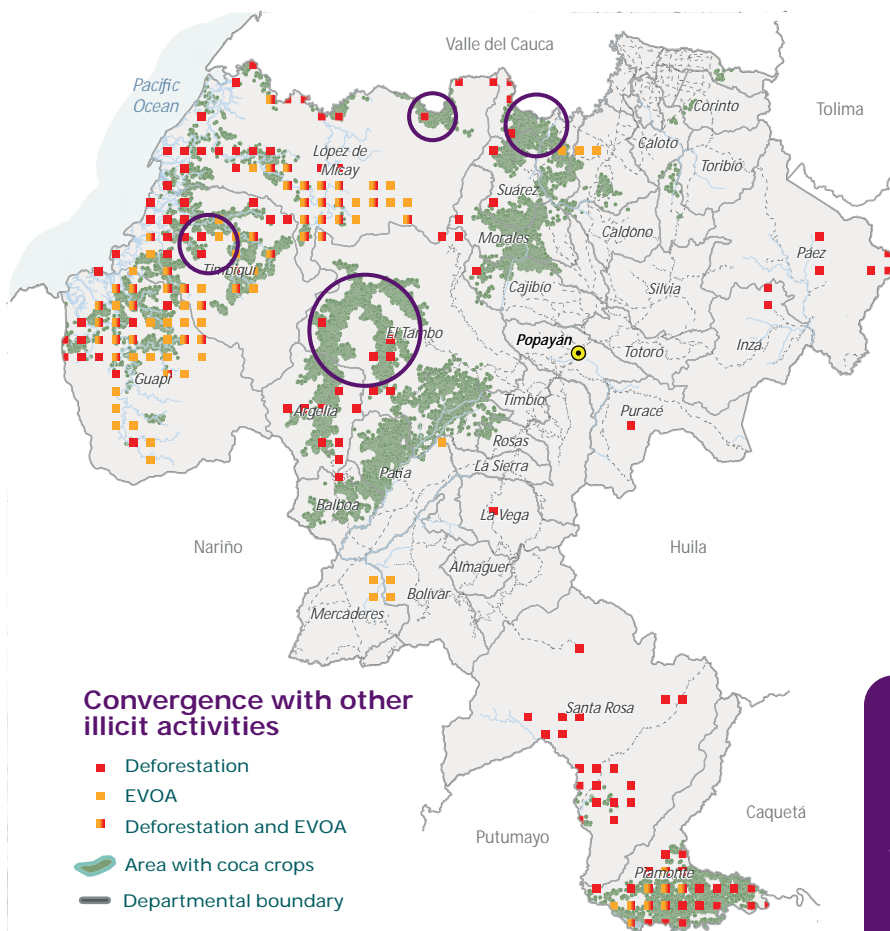
6.

COCA CROPS FACILITATE THE DIVERSIFICATION OF CRIMINAL SUPPLY

The new geography of coca seems to be encouraging the consolidation of territories where the intensification of the phenomenon matches an increase in violence against social leaders, an increase in activities related to coca growing, a general deterioration of security conditions and an increase in pressure against the most vulnerable communities such as indigenous and Afro-Colombian peoples, and in some territories other illegal activities emerge and consolidate.

In the department of Cauca, for example, different crimes converge. Evidence of alluvial gold mining (EVOA) has increased and the illegal growing of opium poppy and marijuana follows the trend of increasing coca growing.

Diversification of the criminal supply: THE CASE OF CAUCA



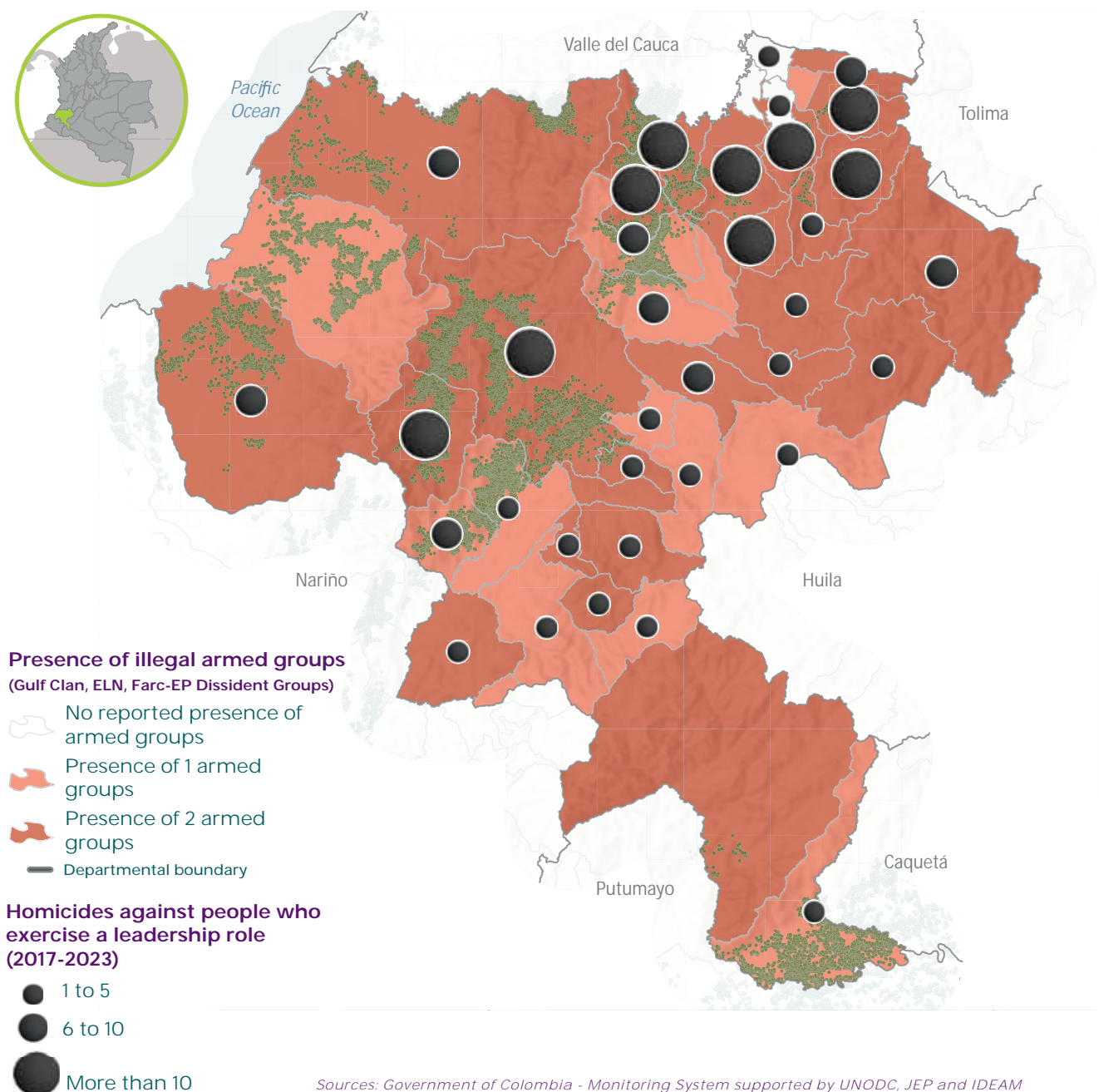
4 PRODUCTIVE HOTSPOTS
that represent **44%**
of the area with
departmental coca
in **864 km²** Coca
crops in Cauca

Coca crops in Cauca

21%

2022	2023
26,223 ha	31,844 ha

The area grown with coca in the department has increased fivefold in the last ten years, this increase is centered in the mountains rather than in the coastal areas and originates in the sowing of new coca clusters that meet the conditions of density and productivity, but do not yet complete the condition of permanence to be considered hotspots





252
cases

social leaders killed in Cauca
between
2017-2023



Municipalities with
coca in Cauca

Municipalities without
coca in Cauca

Reported clashes
between illegal armed
groups and security
forces

50%
of municipalities

20%
of municipalities

Fighting between armed
groups between illegal
armed groups

32%
of municipalities

10%
of municipalities

Homicides of social
leaders

55%
of municipalities

35%
of municipalities

The high interest in the profits from criminal activities has become one of the main incentives to concentrate the presence of illegal armed groups in Cauca. According to data from the JEP¹¹, in 2023, a scenario of violence was created by the action of the Farc-EP dissidents present in the territory with the structures coordinated by Iván Mordisco and the Segunda Marquetalia block, in addition to the interference of the ELN guerrilla with the Southwestern Front and the Western Front.

The influence of illegal armed groups in Cauca has been intensifying violence in the department, especially affecting municipalities with coca crops. In the post-agreement scenario, fighting between illegal armed groups and the security forces, confrontations between illegal armed groups, and homicides of social leaders have increased substantially between 2017 and 2023.



In 2023 and in the framework of the implementation of the National Drug Policy in Colombia

The **Territorial Missions Strategy** is highlighted as a mechanism for inter-institutional coordination and articulation for the comprehensive and focused implementation of the strategic lines of the National Drug Policy. Based on interagency action, the aim is for rural communities that depend on illicit economies linked to drugs to progressively and sustainably transition to licit economies, through a process of productive reconversion.

- The Ministry of Justice and Law implements the **Project Bank strategy** through which in 2023 it technically and financially supported 12 productive initiatives of peasant communities and organizations, including indigenous reservations and community councils, located in the region of Catatumbo, Nariño, Guaviare, Caquetá and Sur de Bolívar. These projects focused on products such as cocoa, coffee, fruit, sustainable livestock, guinea pig production systems and forest conservation, reaching a total of 20,000 beneficiaries.

- The Government has reaffirmed its commitment to meeting the objectives set out in the **National Program for the Integral Substitution of Illicitly Used Crops (PNIS)**. Therefore, until August 2024, resources have been committed for the execution of the Program amounting to \$2.3 billion for more than 80,000 families linked to the program.

11- Based on the information provided by the JEP for the year 2023, the diversity of armed groups in the country was categorized into four major structures. The classification was guided by those groups that have internal structures and substructures, such as the 1) Dissidents of the FARC-EP, the 2) Gulf Clan, 3) and the ELN guerrillas; and those that do not have this division within them: 4) Other groups (La Construcción, La Cordillera, La Inmaculada, Las Palmas, Los Botallones, Los Caparros, Los Chiquillos, Los Espartanos, Los Mexicanos, Los Pachencia, Los Pelusos, Los Puntilleros, Los Rastrojos, Los Rastrojos Costeños, Los Shotas).

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TERRITORIES WITH PRESENCE OF
COCA CROPS

2023

EXECUTIVE SUMMARY



United Nations
Office on Drugs and Crime

SUMMARY FACT SHEET

COLOMBIA COCA CULTIVATION SURVEY

2023



	2022	Change (%)	2023
Net coca cultivation area calculated on 31st December (rounded to the nearest thousand) ¹	230.000 hectares	10	253.000 hectares
Pacific region	94.163 hectares	14	107.078 hectares
Catatumbo region ²	53.648 hectares	6	56.933 hectares
Central region	42.043 hectares	4	43.867 hectares
Putumayo – Caquetá region	32.962 hectares	12	37.063 hectares
Meta – Guaviare region	6.769 hectares	6	7.164 hectares
Orinoco region	283 hectares	21	343 hectares
Amazon region	157 hectares	-22	122 hectares
Sierra Nevada region	3 hectares	-33	2 hectares
Average fresh coca leaf yield ³	6.4 mt/ha/year	33	8.5 mt/ha/year
Potential fresh coca leaf production ³	1.410.600 mt (1.267.800 mt – 1.683.000 mt)	50	2.108.600 mt (1.872.400 mt – 2.548.100 mt)
Potential cocaine hydrochloride (100% purity) production	1.738 mt (1.563 mt – 2.074 mt)	53	2.664 mt (2.367 mt – 3.219 mt)
Average potential cocaine hydrochloride/hectare harvested ³	7.8 kg/ hectare harvested	37	10.7 kg/ hectare harvested
Cocaine seizures ⁴	659.134 kg	12	739.557 kg
Illegal laboratories destroyed ⁵	4.707	11	5.242
Reported manual eradication of illicit crops ⁶	68.974 hectares	-70,5	20.325 hectares

1- This corresponds to the area with coca found on December the 31st, 2022, vis-à-vis December the 31st, 2023.

2- Prior to 2018, Catatumbo region (Norte de Santander and Cesar) was considered as part of the Central region (Antioquia, Córdoba, Bolívar, Santander, and Boyacá). Since 2018, the results of the Catatumbo region are presented separately.

3- The national average yield per hectare per year and the potential cocaine production per hectare harvested are calculated from the productive area during the year (AP).

4- Cocaine seizures include those cocaine hydrochloride seizures that were the results of actions by the control authorities in the national territory, as well as the results of international operations or current Maritime Agreements. Values for the year 2022 were updated in comparison to the 2022 report, to reflect the latest data. Information provided by the Ministry of Justice and Law, July 2024.

5- This only includes cocaine laboratories and other structures set up to produce basic cocaine paste and cocaine base. Values for the year 2022 were updated in comparison to the 2022 report, to reflect the latest data. Information provided by the Ministry of Justice and Law, July 2024.

6- Values are verified and updated on an ongoing basis, which may have an impact on the data and trends reported above. Information provided by the Ministry of Justice and Law, July 2024.