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**Illicit drug traffic and supply: world situation with regard
to drug trafficking and action taken by the subsidiary
bodies of the Commission**

World situation with regard to drug trafficking**Report of the Secretariat***Summary*

The present report contains an overview of global trends and patterns in illicit drug production and trafficking. It also provides information pursuant to Commission on Narcotic Drugs resolutions 47/5, entitled "Illicit drug profiling in international law enforcement: maximizing outcome and improving cooperation", and 47/6, entitled "Effective controlled delivery".

In 2004, the area under illicit opium poppy cultivation in Afghanistan increased by 64 per cent. Owing to droughts and crop disease, yields were lower and opium production increased by 17 per cent. Opium poppy cultivation declined in the Lao People's Democratic Republic and Myanmar. Global potential heroin manufacture remained largely stable at 485 tons. Afghanistan currently accounts for 87 per cent of the illicit opium produced worldwide.

The area under coca bush cultivation declined by 11 per cent in 2003. Total potential cocaine manufacture was estimated at 655 tons (18 per cent less than in 2002).

In 2003, global interdiction of heroin (and morphine) and cocaine increased respectively by 33 and 35 per cent to record-high levels of 96.6 tons and 490.5 tons. Data for 2004 indicate continued intense trafficking.

* E/CN.7/2005/1.



Key developments include intensified smuggling of cocaine through Central America to the United States of America and increased use of West and North Africa as distribution hubs for cocaine and heroin smuggling. Countries in Central Asia and Eastern and South-Eastern Europe have been used heavily by traffickers supplying major heroin markets in Europe.

Cannabis has remained the most seized drug worldwide. Global interdiction of cannabis herb and resin increased by 23 per cent in 2003.

Trafficking in amphetamine-type stimulants rose by 36 per cent in 2003.

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I. Introduction

1. The present report provides an overview of developments in the production of and trafficking in the main illicit drugs at the global and regional levels, based on the latest information available to the United Nations Office on Drugs and Crime (UNODC). It also provides information pursuant to Commission on Narcotic Drugs resolutions 47/5, entitled "Illicit drug profiling in international law enforcement: maximizing outcome and improving cooperation", and 47/6, entitled "Effective controlled delivery".
2. The report presents an overview of the drug trafficking situation worldwide to assist States in their efforts to fight illicit drug production and trafficking.
3. Information on illicit drug crop cultivation and production of plant-based drugs has been drawn from the latest illicit crop monitoring surveys of UNODC. The primary sources of information on drug trafficking were the replies to the annual reports questionnaire, part III (illicit supply of drugs), submitted by Governments for 2003 and previous years.
4. Other sources of information included reports on significant drug seizures and other reports received by UNODC or submitted to the Commission on Narcotic Drugs and its subsidiary bodies. The present report is based on information received by UNODC as at 10 November 2004.
5. The drug trafficking trends described in the report are mainly based on drug seizure data. Statistics on drug seizures offer valid, indirect indicators of trafficking trends. However, they should be treated with caution, as they also reflect different reporting practices and depend on the level and effectiveness of law enforcement.

II. Global trends in illicit drug crop cultivation and the production of plant-based drugs, 2003-2004

A. Cannabis

6. Cannabis continues to be the most widely produced, trafficked and consumed plant-based drug worldwide. In 2003, potential cannabis herb production is estimated to have surpassed 40,000 tons.
7. States in all regions continued to report the detection of illicit cannabis cultivation. Eradication was reported by the Governments of several countries, including the following (listed in descending order according to the total area eradicated): Mexico, Kyrgyzstan, Morocco, Greece, India, Zambia, Lebanon, Swaziland, Nigeria, Madagascar, Nepal, South Africa and Trinidad and Tobago. Hydroponic (indoor) cultivation of cannabis continued to be reported by countries in Europe, North America and Oceania.
8. Global interdiction of cannabis plants increased by 26 per cent to 32,400 tons in 2003. Despite increased seizures in the previous two years, the volume seized in 2003 remained below that of the peak year 1996, when 113,000 tons of cannabis plants were seized. Turkey reported the largest volume of cannabis plants seized, accounting for 43 per cent of the world total.

B. Opium

1. Illicit cultivation of opium poppy and production of opium

9. In 2004, the total area under illicit opium poppy cultivation worldwide increased by 16 per cent to 196,000 hectares (ha). Global illicit opium production in 2004 remained largely stable at 4,850 tons (compared with 4,766 tons in 2003). Potential heroin manufacture in 2004 was estimated at 485 tons (compared with 477 tons in 2003), an increase of 2 per cent. Developments in Afghanistan overshadowed the substantial reduction in opium poppy cultivation in South-East Asia. Afghanistan currently accounts for 87 per cent of the illicit opium produced worldwide, up from 76 per cent in 2003. Myanmar's share of total illicit opium production declined from 17 per cent in 2003 to 8 per cent in 2004. Colombia, the Lao People's Democratic Republic, Mexico, Pakistan and other countries together accounted for the remaining 5 per cent (see figures 1 and 2).

Figure 1

Global illicit opium poppy cultivation, 1993-2004

(Hectares)

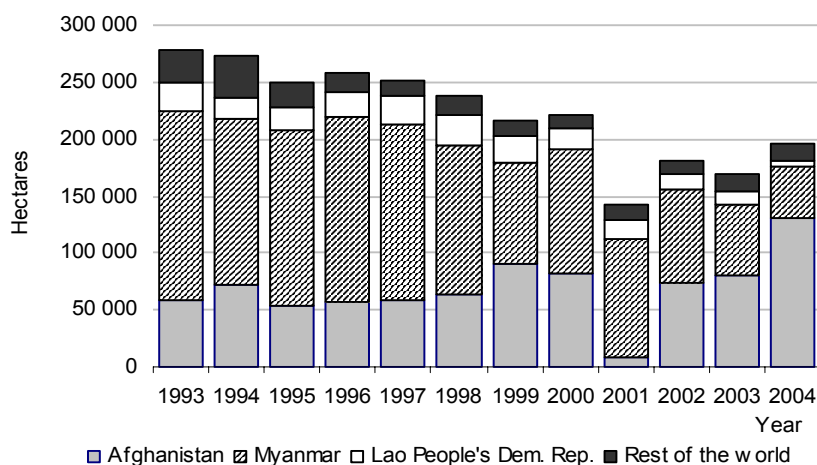
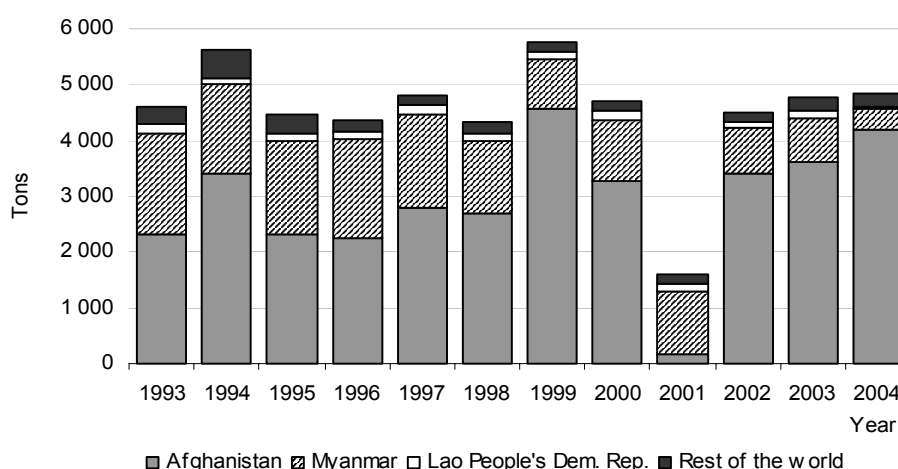


Figure 2
Global illicit opium production, 1993-2004
 (Tons)



10. The Governments of the following countries reported opium poppy eradication for 2003: Afghanistan (21,430 ha), Colombia (2,994 ha), Lao People's Democratic Republic (4,134 ha), Mexico (20,034 ha), Myanmar (638 ha), Pakistan (4,185 ha), Thailand (767 ha) and Viet Nam (100 ha).

11. In Afghanistan, the UNODC opium poppy survey showed an increase of 64 per cent in the total area under cultivation in 2004, to 131,000 ha. As a result of droughts and crop diseases, opium poppy production increased by 17 per cent, from 3,600 tons in 2003 to 4,200 tons in 2004.

12. In Afghanistan, some 2.3 million people, or 10 per cent of the population, were involved in opium poppy cultivation in 2004 (an increase of 35 per cent over 2003). Opium poppy cultivation is currently taking place in all 32 provinces, though it is still primarily concentrated in 3 provinces: Helmand, Nangarhar and Badakhshan. Overproduction drove the average farmgate price of fresh opium down by 67 per cent, from \$283 per kilogram in 2003 to \$92 per kilogram in 2004. The estimated farmers' per capita gross income from opium declined by 64 per cent, which is still 12 times higher than the per capita gross income from wheat.¹

13. In Myanmar, the second largest opium producer in the world, the UNODC opium survey for 2004 showed a further decline of 29 per cent, with opium poppy cultivation estimated at 44,200 ha, compared with 62,200 ha in 2003. Since 1996, opium poppy cultivation has declined by 73 per cent. The potential opium production was estimated to have declined by 54 per cent, to 370 tons.

14. Some 260,000 households are currently involved in opium poppy cultivation in Myanmar (down from 350,000 in 2003), the majority of them in Shan State. Opium farmgate prices in Shan State increased by some 80 per cent, to \$234 per kilogram, in 2004. The net impact of lower production and higher prices was a decline in the average cash income of an opium poppy farmer in Shan State, from \$159 in 2003 to \$133 in 2004. For opium-producing farmers, the sale of opium represents on average 62 per cent of their annual cash income.²

15. The survey conducted by the Government of the Lao People's Democratic Republic and UNODC in 2004 showed that opium poppy cultivation declined by 45 per cent, to 6,600 ha—a cumulative reduction of 75 per cent in six years. The illicit production of opium was estimated at 43 tons in 2004 (64 per cent less than in 2003). The Lao People's Democratic Republic currently accounts for less than 1 per cent of global illicit opium production. However, some 22,800 poor households still derive a significant share of their income from the harvested opium. In the Lao People's Democratic Republic, as in Myanmar, opium scarcity drove prices up—from an average \$172 per kilogram in 2003 to \$218 per kilogram in 2004.³

2. Illicit manufacture of heroin

16. Global heroin manufacture was estimated at 485 tons in 2004. In Afghanistan, it is estimated that 80 per cent of opium is currently processed domestically. That is supported by reports from the Afghan authorities of the destruction of some 100 rudimentary heroin manufacturing laboratories in the period 2003-2004. In addition, there have been record-high seizures of morphine in Pakistan and increased quantities of heroin interdicted in Central Asia and the Russian Federation. Unconfirmed reports suggest that not only acetic anhydride but also other acids such as acetic acid are being used in the manufacture of heroin (and morphine) in Afghanistan. The authorities of the Hong Kong Special Administrative Region of China, India and Myanmar also reported having dismantled heroin laboratories in the period 2002-2003.

17. In the Americas, laboratories manufacturing heroin were detected and dismantled in Colombia and Mexico in the period 2002-2003; in addition, one such laboratory was dismantled by the Canadian authorities in 2003. In Europe, the Russian Federation reported an increase in the number of laboratories manufacturing opiates that had been dismantled (from 91 in 2002 to 304 in 2003); heroin laboratories were also reported to have been dismantled in Poland (laboratories manufacturing "Polish heroin", known as "kompot"), Portugal and Romania.

C. Coca

1. Illicit cultivation of coca bush and manufacture of cocaine

18. The sustained, substantial reduction of illicit coca production in the Andean countries is an encouraging development in the fight against illicit drugs. The 2004 Andean coca surveys of UNODC showed that global illicit coca bush cultivation had declined for the third consecutive year in 2003. The total area under illicit coca bush cultivation in the three Andean countries was estimated at 153,800 ha in 2003, representing a decrease of 11 per cent compared with 2002 (173,100 ha) and a decrease of 30 per cent compared with the peak year 2000 (see figures 3 and 4).

Figure 3
Global illicit coca bush cultivation, 1993-2003
 (Hectares)

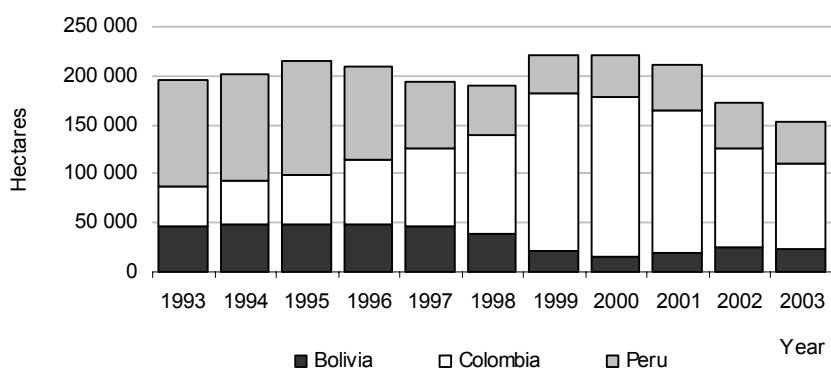
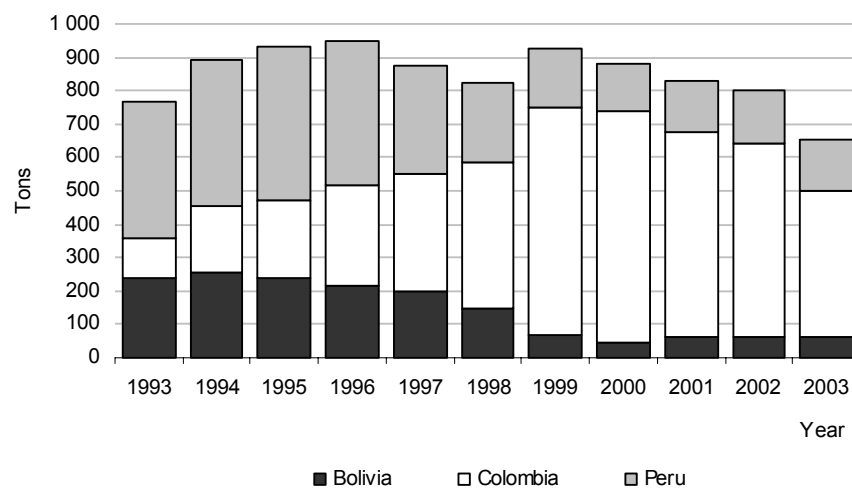


Figure 4
Global potential cocaine manufacture, 1993-2003
 (Tons)



19. In 2003, coca bush eradication was reported in Bolivia (10,089 ha), Colombia (132,817 ha) and Peru (11,312 ha). The total area under illicit coca bush cultivation in Colombia fell in 2003 by a further 16 per cent, to 86,000 ha, the third consecutive annual decline, resulting in a reduction of 47 per cent in the area under coca bush cultivation since 2000. That development follows a major reduction in illicit coca bush cultivation in Bolivia and Peru since the mid-1990s. In 2003, the total area under coca bush cultivation declined in Peru by 5 per cent, to 44,200 ha, and in Bolivia by 3 per cent, to 23,600 ha. Colombia currently accounts for 56 per cent of global illicit coca bush cultivation, Peru for 29 per cent and Bolivia for 15 per cent.

20. In 2003, the potential global production of dry coca leaf was estimated at 235,890 tons (compared with 294,400 tons in 2002), from which an estimated 655 tons of cocaine can potentially be produced. This significant reduction from the 800 tons estimated for 2002 is the lowest level since 1990. The distribution of potential cocaine production among the three main producer countries in 2003 was as follows: Colombia, 67 per cent; Peru, 24 per cent; and Bolivia, 9 per cent.

21. In Colombia, the average price in Colombian pesos for a kilogram of coca base remained largely stable in 2003 compared with 2002; however, the average price in United States dollars fell by 6 per cent, from \$847 per kilogram to \$793 per kilogram.

22. In Bolivia, coca leaf prices have remained stable in recent years (in 2003 at an average of \$5.4 per kilogram). Prices of dry coca leaf in Bolivia are relatively high compared with the prices in Peru (\$2.2 per kilogram). In Bolivia, coca leaf production still accounts for some 13 per cent of the gross domestic product of the licit agricultural sector. Approximately 300,000 people live in coca-producing areas. In Peru, some 50,000 households are estimated to be engaged in coca bush cultivation. At present, sustainable livelihood schemes reach less than 40 per cent of the coca bush growers.

2. Illicit manufacture of cocaine

23. Global potential cocaine manufacture was estimated at 655 tons in 2003. More than 4,000 illicit laboratories manufacturing coca group substances were reported to have been dismantled in 2003 (compared with about 3,000 detected in 2002). Bolivia, Colombia and Peru accounted for 99 per cent of reported laboratory detections. Argentina, Chile, El Salvador, Honduras and South Africa also reported detections.

24. Colombia reported a sharp increase in the dismantling of cocaine hydrochloride manufacturing laboratories. The Colombian authorities also indicated high purity levels in the cocaine interdicted in 2003. In the United States of America, the average purity of cocaine at the wholesale level is also believed to have increased, a trend also observed in some countries in Europe.

III. Drug-related crime and other types of crime

25. Data available to UNODC indicate that worldwide drug-related crime accounted for 4 per cent of total recorded crime in the period 1995-2002. However,

in some parts of the world, such as in countries in Central Asia, more than 50 per cent of the recorded crime was drug-related in recent years.

26. While the proportional share of drug-related crime in relation to all reported crime has not changed substantially, the number of drug-related offences increased by an average of 6 per cent each year between 1995 and 2002. In terms of arrests related to drug trafficking, 50 per cent of the reported arrests involved cannabis, 17 per cent involved cocaine, 14 per cent involved heroin and 10 per cent involved amphetamine-type stimulants (ATS). The remaining 9 per cent of the reported arrests were related to other drugs. On the consumer side, cocaine and methamphetamine have been identified in some countries as the drugs that most contribute to property crime.

27. A number of countries, in particular neighbouring countries of the main illicit drug producers, reported the loss of lives of law enforcement personnel while combating drug trafficking.

28. The links between drug-related crime and other types of crime have not yet been thoroughly documented. In many parts of the world, however, the nexus has been apparent for a long time; in others, it has become apparent only in recent years.

29. In the Andean countries, the proceeds of drug trafficking have historically been used to finance crime committed by paramilitary groups, such as the Autodefensas Unidas de Colombia (AUC) and the Fuerzas Armadas Revolucionarias de Colombia (FARC). In Afghanistan, warlords benefited from drug trafficking during the period of Taliban control.

30. During 2005, UNODC will publish the results of studies addressing the nexus between drug-related crime and other types of crime in West Africa and Central Asia, subregions increasingly being used for the trans-shipment of illicit drugs to major consumer markets.

IV. Global and regional trends in illicit drug trafficking, up to 2003

31. Seizures of cannabis accounted for over two thirds of worldwide drug seizures. Considering developments over the past decade, ATS were the drugs with the largest increases in seizures (see figure 5). In 2003, global drug interdiction increased in respect of all drugs, except methylenedioxymethamphetamine (MDMA, commonly known as Ecstasy), with increases exceeding 20 per cent for all main drug categories (see figure 6). Percentage changes in drug seizures in the different regions are presented in figure 7.

Figure 5
Global drug seizures, 1993-2003
 (Index: average for the period 1990-1992=100)

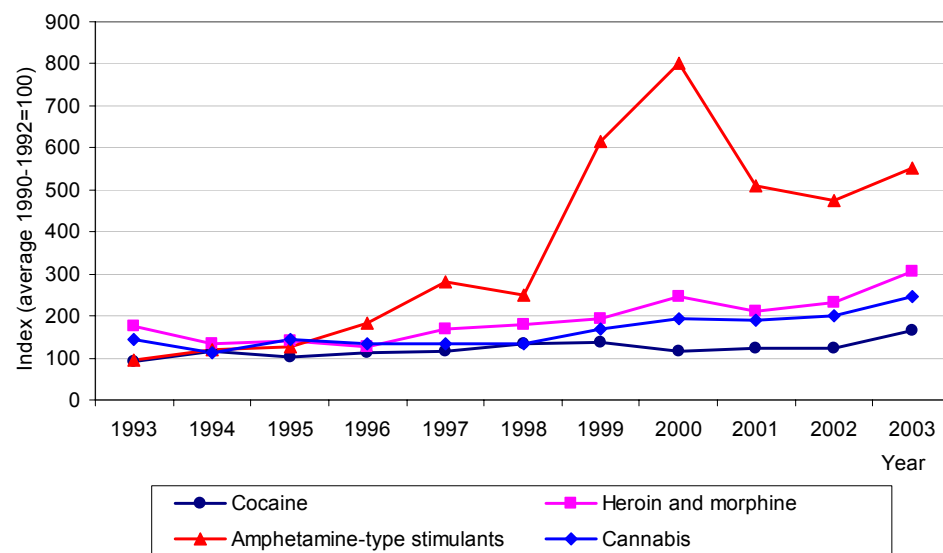


Figure 6
Changes in global drug seizures, 2002-2003
 (Percentage)

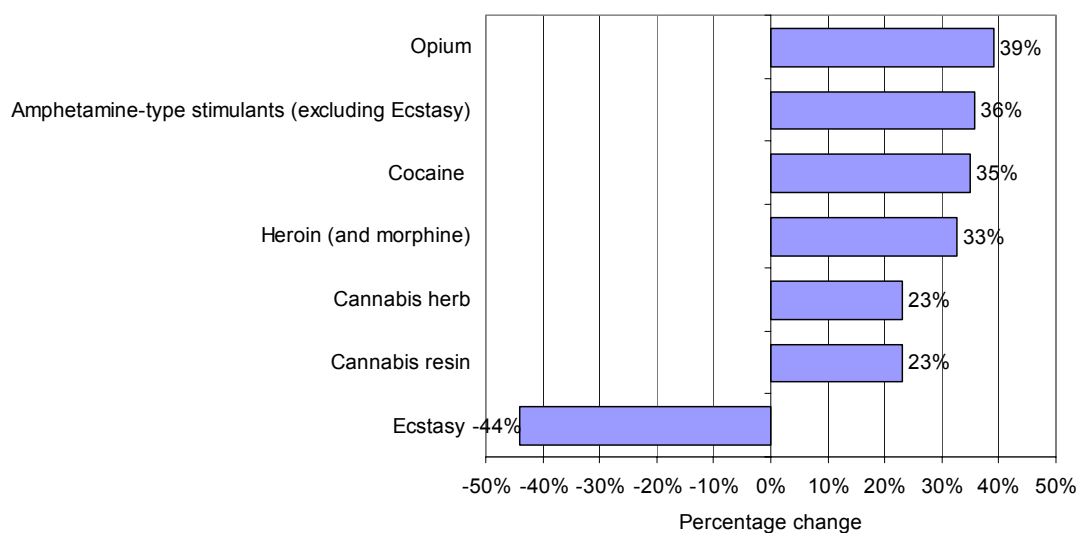
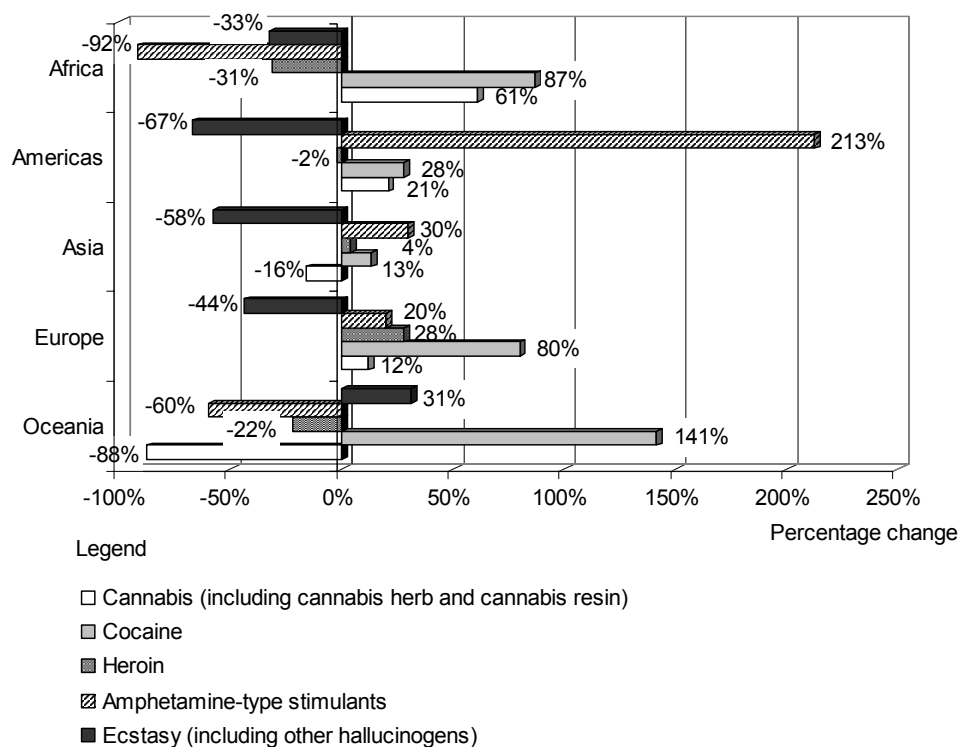


Figure 7
Changes in global drug seizures, by region, 2002-2003
 (Percentage)



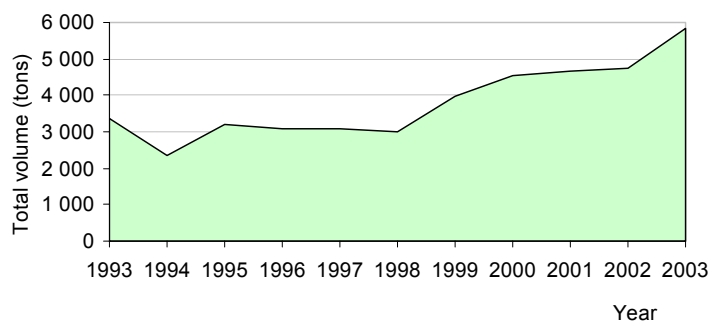
A. Cannabis

32. Cannabis continues to be the world's most widely abused and trafficked drug. About 150 million people are estimated to abuse cannabis worldwide. Interdiction of cannabis products accounted for over two thirds of global drug seizures in 2003. Cannabis herb was the most seized drug in Africa and the Americas, and cannabis resin was the most seized drug in Asia and Europe. The subregions with the greatest increases in seizures of cannabis products were Eastern Africa, Eastern Europe and Central America.

(a) Cannabis herb

33. Global interdiction of cannabis herb increased by 23 per cent in 2003, when 5,821 tons were seized (see figure 8). Trafficking in cannabis herb seriously affected countries in Africa and the Americas, which accounted for 26 and 68 per cent, respectively, of global seizures. Cannabis herb interdiction declined in the other regions.

Figure 8
Global seizures of cannabis herb, 1993-2003
 (Tons)



34. The importance of cannabis herb as a problem drug in Africa is confirmed by the fact that cannabis herb was the most seized drug in all subregions except North Africa, where cannabis resin was the predominant drug seized. In North America, cannabis herb was the most seized drug, accounting for 80 per cent of all drug seizures.

35. The largest volume of cannabis herb seized worldwide in 2003 was reported by Mexico (2,160 tons), followed by the United States (1,224 tons). Cannabis herb seizures in those two countries together accounted for more than half of the global total (see figures 9 and 10). In Africa, the largest cannabis herb seizures were reported by the United Republic of Tanzania and Nigeria. In Asia, India reported the largest seizures. In Europe the largest volume was seized in the Russian Federation.

Figure 9
Distribution of cannabis herb seizures, 2002
 (Total: 4,749 tons)

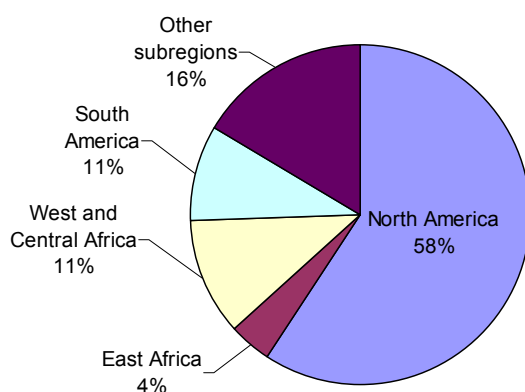
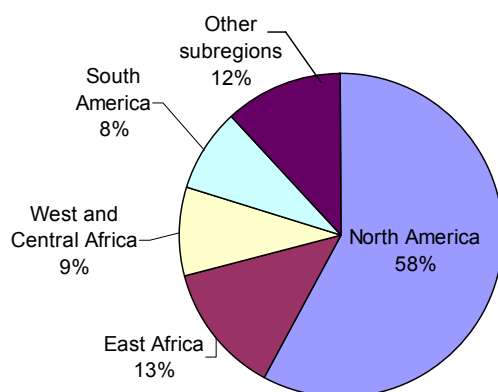


Figure 10
Distribution of cannabis herb seizures, 2003
 (Total: 5,821 tons)



36. Trafficking routes for cannabis herb are more diffuse than those for cocaine or heroin because of the large number of source countries. Most trafficking in cannabis herb is intraregional, with domestic sources being frequently reported. The Netherlands, Albania, Ghana, South Africa, Malawi, Thailand and Paraguay (listed in descending order) were the source countries most frequently cited (mostly by countries in their respective regions).

37. African States accounted for the majority of those reporting on seized cannabis herb bound for Europe. In the United States, cannabis herb comes from both domestic and foreign sources (mostly Canada, Colombia, Jamaica and Mexico). Reports on seizures of cannabis herb bound for the United States in 2003 were received from Guatemala, Mexico, the Philippines and the United Republic of Tanzania.

38. Indoor cannabis production has been reported by an increasing number of countries. Studies conducted in Canada and the United States have indicated an increase in the average potency of cannabis (average content of tetrahydrocannabinol (THC)) in the last few years.

39. Considering the widespread nature of cannabis cultivation and the availability of cannabis products, it is unlikely that trafficking in and consumption of cannabis products will diminish in the near future. In some countries, the increased demand for high-potency cannabis herb may further fuel indoor cultivation.

(b) Cannabis resin

40. In 2003, global interdiction of cannabis resin increased for the second consecutive year, to a record level of 1,347 tons (an increase of 23 per cent compared with 2002) (see figure 11). Seizures increased in all regions except

Oceania. Countries in Western and Central Europe, West Asia, the Near and Middle East and North Africa continued to account for the bulk of cannabis resin interdiction (see figures 12 and 13). Cannabis resin was the most seized drug in the latter subregions.

Figure 11

Global seizures of cannabis resin, 1993-2003

(Tons)

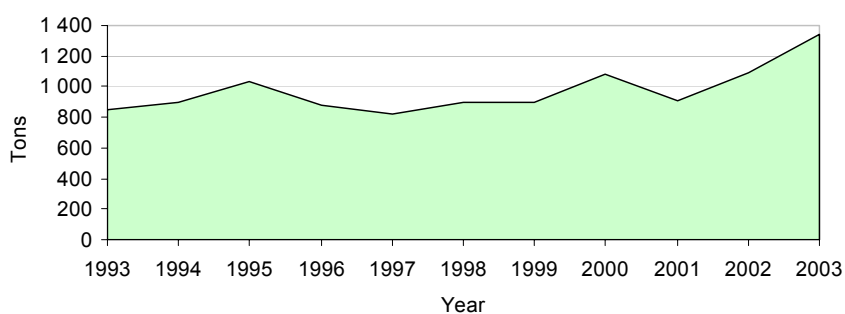


Figure 12

Distribution of cannabis resin seizures, 2002

(Total: 1,091 tons)

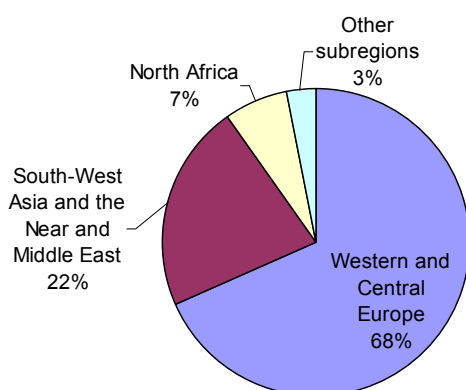
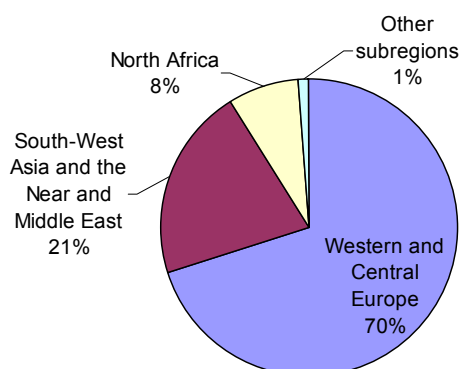


Figure 13
Distribution of cannabis resin seizures, 2003
 (Total: 1,347 tons)



41. In 2003, the largest seizures of cannabis resin were again reported by Spain (727 tons, or 54 per cent of the global total), followed by Pakistan and Morocco. In Europe, interdiction of cannabis resin increased by 26 per cent; increased seizures were reported not only in Spain but also in numerous other countries. In Africa, interdiction of cannabis resin increased in Algeria and Morocco.

42. Increased demand for cannabis resin in countries in the Near and Middle East are reported to have fuelled cannabis resin production in Asia, mainly in Afghanistan. Seizures of cannabis resin increased in Afghanistan (to 81 tons) and in its neighbouring countries, the Islamic Republic of Iran (to 77 tons) and Pakistan (to 99 tons). Jordan, Oman, Qatar and the Syrian Arab Republic also reported increased seizures of cannabis resin. In the Americas, where trafficking in cannabis resin has been modest, substantial increases in seizures were reported in Canada and Paraguay. In Oceania, trafficking in cannabis resin remained limited.

43. Morocco continued to be the most important source country for the cannabis resin smuggled into Europe, with 13 European countries seizing cannabis resin originating in Morocco in 2003 (compared with 11 in 2002). Albania and Spain followed Morocco as the most frequently reported source countries of cannabis resin seized in Europe. India, Lebanon, Nepal and Pakistan were cited as source countries by neighbouring countries. Cannabis resin originating in Afghanistan was seized in the Islamic Republic of Iran and Pakistan, as well as in Canada, Lithuania, Poland and the United Republic of Tanzania. Cannabis resin from Afghanistan was smuggled through West Africa before being seized in Europe in 2004. Large-scale production of cannabis resin is concentrated in a few countries. However, globally, 31 countries were reported as source countries in 2003.

B. Opiates

44. UNODC estimates that some 15 million people in the world use opiates, including 9 million who consume heroin. Opiates, followed by cocaine, remain the

principal problem drugs in the world, as reflected in demand for treatment. In 2003, global seizures of opiates accounted for 9 per cent of global drug seizures in consumption units, down from 14 per cent in the previous year. The decline was accompanied by increases in the proportional shares of total drug seizures accounted for by cannabis and cocaine. Opiates were the second most seized drug in South-West Asia, after cannabis resin, and in East and South-East Asia, after methamphetamine. Opiates continued to be the most seized drug in Central Asia. In East and South-East Europe, heroin was the most seized drug in 2003.

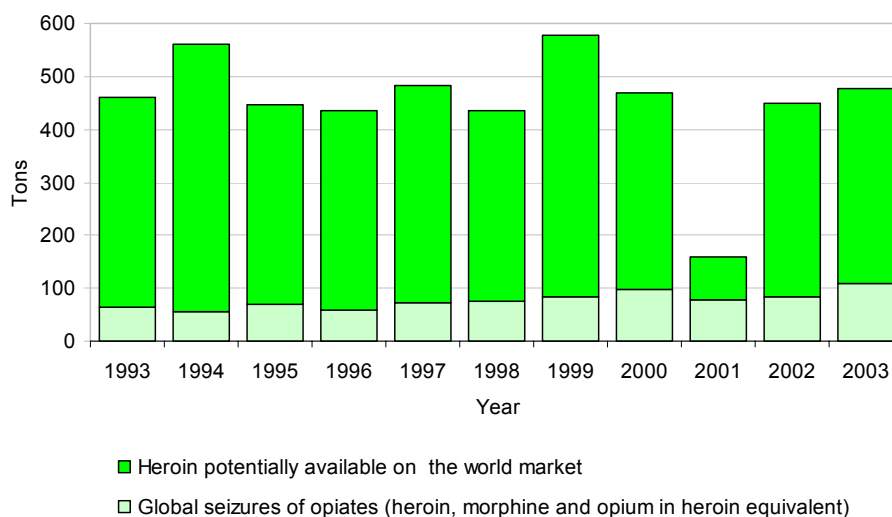
1. Interception rates and potential availability of heroin on the world market

45. After the relatively stable period 2001-2002, global seizures of opiates (that is, combined seizures of heroin, morphine and opium converted into heroin equivalents)⁴ increased by 33 per cent, to 110 tons, in 2003 (see figure 14).

Figure 14

Global seizures of opiates and potential availability of heroin on the world market, 1993-2003

(Tons)



46. Asia accounted for 76 per cent of global seizures of opiates; Europe accounted for 17 per cent, the Americas for 6 per cent and Africa and Oceania for less than 1 per cent of the world total. The subregion of West Asia accounted for 57 per cent of global seizures of opiates. Pakistan accounted for 32 per cent of the world total, and the Islamic Republic of Iran continued to account for approximately one fourth of global seizures of opiates. China accounted for the largest seizures of opiates in East Asia (9 per cent of the world total).

47. In 2003, the largest volume of opium was seized in the Islamic Republic of Iran: 97.6 tons, or almost three fourths of the world total (134 tons). One new development was the record-high seizures of opium in Thailand (10.2 tons—the second largest in the world). Large volumes of opium were also seized in the following countries (listed in descending order): Afghanistan, Pakistan, Tajikistan, Russian Federation, Myanmar and India.

48. With regard to morphine, after the volume of seizures doubled in 2002, interdiction increased again, by 77 per cent, in 2003, when 43.7 tons were seized worldwide. It is particularly noteworthy that this figure far exceeds the 27.6 tons legally used worldwide for medical and scientific purposes in 2003. Record-high seizures in Pakistan (27.7 tons) and seizures in the Islamic Republic of Iran (13 tons), accounted for the bulk of global morphine seizures. Large volumes of morphine were also seized in Mexico and Turkey.

2. Heroin trafficking and seizure trends

49. In respect of heroin, 52.9 tons were reported seized worldwide in 2003, compared with 48 tons in 2002 (an increase of 10 per cent). The distribution of heroin seizures shows an increase in the proportional share accounted for by Europe (see figures 15 and 16). Seizure levels in 2003 were stable in Asia and the Americas, declined in Africa and Oceania and increased in Europe. The increase in Europe was mainly the result of increased heroin interceptions in East and South-East Europe. Increased seizures, coupled with relatively stable or declining street prices, suggest increased trafficking in heroin in Europe.

Figure 15

Distribution of heroin seizures, 2002

(Total: 48 tons)

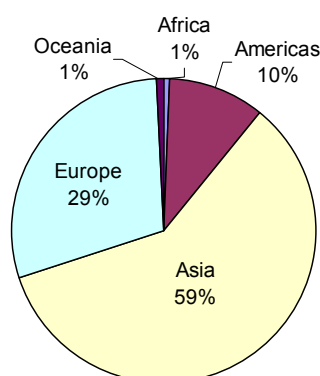
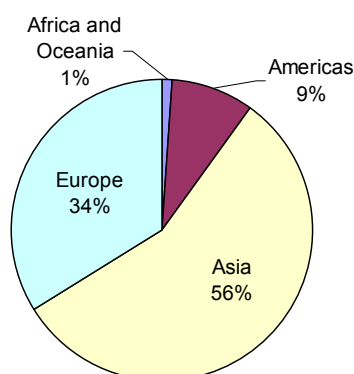


Figure 16

Distribution of heroin seizures, 2003

(Total: 52.9 tons)



50. The largest volume of heroin seized in 2003 was again reported by China (9.5 tons, or 18 per cent of the global total). That country was followed by Pakistan, Tajikistan, Turkey, the Islamic Republic of Iran and the Russian Federation (heroin seizures increased in all those countries except the Islamic Republic of Iran).

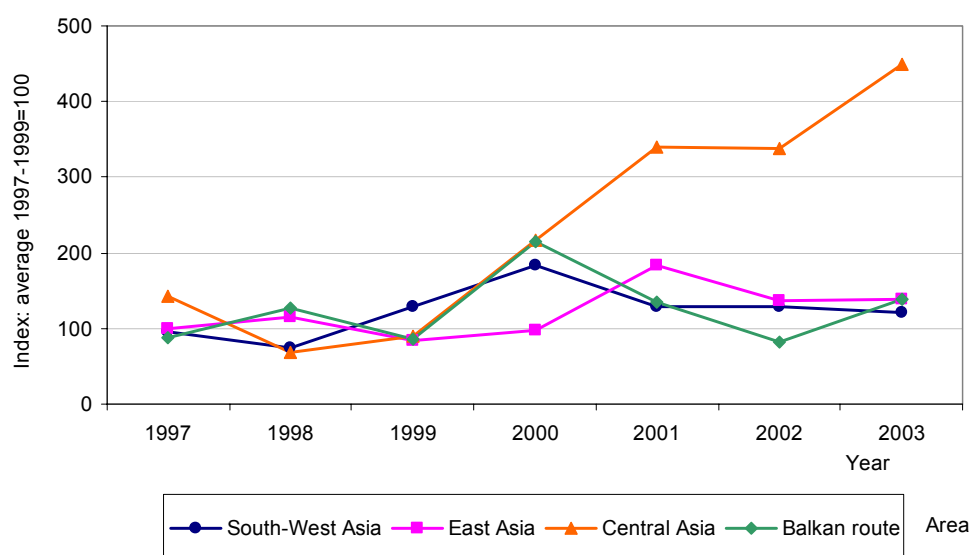
51. Heroin seizures in South-West and South-East Asia, the subregions with the two largest opium production areas, remained stable, accounting for 41 per cent of the world total. In Central Asia, 6.7 tons of heroin were seized in 2003 (up from 5 tons in 2002), representing 13 per cent of global heroin seizures (compared with 4 per cent in the late 1990s) (see figure 17). Tajikistan continued to account for the bulk of heroin seizures in the subregion.

52. In 2003, in countries along the Balkan route, heroin seizures increased by 72 per cent, to 7 tons, or 13 per cent of the world total. Turkey continued to account for the largest volume seized; it was followed by Bulgaria. In the Russian Federation, heroin seizures increased more than twofold, to 3.2 tons.

Figure 17

Heroin seizures in the areas of the main trafficking routes, 1997-2003

(Index: average for the period 1997-1999=100)



53. In Western and Central Europe, heroin seizures declined by 12 per cent, to 8.4 tons, in 2003. The largest volume of heroin was seized in Italy (2.6 tons).⁵ Seizures increased in France, Germany, Greece, Slovenia and Switzerland and remained stable in Italy, but declined in most other countries. One new development reported was the involvement of Iraqi nationals among the criminal groups trafficking in heroin.

54. The most frequently cited European destinations of the heroin shipments that were seized were (in descending order): United Kingdom of Great Britain and Northern Ireland, Germany, Netherlands and Sweden. Although the bulk of the

heroin consignments intercepted in Europe reach the region through traditional trafficking routes, several countries in Africa and in the Americas reported having seized heroin bound for Europe in 2003.

55. In 2002, the Americas witnessed an increase of 20 per cent in seizures of heroin. In 2003, the volume of such seizures was stable at 4.8 tons (accounting for 9 per cent of the world total). The main heroin market is the United States; most of the heroin trafficked in the Americas originated in Colombia and Mexico. Canada reported that half of the heroin seized had come from South-East Asia and the other half had come from Colombia. Costa Rica, Ecuador, Panama and Venezuela (Bolivarian Republic of) were used extensively for the trans-shipment of Colombian heroin. Heroin bound for the United States was also seized in countries in West Africa and South Asia, as well as China. China and India also reported on seizures made of heroin consignments bound for Canada.

56. In Africa, heroin interdiction rates remained low. Southern Africa was the only subregion that registered increased heroin seizures. However, Nigeria reported the largest volume of heroin seized. Holders of passports from West African countries continued to be reported as being involved in transporting Afghan and South-East Asian heroin to various destinations in Africa and additionally to markets in Europe and the United States. In Oceania, seizures of heroin declined; most of the heroin seized in Australia and New Zealand originated in South-East Asia.

57. Data on heroin seizures in 2004 in the Islamic Republic of Iran, Pakistan, Central Asian countries and Turkey indicate continued high levels of trafficking.

58. Developments in Afghanistan, which currently accounts for 87 per cent of worldwide supply of illicit opium, will largely determine the future availability of heroin on the world markets. Attempts by traffickers to increase the market share of Colombian and Mexican heroin in the United States are likely to continue.

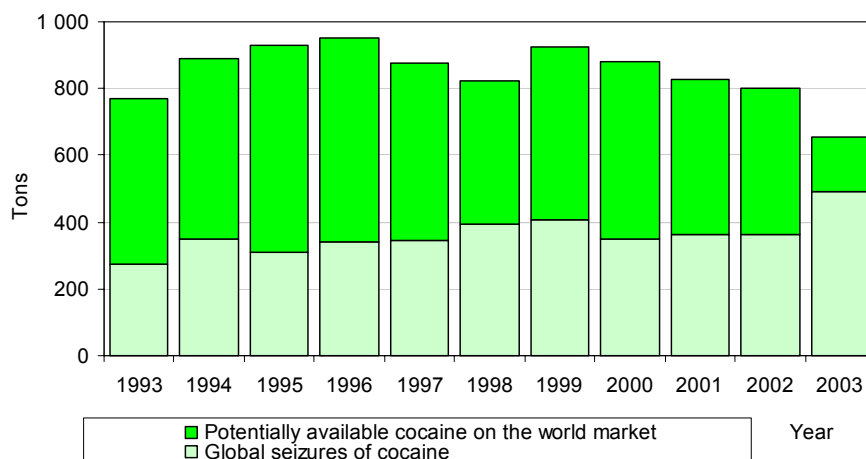
C. Cocaine

59. UNODC estimates that some 13 million people worldwide consume cocaine. Cocaine continued to be one of the most trafficked drugs in the world (second only to cannabis herb and cannabis resin), accounting for 16 per cent of global drug seizures in 2003. Cocaine was the second most seized drug in North America (after cannabis herb) and the most seized drug in all other subregions in the Americas. Cocaine seizures also reached unprecedented levels in European countries. In Western and Central Europe, cocaine was the second most seized drug (after cannabis resin).

1. Interception rates and potential availability of cocaine on the world market

60. Following the stable period 2000-2002, global cocaine seizures increased by 35 per cent, to 490.5 tons, in 2003 (see figure 18), as seizures increased in all regions.

Figure 18
Global seizures of cocaine and its potential availability on the world market, 1993-2003
 (Tons)



2. Cocaine trafficking and seizure trends

61. Cocaine traffickers continued to target countries in the Americas and, increasingly, markets in Western Europe. Both regions thus accounted for the bulk of cocaine seizures worldwide (see figures 19 and 20). Cocaine seizures continued to rise in Colombia (142.6 tons) and in the United States (115.7 tons). Both countries together accounted for 52 per cent of global cocaine seizures in 2003. Cocaine seizures more than doubled in Bolivia (12.8 tons) and increased substantially (to 32.3 tons) in the Bolivarian Republic of Venezuela. Tons of cocaine were also reported to have been seized in the following countries in South America (listed in descending order): Brazil, Peru, Ecuador, Chile and Argentina.

Figure 19
Distribution of cocaine seizures, 2002
 (Total: 363.3 tons)

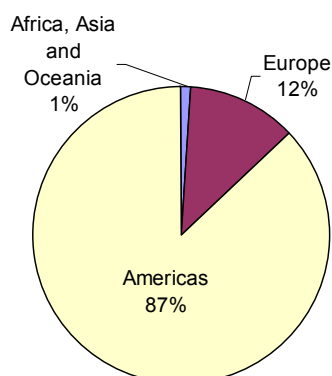
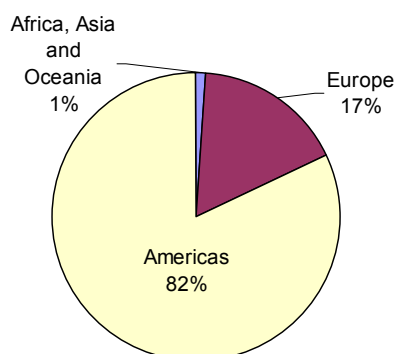


Figure 20
Distribution of cocaine seizures, 2003
 (Total: 490.5 tons)



62. Brazil and Venezuela (Bolivarian Republic of) continued to be affected by trafficking in cocaine bound for markets in the United States and Europe. Of particular concern is the increased use of the Amazon basin by traffickers, which is particularly difficult to police. Cocaine continued to be trafficked along the Brazil-Africa route. There have been reports of increased use of West and North Africa for trans-shipping cocaine consignments destined for Europe, as well as reports of alliances between Colombian cocaine traffickers and North African cannabis resin syndicates. Ghana, Guinea and Nigeria reported having seized cocaine bound for markets in the United States.

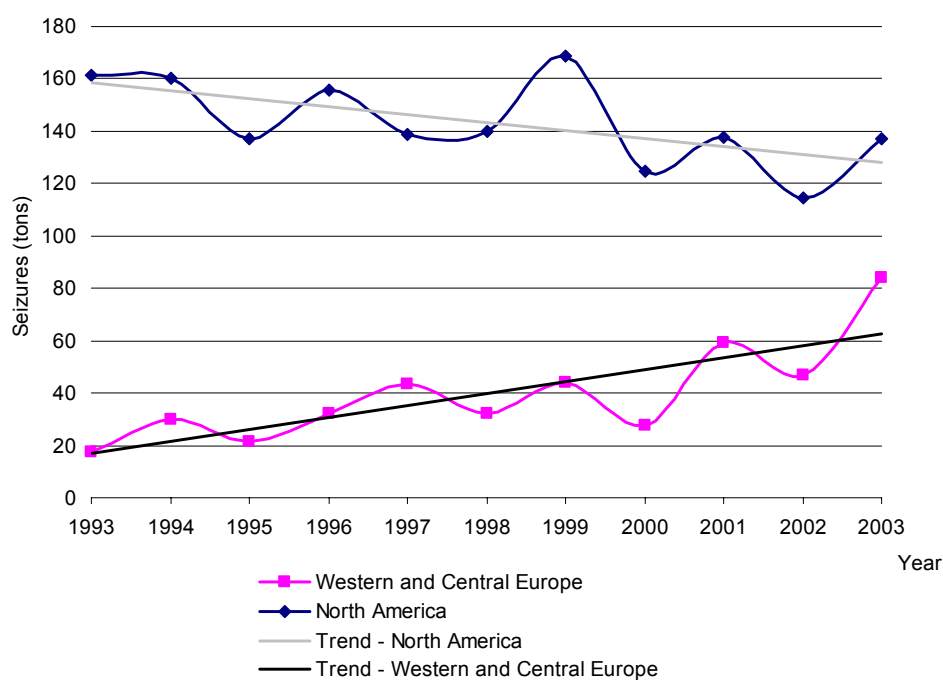
63. The smuggling of cocaine through Central America to Mexico and the United States intensified in 2003, as reflected in the increased cocaine seizures effected in Central America and Mexico. In Guatemala, cocaine seizures increased more than twofold, reaching 9 tons. About 70 per cent of the seized cocaine was reported to have been intended for the United States and 20 per cent for Europe. Honduras also registered a dramatic increase in cocaine seizures in 2003 (5.6 tons, compared with less than 100 kg in 2002). Traffickers have reportedly made increasing use of sea vessels and clandestine flights to smuggle drug consignments. Costa Rica and Panama also reported increased cocaine seizures. Likewise, in the Caribbean, cocaine seizures increased by 35 per cent, the Netherlands Antilles and the Bahamas accounting for the largest volumes seized. Similarly, cocaine seizures increased in Mexico (21 tons) and Canada (0.4 tons).

64. In Europe cocaine seizures increased in 2003 by 80 per cent, to a record-high level of 84.3 tons. In 2003, Western and Central Europe accounted for 60 per cent of cocaine seizures in North America, compared with 11 per cent in 1993 (see figure 21). Spain accounted for the largest volume of cocaine seized in Europe and the third largest worldwide (49.2 tons, up from 17.6 tons in the previous year); it was followed by the Netherlands (17.5 tons). From the countries historically seizing large quantities of cocaine, significant declines were registered only in Belgium and Germany. Brazil and Venezuela (Bolivarian Republic of) were reported by Spain (which also cited Argentina), Portugal (which also cited Suriname) and Italy (which also cited Costa Rica and Spain) to have been among the countries used for transshipping cocaine that was subsequently seized. For seizures of cocaine in the Netherlands and in France, the authorities reported that the Caribbean, as well as Spain, had been used as trans-shipment points.

Figure 21

Cocaine seizures in North America and Western and Central Europe, 1993-2003

(Tons)



65. Despite the increase in the volume of cocaine seized in Africa, Asia and Oceania, its importance remained limited compared with interdiction of other illicit drugs, such as cannabis in Africa and heroin and methamphetamine in Asia and Oceania. Developments in Africa related to increased interdiction of cocaine in South Africa (shipped from Brazil) and Nigeria (transited through South Africa). The authorities in Nigeria reported that 70 per cent of the cocaine seized had been bound for the United States and 30 per cent for Europe.

66. Cocaine interdiction increased in Australia, but still remained well below the level of seizures registered in 2000 and 2001. In Asia, countries in the Near and Middle East continued to account for the largest seizures of cocaine. Reports on such seizures were received for the first time from China.

67. As yet, the progress achieved in curtailing coca bush cultivation in recent years does not appear to have had an impact on cocaine availability on the world market. The sustained high level of interceptions (also reflected in the data available on interdiction in 2004) suggests possible stockpiling and/or improved varieties of coca bush and point to the continuation of illicit activity involving cocaine in the near future.

D. Amphetamine-type stimulants

68. UNODC estimates that worldwide some 30 million people use amphetamines and some 8 million people use Ecstasy. In 2003, global interdiction of ATS⁶ accounted for 3.5 per cent of global drug seizures (2.9 per cent in 2002). Measured in consumption units, methamphetamine was the most commonly seized drug in East and South-East Asia and in Oceania.

1. Illicit manufacture of amphetamine-type stimulants

69. The illicit manufacture of ATS is concentrated as follows: methamphetamine in East and South-East Asia, North America and Oceania; amphetamine in Europe; and methylenedioxymethamphetamine (MDMA, commonly known as Ecstasy) in Europe and, to a lesser extent, in North America.

70. The United States has been reporting the overwhelming majority of detections of clandestine methamphetamine laboratories in recent years. Laboratories detected in the United States are, however, usually smaller than the clandestine facilities detected in East and South-East Asia. For 2003, the following countries reported on such detections: in Asia, China, Myanmar, the Philippines and Thailand; in the Americas, Canada and Mexico (information on detections in the United States had not been received at the time of preparation of the present report); in Oceania, Australia and New Zealand; and in Europe, the Czech Republic, Lithuania and Slovakia.

71. Reports on the detection of clandestine laboratories show increased illicit manufacture of methamphetamine in 2003, which is also indicated in the volumes interdicted worldwide. The Philippines were seriously affected by illicit methamphetamine manufacture, detecting record numbers of clandestine laboratories (11, compared with 4 in 2002).

72. The numbers of illicit laboratories manufacturing amphetamine detected in 2003 remained stable, compared with the reports received for 2002. Illicit manufacture continued to be concentrated in Europe, with reports on such detections received from the following countries: Belgium, Bulgaria, Germany, Lithuania, Luxembourg, Netherlands, Poland, Russian Federation, Serbia and Montenegro and United Kingdom. As for reports received from countries in other regions, Indonesia and Mexico also reported such detections.

73. The illicit manufacture of Ecstasy-type substances is concentrated in Western and Central Europe and, to a lesser extent, in North America. The total number of clandestine Ecstasy laboratories reported detected in 2003 declined substantially, which appears to be consistent with the decline in global Ecstasy interdiction. Reports on such detections in 2003 were received from Belgium, Lithuania, the Netherlands and the Russian Federation in Europe and from Argentina and Canada in the Americas. South Africa and New Zealand also reported on the dismantling of Ecstasy laboratories in 2003.

2. Trafficking and seizure trends involving amphetamine-type stimulants

74. ATS were the drugs with the largest increases in seizures in the last decade. After record-high seizures in 2000, global interdiction declined in 2001 and 2002, only to increase again, to 34 tons, in 2003 (compared with 29.2 tons in 2002) (see figure 22). Methamphetamine continued to account for the greater part of ATS seizures (69 per cent). It was followed by amphetamine (14 per cent) and Ecstasy (13 per cent). The remaining 4 per cent were seizures of unspecified ATS. Seizures of amphetamines (amphetamine and methamphetamine) increased by 36 per cent, while those of Ecstasy declined by 44 per cent. The global distribution of ATS seizures continued to show East and South-East Asia as the most affected subregions (see figures 23 and 24).

Figure 22

Global seizures of amphetamine-type stimulants, 1993-2003

(Tons)

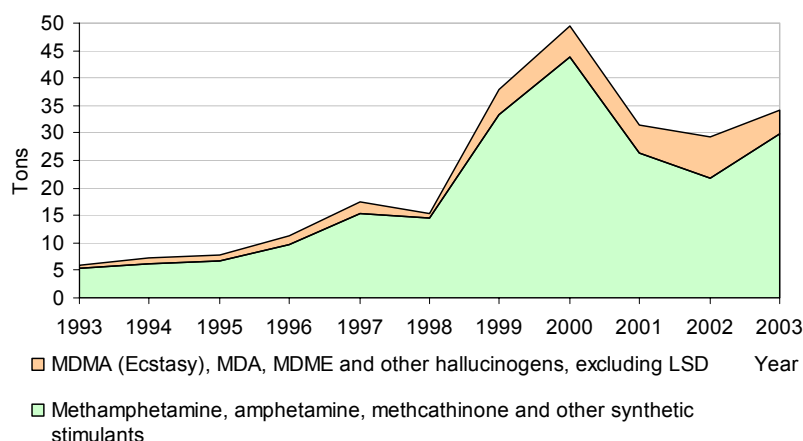


Figure 23

Distribution of seizures of amphetamine-type stimulants, 2002

(Total: 29.2 tons)

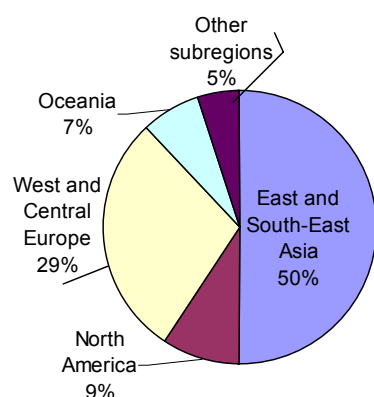
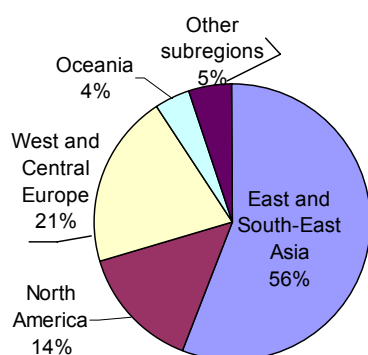


Figure 24

Distribution of seizures of amphetamine-type stimulants, 2003

(Total: 34 tons)

**(a) Methamphetamine**

75. Considered in isolation, methamphetamine seizures increased from 15.4 tons in 2002 to 23.6 tons in 2003 (an increase of 53 per cent). Countries in East and South-East Asia continued to account for the majority of global methamphetamine interdiction. Trafficking in methamphetamine intensified in East and South-East Asia, North America and Oceania in 2003. The global distribution of methamphetamine seizures was as follows: East and South-East Asia, 79 per cent; North America, 19 per cent; other subregions, 2 per cent.

76. During the period 1993-2003, China reported the largest methamphetamine seizures; it was followed by Thailand and the United States. Since 2001, Thailand has reported the largest volume of methamphetamine seizures. In 2003, the largest volume of methamphetamine seizures was reported by Thailand (8.6 tons), followed

by China (5.8 tons). Together, those two countries accounted for 62 per cent of global methamphetamine seizures. Such seizures increased in China and remained stable in Thailand. A key development in the subregion was the significant increase in the volume of seized methamphetamine reported by the Philippines in 2003 (3.1 tons, compared with less than 1 ton in 2002). In Myanmar, methamphetamine seizures declined. In Japan, a slight increase in such seizures was registered. Overall, methamphetamine interdiction increased by 35 per cent in East and South-East Asia.

77. A strong increase in methamphetamine interdiction was registered in North America, mainly due to a more than twofold increase in such seizures in the United States (3.7 tons). In Europe, seizures almost doubled, though from low levels, with the Czech Republic, Lithuania, Norway, the Russian Federation and Sweden reporting increased seizure levels. In Oceania, such seizures declined substantially. In other parts of the world, methamphetamine interdiction was marginal compared with that of other illicit drugs.

78. The source countries of methamphetamine most frequently cited by other countries were (in descending order): China, Philippines, United States and Thailand. Most of the methamphetamine seized in South-East Asian countries before it could be smuggled further had been intended for countries in the subregion.

79. Thailand reported that attempted smuggling of methamphetamine across Thai borders had changed from several million tablets per shipment to smaller shipments. The authorities also reported that methamphetamine was frequently found to be trafficked with heroin, especially in the northern areas of the country and in areas of Bangkok and nearby provinces. China reported seizures of methamphetamine of local origin and from Myanmar. The intended destinations of the methamphetamine seized in China and bound for export were the Philippines, the Republic of Korea and Japan.

80. The Philippines reported seizures of methamphetamine from local sources and shipped from China. Myanmar reported that 100 per cent of the seized methamphetamine was of local origin. The Lao People's Democratic Republic appears to be increasingly affected by trafficking in methamphetamine from Myanmar, bound for Thailand.

81. In the United States, the authorities reported that the methamphetamine produced domestically was the predominant type available; however, methamphetamine produced in Mexico and, to a much lesser extent, South-East Asia was also available.

(b) Amphetamine

82. Global amphetamine interdiction increased by 10 per cent, to 4.9 tons, in 2003. A decline from 2 tons to 1.3 tons was registered in global seizures of non-specified ATS (that is, those not specified as amphetamine, methamphetamine or Ecstasy by reporting countries).

83. Amphetamine interdiction continued to show Europe as the most affected region and, within Europe, Western and Central Europe as the subregions accounting for the bulk of amphetamine interdiction. In 2003, the global distribution

of amphetamine seizures was as follows: Western and Central Europe, 82 per cent; East and South-East Europe, 13 per cent; Near and Middle East, 3 per cent; and other subregions, 2 per cent.

84. Amphetamine seizures remained stable in Western and Central Europe. In Bulgaria, however, seizures of amphetamine increased substantially. The authorities in Bulgaria reported 70 per cent of the seized amphetamine to be of domestic origin and 25 per cent to have originated in Serbia and Montenegro, intended for countries in the Middle East.

85. The largest volume of amphetamine seized in 2003 was reported by the Netherlands (880 kg),⁷ followed by Bulgaria and Germany. Other countries seizing large volumes were (in descending order): Sweden, France, Norway, Finland and Estonia. The main source country of amphetamine seized in Europe continued to be the Netherlands, followed by Poland and Belgium. Lithuania was the source country of amphetamine seized in Sweden, and Estonia was the source country for amphetamine seized in Finland. Trafficking in amphetamine remained mostly intraregional. Relatively small amphetamine seizures were registered in other parts of the world. In South America and in Africa, ATS were still supplied mainly through diversion from licit channels.

(c) Ecstasy-type substances

86. Following increased seizures in the last few years, global interdiction of Ecstasy-type substances and other hallucinogens fell from 7.3 tons in 2002 to 4.3 tons in 2003. The bulk of Ecstasy interdiction continued to be in Western and Central Europe (accounting for 58 per cent of global seizures). In 2003, the second most affected region was Oceania (accounting for 23 per cent of global seizures), followed by North America (10 per cent), East and South-East Asia (5 per cent) and other subregions (4 per cent). The largest volumes of Ecstasy were seized in Australia and the Netherlands in 2003, each accounting for 25 per cent of global seizures).

87. Ecstasy seizures increased in Oceania in 2003 but declined in the rest of the world. The authorities in Australia indicated that detections in 2003 were characterized by smaller numbers, but of significantly larger size. It is possible that the relatively high street prices of ATS in Australia and New Zealand worked as an incentive for traffickers to target the region.

88. Most of the Ecstasy seized worldwide is smuggled out of Europe. The Netherlands continued to be, by a large margin, the most frequently cited source country, with Belgium second. The United States, Australia and the United Kingdom were frequently cited as intended destinations of Ecstasy seized by other countries.

89. It remains to be seen if the decline in Ecstasy interdiction will be accompanied by a decline in abuse levels, thus also reflecting a decline in illicit manufacturing and trafficking.

E. Other drugs

90. Methaqualone seizures declined significantly from more than 11 tons in 2002 to about 3 tons in 2003. South Africa accounted for about 80 per cent of the world total and India accounted for 20 per cent. The authorities in India attributed the large decline in seizures of methaqualone in 2003 to the dismantling of major syndicates in 2002. China, which had seized about 3 tons in 2002, reported no seizures in 2003. Seizures of depressants excluding methaqualone continued to be reported by countries in all regions, totalling 3 tons in 2003 (compared with less than 1 ton in 2002). Nigeria, Norway, the Hong Kong Special Administrative Region of China and the Russian Federation (listed in descending order) together accounted for 94 per cent of the world total.

V. Follow-up to resolutions adopted by the Commission on Narcotic Drugs at its forty-seventh session

91. Pursuant to Commission on Narcotic Drugs resolution 47/5, entitled “Illicit drug profiling in international law enforcement: maximizing outcome and improving cooperation”, UNODC is now finalizing a report for publication, identifying current profiling initiatives and best practices. The report, based on expert technical consultations, and building on existing UNODC work and experience, provides a global inventory of drug profiling initiatives, approaches and best practices. It outlines the concept of drug profiling, identifies what profiling is, and what it can do, and summarizes the prerequisites for successful operational profiling programmes (such as the need for clear goals and realistic expectations, analytical methods and databases, and working mechanisms for the exchange of information and law enforcement follow-up of results). The report then provides an overview of current drug profiling initiatives and how profiling is used in practice. Those initiatives range from national case-to-case comparison of seized samples for evidential purposes, to regional and international efforts to standardize analytical methods, establish mechanisms for collection and exchange of results, and share and develop intelligence findings. In that context, while the report highlights the importance of developing harmonized approaches in the laboratory, it finds that laboratory activities are only one part of drug profiling programmes. Successful programmes also rely critically on the development of systems for the practical utilization of results by law enforcement and others.

92. Pursuant to Commission on Narcotic Drugs resolution 47/6 entitled “Effective controlled delivery”, UNODC has produced model legislation for Member States to guide them in the drafting of new laws and amendments to existing legislation in the matter of controlled delivery. This documentation is available on the UNODC website (www.unodc.org). Interpretation of the provisions of article 11 of the United Nations Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances of 1988⁸ is also available in the Commentary on the 1988 Convention⁹ that accompanies it, offering more detail to assist in the drafting of regulations to meet the needs of individual States. As part of a now completed project activity, UNODC has produced a good practice guide for practitioners of controlled deliveries. The guide is currently under editorial review and will soon be available for circulation to Member States. Concurrent with this activity, UNODC is also

working with the International Criminal Police Organization (Interpol) to revise their publication that provides details of competent authorities and the procedures to follow in undertaking operational controlled deliveries. Subject to available resources, UNODC plans to convene an expert group meeting that will consider controlled delivery following completion of the Interpol review.

VI. Conclusion

93. Future trends in trafficking in opiates will be largely determined by developments in Afghanistan, by far the world's leader in illicit opium poppy cultivation. Greatly increased production of opium poppy registered in 2004 in Afghanistan and the consequent low prices farmers are receiving for their opium poppy present the national authorities and the international community with an unprecedented opportunity for well-targeted alternative development interventions. The control of the Afghan Government over all regions in the country is a prerequisite for the success of such initiatives. Developing the legitimate economy of Afghanistan through private sector investment in the country will provide the positive conditions for alternative sustainable livelihoods.

94. The substantial and sustained reduction of opium poppy cultivation in South-East Asia, as well as of coca bush cultivation in the Andean region are amongst the important achievements of the last years in the fight against illicit drugs. However, much remains to be done. Unless farmers have profitable crops to grow and markets in which to sell them, they may revert to growing illicit crops. Also of concern and requiring national and international attention is opium poppy cultivation in Colombia and Mexico, as well as the spread of coca bush to fragile ecosystems and Indian lands in the Andean subregion.

95. The spread of illicit cannabis cultivation, often at the expense of food and cash crops, and the consequent increase in the numbers of cannabis users worldwide will require further attention from the international community. This is particularly true in the case of Africa.

96. The relatively low volume of seizures in certain subregions, in particular in Africa, should not be seen as being indicative of the absence of trafficking, but rather as a reflection of underreporting of seizures or inadequate resources being available by Governments and the international community to law enforcement agencies.

97. Regarding synthetic substances, interdiction figures for ATS in 2003 point to a possible regaining of momentum in illicit manufacturing and trafficking. The concentration of illicit manufacture in South-East Asia, Western Europe and North America calls for renewed efforts of Governments in those subregions and elsewhere in the world where illicit manufacture of ATS takes place to tackle the problem with energetic resolution.

Notes

¹ United Nations Office on Drugs and Crime, *Afghanistan: Opium Survey 2004* (November 2004).

² United Nations Office on Drugs and Crime, *Myanmar: Opium Survey 2004* (October 2004).

- ³ United Nations Office on Drugs and Crime, *Laos: Opium Survey 2004* (July 2004).
- ⁴ For the purposes of this calculation, it is assumed that 10 kg of opium are equivalent to 1 kg of morphine or 1 kg of heroin.
- ⁵ In the last few years, the United Kingdom of Great Britain and Northern Ireland has seized the largest volume of heroin in Western and Central Europe. However, information on seizures in the United Kingdom in 2003 had not been received at the time of the preparation of the present report. For purposes of analysis, it was assumed that seizure levels in the United Kingdom in 2003 were similar to those in 2002.
- ⁶ Amphetamine-type stimulants, as defined by UNODC, consist of: (a) “amphetamines” (amphetamine, methamphetamine); (b) a number of other synthetic stimulants such as methcathinone, phentermine, fenetylline etc.; and (c) “Ecstasy” (MDMA; related products such as MDA and MDME, grouped together with MDMA under the heading “Ecstasy-group substances”).
- ⁷ In the last few years, the United Kingdom has accounted for the world’s largest amphetamine seizures. However, information on seizures in the United Kingdom in 2003 had not been received at the time of preparation of the present report. For purposes of analysis, it was assumed that seizure levels in the United Kingdom in 2003 were similar to those in 2002.
- ⁸ United Nations, *Treaty Series*, vol. 1582, No. 27627.
- ⁹ *Commentary on the United Nations Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances 1998* (United Nations publication, Sales No. E.98.XI.5).
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