

onward through the Balkan countries to Western and Central Europe. About half of all seizures of heroin and morphine worldwide are made in countries along this so-called “Balkan route”. There were significant changes in 2020. Seizures of heroin and morphine increased significantly in countries neighbouring Afghanistan, notably in the Islamic Republic of Iran and Pakistan, but declined in the Balkan countries and in destination countries in Western and Central Europe.¹

5. While the coronavirus disease (COVID-19) pandemic has not changed the status of the Balkan route as the most prominent heroin trafficking corridor, it did have an impact on trafficking activities during 2020, before they rebounded in 2021. Some traffickers apparently tried to circumvent the Balkan route to ship heroin during the pandemic, shifting flows towards the southern route. This was reflected by an increase in large seizures of heroin of up to 1.3 tons on the Arabian Sea since the onset of the pandemic, and the similarly large seizures made on ships arriving from West Asia at a number of European ports, such as in the United Kingdom of Great Britain and Northern Ireland.²

6. A sudden major increase in opium production in 2022 would not necessarily entail an immediate increase of similar magnitude in heroin manufacture, although increased opium production would eventually lead to upward trends in heroin manufacturing and trafficking. Past seizure data have shown that it can take between 1 and 1 1/2 years for opiates originating in Afghanistan to reach destination countries, depending on the distance from Afghanistan and the mode of transport used. This suggests that an eventual increase in opium production in Afghanistan can be expected, in general, to be reflected in an increase in the supply of opiates in the Near and Middle East and South-West Asia within the same year, and a year later in Europe. It can take up to one year for opiates originating in Afghanistan to reach Western Europe by land on the Balkan route, but it can take much less time if opiates are shipped by air on direct flights.³

7. The cocaine trafficking route between South America and Europe is the second largest in the world, and it is evolving. Supply chains once dominated by a few organized criminal groups are changing, with many more groups becoming involved. Much of the cocaine in Europe used to be imported through well-established channels, notably by Italian organized criminal groups and through alliances between groups in Colombia and Spain. Now, however, organizations originating in the Balkans are increasingly involved in trafficking and supply, and some are cutting out intermediaries and sourcing cocaine directly from production areas in the Andean region. The increased competition and efficiency of supply mean that cocaine is becoming more available and the quality is rising. The purity of cocaine available in Europe has increased by 40 per cent in the past decade, meaning that high-quality cocaine has, in effect, become cheaper per pure unit.⁴

8. Türkiye has been increasingly used as a transit country for cocaine in recent years. Since 2014, the amount of the drug seized in the country has increased sevenfold from 393 kg to a record 2.8 tons in 2021. Some of the cocaine reaching Türkiye arrives after transiting through West Africa, and some comes directly from Latin America. Neighbouring Greece has also been receiving increasing quantities of cocaine in recent years, much of it destined for the Balkan route and the markets of Western Europe. Seizure data show Greece intercepted almost 2 tons in 2020 before a slight decrease in 2022. Brazil and Ecuador are often the countries of departure for seized cocaine shipments.⁵

¹ *World Drug Report 2022*, booklet 3, *Drug Market Trends: Cannabis Opioids* (United Nations publication, 2022). **Error! Hyperlink reference not valid..**

² Ibid.

³ Ibid.

⁴ *World Drug Report 2021*, booklet 1, *Executive Summary: Policy Implications* (United Nations publication, 2021).

⁵ *Global Report on Cocaine 2023: Local Dynamics, Global Challenges* (United Nations publication, 2023).