The illicit trade of cocaine from Latin America to Europe
from oligopolies to free-for-all?
Cocaine Insights

The cocaine market presents a clear threat at global level. Well-defined locations of production in South America and large consumer markets in the Americas and Europe lead to trafficking routes from a circumscribed origin to specific, even if far-flung, destinations. While some parts of the world play a crucial role as transit regions, the routes, modalities and networks employed by criminal actors continue to evolve, diversify and become more efficient. The increasingly globalized, interconnected, digitized and technologically sophisticated nature of society, as well as a growing affluent demographic in some regions where cocaine use has traditionally been low, can potentially catalyse and accelerate the dynamism and expansion of the market.

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Main contributors: Alan Arroyo, Chloé Carpentier, Sascha Strupp, Antoine Vella.

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Disclaimer

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Comments on the report are welcome and can be sent to:
Drug Research Section
Research and Trends Analysis Branch
United Nations Office on Drugs and Crime
PO Box 500
1400 Vienna, Austria
Key findings

**Significant increase in cocaine supply to Europe**

The supply chain to Europe has increased its efficiency and ultimately the accessibility of cocaine to European consumers.

**Convergence of the United States and European markets**

Expansion of the cocaine market in Europe and the United States has resulted in a convergence of the level of cocaine purity that has reached the same level in Europe and in the United States and is on the increase.

Cocaine purity at retail level, Europe and the United States, 2005-2018

![Cocaine purity chart](chart.png)

- Europe (23 countries, cocaine hydrochloride), common range (10th-90th weighted percentiles)
- Europe (23 countries, cocaine hydrochloride), average weighted by estimated number of users
- United States (cocaine, unspecified, retail purchases)

**Diversification of the trafficking groups**

The increased fragmentation of the criminal landscape in Colombia has fostered the formation of new alliances among criminal groups and new opportunities for European criminal networks to establish new contacts with providers in South America. Some of these groups, notably Albanian-speaking and Western Balkan criminal networks, have become especially prominent in procuring large quantities of cocaine directly at source – cutting out the middleman.

**Erosion of the oligopoly**

This diversification has undermined the competitive advantage of the handful of well-established, well-connected criminal networks, such as the Italian ‘Ndrangheta, which used to dominate large-scale trafficking across the Atlantic and nevertheless continue their large-scale trafficking activity, in parallel with new networks, contributing to an increased availability of cocaine in the European consumer market.

**Shifting points of entry into Europe**

The epicentre of the cocaine market in Europe has shifted northwards. The increased use of containerized shipments relying on the high-volume ports of Antwerp, Rotterdam and Hamburg has consolidated the role of the Netherlands as a staging point and led to continental Europe’s North Sea coast overtaking the Iberian peninsula as the primary point of entry for cocaine reaching Europe.

The increased importance of Belgium relative to Spain and Portugal is reflected in seizure data

Distribution of cocaine seizure quantities in Europe, by country of seizure (two-year moving averages), 2000-2019

![Seizure data chart](chart2.png)

Source: UNODC, responses to the annual report questionnaire.

**Seizures at seaports illustrate the large quantities entering through the North Sea coast**

Cocaine seized at seaports by customs authorities of countries in Western and Central Europe, quantities seized in 2020 (or latest available data) and trend in comparison with 2019

![Seizure data map](map.png)

Source: World Customs Organization, Regional Intelligence Liaison Office for Western Europe (CEN Database).
Increased accessibility in Europe

As often happens in legal markets, the dynamics of competition, diversification, specialization and opportunistic collaboration have contributed throughout the supply chain to Europe to increase its efficiency and ultimately the accessibility of cocaine for European consumers.

Increase in violence associated with the cocaine trade in Europe

The booming cocaine market has entailed an increase in the occurrence of assassinations, shootings, bombings, arsons, kidnappings, torture and intimidation related to the trade in cocaine. The nature of the violence appears to have changed. A growing number of criminal networks use violence in a more offensive way.

Future prospects for the European cocaine market

The current dynamics of diversification and proliferation of cocaine supply channels, criminal actors and modalities are likely to continue, if left unchecked. In addition to relatively high wholesale prices for cocaine achieved in European destination countries, repeated interdiction along the route from South to North America may also have contributed to rendering trafficking channels to Europe the path of least resistance of the expanding cocaine market. Illicit cultivation of coca bush threatens to expand beyond the traditional source countries of Bolivia (Plurinational State of), Colombia and Peru, and clandestine establishments where cocaine is processed are increasingly proliferating in transit and consumer countries. Moreover, some parts of Africa are increasingly exposed as transit areas – which may itself catalyse the spread of cocaine use.

UNODC perspective and policy implications

On the one hand, the diversification seen in the cocaine supply channels, criminal networks and modalities involved in the illicit cocaine trade reinforces the argument for intervention at source, as this is the only stage in the supply chain which remains circumscribed and therefore most amenable to targeted intervention.

Given that the current surge in the cocaine market appears to be primarily supply-driven, the international community and the affected national governments must intensify their efforts to address the driving factors behind coca bush cultivation and the related illicit economy in the source countries, by means of alternative development programmes and the promotion of sustainable livelihoods, by strengthening the social fabric and targeting disenfranchisement of communities, and by consolidating governance structures, the presence of the state and the rule of law.

On the other hand, this diversification, which has already resulted in increased flows and increased availability of cocaine at destination, is a sign of an ongoing process of proliferation and of globalization of the market, and calls for intensified measures to bring cocaine flows to Europe under control and pre-emptive measures to stem the further spread of demand.

In terms of supply reduction, the increasingly transcontinental reach of criminal networks calls for close and pro-active collaboration of the criminal justice systems of source, transit and destination countries, including through

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mechanisms and fora specifically targeting the cocaine trafficking routes in their coverage and membership. European stakeholders must strengthen their ability to anticipate and intercept shipments at the external border, to detect and identify the criminal operators and to investigate and prosecute them in a coordinated, strategic and incisive manner. In order to ensure a real impact, these activities must be calibrated to target the backbone and the higher echelons of criminal structures, disrupt the underlying networks and hence counter trafficking activities as effectively as possible. Criminal intelligence must be used to identify the higher levels of DTOs and inform actions to disrupt their business models.

Towards this objective, one key avenue is to promote transatlantic information and intelligence-sharing mechanisms between criminal justice systems (including law enforcement) which operate in a pro-active and timely manner, pool information from agencies from multiple countries and enable coordinated intelligence-led operations, conducted with agility as the picture unfolds. Given the central role of containerized trade, it is important to strengthen the international protocol for shipments at the loading and trans-shipment stages, as well as the operating capacity at ports, so that authorities are more effective at intercepting shipments prior to arrival. Risk-profiling of suspect shipments and recipient companies can be strengthened, for example by developing and sharing common criteria among port authorities, customs and law enforcement agencies.

Authorities must also target corruption at ports, without which many illicit shipments could not happen, and ensure that whistleblower mechanisms and anonymous reporting channels are in place and functioning adequately.

International cooperation must extend to collaboration across jurisdictions among investigators and among prosecutors. Mechanisms and protocols are needed to facilitate such collaboration, including aspects such as building trust, enhancing understanding of institutional setups and identifying appropriate counterparts, bridging linguistic divides and enabling joint investigations. Such mechanisms are essential in order to render concrete and practical provisions of the UN Convention Against Transnational Organized Crime such as international cooperation for purposes of confiscation, extradition, transfer of sentenced persons, mutual legal assistance, joint investigations, controlled deliveries and other special investigative techniques, transfer of criminal proceedings and the establishment of a criminal record across jurisdictions.

Law enforcement must keep up with the increasingly sophisticated technology and communication platforms used by traffickers; legislators need to balance privacy concerns against operational needs of law enforcement, and regulators need to ensure that encryption technologies do not hamper access to information for investigators and prosecutors where this is allowed by law. Moreover governments must ensure that criminal justice systems possess the necessary expertise and resources to operate in an increasingly digitalized environment.

At a domestic level, it is important to ensure smooth inter-agency cooperation in the efforts to counter the activities of drug trafficking organizations. Given the spectrum of areas which are involved in monitoring and countering organized drug trafficking, countries also need to consider the establishment of specialized roles and bodies to coordinate, harness and focus law enforcement, investigative and prosecutorial efforts targeting organized crime groups and drug trafficking organizations.

Governments must also make sure that drug trafficking does not pay, by targeting the financial arrangements which enable criminal organizations to reap the profits of their activities, in order to take away from the monetary gain which motivates trafficking activity and to prevent the infiltration of these arrangements into the legal economy. Financial investigations need to become the norm in the context of the fight against organized crime. Authorities in Europe may take advantage of the fact that the illicit revenues of drug trafficking organizations are ultimately generated at retail level (from drug users) and thus originate to a large extent from within their own jurisdictions – where the opportunity to intervene is bigger. At the same time Governments need to take into account the transnational aspects of money laundering, especially in the context of free movement of people, goods and capital; hence relevant national institutions, such as Financial Intelligence Units, need to be coordinated so as to act in a concerted manner.

The capacities, management practices and legal powers of asset recovery offices need to be reinforced and Governments need to consider legal frameworks which favour confiscation in the absence of a link to a conviction.

At this point, cocaine use in Europe can only be expected to grow. Demand reduction programmes need to consider the ongoing increases in the availability of cocaine. Prevention programmes need to alert their audience about cocaine and cocaine use patterns and drug treatment programmes must be ready for potential increases in cocaine use disorders and shifts in patterns of use and harm.

Concerted efforts need to be mustered across the spectrum of areas of intervention in supply and demand reduction in order to rein in cocaine supply and prevent the further expansion of demand for the drug.
Global drug markets are complex and dynamic environments. Numerous factors beyond demand and supply determine their development and evolution, including the emergence of new routes, *modi operandi* or criminal actors.

The global cocaine market, in particular, has undergone some noteworthy developments over recent years. A significant expansion of the cultivation of coca bush and the manufacture of cocaine has been accompanied by intensified trafficking activity reflected in an increase in recent years in the quantities seized on entry or during transit from the region of production (Colombia, Peru, Plurinational State of Bolivia) to destination markets in Europe. Together with North America, Europe continues to be a major consumer market for cocaine, supplied by large transatlantic flows originating in the Andean countries.

Cocaine is the second most commonly used drug in Western and Central Europe, with the most recent estimates as of 2021 suggesting some 4.4 million past-year users.¹

Repeated multi-ton seizures of cocaine over recent years both at origin and destination have especially highlighted the significantly increased supply of cocaine to Europe, in particular Western and Central Europe. Highly sophisticated drug trafficking organizations (DTOs) operating on a global scale orchestrate the large-scale wholesale supply of cocaine to Europe. To keep pace with the expanding production, these DTOs have adapted their processes and *modi operandi* in order to traffic increasing quantities of cocaine.

Contemporary DTOs are comprised of complex networks of contacts relying on representatives present in source and destination countries and using corruption intensively to facilitate the transportation of cocaine.

This analysis explores how DTOs originating from Europe and Latin America have adapted their business models to transport unprecedented amounts of cocaine from Latin America to Europe and to ensure the availability of cocaine on European markets. These developments include an expansion of the presence of European DTOs in source regions in Latin America and of Latin American criminal networks in key destination markets in Western and Central Europe.

Changes in Colombia’s crime landscape and implications for Europe

Forensic profiling of seizures made in the European Union indicates that Colombia remains, by far, the largest supplier of cocaine available on drug markets in the region. Hence, changes in the criminal landscape and in the cocaine supply in Colombia have the potential to significantly impact cocaine supply to Europe and the criminal enterprises orchestrating this large-scale supply.

Colombia has long been affected by a complex kaleidoscope of groups and organizations operating outside, or on the fringes of, the law, and engaged in activities of a criminal, military and political nature. While these activities are hard to document on the basis of officially reported data, they have impacted the social fabric in Colombia and have been well documented in the public domain. This section triangulates information, in a discerning fashion, from various open sources in order to provide a reliable synopsis of developments.

From few to many groups

A number of factors have resulted in significant shifts in the criminal landscape in Colombia and a fragmentation in the supply of cocaine to wholesale traffickers, notably the dismantling of the paramilitary organization Auto- defensas Unidas de Colombia (AUC) in 2006 and, more recently, the peace agreement signed between the Colombian government and the armed insurgency group known as “FARC” (F.A.R.C.-E.P. Fuerzas Armadas Revolucionarias de Colombia – Ejército del Pueblo) in 2016. The AUC had arisen in 1997, in the aftermath of the dispersal of the Medellin and Cali cartels, through the coalescing of several paramilitary groups, and retained a relatively loose structure. Its dissolution, formalized in 2006, led to the formation of numerous smaller groups, often referred to as Bandas Criminales (BACRIM), most notably the Urabeños (who subsequently expanded into one of the dominant criminal groups in Colombia and came to be known more widely by the designation Clan del Golfo or, as they refer to themselves, AGC, which stands for Autodefensas Gaitanistas de Colombia) and the Rastrojos. The AUC actively engaged in international trafficking and maintained in particular ties with the Italian organized crime group ‘Ndrangheta. The dissolution of the AUC has been credited as the trigger which led to ‘Ndrangheta losing its monopoly in the transatlantic cocaine trade. Around the same time, there emerged indications of ‘Ndrangheta forging links with Mexican organized crime groups.

The peace agreement in 2016 had a fundamental impact on the control of cocaine production and the supply of cocaine produced in Colombia. The FARC controlled a proportion of the area under coca bush cultivation and regulated access to the cocaine supply available to brokers and international traffickers. The peace agreement resulted in the end of FARC’s integrated command structure and the emergence of various splinter groups exercising control over different regions and the cocaine production therein. These criminal groups, including ex-FARC criminal groups, are heavily involved in cocaine production and the wider cocaine illicit trade; notable among them is the dissident 1st Front. This fragmentation multiplied the potential for the formation of new alliances and partnerships. The end of FARC dominance also resulted in the resurgence of other armed groups, notably the National Liberation Army (ELN), especially in the northwestern department of Chocó, along with the consolidation of its presence in Catatumbo.

Another entity which appears to have expanded its role since the demobilization of the FARC is La Contra, a criminal group formally allied with the FARC and now operating in a collaborative arrangement with a dissident faction of the 48th Front, whereby the FARC dissidents provide security for coca crops and cocaine processing laboratories, while La Contra handles international contacts, including with Mexican cartels, and logistics for drug routes to Europe and Central America.


Uppsala University, *Uppsala Conflict Data Programme, AUC*. Available at: https://www.ucdp.uu.se/actor/771.


8 “Project Reckoning,” a multi-agency law enforcement effort involving authorities in Colombia, Italy, Guatemala, Mexico, Panama and United States, led to the arrest of over 500 individuals by September 2008, following a 15-month investigation.


Increased specialization

Overall, these developments have resulted in a further fragmentation in the criminal landscape that controls the cocaine supply chain in Colombia and may even have spurred an increased presence of non-Colombian groups intent on procuring cocaine further upstream. The involvement of an increasing number of criminal organizations may have translated into the erosion of established monopolies of the dominant suppliers and greater accessibility to cocaine supply for a broader range of actors.

It has been posited that the dispersal of the dominant actors, such as AUC, FARC and Cartel del Norte, may be one of the reasons behind the expanded presence of Mexican groups in Colombia, as a way to continue to procure large consignments of cocaine which could no longer be provided by the smaller actors. Moreover, the absence of monolithic structures may now preclude any single organization from managing the entire spectrum of criminal activity associated with the cocaine supply chain, leading to a compartmentalization of functions performed by different actors, such as guarding plantations, processing of coca leaf into the final consumer product, packaging and concealment, transportation along trafficking routes, money laundering, etc.

The global cocaine trade and the role of criminal networks

The supply of cocaine from production to consumers involves various actors operating on different tiers. Cocaine producers and brokers operate in coca cultivation and cocaine-producing regions in the main countries of production of Colombia, Peru and the Plurinational State of Bolivia. Wholesale traffickers ensure the large-scale supply to destination markets and orchestrate trafficking activities using various modi operandi transporting cocaine from South America to Western and Central Europe. Mid-level suppliers and distributors are restricted in their operations typically to domestic or regional destination markets.

Different roles

In coca cultivation regions, the supply chain for cocaine involves multiple actors already before the end-product is ready for trafficking, mostly in the form of cocaine hydrochloride. Coca leaf, coca paste and cocaine base represent intermediate products which may be traded either directly from farmers to manufacturers of cocaine hydrochloride or else through intermediate actors. Individuals who facilitate the trade in these intermediary products are referred to as rescatistas in Bolivia (Plurinational State of), chichipatos in Colombia and paseros in Peru. UNODC estimated that, in 2019, 52 per cent of coca growing farmers in Colombia sold coca leaf and the remainder processed this to the point of coca paste, but the proportion who undertook the processing into cocaine base was negligible, suggesting that processing of coca paste was increasingly being handled by actors specialized in this step. It should be borne in mind that coca leaf may be traded among farmers or bought by other actors while remaining in proximity to the location of cultivation. Moreover, specialized structures called “reoxidaderos”, detected already as of 2014, appear to carrier out another intermediate step of consolidating coca paste or cocaine base, of varying quality, from multiple suppliers and producing cocaine base of uniform purity, to be later processed into cocaine hydrochloride in separate laboratories, sometimes referred to as “cristalizaderos”. Although “reoxidaderos” tend to be found in proximity of the “cristalizaderos”, there are some indications of trade of the reoxidized cocaine base between different laboratories and different groups.

Increased specialization

While cocaine oligopolies tended in the past to supply a limited number of trusted established wholesale traffickers, the removal of centralized control over much of the cocaine supply chain and the opening of the cocaine supply market in Colombia may now be providing an opportunity for smaller international trafficking organizations to gain access to supplies and wholesale quantities of cocaine.

... UNODC Illicit Crop Monitoring Programme, Colombia (SIMCI).
18 By way of comparison, in 2008 UNODC estimated that 39 per cent of farmers sold fresh coca leaf, 24 per cent processed coca leaf to the point of coca paste and 37 per cent undertook processing into cocaine base. See: UNODC and Government of Colombia, Colombia Coca Cultivation Survey Report 2008, June 2009.
19 UNODC and Government of Colombia, Monitoreo de Territorios afectados por cultivos ilícitos 2019, July 2020.
20 Ibid.
22 Ibid.

These activities are typically subject to territorial control by criminal networks and armed groups. For example, UNODC estimated that farmers in Colombia paid illegal armed groups some 33 million USD in “taxes” on transactions of coca paste or cocaine base in 2019.23

On the other hand, brokers based in Latin America typically act as interlocutors between these groups and international DTOs seeking to source bulk quantities of cocaine for trafficking to Europe and other global destinations. Unofficial open source reporting suggests that such brokers may supply multiple buyers and act independently, albeit in collaboration with the powerful organized crime groups who are their clients. They tend to leverage a network of contacts while remaining discreet and taking precautions in their communication, which they sometimes conduct on a strict one-to-one basis.24,25

The global drugs trade is dominated by dynamics of cooperation and competition between various DTOs and criminal actors. The wholesale bulk supply of cocaine heavily depends on close cooperation between cocaine producers and their organizations based in Latin America, brokers and internationally operating DTOs, including groups originating from Europe, that orchestrate the large-scale trafficking of cocaine from source regions to destination markets, sometimes in multi-ton shipments.

### Factors influencing supply routes and partnerships along supply chains

The formation of alliances, collaboration between different drug trafficking groups and consolidation of supply chains is influenced by numerous factors, including geography but also less obvious aspects such as economic ties and patterns of legitimate trade, historical ties and linguistic affinity. For example, the very large quantities of containers going through major ports such as Rotterdam (Netherlands), Antwerp (Belgium), Hamburg (Germany), Valencia and Algeciras (Spain)26 with legitimate goods render them vulnerable to the infiltration of illegal shipments.

Historical, cultural, ethnic and linguistic ties, such as those between Portugal and the rest of the lusophone world, or Spain and Spanish-speaking countries in South America, may also facilitate links of a criminal nature. From a geographic standpoint, these two countries occupy almost equivalent positions on the route from South America to Europe, yet an analysis of the provenance of individual cocaine seizures made in Portugal and Spain over 2007-2011 showed that Brazil, together with lusophone countries in Africa, consistently accounted for

23 UNODC and Government of Colombia, Monitoreo de Territorios afectados por cultivos ilícitos 2019, July 2020.
26 These ports are all known to be significant points of entry for cocaine entering Europe. Based on a global ranking of container ports, produced by Lloyd’s list on the basis of commercial container throughput, as of 2019 they constituted 5 of the top 6 European ports, the other one being Piraeus (Greece). Source: Lloyd’s List, One Hundred Ports 2020, 2020. Available at: http://lloydslist.maritimeintelligence.informa.com/one-hundred-container-ports-2020/port-data#rankings
more than half (59-83 per cent in each of these years) of such seizure cases in Portugal, while Spanish-speaking countries in the Americas accounted the overwhelming majority (74-91 per cent) of seizure cases in Spain during the same time period.27

**Kinship, migration and trust**

Alliances may take time to develop and consolidate, as criminal groups gradually gain trust in their counterparts, a process sometimes aided by family ties or a history of prior collaboration. For example, Belgium reported that collaboration between criminal groups operating in Antwerp and in the Netherlands were facilitated by ethnic and family ties.28

Similarly, the Italian descent of one of the high-level leaders29 of the Colombian armed group Autodefensas Unidas de Colombia may have facilitated a “relationship of trust”30 between cocaine traffickers operating in Colombia and in Italy. One academic study on the transplantation of organized crime groups31 has argued that blood ties were a key factor which enabled the ’Ndrangheta, whose system of recruitment is based mainly on kinship, to expand more successfully in comparison with other criminal groups which used a “meritorietic” recruitment system based on skills and experience. The same study concludes that, while migration is not a sufficient condition for the transplantation of mafia groups, it may contribute to the “supply-side” aspect and, when coupled with “demand-side” aspects such as illegal employment and the absence of state protection, the conditions may arise for a successful transplantation of an organized crime group.

A history of collaboration may also be instrumental for the penetration of markets by organized crime groups. There are indications of a recent incursion of some Mexican groups operating directly in coca cultivation regions in Colombia.32,33,34,35 Their long history of collaboration with Colombian traffickers, intimate knowledge of the cocaine illicit trade and common language likely afforded them significant advantages in reaching so deep into the cocaine supply chain.

Another example of a history of collaboration enabling criminal groups to expand their activities is illustrated by the current ability of Albanian-speaking groups to operate within Italy in cooperation with Italian organized crime groups,36 a development which may have been in part facilitated by their long-standing established role in supplying heroin37 and cannabis herb to their counterparts in Italy.38
Recent developments in cocaine trafficking to Europe

diversification of the criminal actors helped to make transatlantic cocaine trafficking more competitive and more efficient

Various indicators suggest that, in recent years, developments in the landscape of international criminal actors involved in the trafficking of cocaine may have contributed, along with other factors, to making transatlantic cocaine trafficking more competitive and thus more efficient. An increase in the number and the diversity of actors involved, coupled with an increase in supply, may have led to the development of new and more direct routes to the main distribution hubs in Europe. This in turn likely contributed to increasing the availability of cocaine in Europe, as confirmed for example by increases not only in seizures but also in purity levels. These appear to have caught up with purity levels in the United States as of 2012 and have followed a very similar trend since then. One study has also pointed out a significant drop in wholesale price of cocaine in the Netherlands beginning around 2012 (the same time when the above-mentioned development in purity levels occurred), attributing this to the role of Albanian-speaking traffickers in procuring cocaine directly at source and undercutting the prevailing price at the time. 

Customs seizure data indicate that cocaine continued to be seized in large quantities in 2020, notably at seaports. In addition to the established major ports, secondary smaller seaports are increasingly used as entry points to traffic cocaine to the EU.

These developments are likely linked to the emergence of new and more direct routes as well as new actors involved in the trafficking chain. For example, France reported a link between an increase in cocaine reaching consumers and the emergence of distribution channels through French Guiana. A clear example, from media sources, of the use of direct routes could be observed in November 2017, when a collaboration between French and US law enforcement authorities stopped a pattern of cocaine shipments trafficked from Colombia to Biarritz, France, on charter flights. A similar modality was detected in February 2018, when British authorities intercepted cocaine being flown from Colombia to the private airport of Farnborough, United Kingdom, on private flights. The use of private planes was also on display in the case of operation Familia in 2019 (see box on page 24).

In November 2019, Spanish authorities recovered 3 tons of cocaine from a semi-submersible vessel which had been scuttled off the Galician coast; while the exact itinerary of the vessel is unknown, this may point to a new modality to source cocaine directly from Colombia. Media sources suggest that the submersible was made in the rainforests of southeastern Colombia, in a shipyard the vicinity of Leticia, a major port on the Amazon river located at the juncture of the Brazilian, Colombian and Peruvian border. In February 2021, Spanish police, in the context of a broad operation targeting drug trafficking, detected in a warehouse in Monda (province of Malaga) a similar vessel which was under construction and which was apparently intended for cocaine trafficking.

While some of the cocaine reaching Europe continues to flow through West Africa or along the Atlantic coast of Africa, it appears that significant quantities of cocaine are arriving directly in North Africa (as opposed to being transshipped in West Africa) in maritime shipments. Moroccan authorities reported that, in November 2019, a consignment of 476 kg of cocaine coming from Colombia was seized from a boat at Temara (south of Rabat on the Atlantic coast). In December 2018, media outlets reported that

40 Europol information based on intelligence.
41 UNODC, response to the annual report questionnaire from France for 2018.
43 El Tiempo, Bitácora secreta del ‘narcojet’ que salió de Bogotá lleno de cocaína, February 2018.
46 UNODC Drugs Monitoring Platform.
Interpreting drug seizure data

The quantity of drugs seized in a given timespan may be influenced by two main factors, namely the available supply of the drug in the illicit market and the effectiveness of interdiction efforts by law enforcement agencies.

In order to disentangle, from drug seizure data, information on trends in the availability of drugs in a given country or region, it is important to triangulate seizure data with other supply-side indicators, such as production estimates, purity levels, or seizure data in other countries/regions, or even demand-side data such as survey-based estimates of prevalence of use or wastewater-based consumption trends.

Moreover, to the extent that the priorities, efficiency and resources of law enforcement agencies develop independently in different countries, the trends driven by law enforcement aspects may to a certain extent “cancel out” when considering aggregate seizure data at global or regional level. Thus, information on drug seizures is one of the key elements in understanding drug markets, especially if broad geographical entities are considered.

FIG. 2  Cocaine purity at retail level, Europe and the United States, 2005-2018

Notes: European countries were selected on the basis of availability of data and sample size. Imputations and adjustments at national level used to address data gaps (up to three consecutive years) and breaks in series. Data for “crack” are not included.

Source: United States: Office of National Drug Control Policy; Europe: EMCDDA Statistical Bulletin 2020 (purity data); UNODC, responses to the annual report questionnaire and imputations for non-reporting countries (prevalence data).
seven individuals were arrested in Morocco in connection with the seizure of 1 ton of cocaine. The individuals were suspected of belonging to a criminal group which trafficked the cocaine by sea on a merchant vessel from Latin America to Moroccan waters, from where it was transported to El Jadida, in the vicinity of Casablanca, by a fishing vessel.47

Some evidence suggests the movement of appreciable quantities of cocaine between the European and North American markets. For example, French authorities assessed that, in 2018, 9 per cent of cocaine salts seized in France were intended for Canada. On the other hand, some seizure cases reported in the media point to the possibility of cocaine trafficked through the United States to Europe.48 There also appear to be instances of groups based in transit countries in Central America and the Caribbean who supply both of these consumer markets.49,50,51

While the Iberian Peninsula, in particular the Galician coast in northwestern Spain, has long accounted for an important share of cocaine reaching Europe, seizure data point to an increase in the relative importance of quantities entering through Belgium, notably through Antwerp. It appears that in recent years these quantities also increasingly reached Belgium—via maritime shipments—directly from the source country of Colombia (as opposed to transit via other countries). However, by 2019 Colombia had been replaced by Brazil as the foremost country of departure from which cocaine was reaching Belgium, with seizures of cocaine from containers having departed from Colombia falling from 25 tons in 2018 to 10.5 tons in 2019.52 Cocaine seizures in Antwerp continue to increase overall, reaching at least 65.6 tons in 2020.53

Belgium as a major gateway to the Netherlands and Europe

the majority of cocaine reaching Antwerp is likely intended for organizations operating out of the Netherlands...

51 United States Attorney’s Office, Northern District of Georgia, International drug traffickers plead guilty to smuggling heroin through Atlanta airport, 6 August 2019. Available at: https://www.justice.gov/usao-ndga/pr/international-drug-traffickers-plead-guilty-smuggling-heroin-through-atlanta-airport
52 UNODC, response to the annual report questionnaire from Belgium for 2019.
53 World Customs Organization, Regional Intelligence Liaison Offices for Western Europe (CEN Database).
The majority of cocaine reaching Antwerp is likely intended for organizations operating out of the Netherlands, from where the cocaine is further distributed to other European destinations. Belgium reported that groups of Moroccan and Albanian ethnicity, who are involved in the extraction of cocaine from the port, have expanded their role in the procurement of cocaine and the development of contacts in South America. Groups of Moroccan ethnicity also maintained close ties across the border with the Netherlands, sometimes based on family ties, while Albanian-speaking groups were involved in the exportation of cocaine onwards to Italy and Albania. The expanded role of Albanian-speaking groups in the provision of cocaine to Europe has been credited with a decrease in wholesale price, from 2012 onwards, in the Netherlands and hence downstream in other European countries. It is possible that the same development is reflected at retail level in the alignment, also from 2012 onwards, of European purity levels with those in the United States.

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54 UNODC, response to the annual report questionnaire from Belgium for 2019.
55 UNODC, response to the annual report questionnaire from Belgium for 2019.
56 UNODC, response to the annual report questionnaire from Belgium for 2019.
FIG. 5 Distribution of cocaine seizure quantities in Europe, by country of seizure (two-year moving averages), 2000-2019

Source: UNODC, responses to the annual report questionnaire.

FIG. 6 Quantity of cocaine seized at Antwerp port, Belgium, 2013-2020

*Since the source for 2020 data was distinct from that for 2013-2019, the figure for 2020 may not be directly comparable to prior years. In particular the figure for 2020 does not include cocaine seized in consignments of less than 100 grams (if any) and thus potentially underestimates the true quantity, if any such cases did occur. However, a comparison of data for 2018-19 (for which data were available from both sources) suggests that any methodological discrepancies were negligible, as the variation for these two years was around 1 per cent or less.

Sources: 2013-2019: Federale Overheidsdienst Financien, Belgium (2013-2019); 2020: World Customs Organization, Regional Intelligence Liaison Office for Western Europe (CEN Database).
Although Belgium responded to the relevant question in the annual report questionnaire for 2014 and 2019, data specific to Colombia for these years were unavailable because Colombia was not among the top three countries from which cocaine entered Belgium. However, this does not mean that the value for Colombia was zero. The range shown represents the possible values for Colombia, between 0 per cent and the value reported for the third ranked country (in both 2014 and 2019 approximately 14 per cent).

Sources: UNODC, responses to the annual report questionnaire from Belgium for 2011-2019.

**Entry channels into southwestern Europe**

Morocco, which has registered an increase in cocaine seizures in recent years,\(^{58}\) reported that the more important quantities were seized on the maritime route, arriving directly from Latin America.\(^{59}\) Morocco also reported, among at least 171 persons\(^{60}\) recorded for drug trafficking offences in 2018, 10 individuals with French nationality and Moroccan origin and 6 individuals with Belgian nationality and Moroccan origin.\(^{61}\)

Some limited evidence suggests that the established supply chains used to channel cannabis resin from Morocco through Spain to the rest of Europe, notably the Netherlands, may have been adapted to also traffic cocaine intended for distributors in the Netherlands.

French authorities also reported that, given the high profitability of cocaine trafficking, certain networks specialized in cannabis trafficking were, as of 2018, also investing in cocaine acquired outside Metropolitan France, in particular overseas, or in the European distribution hubs of the Netherlands and Spain.\(^{62}\)

The drug trafficking milieu in Spain appears relatively complex, with the involvement of a multitude of actors.\(^{63}\)

According to a Spanish prosecutor specialized on corruption and organized crime in Spain,\(^{65}\) the Italian criminal networks **Ndrangheta**, **Camorra** and **Cosa Nostra** continue to have a presence in Spain, but Nigerian, Albanian, and Russian groups also play an active role in drug trafficking. Groups operating in Spain—including Galician groups but also brokers\(^{64}\) and organized crime groups with links to Italy—have long collaborated with Colombian traffickers. Media sources have also documented the presence of British cocaine traffickers in Spain,\(^{65}\) and also suggest that Dutch groups are important players;\(^{66}\) in some instances

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**Dismantlement of Netherlands’ largest cocaine laboratory, August 2020**

In August 2020, the Dutch police dismantled a laboratory equipped to extract very large quantities of cocaine from carrier material. The facility was estimated to have the capacity to yield 150-200 kg of cocaine per day. A total of 17 suspects—including 13 of Colombian nationality—were arrested.

The facility was located in a former riding school in Nijveen, 20 km northeast of Amsterdam. Police said they found tens of thousands of litres of chemicals and 100 kg of cocaine. The cocaine was found in base form, suggesting that it was to be further processed into cocaine hydrochloride.

In connection with this case, 120 tons of “carrier material” were also discovered during two other police raids at warehouses in Apeldoorn and Elshout, in the centre and the south of the Netherlands. According to open source reporting, the relatively unrefined product of coca paste may have been camouflaged in the load of charcoal prior to departure, to be processed into cocaine on arrival.


Colombian nationals play a significant role in the supply chain on the Spanish mainland. Some of their activities may also involve secondary extraction of cocaine in Europe. In February 2020, media outlets reported that Spanish police concluded an investigation which resulted in the arrest of 39 suspects, of whom 31 were Colombian (some described as “former Colombian cartel bosses based in Alicante”), the detection of 5 cocaine processing facilities within Spain and the seizure of 1 ton of cocaine (in multiple instances). In some cases, Spain may also simply serve as a staging post for cocaine traffickers even if the drugs do not actually reach Spanish territory. In May 2020, for example, an investigation led by Spanish police reported in the media led to the dismantlement of an international operation, apparently led by a Colombian national with links to Spain, whereby cocaine was impregnated in cardboard boxes before departure from South America and retrieved in Europe at secondary extraction facilities in Bulgaria and the Netherlands. Individuals with specialized chemical skills travelled from Colombia to Spain and subsequently onwards to Bulgaria and the Netherlands specifically to perform the extraction step. The operation resulted in the arrest of 18 people in Spain, Bulgaria, the Netherlands and Colombia and the seizure of 1 ton of cocaine in Bulgaria which had entered through Greece.

Some criminal cells in Spain may operate directly on behalf of Colombian drug trafficking organizations and may carry out the functions of ensuring payment and managing deliveries. Such cells have been linked in unofficial open sources to several Colombian groups, notably the “Oficina de Envigado” and the Urabeños (also referred to as the Clan del Golfo). One such cell was allegedly responsible for 30 kidnappings and hundreds of incidents of extortion against traffickers with outstanding debts with suppliers. Spanish authorities assessed that, in 2018, the most common means of trafficking cocaine into Spain was by way of shipping containers, using the “rip-off” method. The largest quantities of cocaine were seized in the Provinces of Cádiz, Las Palmas and Málaga and were primarily of shipments seized at ports. A total of 58 containers containing 19.5 tons of cocaine (40 per cent of the total) were intercepted, together with 12 vessels transporting 11.8 tons of cocaine (24 per cent of the total) and 2,097 kg seized from couriers (4 per cent of the total). The largest seizure was made in the port of Algeciras (Cádiz) and involved a container arriving from Colombia that contained 7.3 tons of cocaine.

Media reports suggest that the activities of Galician-based groups continue, and some of these actors have exploited the contacts established over time with Colombian groups in order to become middlemen facilitating the movement of cocaine to destinations such as Italy and the Netherlands (aside from Spain). Moreover, these groups appear to have the ability to use countries in North and West Africa as staging posts for cocaine shipments, storing the drugs until buyers have been identified in Europe.

Cocaine smuggling from Brazil to Spain, 2020

In February 2020, 14 members of a DTO were arrested for cocaine trafficking by Spanish authorities with the support of EUROPOL.

The arrests were the result of a yearlong operation, which began after 1,413 kg of cocaine were found at a company near Barcelona in December 2018. The drugs had been sent from Brazil, hidden in boxes of A4 paper, and were found when an employee accidently dropped one of the boxes. The investigation identified that the suspects were part of a criminal network smuggling drugs from Brazil.

In addition to cocaine trafficking, the suspects were also arrested in relation to money laundering, as they had created a business structure involving different companies in order to launder the proceeds. They also used ‘money mules’ to make frequent small cash deposits at different banks.


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67 The Local, Spain busts Anglo-Dutch drug gang seizing three tonnes of cocaine, 5 January 2016.
74 El País, Los nuevos amos de la coca en Galicia, 6 April 2019.
75 El País, Sito Miñanco traficaba con cocaína a Italia, Holanda y Albania, 7 February 2018.
76 El País, Arrest of 85-year-old drug lord confirms return of historical gangs to Galicia, 9 August 2018.
European actors in Latin America and challenges to established supply chains

Criminal networks originating in Europe and primarily composed of nationals of European states have long been active in the transcontinental cocaine trade, procuring significant amounts of cocaine from suppliers in Latin America and organizing its transportation to Europe. These criminal networks primarily operate at the wholesale supply level and do not get involved in the retail distribution of cocaine on European drug markets.

These European networks orchestrate the transportation of cocaine from Latin America to Europe, typically relying on front companies and corruption targeting ship crews, port workers and officials. Some criminal networks have systematically infiltrated internationally operating freight haulage companies for years, which has provided them with access to trafficking means and to key European ports.

Data from South American countries on persons brought into formal contact with the police on cocaine trafficking charges, while not necessarily representative of high-level trafficking activity, do bring out the relative importance of Spanish and Italian nationals, which were the most prominent among European nationals over the period 2016-18 (while Spanish and Dutch nationals were the most prominent over 2006-08).

Based on a long-term analysis of supply-side indicators, such as seizure data and purity, it appears that, at least since 2009, the flow of cocaine from Latin America to Europe has been steady, with little interruption to supply, despite occasional large-scale seizures. As documented in open sources, well-established and powerful criminal networks such as the Italian ‘Ndrangheta have been controlling trafficking flows of cocaine, acting as wholesale suppliers to mid-level distributors based in Europe, who lacked the contacts and capabilities to organize the trafficking of the drug from source to destination markets. While these criminal networks remain very active in the wholesale supply of cocaine from South America to Europe, their dominant position is increasingly being challenged by smaller and emerging trafficking organizations originating from Europe.

The established European criminal networks mentioned above exercised a competitive advantage by means of their close collaboration with Colombian cartels and other producers in Latin America, in particular via their established presence in Brazil. Prior to the recent changes, these sophisticated Italian mafia-type organizations benefited from a comparatively stable criminal landscape in cocaine-producing countries, especially Colombia, and in Europe, enabling their criminal businesses to grow and mature over time.

European criminal networks like the ‘Ndrangheta used to exercise a competitive advantage through close ties with producers...

These Italian mafia-type organizations and other established DTOs originating in Europe, such as British and Spanish groups, still maintain ties to Colombian producers and continue to organize the trafficking of large quantities of cocaine to Europe. There are recent reports in open sources of Representatives of European criminal organizations being present in laboratories in Colombia in order to verify the purity of cocaine prior to shipment.

However, these well-established criminal organizations are increasingly challenged by other European DTOs, who may have previously relied on established DTOs to supply them with cocaine. A new type of DTOs—primarily originating from the Balkan region—have increasingly challenged existing wholesale trafficking monopolies controlling the flow of cocaine from Latin America to Europe.

…but the fragmentation in Colombia may have opened the door to new actors

The fragmentation and diversification of the criminal landscape in Colombia may have disrupted the previously successful business model of monopolized access to cocaine in Colombia for established European criminal networks, such as the Italian ‘Ndrangheta, and provided the space for a broader range of emerging European DTOs to expand their contacts and relationships with cocaine producers in the source regions of Latin America. It seems that, while established criminal networks such as the ‘Ndrangheta still dominate the wholesale supply of cocaine from Latin America to Europe, they no longer maintain an oligopoly and have been unable to deny other European DTOs entry to the wholesale market for cocaine in Latin America.

Groups such as Albanian, Belgian, British, Dutch, French, Irish, Moroccan, Serbian, Spanish and Turkish DTOs appear to be gaining greater shares of the cocaine market in Europe.

83 See also: The Mirror, *Colombian drug cartels’ British Kingpin in £350m cocaine trafficking gang is captured*, 1 September 2018.
84 Europol information based on intelligence.
86 Europol information based on intelligence.
While traditional mafia-type groups, such as 'Ndrangheta and Camorra, continue to play a leading role, new actors are emerging, especially criminal groups from the Balkan region, which are increasingly present in South America.\footnote{European Union Agency for Law Enforcement (Europol) information based on intelligence.}

A broad range of European DTOs is now involved in the trafficking of cocaine including some originating from Albania, France, the Netherlands, Spain and the United Kingdom.\footnote{European Union Agency for Law Enforcement (Europol) information based on intelligence.} Less prominent cocaine trafficking DTOs also originate from Ireland, Poland and Serbia.\footnote{European Union Agency for Law Enforcement (Europol) information based on intelligence.} Considering the scale of cocaine trafficking activities to Europe, it is likely that a much wider range of DTOs originating from all over Europe and beyond are involved in the cocaine illicit trade.

Drug traffickers originating from the Western Balkan region are increasingly active in procuring large amounts of cocaine at source in Latin America. In order to facilitate this business, they maintain established residents in Latin America, either in the countries of production or countries used as major transit and departure points on the trafficking routes to Europe.\footnote{European Union Agency for Law Enforcement (Europol) information based on intelligence.} The increased importance of criminal networks originating from the Western Balkans is also borne out by arrestee information collected on a case-by-case basis, which shows that, while nationals of some of the countries in this region may not account for a large number of arrestees, they tend to be involved in larger-scale trafficking.

Albanian-speaking and Serbo-Croatian-speaking groups are increasingly active in procuring large amounts of cocaine at source.
The ’Ndrangheta presence in Latin America

As well documented in open sources, the Calabrian mafia organization ’Ndrangheta has long been involved in the trafficking of cocaine from Latin America to Europe.\(^a\) Evidence of links between Italian criminal networks and DTOs in Latin America, notably the Calí cartel, existed since the early 1990s.\(^b\) These links have continued to thrive and have driven much of the cocaine supply to Europe since then.

The ’Ndrangheta counts among the most established organized crime networks operating wholesale supply networks of cocaine from South America to Europe and North America, using representatives present in the region to negotiate purchases, arrange and supervise shipments and oversee payments.\(^c\)

In order to facilitate this high-volume trafficking activity, ’Ndrangheta maintained a well-connected presence in Latin America close to or in countries of production and departure.\(^d\) High-profile law enforcement operations, such as Operation Pollino, have targeted the organization and its Latin American presence.\(^e,f\) This operation confirmed the wide reach of the ’Ndrangheta and brought to light a network spanning South America, northern Europe and Turkey, based around the Locride clans of the Pelle-Vottari’s of San Luca, the letto’s of Natile di Careri and the Ursini’s of Gioiosa Ionica.\(^g\)

The presence of ’Ndrangheta operatives is focused in countries of production as well as crucial countries of departure. In recent years, Brazil has emerged as a key departure point for cocaine trafficked from Latin America to Europe. Consequently, the ’Ndrangheta has established a presence in the country in order to ensure the flow of cocaine to destination markets.\(^h\)

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\(^c\) The Times. Rise of the ’Ndrangheta: how the feared Calabrian mafia has reached the UK, 2 December 2018.


\(^g\) ANSA. 90 ’Ndrangheta arrests in Europe-S. America operation. 5 December 2018. Accessible at: http://www.ansa.it/english/news/2018/12/05/90-ndrangheta-arrests-in-europe-s.america-operation_4976481-9667-41b4-a365-117b174430.html

Albanian-speaking groups

Several sources corroborate the expanded role of Balkan groups in the international illicit trade of cocaine, however such reports do not always distinguish the identity of such groups with sufficient detail. It is likely that Albanian-speaking groups in particular operate largely autonomously from other groups from the Balkan region (although collaboration also occurs). Authorities from the United Kingdom identified Albanian groups in particular, among criminals from the Balkans, and assessed that they had established considerable control across the United Kingdom drug market.

Since 2010, Italy, Germany and Belgium have consistently identified Albanian among the top ten nationalities of individuals brought into formal contact with police for cocaine trafficking offences, but in more recent years such a role has also been reported by Austria, Bulgaria, Greece and Switzerland. Italy also identified Albanian groups as the most active, as of 2018, among foreign groups involved in trafficking and distribution of drugs, and assessed that such groups cooperate with domestic organizations in this activity. In 2018, Italy also registered an increase in cocaine seizures quantities at land borders, notably in the northeast; Italian authorities ascribed these increases to new trafficking dynamics attributable to Balkan groups, such as Albanian, Serbo-Montenegrin and Bulgarian groups, increasingly involved in the importation of large quantities of cocaine on maritime routes flowing into ports in the Aegean sea (Turkey and Greece) as well as the Black Sea (Bulgaria, Romania).

In Germany, the activities of Albanian-speaking criminal networks appear to be focused on drug trafficking, and specifically cocaine. German authorities assessed that, for

Notes: The figure is based on data for 1,878 arrestees from a subset of 1,375 individual seizure cases for which information was available to UNODC; this constitutes an opportunistically determined subset of all relevant seizures. Number in brackets denotes total number of arrestees of the given nationality. Nationalities with less than 50 arrestees are not shown. The acronym BCMS refers to the four Serbo-Croatian-speaking countries of Bosnia and Herzegovina, Croatia, Montenegro and Serbia, taken collectively. For some of these countries, taken individually, the number of arrestees was too small to allow a statistically meaningful breakdown.

Sources: UNODC Drugs Monitoring Platform.
Joint investigation team leads to dismantling of one of Europe’s most active Albanian-speaking networks trafficking cocaine into Europe

An unprecedented international operation involving judicial and law enforcement authorities in 10 countries has resulted in the complete takedown of the Albanian-speaking ‘Kompania Bello’ criminal group, one of the most active cocaine-trafficking networks in Europe.

In the early hours of 15 September 2020, hundreds of police officers, including special intervention teams and in close cooperation with prosecutors and investigative officers, with the support of Europol and Eurojust, carried out coordinated raids against the members of this highly professional criminal syndicate.

As a result of this joint action, 20 individuals were arrested in Italy (5), the Netherlands (2), Germany (2), Greece (2), Romania (1), Hungary (1), Spain (1), Albania (5) and the United Arab Emirates (1). The suspects were placed in pre-trial detention for international narcotic substances trafficking, illegal possession and distribution of drugs and brutal assaults, including murder. These arrests followed those of 84 other members of the same criminal group earlier on during the investigation in Italy, Ecuador, the Netherlands, the United Kingdom, Switzerland and Germany.

This international sweep followed a complex investigation led by the Italian State Police (Polizia di Stato) under the direction of the Public Prosecutor’s Office of Florence (Procura della Repubblica di Firenze). It is considered the biggest ever of its kind against Albanian-speaking organized crime and was the result of a Joint Investigation Team with the participation of Italy and The Netherlands, in which the parties worked closely together for five years. Close to 4 tons of cocaine and over €5.5 million in cash were seized over the course of this investigation.

A sophisticated business model

For years, international importers of cocaine to Europe have been working separately from the wholesalers and the gangs distributing the drug on the streets. The model revealed in this case was different, as the Albanian-speaking network was able to control the whole supply chain – from arranging huge shipments directly from South America to the distribution throughout Europe.

Using sophisticated encrypted communication means, the organization’s ringleader – a 40-year old Albanian national based in Ecuador – negotiated directly with the South American drug cartels, arranged large shipments of cocaine to the major ports of Europe and, with the help of accomplices based in Italy, the Netherlands and Albania, organized distribution throughout Europe. The cocaine was smuggled across European borders concealed in vehicles equipped with sophisticated hidden compartments.

The criminals laundered their proceeds using an underground alternative remittance system of Chinese origin, known as the fei ch’ien system. Much like the hawala transfer system, people using the fei ch’ien deposit a sum in a network “agency” in one country. Another operator withdraws the equivalent amount elsewhere in the world and passes it on to the intended recipient. Leaving not a trace of tell-tale evidence for law enforcement investigators, the network is believed to have laundered millions of euro through this system.


29 among 31 Albanian-dominated groups detected in 2019, drug trafficking was the identified area of activity – second only to German-dominated groups (66 groups active in drug trafficking out of 171), and ahead of Turkish-dominated groups (23 groups active in drug trafficking out of 78). In addition, among all individuals brought into formal contact with the police for trafficking offences in Germany in 2019, Albanian nationality was ranked second for cocaine-related offences – again second only to German and ahead of Turkish, but not among the top 10 for any of the other drug classes (cannabis, opioids and amphetamine-type stimulants). It appears that Albanian-speaking groups may manage cocaine distribution networks across Europe with a certain degree of transnational coordination, in addition to forming direct relationships with suppliers in Latin America. Some reports indicate that, starting in 2012, Albanian-speaking groups developed influence in key ports both in South America (the Bolivarian Republic of Venezuela, Brazil, Colombia and Ecuador) as well as Europe (initially in Belgium and the Netherlands and subsequently in Germany and Spain), and were also engaged in distribution in Germany, Sweden, the United Kingdom and even Australia. Already as of 2012, Italian authorities had identified an

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101 UNODC, response to the annual report questionnaire from Germany for 2019.
Albanian-speaking organization, active between the Benelux countries and Italy, which had established ties to Colombian suppliers. Belgium reported that Albanian-speaking groups, beyond the extraction of cocaine from ports, were involved in the exportation of cocaine to Italy and Albania (as of 2018). In 2018, Italian authorities dismantled a criminal group, operating from Rome and made up predominantly of Albanian citizens, which was trafficking cocaine imported from Spain and the Netherlands and intended for the entire Italian territory. Greece reported that, as of 2017, Albanian traffickers were increasingly expanding into the cocaine illicit trade and were working with Latin American counterparts in order to import significant quantities into Greek territory, with the aim of distributing it further. Greece further reported that, as of 2018, some 35 per cent of individual members of criminal groups involved in cocaine trafficking held Albanian nationality (second only to Greek nationality), but that the proportion was even higher among leadership positions.

In 2017 and 2018, German authorities conducted an investigation into a group, composed mainly of Albanian nationals, which was importing large quantities of cocaine, under cover of shipments of banana, from Ecuador through the port of Hamburg. The investigation was triggered by an episode in which cocaine ended up in numerous facilities for storing and ripening bananas across Germany, and being retrieved by Albanian nationals who had travelled to Germany for this purpose. The case also had connections to Paraguay, the Netherlands and Albania.

DTOs comprised of Albanian-speaking criminals are believed to have used their close ties to the Italian ‘Ndrangheta, as suggested by media sources, to establish their own wholesale supply of cocaine from Latin America to Europe by directly engaging with producers in Colombia and establishing a permanent presence in source regions. The presence of Albanian-speaking drug traffickers in Latin America has also been linked in the media to a number of homicides in Latin America of criminals of Albanian origin suspected of being involved in the illicit trade of drugs over recent years.

Albanian-speaking groups have established a presence in source regions and their own wholesale supply chain to Europe

Aside from Albanian-speaking groups, other European DTOs originating from the Balkan region have been active in Latin America for some time organizing the trafficking of cocaine from Latin America to Europe. Developments in Colombia in particular may have helped these groups to obtain cocaine directly at source without the need for middlemen. Previously, DTOs composed of nationals of Balkan countries such as Croatia or Serbia were primarily present in countries of departure for cocaine trafficked to Europe such as Argentina, Brazil and Uruguay. Increasingly, these types of DTOs are also present in countries of production—notably Peru—where they can engage with the local criminal networks controlling the production of cocaine directly. As documented in open sources, in July 2016, a Serbian national, allegedly affiliated with the “Group America” and previously based in Argentina (from where he allegedly orchestrated the trafficking of large quantities of cocaine to the Netherlands and Spain) was arrested in Peru, where he may have attempted to establish links with drug traffickers operating in the port of Callao.

In 2019, authorities of Bosnia and Herzegovina assessed that there were groups in the country participating in international smuggling of cocaine destined for Western Europe for its subsequent distribution and selling across Europe.

In recent years, the illicit activities of European DTOs originating from the Balkan region related to cocaine trafficking from Latin America appear to have significantly intensified. In 2018 and 2019, suspects originating from the Serbo-Croatian speaking countries of Bosnia and Herzegovina, Croatia, Montenegro and Serbia were identified and arrested for arranging the transportation of significant amounts of cocaine to Europe departing from Argentina, Bolivia (Plurinational State of), Brazil, Colombia, Ecuador and Peru. Based on data on large (100kg or more) individual seizures of cocaine made in Europe from 2017 onwards, Dutch nationality ranked first among people arrested in connection with such seizures, but nationals of the four Balkan countries mentioned above, considered together, were equally prominent.

Several recent incidents and investigations reported in open sources also highlight in particular the role of Montenegrin

103 Fondazione ICSA, Direzione Centrale per i Servizi Antidroga, Rapporto Narcotruffia 2012, November 2012.
104 UNODC, response to the annual report questionnaire from Belgium for 2018.
105 Direzione Centrale per i Servizi Antidroga, Italy, Relazione Annuale 2019, 2019.
106 UNODC, response to the annual report questionnaire from Greece for 2017.
107 UNODC, response to the annual report questionnaire from Greece for 2018.
109 The Times, Rise of the ‘Ndrangheta: how the feared Calabrian mafia has reached the UK, 2 December 2018.
110 The Guardian, Kings of cocaine: how the Albanian mafia seized control of the UK drugs trade, 13 January 2019.
111 Vice Media Group, The Inside Story of Europe’s First Narco-State, 6 June 2019.
113 Mimi Yagoub, Arrested Serb Highlights South America’s Balkan Connection, Insight Crime, 15 September 2016.
115 In linguistic terms, Bosnian, Croatian, Serbian and Montenegrin may be considered as four standard varieties of Serbo-Croatian. See: Šipka, Lexical layers of identity: words, meaning, and culture in the Slavic languages (New York, Cambridge University Press, 2019).
116 Europol information based on intelligence.
117 UNODC Drugs Monitoring Platform.
groups and Montenegrin nationals in cocaine trafficking. In February 2020, authorities in Aruba seized 5 tons of cocaine on board of a cargo ship destined for Greece and arrested several Montenegrin members of its crew. 118 In June 2019, authorities in the port of Philadelphia, United States, seized the remarkable quantity of 20 tons of cocaine from a container ship 119 en route to the Dutch port of Rotterdam, and arrested several Montenegrin members of its crew. 120 In 2015, five Montenegrin nationals were arrested after they organized a drop-off from cargo ships of cocaine, collected near the Spanish coast by small yachts and delivered to Spanish ports. 121

Media sources also suggest that, in many cases these DTOs do not route the trafficked cocaine via their countries of origin in the Balkans, but use well-known entry points and drug trafficking hubs in Europe122 such as the ports of Antwerp, Rotterdam, Valencia or major airports.

Balkan DTOs appear to be also using their contacts and access to wholesale drug supply in Latin America to traffic cocaine not only to Europe, but also to other profitable destination markets in Asia and Oceania, where they cooperate with local DTOs for the distribution of cocaine.123,124

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118 Samir Kajosevic, Montenegrin crew of cocaine ship arrested in Caribbean, Balkan Insight, 26 February 2020.
119 CNN, Record cocaine seizure at Philadelphia terminal weighed nearly 20 tons - or 39,525 pounds, June 27, 2019.
120 Nacional – Neovisni News Magazin, While cocaine jet-setter Michael Dokovich fights his extradition to Croatia, the Balkan Cartel is on the rise, 13 November 2019.
121 Nacional – Neovisni News Magazin, While cocaine jet-setter Michael Dokovich fights his extradition to Croatia, the Balkan Cartel is on the rise, 13 November 2019.
123 Blic, Ovo je novi svetski Put Droge, a njime gospodari Balkanska Mafija, 26 August 2019.
Emerging pattern of criminal consortia

Another new phenomenon involves increased cooperation between DTOs based in Europe. Recent reports in the media suggest possible collusion among European high-level cocaine brokers and traffickers from distinct backgrounds. One example of an attempt at collusion among different groups may have been observed in 2017 in Dubai, involving individuals with ties to Irish, Italian, Bosnian and Dutch DTOs.\(^{125,126,127,128}\) Italian authorities also assessed that the Italian criminal network Camorra in particular participated in such “criminal consortia.”\(^{129}\)

In some cases, DTOs have pooled their capital to jointly purchase larger quantities to maximize profits.

Another instance of such collaboration, reported in the media, may have been detected when French and American authorities stopped, in November 2017, a pattern of charter flights arriving at Biarritz, France loaded with large quantities of cocaine from Colombia and organized by a mix of Albanian, Turkish, Dutch, Spanish, Italian, French and English masterminds.\(^{130}\) As previously described, some of these DTOs now have direct access to cocaine producers in Latin America, but individually would lack the capital required to procure cocaine in quantities that would ensure sufficient profit margins. In some cases, these DTOs have pooled their capital to jointly purchase larger quantities to maximize profits.\(^{131}\) It is plausible that a dynamic and stimulated global market for cocaine will continue to engender such patterns of collaboration in the procurement and trafficking of cocaine in the future.

Latin American criminal networks maintaining a presence in Europe

Europe continues to be an attractive destination market for cocaine producers. Cocaine-producing criminal networks from Colombia, Peru and the Plurinational State of Bolivia have long maintained contacts with European criminal networks in order to arrange the wholesale supply of unprecedented amounts of cocaine.\(^{132}\) Cocaine achieves very high prices in Europe compared to most other regions of the world, which implies significant profit margins both for producers and distributors of cocaine on the European market. Similar to their European counterparts’ presence in Latin America, Latin American criminal networks are also established in Europe. However, their presence remains limited and is largely restricted to liaising with Europe-based criminal counterparts and with facilitators of money laundering schemes.\(^{133}\) Some Colombian drugs trafficking organizations have formed “consortia” with criminal networks based in Europe. They take responsibility for the reception, storage and further wholesale distribution of cocaine trafficked to the EU.\(^{134}\)

For example, acting as permanent representations for Colombian criminal networks, so-called “Collection Offices” (Oficinas de Cobro) are established in key locations for the cocaine trade in the EU such as Spain or the Netherlands.\(^{135}\) These small representations supervise the arrival of shipments, handover to clients, payment collection and liaising with money laundering service providers.\(^{136}\)

Such cells have been occasionally documented in the media. For example, in January 2021, Spanish authorities arrested 4 individuals, nationals of Colombia, Spain and Venezuela (Bolivarian Republic of), belonging to a cell, with ties to Colombian and Peruvian DTOs, whose main functions appear to have included debt collection, assassinations and laundering of the proceeds of drug trafficking.\(^{137}\) In May 2014, Spanish police arrested 13 individuals, including 9 Colombians, accused of acting as an “Oficina de Cobro” for the Colombian group Urabeños.\(^{138}\) In July 2014, Spanish police arrested one of the main leaders of the Colombian

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\(^{125}\) Algemeen Dagblad, Bundelen cokekartels de krachten in Dubai?, 18 October 2019.

\(^{126}\) NL Times, Taghi part of ‘Super Cartel’ Controlling Third of EU Cocaine Trafficking, 18 October 2019.

\(^{127}\) thejournal.ie, The curious case of Daniel Kinahan: Cocaine scion or boxing power broker?, 17 May 2020. Available at: https://www.thejournal.ie/daniel-kinahan-dubai-5097835-May2020

\(^{128}\) The Irish Sun, Dutch drug baron part of “super cartel” with Daniel Kinahan arrested in Dubai and extradited back to the Netherlands, 22 December 2019.

\(^{129}\) Direzione Centrale per i Servizi Antidroga, Relazione Annuale 2020.

\(^{130}\) El Tiempo, Los vuelos chárter colombianos que llenan de coca a Europa, 25 November 2017.


\(^{134}\) Europol information based on intelligence.


\(^{137}\) El Espectador, Detienen en España a una banda vinculada a carteles de droga de Colombia y Perú, 20 January 2021.

\(^{138}\) Informador, España desmantela red de sicarios colombianos, 6 May 2014.
The use of violence by criminal networks is a growing concern in Europe. Over the last few years, a surge in serious violent incidents associated to organized crime, particularly drug markets, has been seen.

In recent years, drug-related conflicts have resulted in public shootings, bombings, kidnappings, torture and intimidation. Cocaine (and cannabis) markets have attracted new DTOs, resulting in intensified competition.

In the spring of 2020, the French and Dutch authorities, with the support of Europol and other countries, carried out investigations into organized crime groups using an encrypted communications platform. The data collected provided law enforcement agencies with a unique global view of the activities of high-risk organized crime groups, particularly in drug trafficking, but also in the use of violence. Hundreds of serious violent crimes including also homicides and threat to life incidents were detected and/or prevented. One investigation involved shipping containers detected in the Netherlands that had been converted into cells to be used as torture chambers.a,b

In the United Kingdom, “crack” cocaine is one of the drug types (alongside heroin) most strongly associated with the “county lines” trafficking model, which is assessed to be driving violence at the lower end of the supply chain and drawing in young people in particular.c,d

In the European Union, these organizations use representatives or independent intermediaries to cooperate with local DTOs. While Mexican criminal organizations were previously only marginally involved in drug (including cocaine) trafficking in Europe, they have more recently intensified their activities in Europe.

In February 2020 Italian authorities foiled an attempt by the Sinaloa cartel to supply cocaine from Colombia to traffickers in Italy through Catania (Sicily).e Open sources suggest that the cartel was aiming to develop a new route involving large shipments trafficked by private plane from Colombia to small airports in Italy. However, in this instance around 400 kg reached Fontanarossa airport (Catania) on a passenger flight. The law enforcement operation appears to have involved the infiltration of informants.f

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 group Oficina de Envigado\textsuperscript{139} and another affiliate of the same group in 2016.\textsuperscript{140} The Oficina de Envigado originated as a debt collection agency for the Medellin cartel and is reportedly still more of a service provider to drug traffickers than a drug cartel in itself.\textsuperscript{141} Some research has also posited an emerging type of high-level criminal operators controlling the production of cocaine in Colombia called “Invisibles”.\textsuperscript{142} While these individuals have little direct involvement in criminal activities, they maintain contacts with clients and use representatives based both in Colombia and in Europe.

As mentioned previously, Colombian nationals are also sometimes involved in the secondary extraction, in Europe, of cocaine trafficked within carrier materials.

Mexican cartels are multinational criminal organizations and highly active on the global drug market. These sophisticated organizations are typically involved in four principal areas of activity: drug trafficking (precursors supply, drug production, storage, transport and distribution), security services (professional killers, known as ‘sicarios’), legal assistance (of members in court proceedings), and finance operations (payments, money laundering and investments).\textsuperscript{143}

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\textsuperscript{139} BBC News, Spanish police arrest Colombian drug lord el Ratón, 19 July 2014.
\textsuperscript{140} La Información, Del ‘Carbonero’ a ‘Snoopy’ o ‘Nené’, el rebrote de los sicarios colombianos en España, 12 March 2016.
\textsuperscript{141} Insight Crime, Oficina de Envigado, 7 June 2019. Available at: https://insightcrime.org/colombia-organized-crime-news/oficina-de-envigado-profile/
\textsuperscript{143} Europol information based on intelligence.
Knowledge gaps

While there is some awareness of the global connections and the use of representatives from criminal organizations in source and destination regions which facilitate the global trafficking of cocaine, many aspects remain unclear:

• What is the scope of the presence and the activities of South American criminal networks based in Europe and which exact function do they play in maintaining the flow of cocaine from production to destination regions?

• How has the role of West African and North African countries evolved as transit and, potentially, as destination countries for cocaine produced in South America and trafficked to destination markets in Europe and elsewhere?

• Who are the main local interlocutors for European criminal networks maintaining a presence in South America in order to procure wholesale quantities of cocaine and facilitate its trafficking to Europe?
CRIMJUST is implemented by UNODC in partnership with INTERPOL and Transparency International. CRIMJUST seeks to enhance law enforcement and judicial strategies beyond interdiction activities and to foster transnational responses along drug trafficking routes targeting each stage of the drug supply chain. This includes the production of knowledge on the cocaine market to support evidence-based policy and strategies designed to counter the cocaine threat.