



UNITED NATIONS
Office on Drugs and Crime

**DRUG TRAFFICKING AS A SECURITY
THREAT IN WEST AFRICA**

NOVEMBER 2008

Acknowledgements

This report was prepared by the Studies and Threat Analysis Section and the Regional Office for Western and Central Africa of UNODC in the context of the segment of UNODC's Trends Monitoring and Analysis Programme dedicated to Africa and funded by France and Sweden.

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UNODC reiterates its appreciation to the African and European Member States who responded to the UNODC Annual Report Questionnaire on drugs. This questionnaire, together with the UNODC database on individual drug seizures, constitutes the core source of information on which this report was built. Comments and feedbacks can be addressed to <stas@unodc.org>.

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This report has not been formally edited.

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PREFACE

The crisis of drug trafficking in West Africa is gaining attention, in the media and among governments. Alarm bells are ringing about the volume of cocaine transiting the region (roughly 50 tons a year), and its impact on the security of fragile states.

West Africa, which never had a drugs problem in the past, has become a hub for cocaine trafficking. Ships and planes loaded with cocaine are coming from Latin America into poorly guarded ports and airfields in West Africa. The shipments are then broken down into smaller consignments, and sent to Europe by a variety of means, including commercial flights in the luggage, clothing or intestines of couriers. Distribution is mostly in the hands of criminal groups among the West African diaspora.

Seizures indicate that much of the cocaine is destined for Spain, and the United Kingdom, the two largest cocaine markets in Europe, but may transit France and Portugal, countries with cultural ties and air links to the region. Cocaine imported from West Africa is worth almost \$2 billion a year at wholesale level in European cities.

But this is more than a drugs problem. It is a serious threat to security. That is why the issue of drug trafficking in West Africa is on the agenda of the UN Security Council, the Peacebuilding Commission, the Economic Community of Western African States (ECOWAS), and the European Union.

Latin American drug cartels are preying on West Africa because countries of the region are vulnerable. Poor countries like Guinea Bissau – that are at the bottom of the human development index – are unable to control their coasts or airspace. Police are almost helpless against well-equipped and well-connected traffickers. Drug seizures are growing dramatically – at least 46 tons of cocaine have been seized on route to Europe via West Africa since 2005. Prior to that time, the entire continent combined rarely seized a ton. But most of these seizures occurred by chance. Prosecutors and judges lack the evidence or the will to bring to justice powerful criminals with powerful friends.

Drug money is perverting the weak economies in the region. In some cases, the value of the drugs being trafficked is greater than the country's national income. Drugs are also poisoning the region's youth since the foot soldiers in this growing trade are paid for their services with cocaine. As a result, the vulnerability of West Africa to drugs and crime is deepening even further.

These states are not collapsing. They risk becoming shell-states: sovereign in name, but hollowed out from the inside by criminals in collusion with corrupt officials in the government and the security services. This not only jeopardizes their survival, it poses a serious threat to regional security because of the trans-national nature of the crimes.

The drug trafficking problem in West Africa is still small by the standards of West Asia, the Caribbean or Central America. But it is growing exponentially and threatening to turn the region into an epicentre of lawlessness and instability. This is the last thing West Africa needs. By strengthening the defences of the states under attack and building a regional response, there is a chance to bolster the rule of law and equitable development of West Africa, enabling vulnerable countries to withstand the onslaught of drugs and crime.



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Map No. 4242 UNITED NATIONS
February 2005
Department of Peacekeeping Operations
Cartographic Section

EXECUTIVE SUMMARY

- A declining US cocaine market and a rising European one appear to have prompted South American cocaine traffickers to make use of low-governance areas in West Africa as transit zones.
- At least 46 tons of cocaine have been seized on route to Europe via West Africa since 2005. Prior to that time, the entire continent combined rarely seized a ton annually.
- There appear to be two parallel flows. One, mainly involving large maritime and private air shipments, is owned and managed by South Americans. In exchange for logistic assistance with these shipments, West Africans are paid in cocaine. This has created a second flow, as West Africans also traffic these drugs to Europe, usually via commercial air flights.
- The large shipments are dangerous because of their extreme value relative to the local economies, but the small shipments, which are widely dispersed throughout the region, have the potential to fuel local violence and drug use.
- It appears that most cocaine entering Africa from South America makes landfall around one of two hubs, centred on Guinea-Bissau in the north and Ghana in the south. The drugs are then trafficked between West African countries before being shipped out on commercial air flights, among other means.
- Approximately 3.4 tons of cocaine was seized from some 1357 couriers on commercial air flights from West Africa to Europe since 2004.
- In terms of commercial air couriership, some 62% of the incidents and 55% of the cocaine interdicted came from just four of the 15 ECOWAS countries: Senegal, Nigeria, Guinea (Conakry), and Mali.
- Senegal and Nigeria were the source of the greatest volumes of cocaine seized on commercial air flights, but they also have the largest international air traffic volumes. Guinea (Conakry) and Mali are disproportionately represented in terms of the number of air couriers detected relative to their air traffic volumes.
- Guinea (Conakry) was embarkation point of 221 couriers detected since 2006, the single largest national total in the region. Mali is puzzling because reaching Bamako requires driving the drug another 1000 km inland, for no apparent commercial advantage.
- In contrast, both Cote d'Ivoire and Ghana are the source of fewer cocaine seizures on commercial flights than might be expected. Senegalese are under-represented as couriers.
- Nigerian citizens were by far the most detected nationality among arrestees, although their share of the air couriers (57%) was close to their share of the regional population (53%). Nigerian couriers were the most commonly detected nationality on flights embarking from almost every country in the region.
- About half the cocaine detected on commercial air flights was destined to the two largest cocaine markets in Europe: the United Kingdom and Spain.
- The couriers feeding these two markets show some clear patterns. Over 80% of the cocaine seized destined for Spain was taken from nationals of Nigeria, Guinea-Bissau, Mali, and Cape Verde. Two-thirds of the Nigerians embarked from Guinea or Mali. The market in the United Kingdom is even more concentrated among a few groups, with 75% of the couriers detected being Nigerian or British nationals. Over 60% of the Nigerians detected embarked from Nigeria, the single largest origin-destination pairing.
- While France has a growing market for cocaine, it appears to be increasingly used as a transit country, perhaps due to air links to French-speaking countries in the region. Of 122

couriers arrested in France, only 61 were destined for France; the others were in transit to other countries.

- It is likely these couriers are supplying well established West African cocaine distribution networks in Europe. Nigerian nationals were the foremost foreign group arrested for cocaine trafficking in France in 2006, comprising 31% of the foreign cocaine traffickers arrested that year. They are also prominent in arrest figures from Austria, Italy, Ireland, and Spain. In Portugal, citizens of Cape Verde and Guinea-Bissau make up most of the foreigners arrested for cocaine trafficking in 2007. In Switzerland, 60% of the foreign drug traffickers arrested were West African, from a wide range of countries with no clear links to Switzerland. Some 543 West Africans were arrested in 2006 alone, compared to 581 Swiss.
- Heroin also transits the region, largely handled by Nigerian couriers operating from Pakistan. Nigerian citizens were responsible for 81% of the 2.4 tons of heroin seized from West Africans on commercial air flights since 2000, based on incidents recorded in the UNODC Individual Drug Seizures (IDS) database. In addition, almost half of this 2.4 tons was destined for Nigeria, and 61% to West Africa generally.
- Cannabis is the only drug produced in West Africa and the most abused drug locally. West African cannabis does not enjoy much of an international reputation, and consequently the risks of inter-regional trafficking are limited. A declining market for Moroccan hashish in Europe, however, may lead traffickers to seek new markets to the south and east, which could result in West Africa becoming a transit zone for this drug. Large, heavily guarded shipments of hashish were seized in remote areas of Mali and Niger, which may have been destined for Egypt and the Middle East.
- Despite these threats, it appears that cocaine is presently the biggest challenge confronting the region. Efforts made to address cocaine trafficking should also help address the other markets.
- Based on an analysis of seizures in Europe where the origin was known, it is estimated that some 27% (or some 40 tons) of the cocaine consumed annually in Europe is presently transiting West Africa. This amount is worth an estimated US\$ 1.8 billion at wholesale level. Perhaps US\$450 million accrues to the traffickers, giving them more resources than governments have to combat them.
- The single greatest point of vulnerability lies in the region's under-resourced criminal justice agencies, which are highly vulnerable to corruption. At present, even when arrested, international drug traffickers operating in West Africa are seldom sentenced. Much needs to be done with very few resources, so the region needs to strategise carefully for maximum impact.
- International support is needed to help governments in West Africa establish justice and security as cornerstones of their countries' development. Bringing law and order to this region will go a long way toward securing it for investment and the development of healthy societies.

INTRODUCTION

On the path from their sources to the destinations, illicit drugs do not necessarily follow the most direct routes. Factors other than geography enter into the calculus of the most “efficient” trajectory to take. Weak states have a gravity of their own – law enforcement in these nations is typically under-resourced and subject to corruption. For a variety of reasons, Africa is home to some of the weakest states, in terms of their capacity to enforce the rule of law in their territories, in the world.

In the last three or four years, it has become clear that the special vulnerability of Africa is being exploited. Cocaine produced in South America is increasingly taking a detour on its way to growing markets in Europe. The area most affected is West Africa, a poor region recovering from many prolonged civil conflicts. This report is about the threat posed by drug trafficking to the security of this region.

Organised crime tends to reinforce the conditions under which it germinates. It often emerges in communities under-served by the state, initially providing order by concentrating violence under a single authority. It then grows to challenge the official government structures, seeking to protect its operations from outside interference, further distancing the areas it controls from state authority. Organised crime develops opportunistically, flourishing wherever resistance is low.

Unfortunately, resistance appears to be low in much of West Africa. While many countries are becoming more stable, there remain areas that are not truly under the control of an accountable nation, and the threat of armed insurrection still exists. Between 1998 and 2005, at least 35 armed groups have been active in ten West African countries. Most of these acquired their arms illegally, and many are actively involved in criminal activities to fund their operations. Even if they are unsuccessful in their political aspirations, their criminal activities are likely to retain enduring attraction.

The relationship between diamond smuggling and the civil wars in Sierra Leone and Liberia has been well documented, but, at their peak, profits accruing from this activity amounted to some tens of millions of dollars per year. The potential destabilizing influence of the cocaine traffic, where the value of a single consignment can exceed that sum, is very real. The profits generated by this trade are larger than the entire security budgets of some of the smaller West African countries. But it is likely the traffickers are making use of the region for a far smaller sum, paid out in kind, rather than cash. This has generated local cocaine markets, which pose hazards of their own.

In addition to cocaine, the region has been used for the trafficking of heroin and cannabis resin. As with cocaine, the logic has less to do with where West Africa is placed geographically than with the ability of traffickers to operate in the area with impunity. Indirect routes add to transportation costs, but this may be offset by lower seizure rates and the availability of cheap labour. Traffickers take advantage of the presence of large West African expatriate populations in some of the key consumption countries. West Africans paid in drugs can distribute this largess through networks already well established in Europe.

The relationship between West Africa and Europe with regard to trafficking may prove to be similar to that between Mexico and the United States. Like West Africans, the Mexican cartels started out as service providers to Colombian trafficking groups, and were paid in drugs rather than cash. Their extensive marginalised diaspora in the US allowed them to eventually assume control of the market and relegate the Colombians to a secondary role. In both cases, cross-border relations and remittance flows provide infrastructure for transnational criminal commerce. The situation in West Africa could come to resemble that confronting Mexico today, in which some local police forces have been co-opted by trafficking groups, which engage in open warfare with both the state and one another. Except West Africa, as a whole, is both poorer and less stable than Mexico, and so more likely to be subsumed in the conflict. Large numbers of former child soldiers and other brutalised young men have few rival sources of income or alternative plans for their future.

The situation is rendered all the more worrisome due to a lack of basic information on security issues. Data on drug use levels in the region mostly date to the late 1990s, and were questionable even then. Crime statistics are unreliable indicators in countries with little capacity to collect them and where much of the justice activity occurs through traditional structures. Most of the big drug seizures made in this region were detected either through foreign tip offs or by accident. Estimates on the extent of the problem are necessarily rough and trend indications unreliable. The information that has emerged, however, is sufficiently alarming to merit a renewed effort to collect and share data for West Africa.

This report presents the information currently available, starting with a description of the major drug markets: cocaine, heroin, and cannabis. Seizure and arrest data from both West Africa and Europe are analysed. The report then discusses the potential impact and the deep vulnerability of the West African region to both crime and instability.

THE DRUG THREATS

To understand the threat posed by the drug trade, it is necessary to understand the nature of the trafficking. Different types of trafficking can have very different effects in transit areas. For example, Central America and the Caribbean have long suffered for being placed between South America's cocaine producers and the cocaine users of North America. But in recent years, this flow has started to have a serious impact on murder rates in a number of transit countries. This effect can be demonstrated quite dramatically by a provincial analysis of murder rates in countries like Guatemala and El Salvador. The most troubled provinces are those associated with the drug trade, not (as is usually the case) those containing the largest conurbations. This effect may be reflective of a large number of small-scale traffickers operating in competition with one another, unlike the more centralised flows of the past.

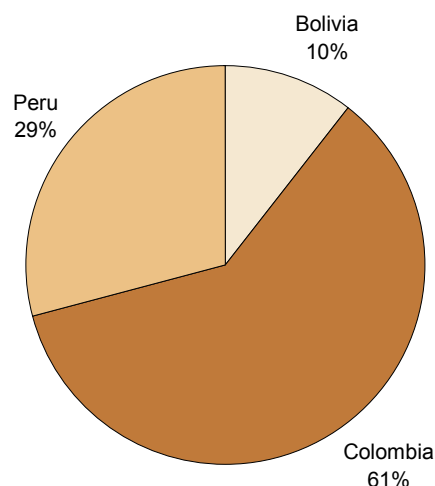
In contrast, South East Europe has been the primary corridor for heroin trafficked from Afghanistan to West Europe via the so-called "Balkan route" for quite some time. These flows, originally organised under authoritarian governments, have remained highly controlled, and have had relatively few "spill over" effects in the transit countries. At least through the Balkans, it appears that the drugs remain in the hands of the same groups. Drug use rates in the Balkan countries remain low – crossing a border or two can double the value of the shipment, so it makes little commercial sense to dump product on local markets. The risk of interdiction is also minor – while an estimated 80 tons of heroin passes through the region each year, only about 2% of this was seized by the governments of South East Europe in 2006. As a result, it appears that most of the heroin passes through the region intact.

The key question, then, in predicting future impact is: "Does drug trafficking in West Africa more closely resemble the situation in Central America or the situation in the Balkans?" Based on what we know today, how deep an impact is drug trafficking likely to have on security in the region? The following discussion considers this question for each major drug type.

Cocaine

Nearly all of the world's coca leaf is produced in just three countries: Colombia, Peru, and Bolivia. Colombian groups produce the most coca leaf, manage cocaine production in the other two countries, and have been chief among the international traffickers in the past. Many, if not most, of the very large shipments of cocaine seized around the world were in the control of Colombian groups, whatever the nationality of the crew or flag of the vessel.

Figure 1: National shares of global potential cocaine production in 2007

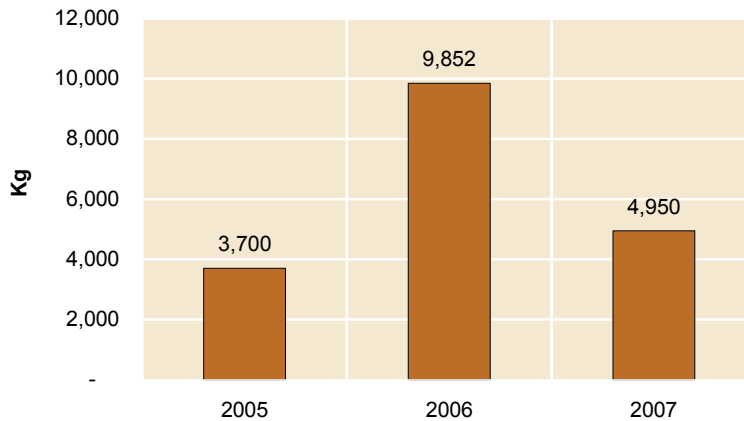


Source: World Drug Report 2008

Global cocaine markets are in flux. Since the mid-1980s, cocaine has been losing its appeal in the United States. Adult cocaine prevalence is currently 50% lower than it was two decades ago.¹ In the face of declining demand in the premiere market, cocaine traffickers have had to find new consumers elsewhere.

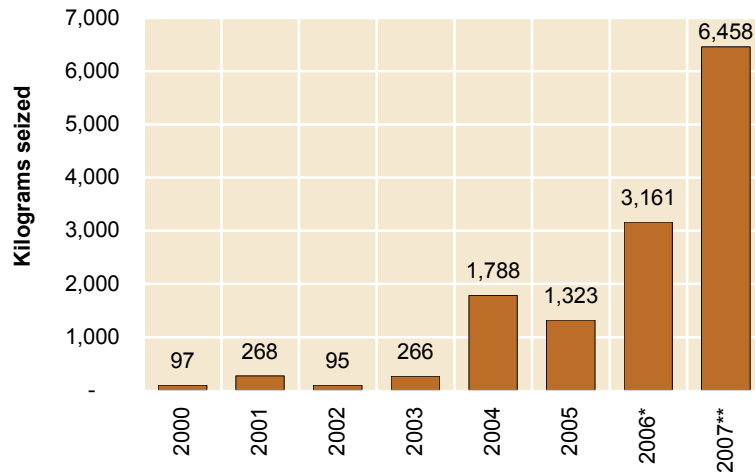
They found these new users in West Europe. From the mid-1990s, cocaine markets in several European countries began to grow. In some areas, cocaine has become the club drug of choice, as ecstasy and related substances become passé. For example, according to the British Crime Survey, the prevalence of cocaine use increased more than four-fold in the last decade, from 0.6% of the adult population in 1996 to 2.6% in 2007. Spain, Italy, and France have all seen cocaine use levels double or triple in recent years.²

Figure 2: Total of large cocaine seizures (above 100 kg) linked to Africa and made by European law enforcement agencies



Source: UNODC Individual Drug Seizures Database and Data for Africa

Figure 3: Annual Cocaine Seizures in West Africa, 2000 – 2007



Source: UNODC World Drug Report 2007, and UNODC 'Data for Africa' for 2006 and 2007 statistics

* preliminary data for 2006 based on available data as of November 2007

** from data collected by UNODC between January – November 2007

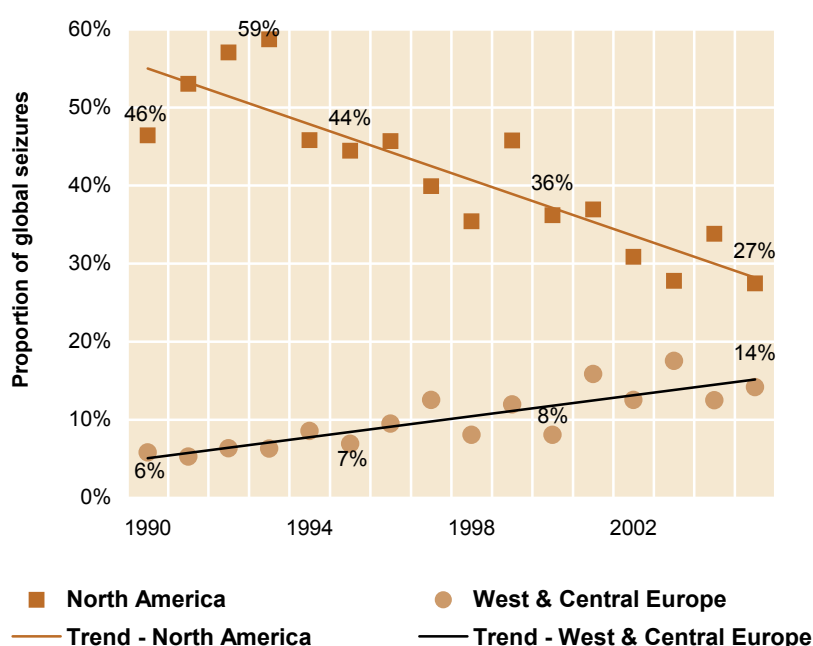
¹ Further, recent forensic evidence from workplace testing indicates a sharp downward turn in use levels. See ONDCP, *Cocaine Use Declines Among U.S. Workforce*, press release 9 August 2007.

² UNODC, World Drug Report 2007. Vienna: UNODC, 2007.

As a result, a growing share of total cocaine production is shifting from markets in North America to markets in West Europe, as reflected in the seizure figures (Figure). The declining value of the US dollar relative to the Euro may also be affecting traffickers' choices of preferred markets. The most recent figures available suggest a kilogram of cocaine in Europe is worth twice as much as it is in the United States.

Another important factor is interdiction. After years of effort, the governments of the Western Hemisphere have scored significant gains in stopping cocaine supply to the United States. The crackdown on cartel leaders by President Calderon's administration in Mexico appears to have significantly affected trafficking.³ Increased law enforcement, among other things, has scored several record cocaine seizures and significantly hindered fast boat traffic.⁴ In 2007, a cocaine drought was witnessed in 38 U.S. cities, causing prices to double.⁵ Traffickers may be increasingly following the path of least resistance.

Figure 4: Share of global cocaine seizures made in North America and West/Central Europe

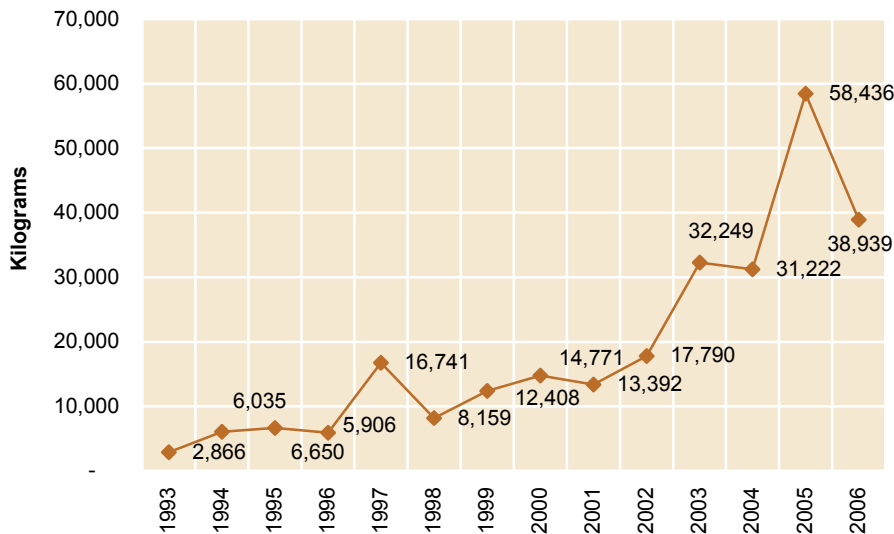


Recent crackdowns under the Uribe government and progress made against the main insurgent groups have pushed some of the Colombian groups into Venezuela. Increasingly, large maritime and air shipments of cocaine are departing from Venezuela, not Colombia, particularly those headed east to Europe via West Africa. Perhaps partly as a result, Colombia's murder rate has been diminishing, while Venezuela now has one of the highest rates in the world.

³ Cook, C. *Mexico's Drug Cartels*. Washington, D.C.: Congressional Research Service, 16 October 2007.

⁴ In March 2007, the U.S. Coast Guard seized more than 20 tons of cocaine off Panama's Pacific coast. In April, Colombian authorities discovered 13 tons of cocaine buried near the coastal town of Pizarro. In October, authorities seized 10 metric tons of cocaine in the northern Mexican city of Tampico. Later in the month, authorities seized 26 tons of cocaine from a ship in the port city of Manzanillo. See 'Mexico calls cocaine seizure biggest in nation's history'. The Associated Press, 1 November 2007.

⁵ McKinley, J., "Citing Price Rise, U.S. and Mexico see Antidrug Progress". *New York Times*, 2 October 2007.

Figure 5: Cocaine seizures in Venezuela

Source: UNODC Delta database

Colombian traffickers remain very important in supplying markets around the world, however, and it appears that most of the large shipments that transit West Africa remain in the control of Colombian groups until they reach Europe. It appears that presently West African groups are supplying services to this flow, and are being paid in cocaine. These cocaine “payments” are then trafficked to Europe, largely by couriers on commercial air flights. Once in Europe, they may be distributed by groups of expatriate West African dealers, who are key in many European drug markets. The discussion below traces the flow of the cocaine from its source, through West Africa, to the consumer.

From South America to West Africa

Cocaine leaves South America for West Africa both by sea and by air.

While only a few air shipments have been seized, radar surveillance suggests a growing number of small planes are leaving Venezuela toward Africa on unscheduled flights. The aircraft involved are often modified for the trans-Atlantic voyage by the inclusion of additional fuel tanks or other modifications to allow in-flight re-fuelling. Seizures of these craft have been made in both South America⁶ and in Africa.⁷ The amounts involved are large, with instances of between 600kg and 700 kg seized. These shipments would be worth about US\$33 million on the European wholesale market. Flights have been detected to Mauritania, Sierra Leone, and Guinea Bissau.

⁶ On 10 July 2007, in Venezuela a consignment of 2.5 tons of cocaine were seized. The traffickers were loading the drug in a private plane bound for Sierra Leone.

⁷ On 1 May 2007, in Mauritania 630 kg of cocaine compressed into bricks were seized on board a 2-engine Cessna 441 aircraft. The GPS-record of the aircraft revealed the plane had left a small airstrip in Venezuela. In July 2007, the Moroccan Narcotic Control Board reported the seizures of similar cocaine bricks. On 3 July 2008, a small aircraft registered in Caracas and bearing a false Red Cross emblem landed without authorisation on an unlit airstrip at Lungi International Airport in Sierra Leone. After the crew fled, it was found to contain some 700 kg of cocaine. Also in July 2008, a conflict erupted between soldiers and police at the airport in Bissau with regard to a flight alleged to contain 500 kg of cocaine, but the drug was never recovered.

Picture 1: The Dual-engine Cessna 441 aircraft used to fly cocaine from Venezuela to Mauritania in May 2007



Picture : Interpol IRT mission to Mauritania

But the bulk of the cocaine appears to arrive in West Africa by sea. The maritime shipments from South America to Europe follow one of three general routes, according to Europol:

Three main sea routes to Europe have been identified: the Northern route, leading from the Caribbean via the Azores to Portugal and Spain; the Central route from South America via Cape Verde or Madeira and the Canary Islands to Europe and, more recently, the African route from South America to Western Africa and from there to Spain and Portugal. (emphasis added)

The African route tends to involve large commercial fishing or freight “mother ships”, often specially modified for cocaine storage. These ships are met at sea by African vessels with African crews, often with a Latin America “controller”. There has been at least one incident in which containerised shipment was used.⁸ The African vessels may continue northward or dock in West Africa, with the drugs to be transferred northward by other means. Ownership of the bulk of the drugs is not transferred, however, and remains in hands of the Latin American groups until they reach Europe.⁹ The West Africans¹⁰ appear to be paid for their services in drugs, and move these to Europe through their own networks. According to the British Serious Organised Crime Agency (SOCA): “Most cocaine transiting West Africa is controlled by Colombian traffickers based in the area on behalf of groups in Colombia, and there is a continuing increase in Colombians using West African criminal groups for the secondary distribution of cocaine to Europe.”¹¹

Guinea Bissau appears to be a key point of entry for the drug,¹² and at least one large shipment was detected entering Ghana.¹³ But, as will be explained below, the point at which drugs enter

⁸ In March 2007, 500 kg of cocaine was seized from a container in Cape Verde.

⁹ Comprised of, especially, individuals from Colombia, Venezuela, Mexico, and Brazil.

¹⁰ Comprised of, especially, individuals from Nigeria and Ghana.

¹¹ SOCA, *The United Kingdom Threat Assessment of Serious Organised Crime 2008/9*. London: SOCA, 2008.

¹² See UNODC, *Cocaine trafficking in West Africa: The threat to security and development (with special reference to Guinea-Bissau)*. Vienna: UNODC, 2007.

¹³ On 21 April 2006, the British Navy sighted a fishing trawler they suspected to be a Ghanaian vessel (the MV Benjamin) carrying a multi-ton consignment of cocaine in the Atlantic Ocean, heading towards the West African coast. They promptly relayed the information to the Ghanaian Narcotic Control Board and continued to monitor the vessel until it was 40 nautical miles south of Tema, the main sea port in Ghana, keeping the Ghanaian authorities apprised. Unfortunately, the Ghanaian authorities

African soil may be different from the point from which they leave. For a variety of reasons, it may make sense to make landfall in one country but exit from another. Drugs may be moved within West Africa (and perhaps even to North Africa) by air, sea or land before being shipped to Europe. Shipments onward seem to involve mainly large maritime shipments and small couriers on commercial air flights, although other means have been detected.¹⁴

Picture 2: Seizure of 1,900 kg of cocaine in the small coastal village of Pirampan in May 2006, Ghana



Picture: Ghanaian authorities

While it appears that West Africa is presently being used for the purposes of subterfuge, the exact significance of the region to the big trafficking groups remains unclear and subject to change. It is possible that pressures in South America are forcing traffickers to relocate aspects of the trade across the Atlantic. Seizures in West Africa have revealed large stockpiles,¹⁵ suggesting at least some of the larger shipments linger in West Africa for a while before proceeding northward. In addition, several cocaine labs, which convert cocaine base into refined cocaine hydrochloride, have been detected in Portugal and Spain,¹⁶ and it has been suggested that cocaine processing may be occurring in West Africa. If traffickers are willing to move portions of the manufacturing process across the Atlantic due to more favourable conditions, the relocation of part of the wholesale market appears plausible.

did not take action until 27 April, six days after the tip-off from UK counterparts. The boat was searched, but only one bag of 30 kg of cocaine was found. At the request of the Ghanaian Minister of Interior, a fact finding commission was set up to establish the reason for the slow reaction time of the Ghanaian authorities and the small amount of cocaine seized. The committee established that the boat was actually carrying 77 bags, or about 2.3 tons of cocaine.

¹⁴ On 21 June 2007, 800 kg of cocaine was found by the Spanish authorities on a plane forced to land in the Canary Islands. The plane had departed from an unknown location in the Sahara, in the north of Mauritania. In May 2006, 28 kg of cocaine were seized in Morocco from a French citizen. The drug was concealed in a four-wheel drive vehicle, which the perpetrator had driven from Senegal via Mauritania to Morocco. The vehicle was registered in Guinea Bissau.

¹⁵ For example, the seizure of 1,900 kg of cocaine on the small coastal village of Pirampan in May 2006, revealed the use of Ghana as a stockpiling place in Western Africa. On 27 June 2007, a passer-by informed the Senegalese Gendarmerie about a boat, unknown to the local fishermen, in M'bour, a village south of Dakar. The Gendarmerie found the unanchored boat had washed ashore in front of Club Aldiana, 11 kilometers south of M'bour. In the boat were 50 sacks, each containing 20 bricks of cocaine. Each of the sacks weighed 24 kg, for a total load of about 1.2 tons. Rumor had it that the boat had broken down, and the owners had gone in search of a mechanic to fix the engine. On 30 June 2007, another 1.25 tons of cocaine were seized from a walled, two-storey beach house close to the first seizure. In the garden was a semi-rigid pneumatic boat covered by a tarpaulin. Under the boat was a hidden concrete cellar containing another 51 bags of cocaine, identical to the first. Seven persons were arrested, including three Latin Americans and a French woman. The seizure was burned in August 2007 and the investigation is still underway.

¹⁶ Europol 2007 op cit.

At present, however, it appears that there are two parallel flows: large, mainly maritime shipments owned by Latin American groups, and smaller shipments by West Africans, mainly using commercial air couriers. It is the latter flow that has the most serious implications for the region, because the drugs are spread among a large number of local actors. What they do with the profits, how they settle disputes, and where they direct the drugs all could have profound implications for local security. The following section looks in detail at what is known about air couriering from West Africa to Europe.

Commercial air couriering from West Africa to Europe

The use of couriers on commercial air flights is a favourite of West African drug trafficking networks worldwide. This is largely because these networks are loose, transactional structures, not the hierarchical organisations seen with some other national groups. Many players have diversified formal and informal business interests, and use drugs as a way of acquiring start-up capital, often moving on to less hazardous activities at the first opportunity. Entry is open to anyone able to source, move, and distribute the drug, and these connections are easily made within the global diaspora community. The preponderance of low level players favours low cost trafficking techniques, such as commercial air couriers and parcel post.

New traffickers may start out couriering the drug themselves until they earn enough money to subcontract this risk, preferably to couriers less likely to attract attention. Better resourced networks can afford to field large numbers of couriers on the same flight, a technique known as the “shotgun approach”. The traffickers know that most airports have the capacity to detain only a limited number of suspects on any given flight. Losses are anticipated, and even planned, but the bottom-line remains viable.

For example, in December 2006, the Dutch authorities arrested 32 couriers on the same plane. The couriers had left Guinea-Bissau, transited Casablanca and landed at Schiphol airport. Out of the 32 couriers, 28 were Nigerians. In July 2007, 16 couriers were arrested on the weekly flight between the Gambia and the Netherlands. Eight couriers were arrested at Banjul airport before departure and eight other persons were arrested at Schiphol airport on arrival. The couriers were mostly Nigerians with residency in Europe. On 23 October 2007, another 22 couriers were arrested on the flight from Bamako via Tripoli to Schiphol, of which 19 were Nigerian, two were nationals of Mali and one was a national of Liberia. Of these, 18 were resident in Spain, two in Greece, one in Nigeria and one in Italy.

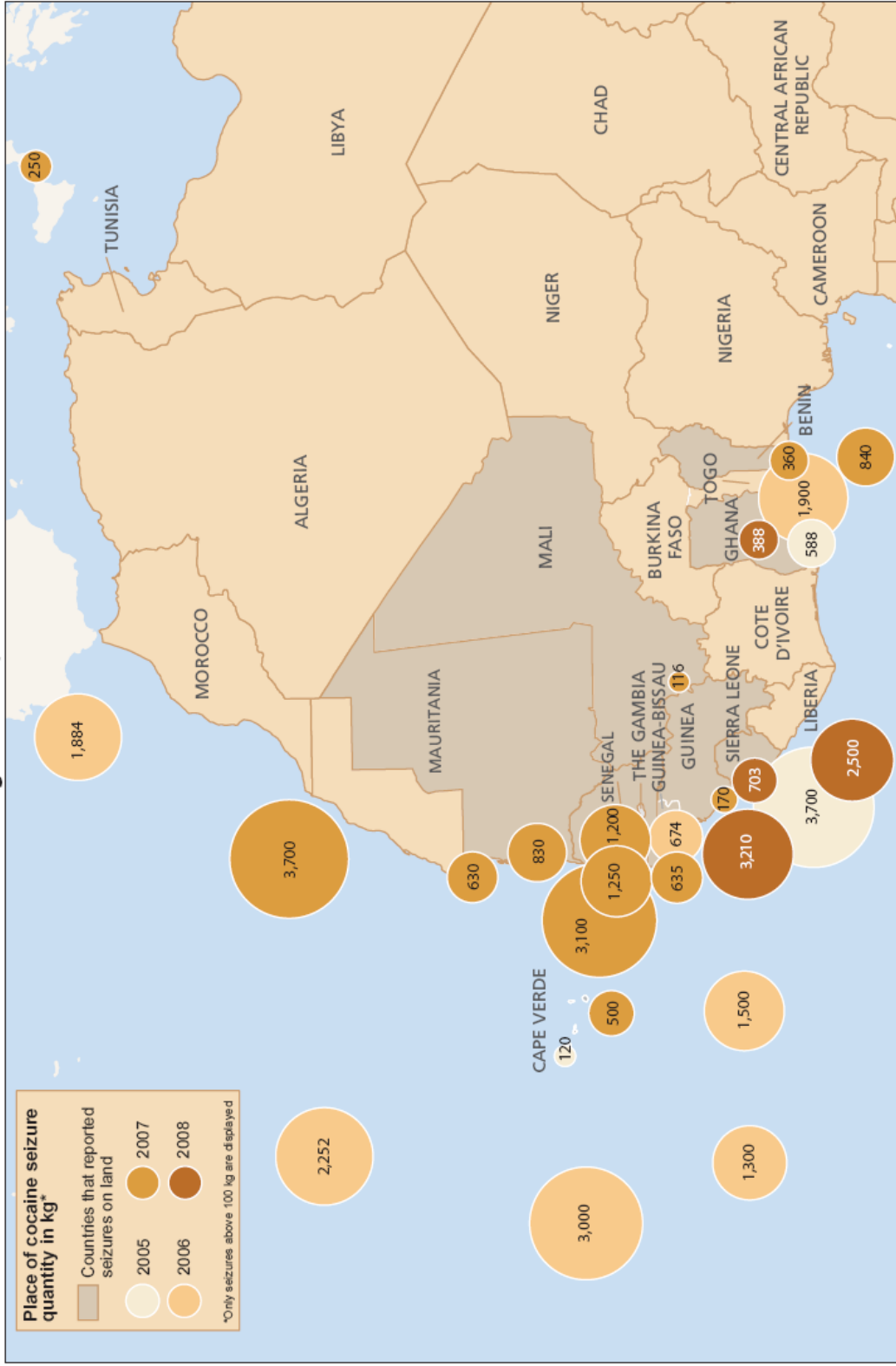
At least 1357 couriers detected since 2004

Since 2004, there have been at least 1357 detected cocaine couriers on flights originating in West Africa and destined for Europe (often via Casablanca or Tripoli). Some of these seizures have been captured by Interpol through its COCAF database, which deals exclusively with flights emanating from the West Africa region to Europe, and others by UNODC, through the longstanding Individual Drug Seizures (IDS) database, which is global in scope.¹⁷ Between them, these databases document the seizure of some 2.7 tons of cocaine since 2006, most in seizures of two kilograms or less. While this sample cannot be said to be representative,¹⁸ it is large, and the data are instructive. All of the graphs and discussion below refer to this combined dataset.

¹⁷ The IDS database records seizures above a threshold amount (100 grams for cocaine), with the assumption that these larger volume seizures represent drugs in the process of being trafficked, rather than those in possession of users or small dealers. For the purposes of this analysis, only those seizures made in airports were included.

¹⁸ It is not clear that any given contributing member state submits all the relevant seizures, or just the most remarkable ones. There are also clear gaps in the coverage in terms of the amount of data submitted by some key member states, which assure that the sampling is non-random. For example, Italy has not consistently submitted data to either database, and so cannot be ruled out as a major point in ingress for air couriered cocaine.

Individual seizures linked to cocaine trafficking in Africa, 2005-2008



Source: UNODC
 Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.

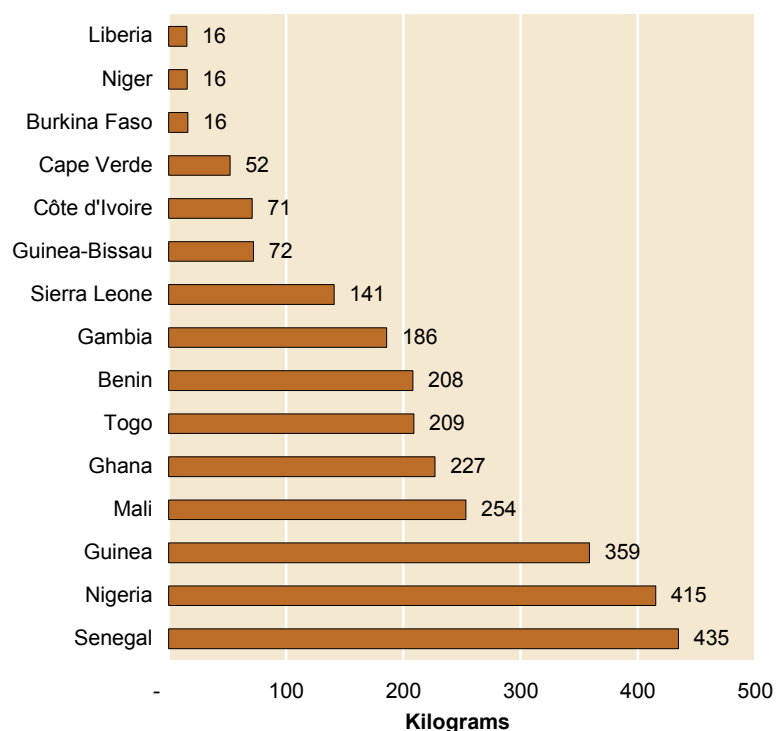
Many of the detected attempts are manifestly amateurish, which could be indicative of two things. One is that the market for cocaine in West Africa is truly open to entrepreneurs of all levels of experience. The other is that the hapless couriers were detected by design, intended to distract attention from other couriers on the same flight.

For example, on 15 August 2008, the German police caught a 15-year-old Nigerian courier with just under four kilograms of cocaine at Hamburg Airport. The cocaine was concealed in the double bottoms of two pieces of luggage, one of which was an otherwise empty (but unusually heavy) carryall. On the one hand, the age of the courier and his “empty” luggage suggests this child was being used as a decoy. On the other, the same effect could have been achieved with substantially less than four kilograms of cocaine, worth just under \$300,000 at German wholesale prices. Overall, this looks like the work of traffickers with more resources than know-how.

Greatest volume from Senegal and Nigeria

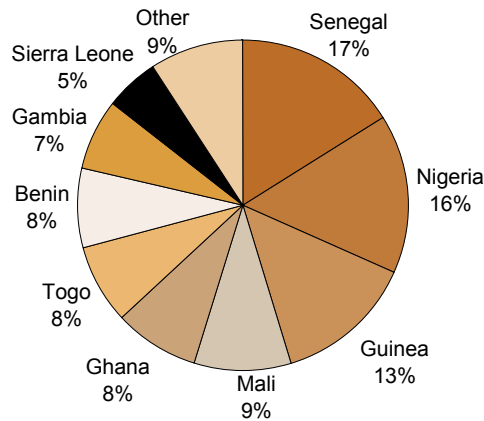
Looking at the volumes interdicted by flight origin country, Senegal emerges as the single largest source, with 434 kg secured in 105 separate seizures. But there is considerable variation in the average size of the seizures for each embarkation country. Senegal rises to the top because of the large average size of the Senegalese seizures – over four kilograms. A greater number of smaller seizures were made from flights originating in Nigeria (165), Mali (177), and Guinea (221). The top four embarkation countries accounted for 62% of the incidents, and 55% of the volume interdicted.

Figure 6: Cocaine seizure volume on flights to Europe by embarkation country (January 2006-May 2008)



Source: COCAF/IDS database

Figure 7: Share of total volume of cocaine seized on flights to Europe by embarkation country (January 2006-May 2008)

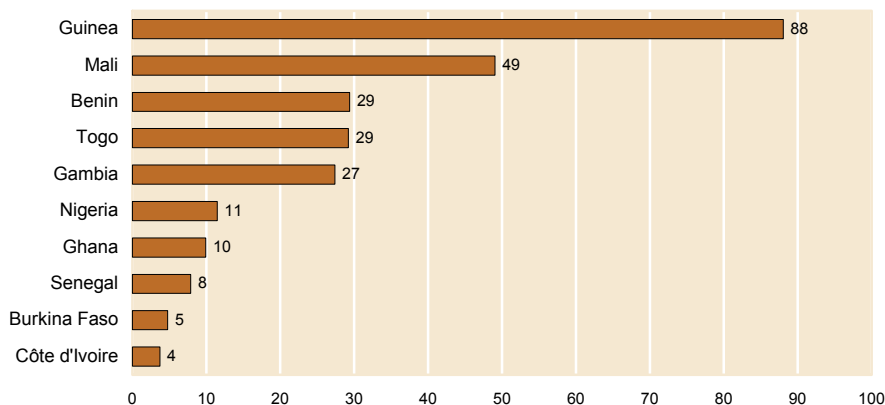


Source: COCAF/IDS database

Greatest courier volume departs Guinea Conakry

It is not surprising that Senegal and Nigeria rise to the top in these comparisons, as their major airports handle over 1 million international passengers per year. If all other things were equal between West African countries, these countries would be expected to carry the largest volumes. It is interesting, then, that Cote d'Ivoire, which would be ranked third or fourth in terms of passenger volumes (with nearly one million international passengers in 2007), was the origin of about 2% of the seizures. Conversely, low seizure volumes in countries like Liberia or Guinea-Bissau can be attributed to the low levels of air service to those countries. Air traffic can be factored in by looking at the rate of seizures per 100,000 international air passengers, based on data from the International Civil Aviation Organisation. When this is done, the number of couriers detected coming from Guinea (Conakry) and Mali is particularly remarkable in proportion to overall passenger volumes. In other words, these countries have more seizures than air flight volumes would predict, suggesting there are other factors at work causing traffickers to favour these points of embarkation.

Figure 8: Detected cocaine couriers on flights to Europe per 100,000 international passengers by embarkation country (January 2006-May 2008)



Source: Elaborated from Interpol (COCAF); UNODC (IDS); and ICAO¹⁹

¹⁹ ICAO numbers are from 2003, the most recent year for which comparable data are available. While these numbers are likely to have increased in recent years, they likely continue to reflect the relative capacities of the national airports.

Guinea (Conakry) has not previously been emphasised as a major trafficking hub, but over 20% of the couriers detected flew out of this country, and the large number of couriers relative to overall passenger volumes suggests that more attention should be paid to this country.

Mali: A puzzling point of departure

The use of Mali as a point of embarkation represents a curious detour from the most efficient routes to Western Europe. Since most of the cocaine arrives by sea, it makes little commercial sense to transport the consignment an additional 1000 kilometres inland to Bamako, only to fly it to Europe by commercial carrier from there. At least one large seizure (116 kg) has been made from a commercial vehicle trucking cocaine from Guinea to Bamako, and intelligence reports suggest this is the method used to move the drug inland. It is possible that this routing was originally chosen for its novelty, because the decline in the number of couriers registered in the database between 2007 and 2008 was greater for Mali than for the region as a whole.²⁰ Alternatively, this routing could be linked to the network connections of some trafficking groups. The preferential use of Bamako over more obvious coastal points of embarkation requires further investigation.

Nigerians are key couriers

The nationality of the courier is not necessarily the same as the nationality of those pulling the strings. While entry-level drug traffickers may courier cocaine on their own behalf, more often the relationship between the “mule” and the owner of the drugs is an exploitative one, and the two are frequently from different national groups, especially where the courier holds a passport less likely to attract attention.

Nigerian nationals made up 57% of the couriers. While there were more than 10 times more Nigerians detected than any other national group, this share is only slightly greater than their share of the regional population (53%). Since Nigerian passports raise suspicions in most European airports, it is highly unlikely that any other national group would want to pass itself off as Nigerian, or preferentially employ Nigerian couriers. Thus most Nigerian couriers were probably employed by Nigerian traffickers, and some Nigerian nationals may have acquired, legitimately or through fraud, the passports of less stigmatised nations.

In addition, Nigerian nationals are not limited to shipments originating in Nigeria and were detected on flights departing from every country in the region. In fact, Nigerian nationals are the single most detected group on flights from every country in the region, except Guinea-Bissau. Two thirds of the seizures originating in Mali were associated with Nigerians. From Guinea, at least 139 Nigerians were detected between 2006 and mid-2008, compared to 15 Guineans. Nigerian nationals resident in Spain were detected in no less than 86 incidents, suggesting a tie with the expatriate community in this country.

In contrast, Senegalese, who hail from the country with the largest overall seizure volumes, made up less than 2% of the couriers. Most of the couriers coming from Senegal were from Nigeria (29%), Cape Verde (22%), and Guinea-Bissau (15%).

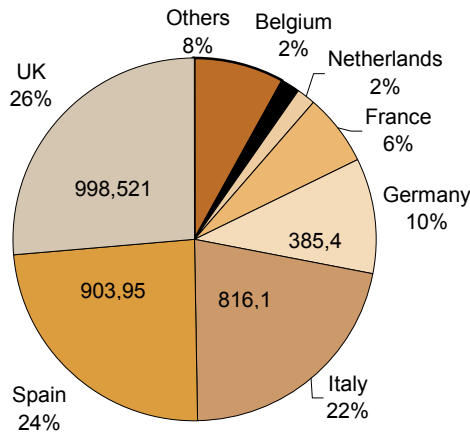
Close to 9% of the couriers were Europeans, in particular British, French, German and Dutch nationals, apprehended alone or alongside West Africans. Most were caught trafficking cocaine to their country of citizenship.

²⁰ The number of couriers detected increased dramatically between 2006 and 2007, in keeping with growing awareness among law enforcement that West Africa was being used as a transit zone. It is more difficult to draw conclusions about a trend between 2007 and 2008, because data are often late in arriving, but the data received to date show a decline. This decline is not uniform between embarkation countries, which may partly be a result of late reporting from some key destination countries.

Cocaine is destined to known markets: UK and Spain dominate

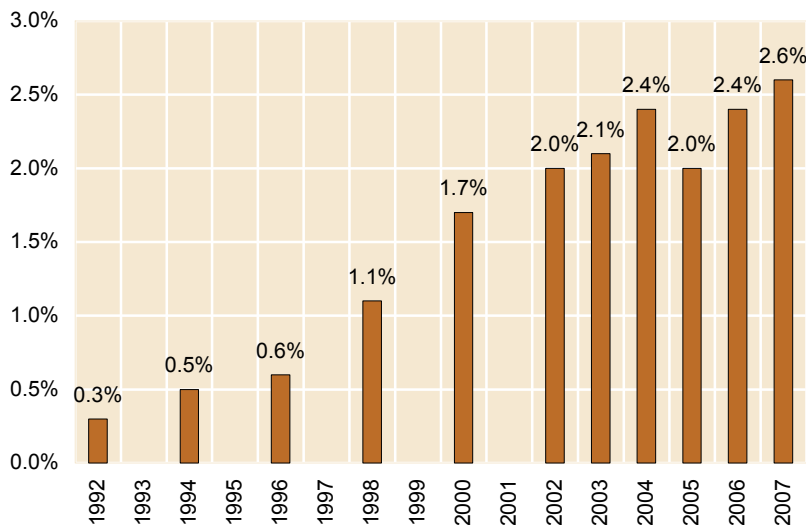
In terms of destination countries, the seizure data are broadly in keeping with what is known about the European cocaine markets. Spain and the United Kingdom host the two largest populations of cocaine users in Europe, and have the largest total volume of seizures made from air couriers travelling from West Africa. The UK claims a smaller share of total seizures (21%) than their market share (26%) would predict, but this is because they are also receiving cocaine from non-West African sources, including other European sources. Spain serves as both a prime destination and as a redistribution centre, so its role is complex. The Netherlands, Belgium and France, in contrast, seize a greater share of the cocaine than their local markets would indicate, suggesting some of the drugs seized were destined for onward trafficking. Germany seizes less than expected, probably because it receives most of its cocaine from other European countries. Unfortunately Italy, one of the main cocaine consuming countries, does not consistently contribute data to the COCAF or IDS databases. While Italy is mentioned as a destination in seizures made in other countries, the lack of Italian seizure data means that the importance of the country is underplayed in the analysis.

Figure 9: National shares of the West Europe's cocaine users (January 2006-May 2008)



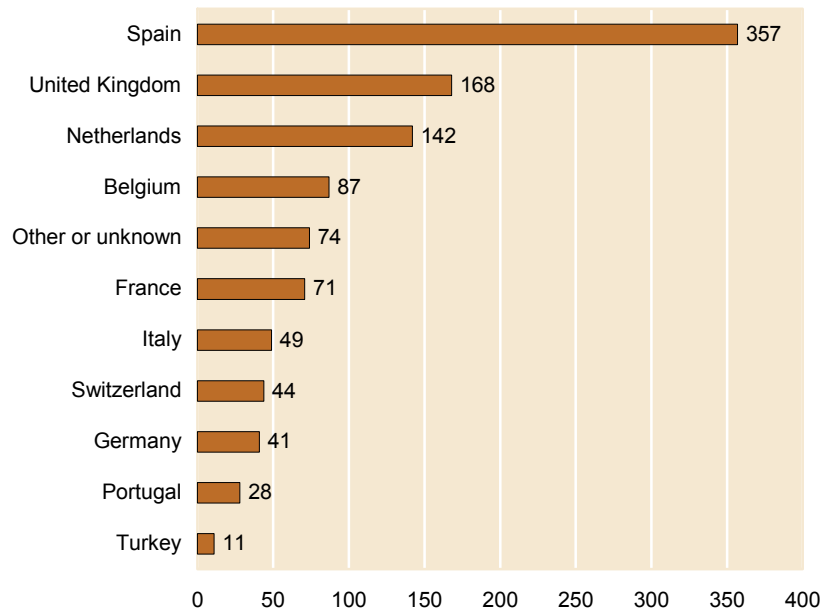
Source: UNODC Delta database

Figure 10: Share of the adult population of the United Kingdom that uses cocaine annually



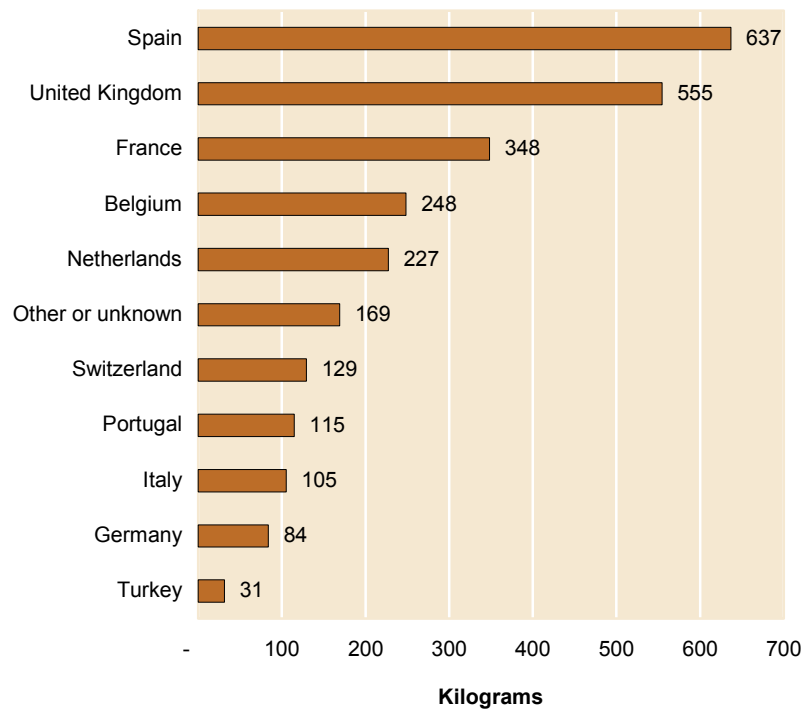
Source: British Crime Survey

Figure 11: Number of cocaine seizures from commercial air couriers by destination country (January 2006-May 2008)



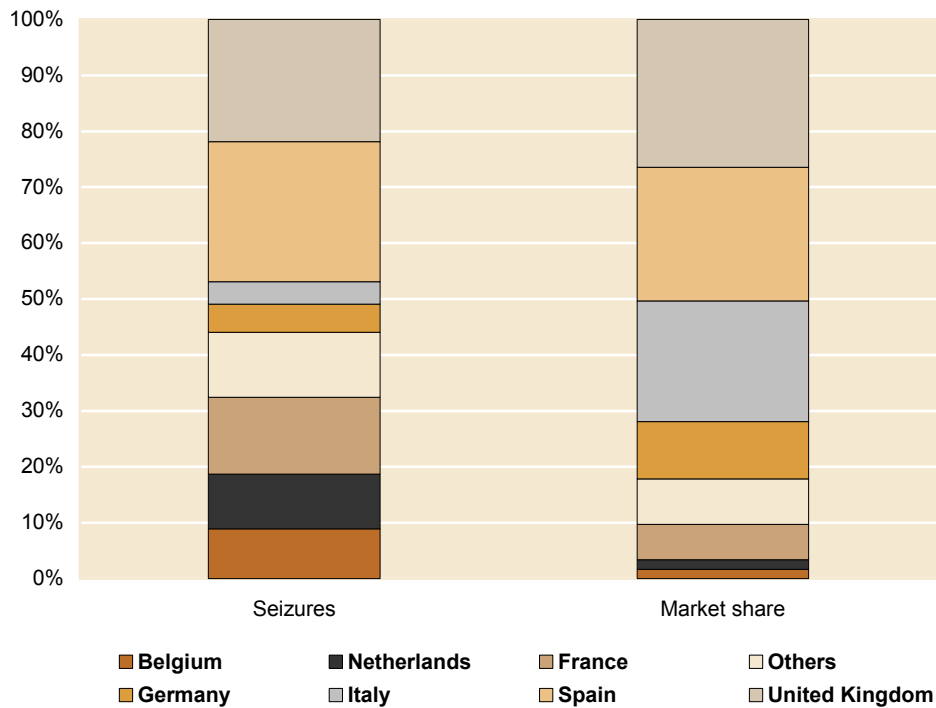
Source: COCAF/IDS database

Figure 12: Weight of cocaine seized from commercial air couriers by destination country (January 2006-May 2008)



Source: COCAF/IDS database

Figure 13: Share of cocaine seizures made versus estimated national share of European cocaine market



Source: COCAF/IDS database and DELTA database

The largest number of seizures made were destined for Spain (33%). This is particularly remarkable given the number of couriers Spain apprehends coming directly from Latin America. Spain has one of the two largest cocaine user populations in Europe (along with the United Kingdom), but this prominence may also be a reflection of the importance the country has assumed as a redistribution centre, due to its role in receiving maritime traffic and Latin American links. However, nearly every courier documented in the database who was arrested in Spain was said to have been destined for Spain. The same is true for the United Kingdom, the other key destination country.

Growth in French markets may be linked to its use as transit country

Looking at the volume of seizures, the shipments to Spain are relatively small compared to countries like France, which was the destination of just 7% of the traffickers arrested but 13% of the volume seized. This may be reflective of the relatively small user population in France – the larger shipments may be consignments ultimately intended for other countries. Of 122 couriers arrested in France, only 61 were destined for France; the others were in transit to other countries. The use of France as a transshipment point may be related to its ties and air links with its former colonies in the region. If so, this represents a new role for France, previously somewhat insulated from the cocaine traffic due to its relatively small user population and limited links to source countries. France has shown a remarkable increase in cocaine seizures in recent years, as well as growing use rates, although seizures continue to be disproportionate to local use. In 2006, France seized more than twice as much cocaine as did the United Kingdom, despite the fact that it has about one quarter as many cocaine users. While part of this is due to seizures made in Caribbean département and by the French navy, the contrast is striking.

Figure 14: Kilograms of cocaine seized in France, 2000-2006

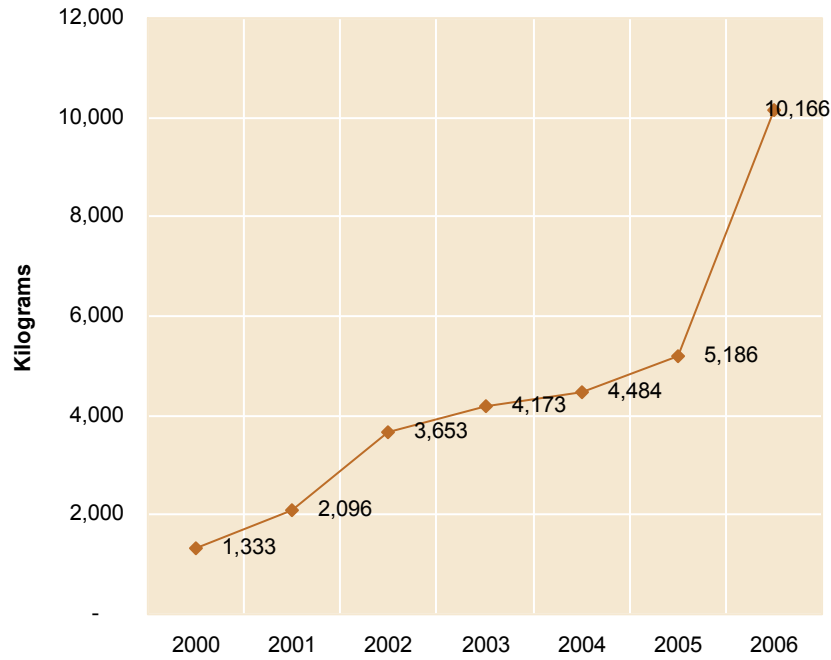
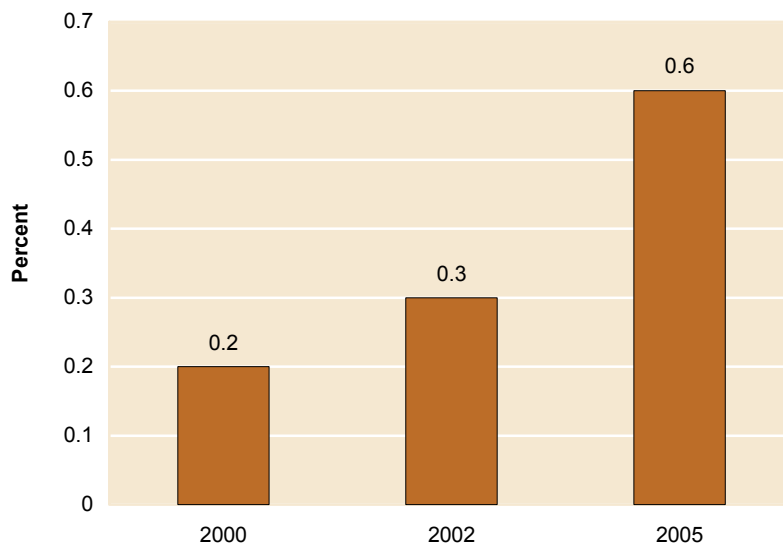


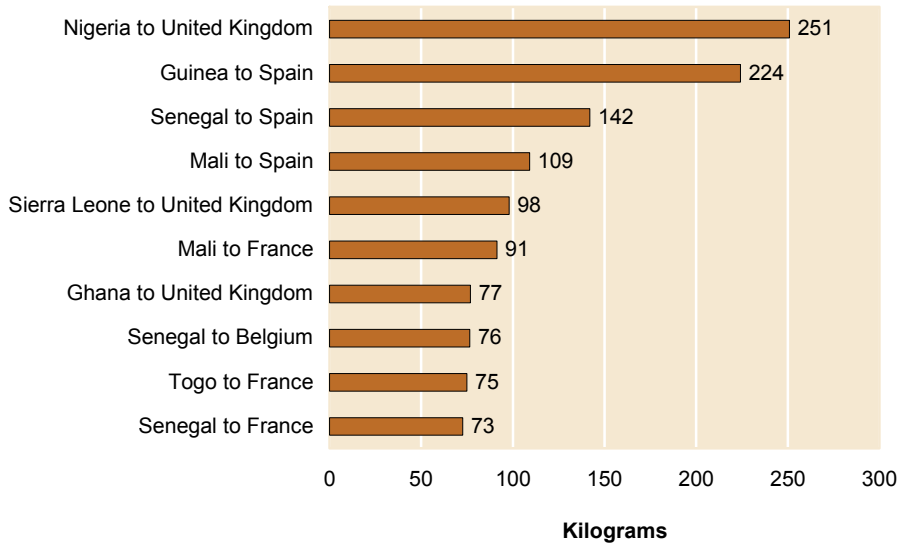
Figure 15: Annual adult (15-64) cocaine use prevalence in France



Big routings: Nigeria to UK and Guinea to Spain

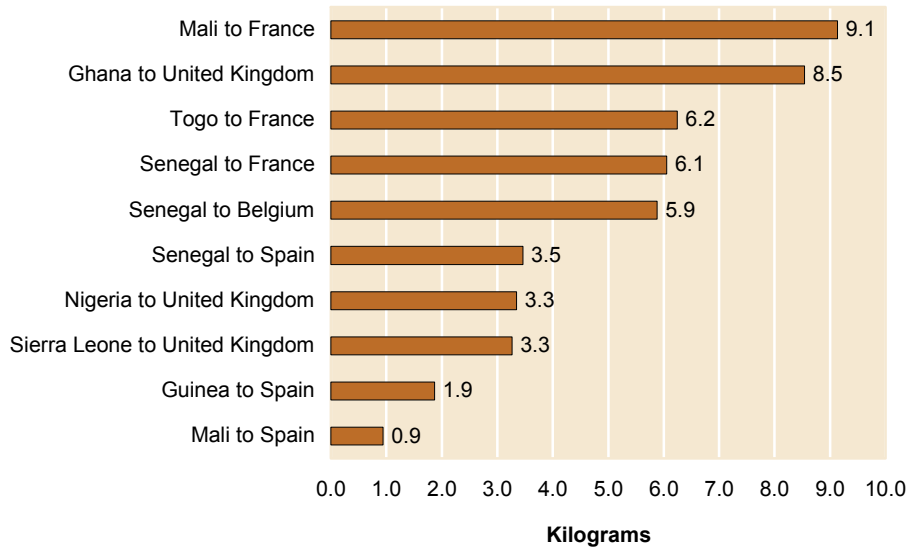
Focusing on the Spanish market for a moment, it is possible to discern a few distinctive patterns. Over 80% of the cocaine seized destined for Spain was taken from nationals of Nigeria, Guinea-Bissau, Mali, and Cap Verde. Two-thirds of the Nigerians embarked from Guinea or Mali. The market in the United Kingdom is even more concentrated among a few groups, with 75% of the couriers detected being Nigerian or British nationals. Over 60% of the Nigerians detected embarked from Nigeria.

Figure 16: Total volume of cocaine seized from commercial air couriers along top routings (January 2006-May 2008)



Source: COCAF/IDS database

Figure 17: Average size of seizures made along most commonly used routes



Source: COCAF/IDS database

Average seizure size tied to the nature of the trafficking

The average size of the seizures along any given route may be tied to the form of concealment most commonly used. It is not possible to swallow (body pack) much more than a kilogram of cocaine, so routes where this technique predominates have lower average seizure volumes. For example, Nigeria's smaller average seizure size is related to the fact that most (56%) of the detected couriers had swallowed the drug. This is higher than the overall rate of body packing among all the couriers detected (41%). From Mali, the rate was even higher (67%), while from Senegal, the rate was much lower (9%).

Specific concealment techniques may be associated with particular trafficking groups. Nigerian traffickers are known for body packing, and they also dominate trafficking from Mali – just under

half of the couriers originating in Mali were Nigerian. Nigerians were recently apprehended body packing cocaine at the border of Burkina Faso with Mali; they were only detected because delays in the border crossing forced them to pass the drug. Overall, 56% of the Nigerian couriers detected were body packing. In contrast, only 10% of the British couriers were body packing.

But seizure size may also be related to the rate of detection of body packers in different destination airports. Airport staff who have long experience with drug trafficking may be more likely to detect body packers than those to whom the phenomena is more novel. Only 18% of the couriers arrested in France were body packers, as opposed to 99% of those arrested in the Netherlands. It may also be that couriers adapt their techniques to fit the challenges of particular airports.

Most of the commercial air couriership comes from Senegal, Nigeria, Guinea and Mali

In summary, while it is true that every country in the region is affected by cocaine trafficking, some countries are much more important than others. Some 62% of the incidents and 55% of the volume interdicted came from just four of the 15 ECOWAS countries: Senegal, Nigeria, Guinea (Conakry), and Mali. Senegal and Nigeria make sense, as they have the largest air traffic volumes, but further investigation is needed to determine why Guinea and Mali play such an important role.

While clearly not as important as the big four, Benin, Togo, and the Gambia collectively contribute nearly 20% of the seizure volume, surprising for such small and under-serviced areas. Whether these countries receive maritime or air shipments directly from South America or whether the drugs are trafficked from other West African countries is unclear. Few large seizures have been associated with these countries, so the reason for their use requires further research.

Air couriership from Cote d'Ivoire and Ghana less than might be expected

Despite being well connected to Europe, Cote d'Ivoire is the source of very few of the couriers and has had no major seizures associated with its territory. More research would be required to determine why this country seems to be overlooked by cocaine traffickers, particularly as it was formerly a favourite point for transshipping heroin. Ghana, on the other hand, has well documented major seizures both at sea and inland. While a fair amount of courier traffic has been detected, it is less than would be expected based on its connections. It appears that much of the inflow to Ghana is diverted to Nigeria, Benin, and Togo, perhaps in response to heightened airport security under the British-sponsored "Operation Westbridge".

Lack of air connections means cocaine must be trafficked within West Africa

Guinea-Bissau is commonly believed to be one of the major points of ingress for cocaine entering the continent, but its lack of regular commercial air flights renders it poorly suited for couriership. Drugs entering at this point will have to be re-routed to better connected countries, such as Senegal and Guinea. Liberia also lacks commercial air traffic, and there have been few seizures associated with this country. Mauritania has been the site of some large seizures, but it suffers from the same deficiency.

There may be two hubs functioning independently

Based on both maritime and airport seizures, it appears that there are at least two distinct hubs for cocaine trafficking in West Africa. The southern one appears to involve cocaine trafficked into Ghana and then routed into Togo, Benin, and Nigeria.²¹ The northern hub involves Guinea-

²¹ According to the Togolese authorities reporting in 2007, cocaine entering their country comes from Benin, Guinea, and Ghana, with traffickers mainly coming from Nigeria (11 out of 24 traffickers arrested in 2007), Benin (4), and Ghana (3). The cocaine allegedly goes out to Spain (45%), the Netherlands (30%) and France (25%). Togo reports receiving no cocaine by sea.

Bissau as an entry point, as well as possibly Sierra Leone and Mauritania as air destinations. These drugs could be shipped to Senegal, Guinea, and The Gambia for air couriering.²² Mali appears to be supplied by road from Guinea Bissau and Guinea Conakry. Between these two hubs, in Liberia and Cote d'Ivoire, there is little evidence of activity.

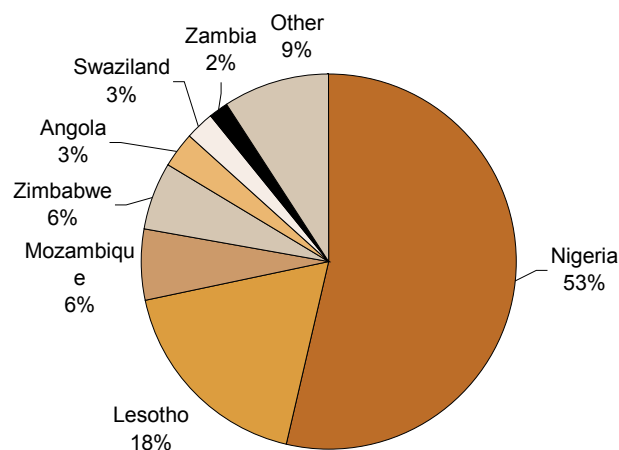
All this commercial air couriering activity would not be possible if it were not for well established drug wholesaling and retailing markets in Europe. West Africans would not accept cocaine in payment if they did not know of a way of reselling it quickly at a profit. In other words, West Africa's role as a drug transit region is heavily dependent on the presence of West African drug distribution networks elsewhere in the world. Unfortunately, these are plentiful and highly evolved.

West African involvement in cocaine distribution in Europe

West African organised crime networks, particularly Nigerian groups, are active in drug markets around the world. The IDS records arrests of Nigerian nationals for drug trafficking in at least 45 countries since 2000, including areas not normally associated with African migration, such as Afghanistan, Finland, Kyrgyzstan, Indonesia, and the Republic of Korea. Rather than contesting markets already well served by local trafficking groups, these networks are highly adaptive, addressing markets overlooked by others or working in cooperation with established organisations.

West African trafficking networks also have a large presence in cities close to the sources of cocaine and heroin, including Sao Paolo, Bangkok, and Karachi. They dominate the drug trade in other parts of Africa, comprising over half the foreign nationals arrested for drug trafficking in South Africa in 2005, for example. In Europe, Nigerians²³ and other West African nationals rank among the top foreign groups arrested for trafficking cocaine and other illicit drugs.

Figure 18: Citizenship of foreigners arrested for drug trafficking in South Africa in 2005



²² The Gambian authorities say all the cocaine entering their country in 2007 came from Guinea Bissau. They say only 5% of this traffic comes by sea, with 55% coming by air and 40% by land. They report a strong increase in cocaine traffic in 2007. Of the 31 people arrested for cocaine trafficking in 2007, 21 were Nigerian and five were European.

²³ As with the drug seizures discussed above, Nigerians are prominent in part because they comprise about half of the population of the region. Because data on arrests are rarely comprehensive, it is difficult to say whether Nigerians are disproportionately represented relative to other national groups in the region.

Data on the citizenship of those arrested for drug trafficking is collected in the United Nations Annual Reports Questionnaire (ARQ). Not all countries provide this information and some reports are more complete than others, and these data, like the seizure data, highlight who is getting caught, rather than who is pulling the strings. A review of the data, however, serves to underscore the importance of West African groups to European drug distribution. For example, more Nigerians are arrested for cocaine trafficking in France than any other foreign national group. In 2006, 31% of foreign cocaine arrestees were Nigerian. Remarkably, Nigerians were not listed among the top 10 nationalities arrested for drug trafficking in 2005.

The same was true in Austria – Nigerians were the top foreign group arrested for cocaine trafficking in 2007, with 115 individuals arrested. In their 2006 ARQ submission, the Austrians also note that West African groups are increasingly making use of European couriers, especially those of the new EU member states, so their reach may be greater than the arrest figures suggest.

There were 384 Nigerians arrested in Italy for cocaine trafficking in 2006. While this only places them third in terms of foreign trafficking groups, they are up against competition from well-established North African and Albanian groups.

Figure 19: Citizenship of foreigners arrested in France for cocaine trafficking in 2006

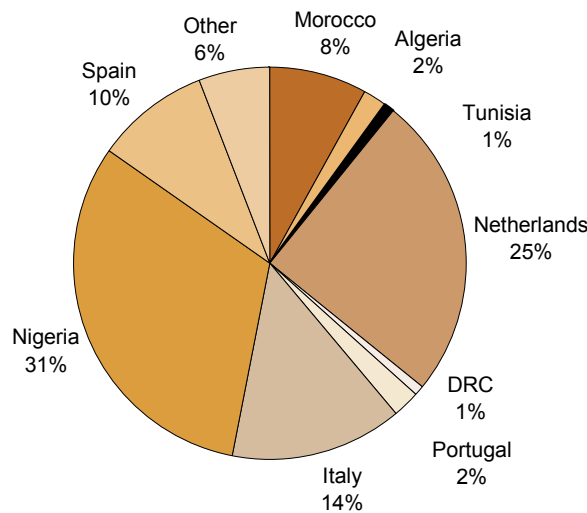


Figure 20: Citizenship of foreign cocaine traffickers arrested in Austria in 2007

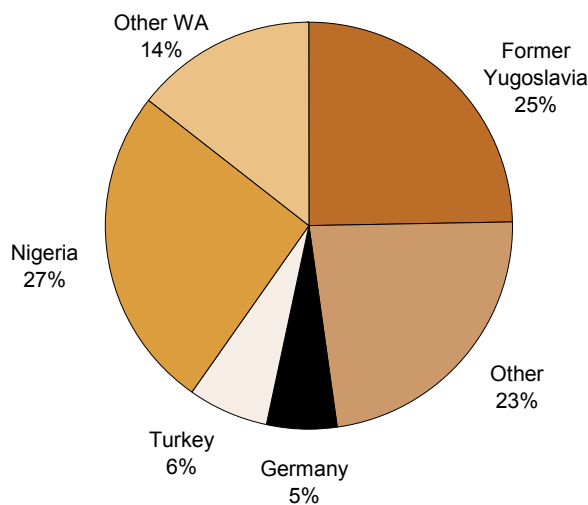
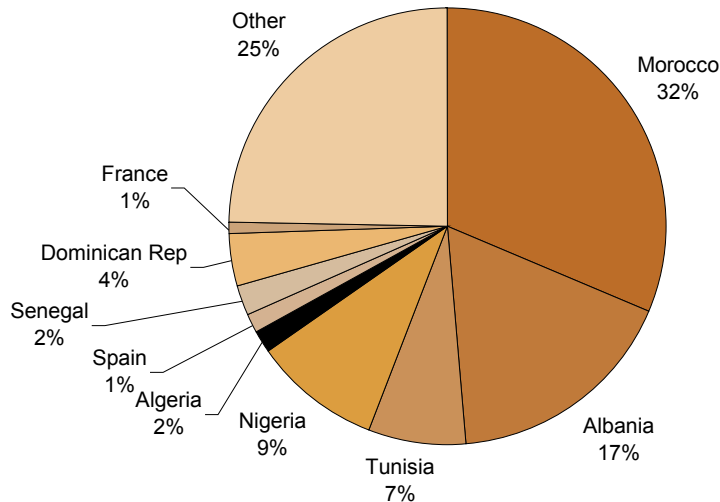
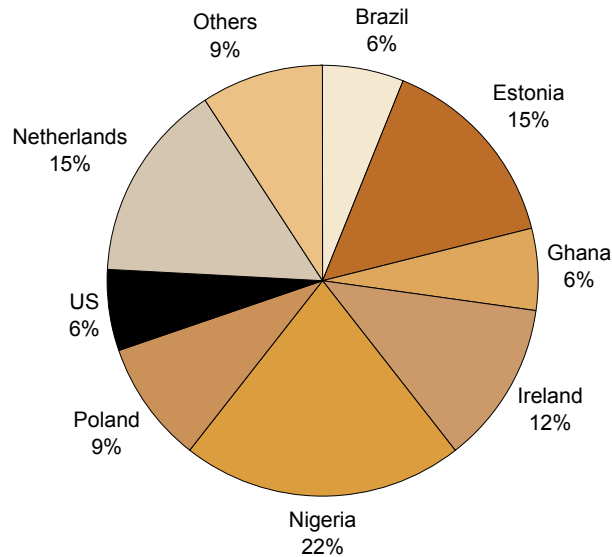


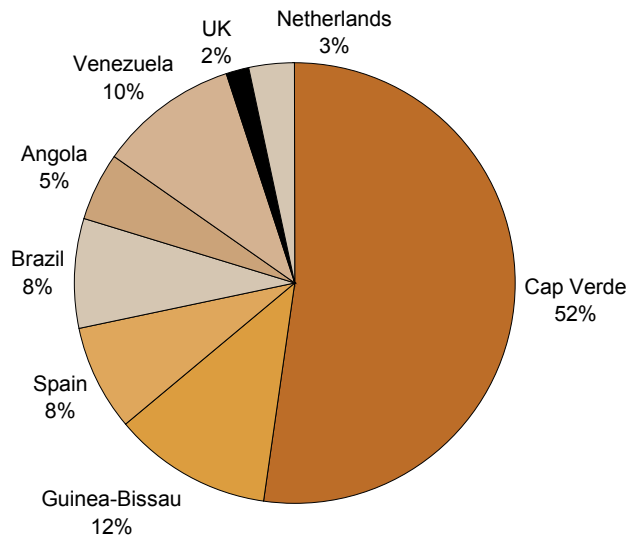
Figure 21: Citizenship of foreign traffickers arrested in Italy in 2006

Nigerians have also held a prominent place in Irish drug markets for some time, and some have even learned to speak Gaelic. Although the numbers involved are much smaller than for many other countries, there were more Nigerians arrested for cocaine trafficking in Ireland than Irish, and there are Ghanaians in the market as well. This is unusual – most countries arrest a good deal more of their own citizens for drug offences than foreigners.

Figure 22: Citizenship of cocaine traffickers arrested in Ireland in 2006

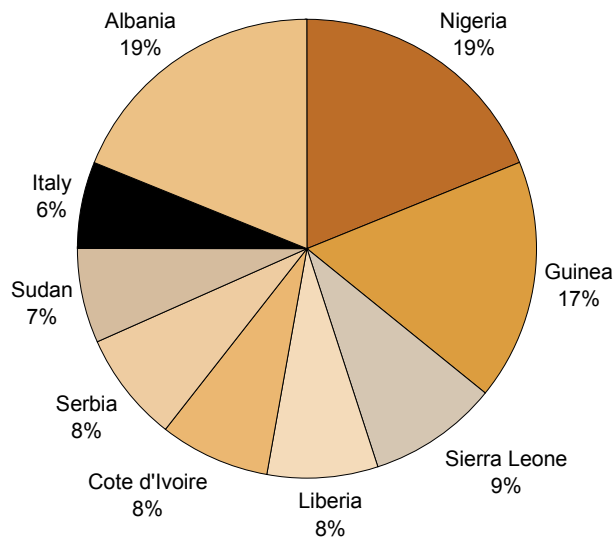
In Portugal, West Africans comprised a remarkable two thirds of those arrested for cocaine trafficking, some 276 individuals in 2007. This time, however, it is citizens of the Lusophone West African countries that dominate: Cape Verde and Guinea-Bissau. It is remarkable that these groups can compete with groups more numerous in Portugal and closer to the drug source, such as Brazil.

Figure 23: Citizenship of those arrested in Portugal for cocaine trafficking in 2007 (top eight foreign drug trafficking national groups)



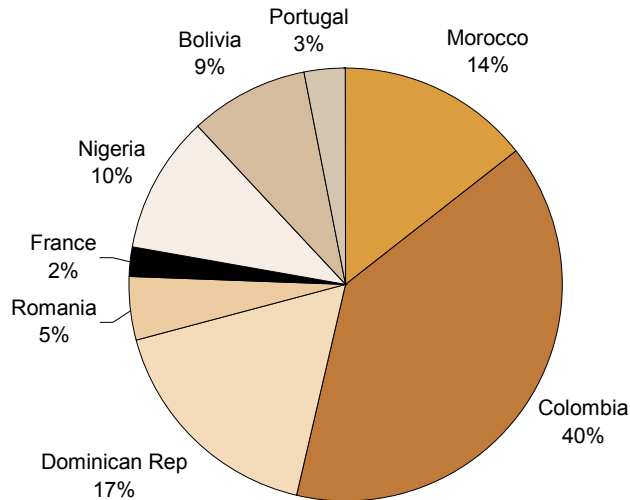
The situation is even more lopsided in Switzerland, where over 60% of the foreign drug traffickers arrested were West African, from a wide range of countries with no clear links to Switzerland. Some 543 West Africans were arrested in 2006 alone, compared to 581 Swiss. Nigerian nationals again formed the single largest foreign group arrested for drug trafficking.

Figure 24: Citizenship of foreigners arrested for drug trafficking in Switzerland in 2006 (top nine foreign drug trafficking national groups)



Spain represents a much more hotly contested market, as the primary entry point for cocaine to Europe. Spain has a sizable Latin American presence, so it is not surprising that Colombians and Dominicans comprise the largest groups of cocaine traffickers detected. Nigerians, however, claim 10% among the top eight foreign drug trafficking citizenships, remarkable given the lack of language or cultural links to the country.

Figure 25: Citizenship of foreign cocaine traffickers arrested in Spain in 2007 (top eight groups for overall drug arrests)



What is the threat of cocaine to West Africa?

In sum, the data above demonstrate at least three things:

- In the last three to four years, West Africa has become a major transit zone for cocaine travelling from South America to the European market, as evinced by the very large seizures made both on land and at sea.
- West African and European couriers are trafficking smaller amounts of cocaine from West Africa to Europe, as evinced by more than 1357 airport courier arrests made since 2004.
- West Africans resident in Europe are central to local cocaine distribution networks, comprising between about 10% and 30% of the foreign cocaine traffickers arrested in several key European countries.

None of this is good news for West Africa. The size and distribution of the large seizures, the number and distribution of couriers, and the links to near-dominant distribution networks in consumer countries all suggest a scenario closer to Central America than to the Balkans. Many small operators appear to be trying their hands at drug trafficking, spreading the drugs, and their impact, throughout the region. Given the economic desperation and entrepreneurial ingenuity of the populace, many more will likely enter the market in the near future.

Ironically, two things may mitigate the impact, allowing West Africa to become a third scenario in alternate to the two described above. One is that the European market is rapidly expanding, minimising competitive pressures. For the time being anyway, there appears to be plenty of opportunity for everyone. Secondly, the limited capacity and of local law enforcement and its vulnerability to corruption may also reduce local competitive pressures. Different from the centralised corruption of the Balkans, the disorganisation of the West African market may the dissuade any single group from attempting to claim a monopoly. Rather than trying to eliminate competitors, trafficking networks may well focus on stampeding to the marketplace.

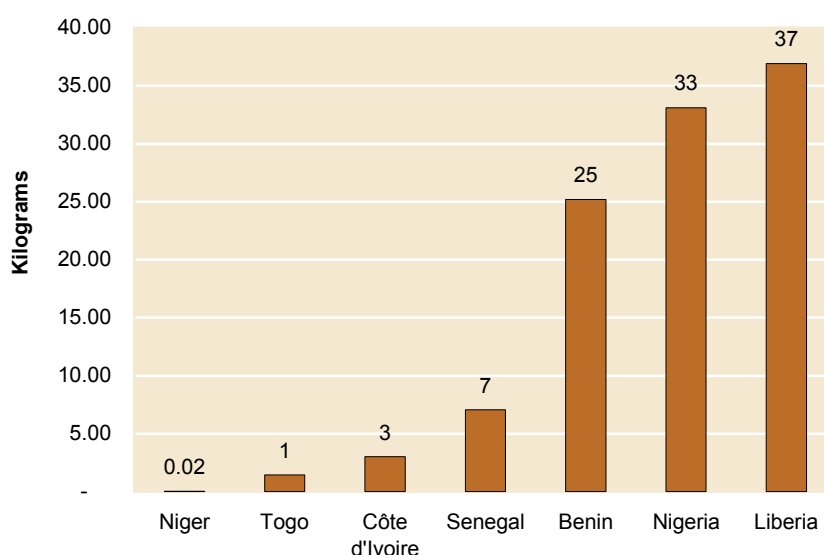
Heroin

In terms of geography, West Africa appears less suited for heroin transshipment than for cocaine. In 2007, Afghanistan produced 92% of the world's opium, and West Africa does not lie between Afghanistan and any major destination country. West African networks do have a sizable presence in Bangkok, and so may have access to heroin produced in Myanmar. In 2007, the government of Thailand said West Africans were responsible for air couriering heroin via India to China, using female Nigerian, Congolese, Ghanaian, Filipino, Pakistani, and Thai couriers.

Maritime transshipment from either Central or Southeast Asia would be extremely inefficient, as the drugs would either circumnavigate the southern tip of Africa or be diverted away from destination markets to ports in West Africa. Land routes to West Africa are blocked by multiple borders, the Sahara Desert and thousands of kilometres of bad road. The only conceivable way of accessing the region for heroin transport would be by air, using either cargo or passenger planes.

Commercial passenger flights are known to be utilised, but the volumes involved in such shipments are limited, as explained in the cocaine discussion above. Not surprisingly, then, annual heroin seizure totals in West African countries are generally very small, accounting for less than two-tenths of one percent of the global total in 2006.

Figure 26: Total heroin seized in West African countries in 2006



Source: UNODC Individual Seizures Database

As noted above with cocaine, West African organised crime networks are key to heroin distribution in countries around the world, being involved in both import and street dealing. Among nationals of West African countries, Nigerians dominate the transnational trafficking of heroin, and are responsible for 81% of the 2.4 tons of heroin seized from West Africans since 2000, based on incidents recorded in the UNODC Individual Drug Seizures (IDS) database. In addition, almost half of this 2.4 tons was destined for Nigeria, and 61% to West Africa generally (Figure). At one point, Cote d'Ivoire was considered a major transit country for heroin, but its use seems to have declined until this year, when an increase was again detected.

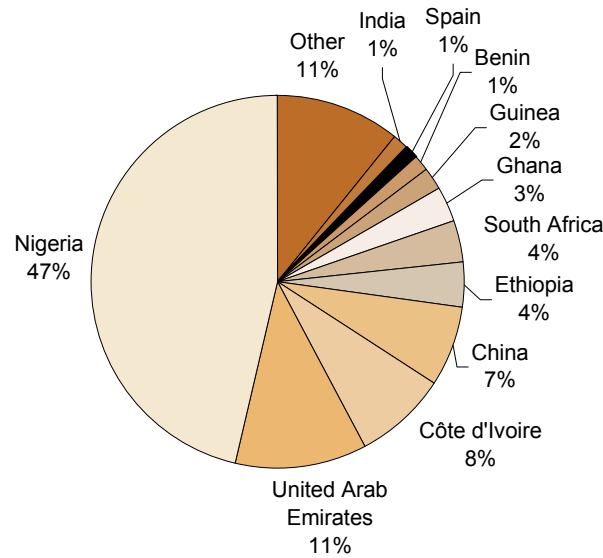
At least 600 Nigerian nationals have been arrested in Pakistan in possession of more than 100 grams of heroin since 2000, based on incidents recorded in the IDS. In almost two thirds of these incidents, the suspect was apprehended on a commercial air flight destined for Nigeria. In addition to West Africa, China and the UAE were popular destinations for these couriers.

However, since 2000, less than 300 incidents of Nigerians air couriering heroin to other parts of the world were recorded in the IDS database, suggesting either traffickers of another nationality

were used, or the drugs were trafficked onward from Nigeria by means other than commercial air flights. It remains unclear where the heroin being trafficked into Nigeria is going, or who is taking it there.

In 2007, the United States government reported Nigeria in particular and West Africa more generally as a key heroin transit area for the US, but the federal government only arrested 10 Nigerians for heroin trafficking that year. In October 2007, the Ghanaian authorities arrested two Afghans alleged to be conspiring to import 100 kilograms of heroin for re-export to the US.

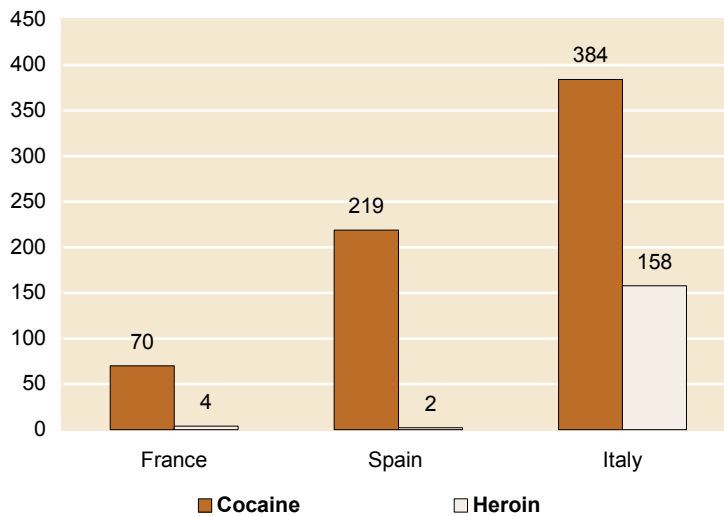
Figure 27: Destination of heroin seized from West African nationals globally, 2000-2007



Source: UNODC Individual Seizures Database

In consumer countries, West Africans have been as important in heroin markets as they are in cocaine markets, but they appear to be shifting toward the latter in response to growing demand. Dealers may sell both drugs, of course. In the end, the competitive advantage of Nigerians in heroin markets in Europe may be rather slim as compared to cocaine markets, and so trafficking of heroin through the region is probably less a threat to security than cocaine trafficking.

Figure 28: Number of Nigerian citizens arrested for cocaine and heroin trafficking in three European countries in 2006



Cannabis

Cannabis is generally regarded as the most problematic illicit drug for the people of Africa, where an estimated 8% of the population used cannabis in 2006 and where cannabis is responsible for an estimated 64% of the demand for illicit drug treatment.²⁴ Ghana has reported the second highest annual adult cocaine consumption prevalence figures ever reported: 22% in 1998. There are very few parts of the world where nearly a quarter of the adult population consumes an illegal substance annually.

Cannabis is also the only major drug of abuse cultivated in West Africa, with estimated regional production at about 3,500 tons.²⁵ If this were sold at a typical price of US\$ 0.17/g,²⁶ would amount to slightly less than US\$ 600 million. This is the retail price, of course, but inputs would be minimal and labour is cheap. At first glance, this would appear to be a formidable illicit market.

Closer analysis suggests the problem is less severe than these figures suggest. Data on cultivation, pricing, and use in West Africa are all very tenuous, so these figures must be treated with caution. Use data are a decade old in many instances. Price data are problematic for any illicit drug, even when collected through sophisticated monitoring systems, and price quotes for cannabis, which is not a homogeneous product and is generally sold by volume rather than weight, are especially unreliable. Even the United States government avoids giving an estimate of domestic cannabis cultivation due to the methodological difficulties involved in tracking a drug that can be grown anywhere, and West African states have considerably less capacity to provide sound figures. Cannabis cultivation in Nigeria, for example, has been exaggerated by outside authorities in the past.

Furthermore, the market appears to be highly decentralised, with many small players cultivating and distributing cannabis. This diffuses the profits, preventing any single group from acquiring disproportionate influence. It is difficult for organized crime to monopolise a drug that anyone can grow in their backyard. This also keeps markets competitive and profits low, reducing the incentives for violence. While the drug remains problematic from a public health perspective, it does not pose the kind of security threats posed by cocaine and heroin.

Despite this, there have been allegations of organised cannabis farming as a source of funding for the insurgent groups, in particular the Movement of the Democratic Forces of Casamance (MFDC), though its relative importance has been debated among experts. It has been alleged that the Liberian National Patriotic Front for Liberia traded guns for MFDC cannabis. But Senegalese cannabis does not command much of a market outside the region, so its value to arms traffickers is limited.

Indeed, it appears that the vast majority of West Africa's cannabis production is consumed within the region. With very few exceptions, countries outside West Africa do not cite the region as a major source of cannabis supply.²⁷ The cannabis from this region does not have a remarkable international reputation, unlike that from parts of Eastern and Southern Africa. Again, the lack of a transcontinental market reduces stakes and thus the risks associated with the trade.

²⁴ Based on the unweighted average of treatment demand figures for 41 African countries 1994-2006. See World Drug Report 2008.

²⁵ UNODC estimates global cannabis herb production was 42,000 metric tons in 2005. Africa alone accounted for 10,500 metric tons or 25 per cent of the total and West Africa alone accounted for 3,500 metric tons. For 2006, information is still partial, but the volumes are expected to remain stable. The United Nations civilian police contingent in Liberia recently seized 440,000 cannabis plants, in a country where many began smoking the drug during wartime and remain addicted.

²⁶ Based on retail prices for cannabis herb provided by 6 Western African countries through the Annual Report Questionnaire for 2006, the typical price of cannabis is estimated at US\$0.17 / g for 2006.

²⁷ In 2003, the German police seized 2.7 tons of cannabis resin said to have originated in Senegal in a motor home in Hamburg. Its ultimate destination was said to be the Netherlands. See Bundeskriminalamt, *Annual Drug Report 2003*, February 2004, p. 7. The country has also been the source of a number of significant seizures of resin of unknown origin destined for Belgium. The resin is typically concealed in vehicles such as campers and trucks. Resin however, has been seized coming into Senegal from both Morocco and Afghanistan, so it is unclear how much of this is produced in the country and how much is simply in transit.

There is an African cannabis product that does have an international market, however: Moroccan hashish. In the past, the vast majority of the hashish consumed in Europe was produced in Morocco, but this may be changing. While data in this area are far from complete, it would appear that Moroccan hashish may be losing market share in Europe, due to competition from domestically produced indoor cannabis. Indoor cannabis is based on seed stock bred over the decades for maximum potency and is grown under optimal conditions, often using non-soil (hydroponic) techniques. Drug yield per unit area is also very high for modern indoor cannabis, especially compared to plants grown for hashish. While hashish smokers may be slow to change their ways, in the long term it will probably be difficult to rationalise spending more money for a less potent imported drug.

Aside from a shrinking market, Moroccan hashish production is facing other challenges. Surveys of the Moroccan cannabis crop conducted between 2003 and 2005 showed a marked reduction in both the land dedicated to the crop and the net yield, due to a combination of bad weather and eradication. This decline in supply was occurring at exactly the same time that hydroponic cannabis was growing in popularity in Europe, further weakening the product relative to its competition. In addition, hashish production in Afghanistan has increased rapidly in recent years, paralleling the expansion of opium production. Facing shirking demand in Europe and emerging competition from elsewhere, Moroccan hashish producers may be looking for new markets for their product, and West Africa may become a tempting transit zone.

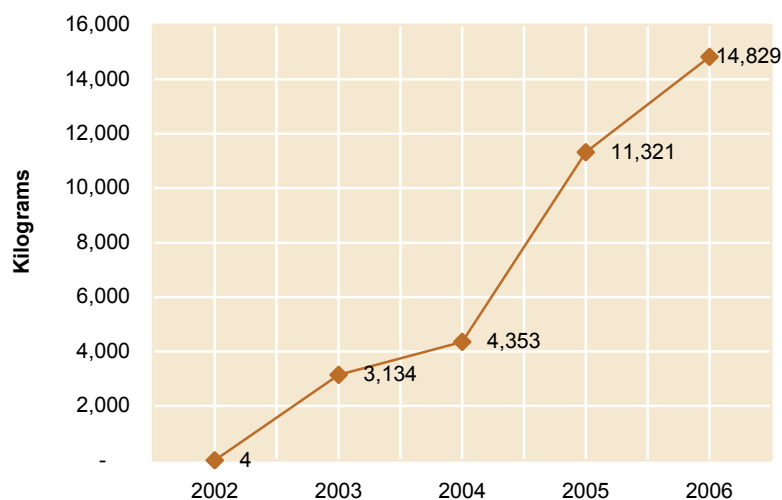
There have already been some unusual hashish seizures, made in areas of West Africa not generally regarded as transit routes. In Mali, 750kg were reportedly intercepted by customs in the Northern region about 200km away from Kidal in early January 2008. In Niger, a string of five seizures totalling close to six tons of hashish were made between April 2006 and April 2007 in the northern part of the country, a remote desert area not on the route from any known source to any known destination. The Army of Niger made these seizures, and encountered considerable resistance from a professional organisation. The traffickers used convoys of three to five new four-wheel drive vehicles (allegedly bought in Algeria), secured with military weaponry. The satellite phones seized indicated connections with Morocco, Algeria, Mauritania, Mali, Libya and Egypt.

Picture 3: Sample of hashish seized in Northern Mali in January 2008



Source: UNODC

The most likely explanation is that the hashish was from Morocco and destined for Egypt, for re-distribution to markets in the Middle East. In 2007, the Israeli authorities noted the trafficking of Moroccan hashish from Egypt into their country. The wholesale value of the seized shipments in Egypt would have been US\$7.4 million, a sum that might justify crossing the length and breadth of the Sahara Desert. Rising cannabis seizures in North Africa suggest the coastal route has also been tried, but may be even more hazardous.

Figure 29: Hashish seizures in Libya in kilograms

Source: Delta database

Despite all this, the destabilising impact of Moroccan hashish is likely to be limited. By weight, cocaine is worth at least 30 times as much as hashish. While air couriering of hashish is common, it is both more likely to be detected and provides lower profits than cocaine or heroin couriering. Recent forensic testing of hashish in the UK (most of which is imported from Morocco) found median THC levels of 5%,²⁸ which would not be much better than locally grown herbal cannabis in most parts of the world. Despite the remarkable seizures in the desert, it is unlikely this will be a market on the rise.

Which is the greatest threat?

For most intents and purposes, it does not really matter which substance is most hazardous, because many of the interventions needed to address one drug market would address all. West Africa will remain vulnerable to all forms of trafficking for as long as the rule of law remains weak in the region. What applies to cocaine applies to other substances, as well as firearms, would-be migrants, stolen property, and all manner of contraband.

New drug threats may emerge so long as rule of law in the region is weak. For example, there have recently been a number of seizures in South Africa of crystal methamphetamine shipped from Lagos, Nigeria. There has been a massive boom in crystal methamphetamine use in South Africa since 2003. Upwards of 40% of admissions to drug treatment in the Western Cape Province in recent years being for methamphetamine, and surveys in the most affected communities suggest as much as one fifth of adult males have tried the drug. As noted above, Nigerian nationals dominate South African cocaine and heroin markets. Methamphetamine is easy to manufacture given access to the precursor chemicals, so would not be surprising if West Africa were to emerge as a centre of production for this and other synthetic drugs in the future.

But while synthetic drugs, heroin and cannabis remain issues to be monitored, the substance of the day is cocaine. As will be discussed in the following section, no other drug can approximate its profitability, so the lengths to which traffickers are willing to go to protect their routings are commensurably higher. More profits mean more corrupting influence, more potential for violence, and greater risk that the drug market will crowd out licit commercial activity.

²⁸ Hardwick, S and L King, *Home Office Cannabis Potency Study 2008*. London: Home Office Scientific Development Branch, 2008.

IMPACT ON SECURITY

It may sound hyperbolic to speak of drug trafficking as a threat to national security. While escalating local drug use and official corruption undeniably undermine the state, it would be difficult to imagine organized criminals plotting to overthrow a government, or render portions of a sovereign country ungovernable. After all, effective drug traffickers tend to fly under the radar, and it is not generally in their commercial interest to tinker overtly with politics.

But West Africa, despite growing stability in many areas, remains one of the few areas of the world where governments could conceivably be threatened by moderately resourced private interests. Past coups have been successfully executed by small groups of improbable figures.²⁹ Successful insurgencies in the region have been led by uneducated men in their teens and 20s, commanding battalions of children whose military training was based on Rambo movies. These forces were easily routed when confronted with even the smallest disciplined opposition,³⁰ suggesting that it does not take much to flout state authority in some countries.

A spark on dry tinder

While most countries in the region have become more stable since the conflict-ridden 1990s, some have not. Of course, it is highly unlikely a foreign cocaine cartel would directly attempt to topple a government, but local dissidents, empowered with drug wealth, could. Less ambitiously, but more likely, standing rebel/criminal forces could render ungovernable territory of strategic importance to their interests, or co-opt key officials in the security forces and local government. The bottom line is that cocaine trafficking adds spark to an already highly inflammable tinder, and the security implications are real.

The region's vulnerability to both violent changes of government and drug trafficking are rooted in a common cause: weak rule of law. There are at least two aspects to this deficiency. One is a genuine lack of capacity in war-ravaged countries where the tax base is miniscule and life expectancy in the mid-40s. The second is corruption, which flourishes in an environment where incentives for obeying the law are sparse and the likelihood of detection minimal.

The lack of state capacity is rooted in the poverty of the region. Today, West Africa is arguably the poorest region in the world. All but three of the 15 members of ECOWAS are on the United Nations list of the "least developed countries",³¹ including the five countries with the lowest levels of human development in the world: Mali, Niger, Guinea-Bissau, Burkina Faso, and Sierra Leone.³² War-shattered Liberia is not included in the UNDP rankings, due to lack of data, but in terms of per capita income, it is even poorer than the others.

Due to lack of basic resources, many West African states lack a functioning criminal justice system to respond to either the drug trafficking problem or official corruption. Guinea-Bissau, for example, doesn't even have a prison in which to house sentenced prisoners – the old one was

²⁹ For example, Samuel Doe was a 29-year-old Master Sergeant with a primary school education when in 1980, with a force of 17 enlisted men, he murdered Liberian President William Tolbert, executed his cabinet, and assumed power for a decade. Valentine Strasser was 25-year-old junior officer when he and six other soldiers overthrew Sierra Leone's President Joseph Momoh in 1992. He was deposed four years later and fled to London. After failing to secure either a higher education or a job, he was deported to West Africa, and presently lives in Freetown with his mother.

³⁰ For example, with an estimated force of 150 men, Executive Outcomes was able to wrest the diamond producing areas of Sierra Leone from the RUF, a task the national military had allegedly been unable to do. More recently but further afield, the 2004 planned coup in Equatorial Guinea was apparently designed to be executed using less than 100 mercenary troops.

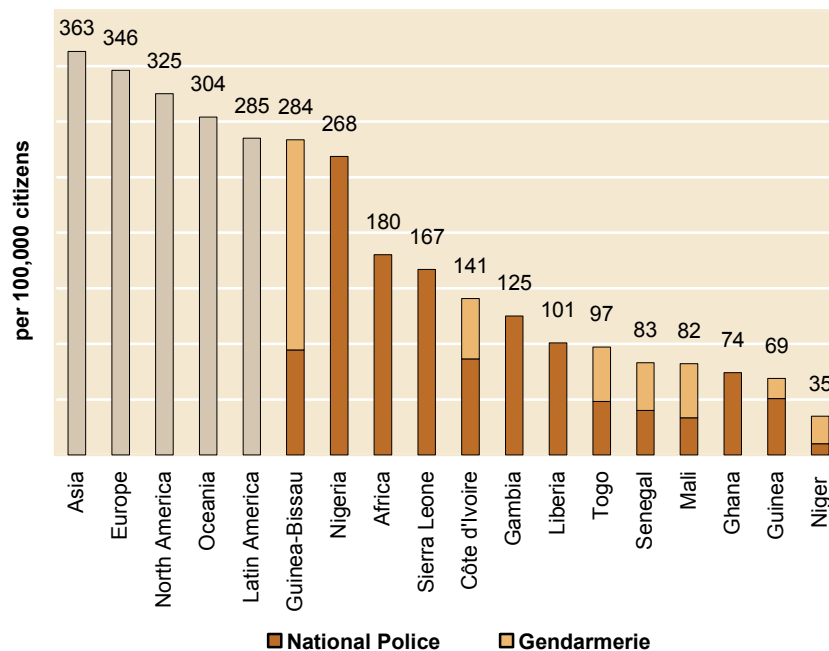
³¹ <http://www.un.org/special-rep/ohrls/ldc/list.htm>

³² UNDP Human Development Report 2008. This is all the more remarkable given that HIV rates are relatively low by African standards. Life expectancy comprises one the three indicators combined to create the HDI, and life expectancies in Southern Africa and dramatically decreased due to the HIV epidemic. Still, West African countries lag behind their counterparts to the south in so many other respects that they remain at the bottom of the UNDP rankings.

destroyed in political violence, and the country has not been able to afford to replace it. Ironically, Guinea-Bissau has one of the best police to public ratios, as well as the largest per capita security force overall, in West Africa.³³ This is a legacy of the relatively recent liberation struggle, recent civil war, and the governments' apprehensions about tackling military reform in a country that remains unstable.³⁴ For policing the country, Guinea-Bissau had about 3,000 gendarmes under the Ministry of Defense for rural areas and 1,500 policemen under the Ministry of Interior in 2006. The combined total of about 4,500 personnel gives a ratio of 284 law enforcement officers per 100,000 citizens.³⁵ The judicial police in charge of drug control, however, has only 60 agents, a single vehicle³⁶ and often no fuel to use it.

Nigeria also has a large national police force by African standards, but other countries do not fare so well. Even Ghana, one of the better developed countries in the region, fields a paltry 74 police officers per 100,000 people, with a poor country like Niger having less than half that. In many countries, a large share of the police are gendarmerie, who may play a role in border control but are not routinely assigned to the investigation of narcotics matters.

Figure 30: Police per 100,000 inhabitants (2007 or most recent year available)



Source: National authorities and Jane's Sentinel Security Assessments

This weakness is seen in other sectors of the criminal justice system. Little standardised data are available on justice personnel for these countries, but national and anecdotal reports confirm what would be expected – there is a shortage of the highly skilled personnel needed to assume the roles

³³ The ratio of troops to population between 1999 and 2004 was 10 times the ECOWAS average ratio of the region. See Jane's Sentinel Security Assessment, *Guinea-Bissau: Security and Foreign Forces*. London: Jane's, 3 August 2007.

³⁴ At the end of the 1999 civil war, there were 17,000 uniformed military and police personnel in Guinea Bissau. The military budget for Guinea-Bissau amounted to US\$ 7.5 million in 2003, with most soldiers paid just US\$ 400 per year. Between 2003 and 2005, the army demobilized 7,782 persons and a military census recorded 5,100 personnel in full-time active service in May 2005. Relative to the size of its population, the country remains however one of the most militarized in West Africa.

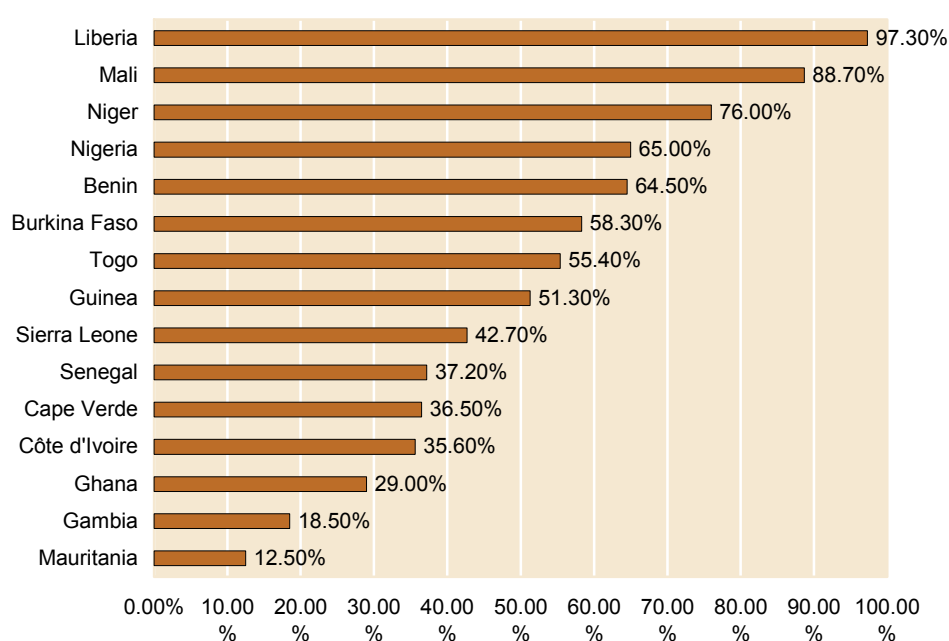
³⁵ The gendarmes have however a poor disciplinary record and there are plans to downsize their staff to 1,200 personnel under the 2007-2009 security sector reform plan. This will bring the police ratio down to around 190 personnel per 100,000 citizens, which will still be among the highest in Western Africa.

³⁶ Vincent, L. *Guinea-Bissau: Cocaine and coups haunt gagged nation*. Paris: Reporters Sans Frontieres, November 2007, p. 4.

of prosecutors and judges, and a shortage of funds to retain them. This leaves judicial staff especially vulnerable to corruption. Facing large case loads, poor pay, and difficult working conditions, some in the local judiciary are lured or coerced into cooperation with well-resourced drug traffickers. Those judges who remain honest can be avoided through side payments to the clerks in charge of case allocation, and judicial oversight is difficult to maintain in countries that can barely afford the judges themselves. There have been many instances of questionable judicial decisions in West African drug cases in the last few years.

Lack of judicial capacity results in an extremely slow justice process. In the majority of the countries, more than half the prisoner population is awaiting trial. In Liberia, the figure is over 97%, indicative of a collapsed justice system. In countries like this, to be accused is to be convicted. For all intents and purposes, the trial system has become superfluous.

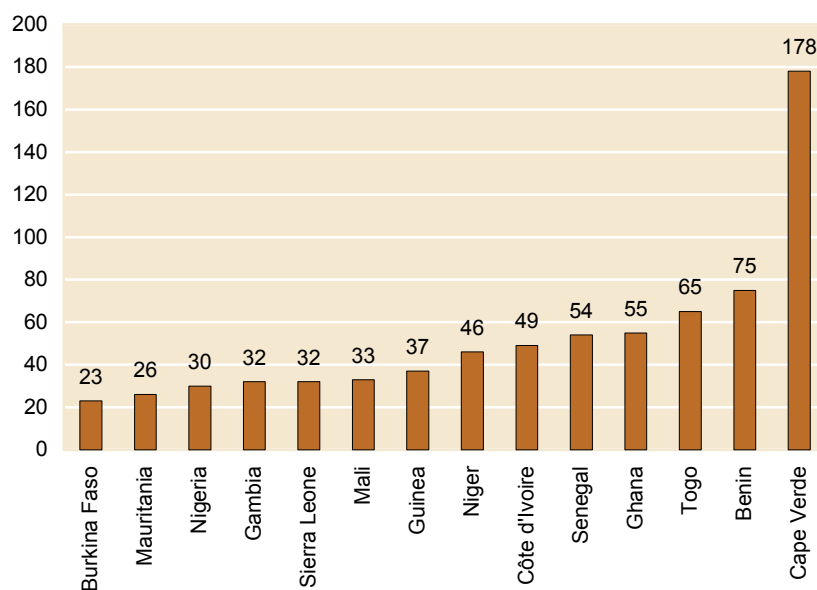
Figure 31: Share of the prison population that is unsentenced (2007 or most recent year available)



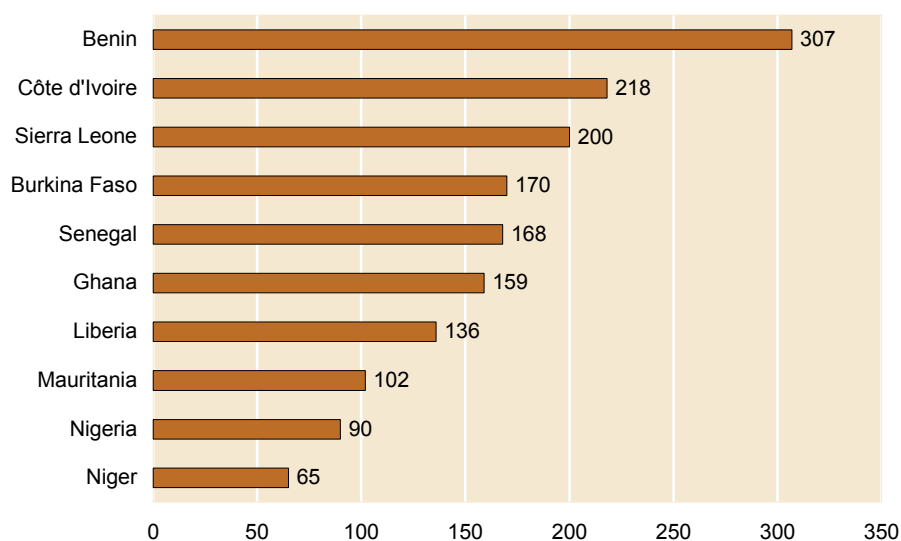
Source: *International Centre for Prison Studies*³⁷

One mildly positive outcome of poor criminal justice capacity is a light corrections burden – most countries in this region house relatively few prisoners per capita. Unfortunately, even these modest prisoner numbers exceed the capacities of many African prisons, the majority of which are seriously overcrowded. These conditions render real rehabilitative work impossible.

³⁷ Walmsley, R., *World Pre-trial / Remand Imprisonment List*. London: Kings College London.

Figure 32: Prisoners per 100,000 inhabitants (2007 or most recent year available)

Source: International Centre for Prison Studies³⁸

Figure 33: Occupancy rate (share of prison capacity filled) (2007 or most recent year available)

Source: International Centre for Prison Studies³⁹

³⁸ Walmsley, R., *World Prison Population List Seventh Edition*. London: Kings College London.

³⁹ <http://www.kcl.ac.uk/depsta/law/research/icps/worldbrief/?search=africa&x=Africa>

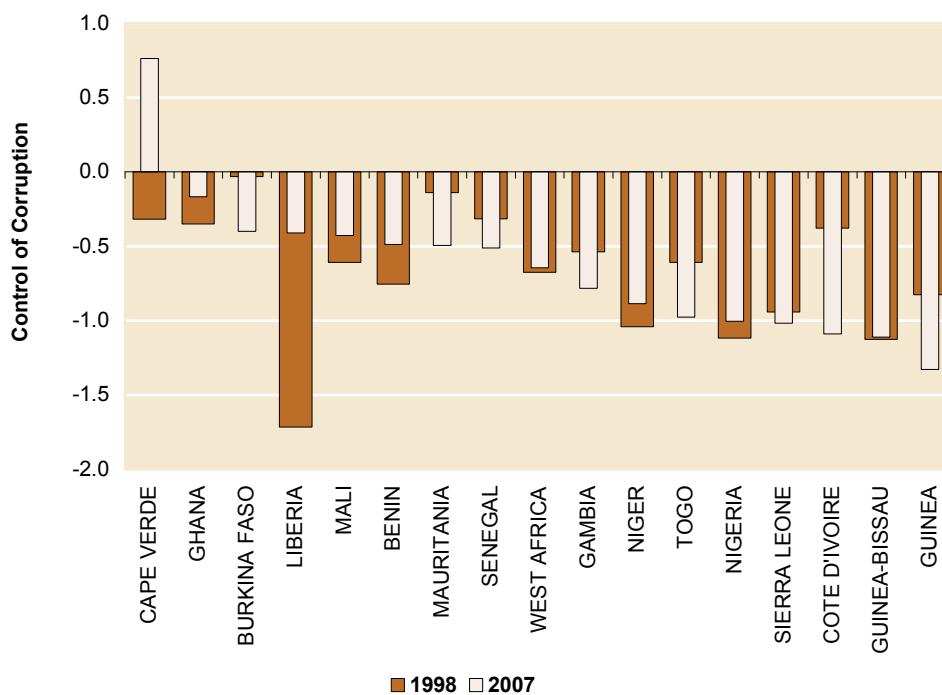
As a result of all these shortcomings, West African countries are faced with a dilemma. Even assuming the ability and the will to arrest drug traffickers, there would be, in many countries, little capacity to subject them to trial and incarcerate them. It does not help that, in many instances, some high ranking security officials are apparently working for the other side.

Even the best resourced criminal justice apparatus can be rendered useless by corruption. In corrupt nations, traffickers do not need to be stealthy or clever – they just need to be connected. An ideal trafficking scenario would involve a society that was well developed and stable, with a powerful, but utterly corrupt, security sector.

There are a range of international instruments that attempt to measure corruption, and West African countries are typically portrayed as being especially vulnerable. Surveys in Nigeria and Senegal in 2007 indicated about 40% of the population paid a bribe that year to obtain services from their governments.⁴⁰ In the same survey, Ghana and Nigeria rated the police as the most corrupt sector of society, while in Senegal they were a close second to political parties.⁴¹

With the exception of Cape Verde, which saw a turnaround between 1998 and 2007, every country in the region ranked below the global average in terms of control of corruption. In countries like Ghana and Nigeria, things appear to be improving, but in countries like Guinea, Sierra Leone, Cote d'Ivoire, and Togo, the situation appears to have become worse in the last decade.

Figure 34: Control of Corruption in West African Countries (0 = world average)



Source: World Bank, Governance Indicators 2007

The ability of the drug traffickers to fuel this corruption is linked to the amount of money they are making off the trade. The following section looks at the money that might be available to combat or subvert local law enforcement.

⁴⁰ Transparency International, *Global Corruption Barometer 2007*. Berlin: Transparency International, 2008, p. 21.

⁴¹ *Ibid*, p. 22.

Sizing the cocaine problem

The seriousness of the threat to West Africa's stability is contingent, in part, on the value of the drugs passing through the region. If the amount of money involved were trivial, few resources would be expended to ensure its safe passage, meaning less money for predatory criminals, corrupt officials, and insurgent groups. The lower the stakes, the less likely anyone would kill to protect them. On the other hand, given the economic desperation of many local people, the amount required to precipitate violence may be less than elsewhere in the world.

Europe consumes a large and growing amount of cocaine. According to UNODC estimates, about four million people used cocaine in Europe in 2006, and, on average, it is estimated that cocaine users consume about 36 g of cocaine per year. Based on these figures, European cocaine users would have to import a total of about 146 tons of cocaine from South America per year.

What share of this flow transits West Africa? One way of answering this question is to look at those large cocaine seizures where the source of the drug was known. In 2006, the government of Spain (which is the primary entry point of cocaine in Europe and leads Europe in cocaine seizures) provided UNODC with information on some 900 cocaine seizures from all sources, totalling 33.5 tons. Out of these seizures, data on the origin or the transit routes of the consignment could be established for 892 seizures, totalling 27 tons of cocaine,⁴² equal to 49% of the volume of all cocaine seized in Spain. Some 29% of this volume transited Africa. Looking at similar data from other countries (France, Germany, Belgium, Italy), it is possible to estimate that about 27% of the cocaine that entered Europe in 2006 transited Africa.⁴³

Twenty-seven percent of Europe's 146 ton cocaine supply is 40 tons. With an average wholesale value of US\$ 46,700 in Europe, the value of these 40 tons to importers would be US\$ 1.8 billion.

This is not to say that cocaine traffickers could readily have at their disposal the total market value. In fact, the share of this total wholesale value of cocaine that accrues to traffickers is unclear, but studies of the books of traffickers seized in law enforcement investigations in the Western hemisphere suggest a profit margin of perhaps 25% on the wholesale price, which, in this case, would represent US\$450 million annually. Profits would be greater if the traffickers also retailed the drug, as some West African networks are known to do.

Half a billion dollars per year is a lot of money in West Africa, exceeding the GDPs of countries like Guinea-Bissau and Liberia. The 2007 budget for police formations and command in Nigeria, undoubtedly the largest in the region, was just over US\$800 million.⁴⁴ In theory, the cocaine traffickers could amass the resources to challenge any law enforcement agency in the region. More likely, they won't have to: their West African partners will bribe and intimidate a clear path through the region for a relatively minor sum. This, of course, is the reason why the region is attractive as a transit area in the first place.

Economic security

Aside from the possibility that some of the half a billion dollars in profits will go to groups with interests in undermining the state, there are many secondary corrosive effects on the rule of law that could prove equally effective at generating instability, such as the impact drug trafficking could have on the economies of these countries.

West African economies are fragile because, with the exception of Nigeria, they are generally very small, with some having GDPs comparable to the wholesale value of the cocaine transiting the

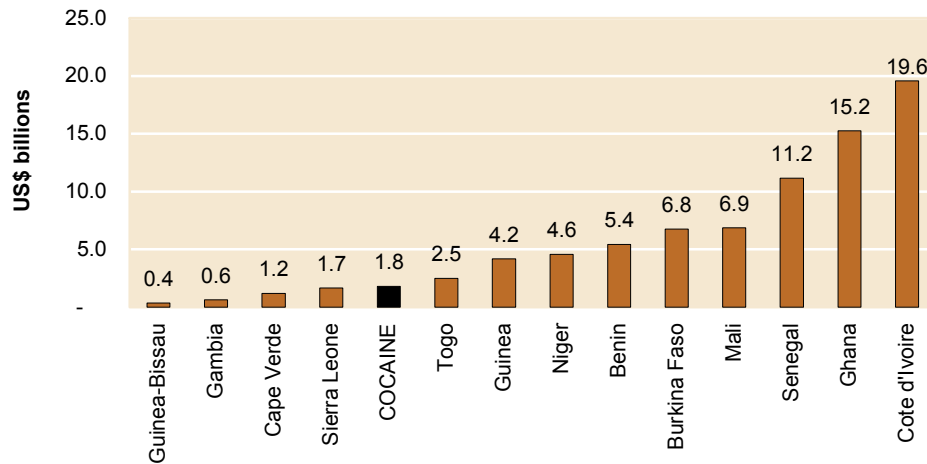
⁴² Information on the origin of the consignment is missing for two large maritime seizures, one of 2 tons and another one of 3 tons

⁴³ For example, in 2007, the Belgian government said it got 30% of its cocaine from West Africa, and 70% directly from South America, which exactly corresponds to the share they said they received by air (30%) and sea (70%).

⁴⁴ <http://www.budgetoffice.gov.ng/PDF/2007budget.pdf>

region. They also tend to be dependent on imported manufactured goods, which they pay for through the extraction of primary commodities or basic agricultural products. While the commodities vary from country to country, most West African economies are focused on a limited number of exports, leaving them subject to shocks based on global market prices or weather conditions.

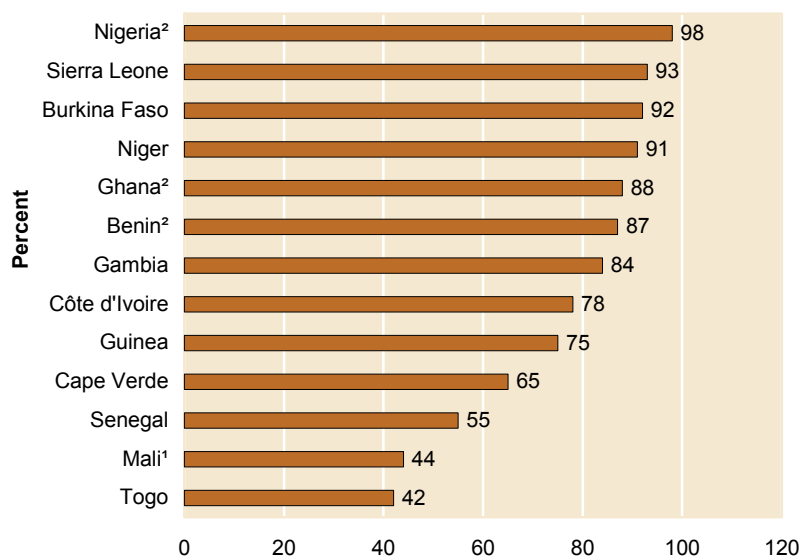
Figure 35: 2007 GDP of West African countries (excluding Nigeria) versus estimated European wholesale value of cocaine transiting the region



Source: World Bank and UNODC

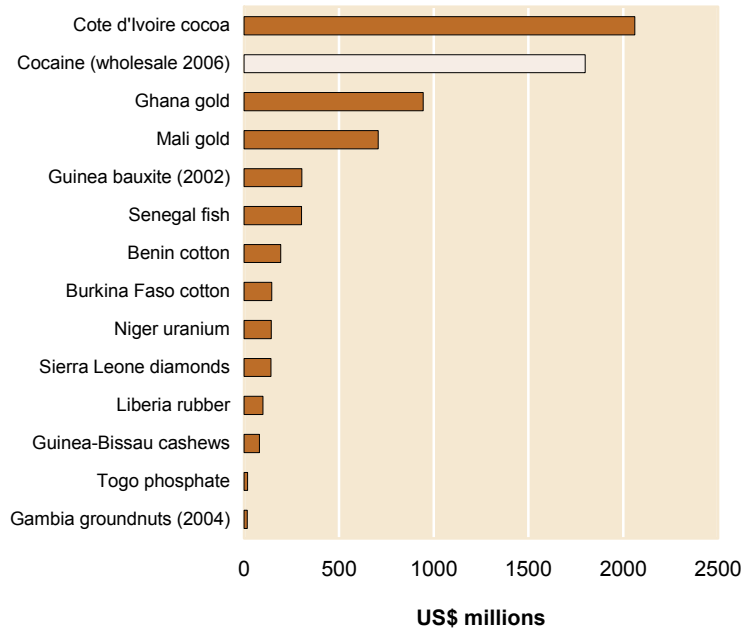
While the economic impact of the cocaine trade on the region as a whole may be limited, the estimated two billion dollars in cocaine exports is large in proportion to the other sources of foreign revenue in the region for some of the smaller countries. The economic weight of this flow could create a “Dutch disease” effect, in which other forms of commercial activity become less attractive than drug trafficking. In countries such as Guinea Bissau, where the largest commercial activity is the export of cashew nuts to India, drug trafficking and services to the drug traffickers may generate more money and jobs than anything in the legal economy. Why bother exporting nuts when income prospects appear far greater in providing security to cocaine barons?

Figure 36: Primary commodity exports as a share of all merchandise exports, by country



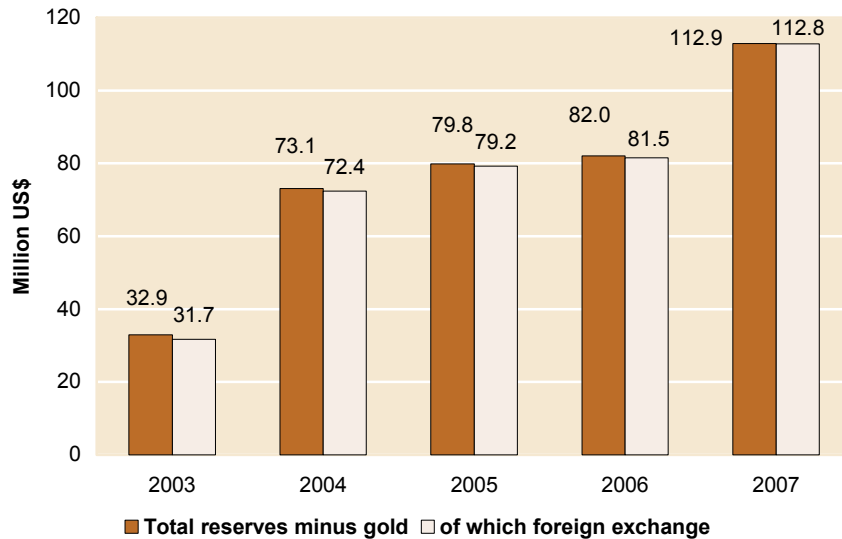
Source: Human Development Report 2008

Notes: 1 - One or more of the components of primary exports are missing
2 - Data refer to the closest available year between 1988 and 1992.

Figure 37: Wholesale value of cocaine transiting West Africa versus value of main export commodities in 2005

Source: Economist Intelligence Unit data; UNODC

If large amounts of drug money have been flowing into the region over the past few years, this might be detectable in the macroeconomic statistics of some of the smaller economies. For example, foreign reserves in Guinea-Bissau have increased substantially in recent years, from US\$33 million in 2003 to US\$113 million in 2007. Some of this can be explained by aid and the development of the bauxite industry, but it is unlikely that all of it could.

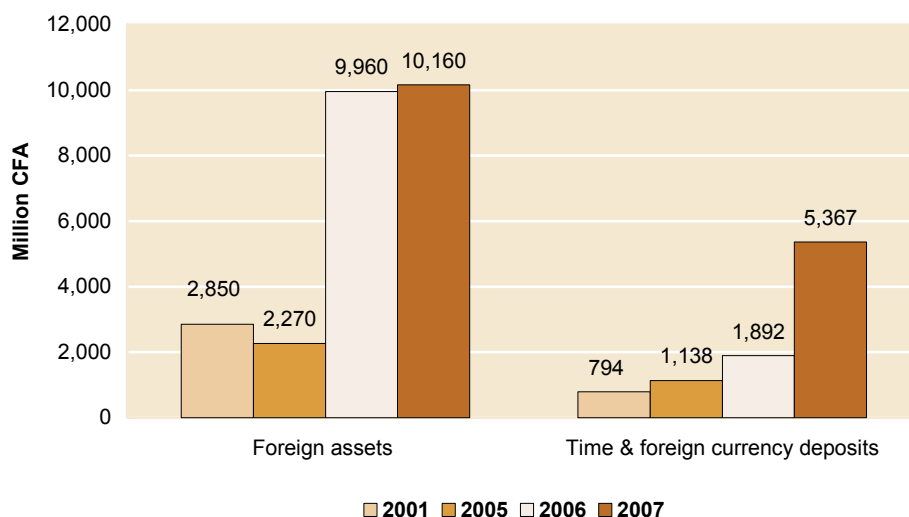
Figure 38: Guinea Bissau: Total Reserves (minus gold), in million US\$

Source: IMF, International Financial Statistics, October 2008.

There has also been a marked increase in the reserves held by banks in Guinea Bissau since 2003. Foreign assets rose from CFA 2,077 million in 2003 to CFA 9,756 million in 2007, nearly a five-fold increase. Foreign assets, held by deposit banks in Guinea Bissau, rose from CFA 2,270 million in

2005 to 10,160 million in 2007, a more than four-fold increase. Time and foreign currency deposits rose from CFA 1,138 million in 2005 to CFA 5,367 million in 2007, almost a five-fold increase in two years.

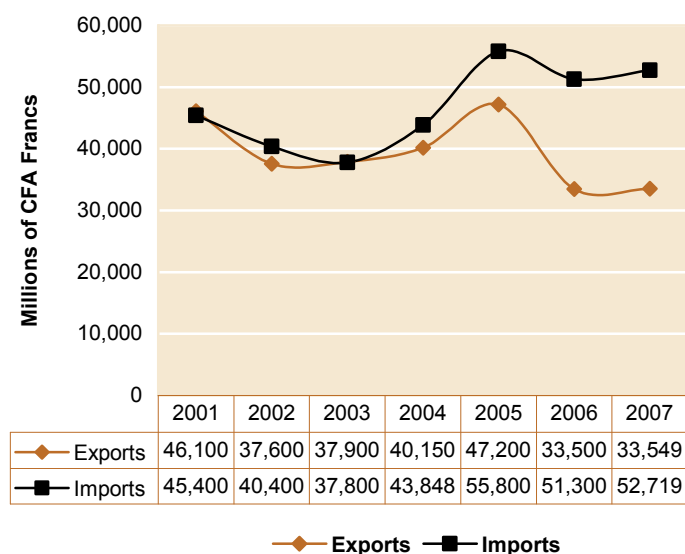
Figure 39: Foreign assets and Time/Foreign currency deposits in Guinea Bissau (millions of CFA Francs)



Source: IMF, International Financial Statistics, October 2008.

These increases could be due to licit activity, but, if so, they should be reflected by an increase in exports during the same period. On the contrary, the value of legal exports declined in Guinea Bissau from CFA Francs 47,200 million in 2005 to 33,500 million in 2007. The country ran a trade surplus in 2001 and showed a more or less balanced merchandise trade account until 2004, but the import cover ratio deteriorated from 92% in 2004 to just 64% in 2007. Imports of goods and services were equivalent to 50.5% the country’s GDP in 2007 and almost twice the country’s exports of goods and services. While some of this can be explained by foreign aid, these divergent trends call out for further investigation.

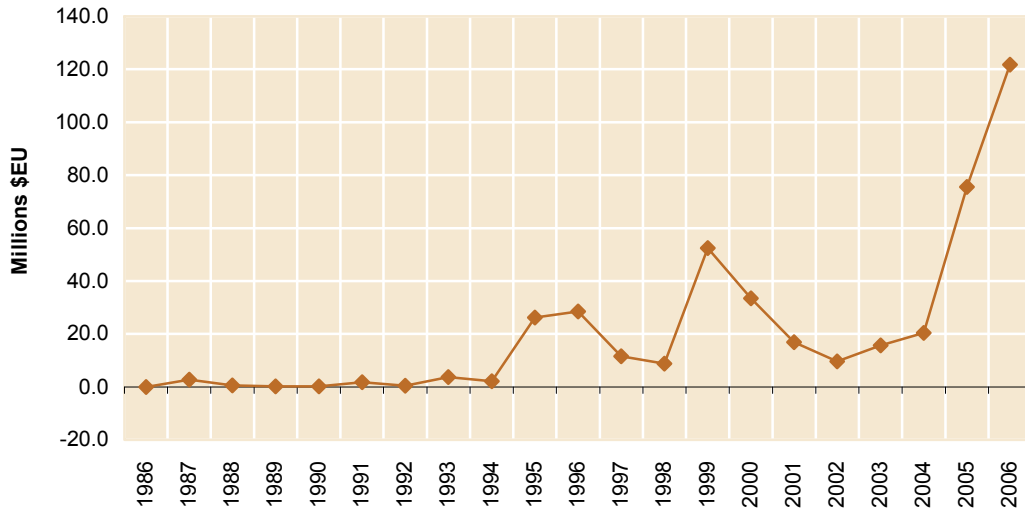
Figure 40: Guinea Bissau: Foreign trade, 2001-2007. in millions of CFA Francs



Source: IMF, International Financial Statistics, October 2008.

There is also evidence that traffickers are establishing a presence in these countries, which would be reflected in an inflow of foreign direct investment (FDI) in the region. Using again the example of Guinea Bissau, data show that after years of little or no FDI, Guinea-Bissau suddenly attracted US\$ 42 million in 2006, equal to nearly a sixth of GDP. FDI can suddenly increase as a result of a small number of transactions, which may, in fact, be legitimate investment, but the matter merits further investigation.

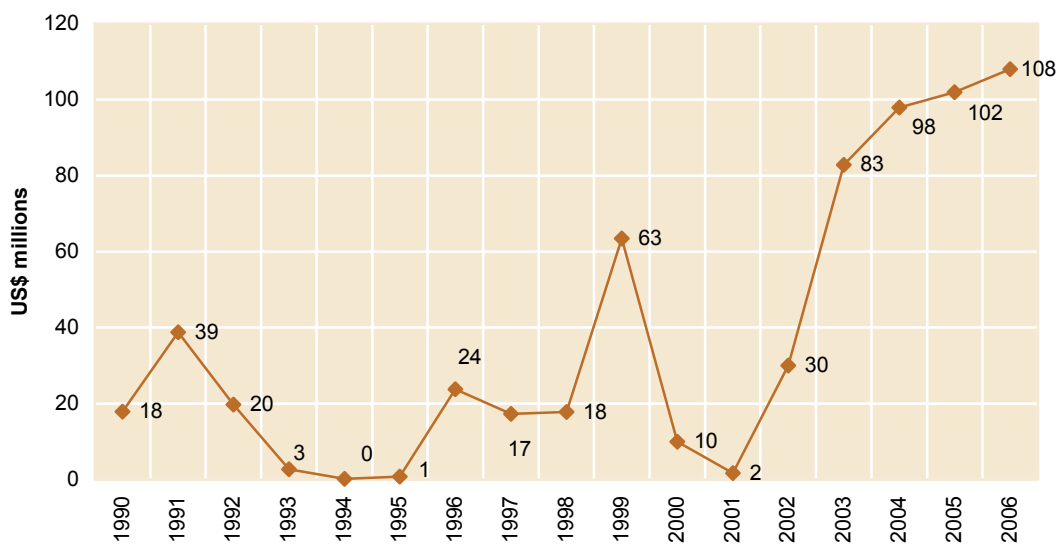
Figure 41: Foreign Direct Investment inflows into Guinea-Bissau (US\$ millions)



Source: UNCTAD

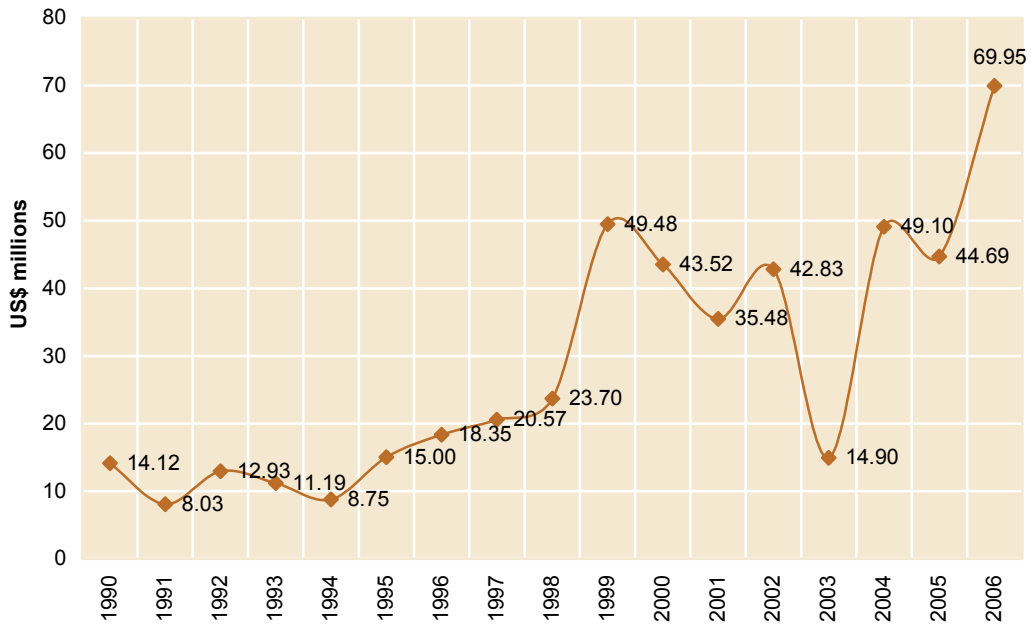
There has been also a marked increase of foreign direct investment (FDI) in Guinea and in Gambia in recent years. FDI inflows into Guinea increased from just US\$10 million in 2000 to US\$108 million in 2006. FDI inflows into Gambia grew from around US\$40 million in the first years of the new millennium to US\$70 million in 2006. Again, much of this gain may be legitimate, but a more detailed analysis may uncover anomalies linked to the drug trade.

Figure 42: Foreign Direct Investment inflows into Guinea (US\$ millions)



Source: UNCTAD

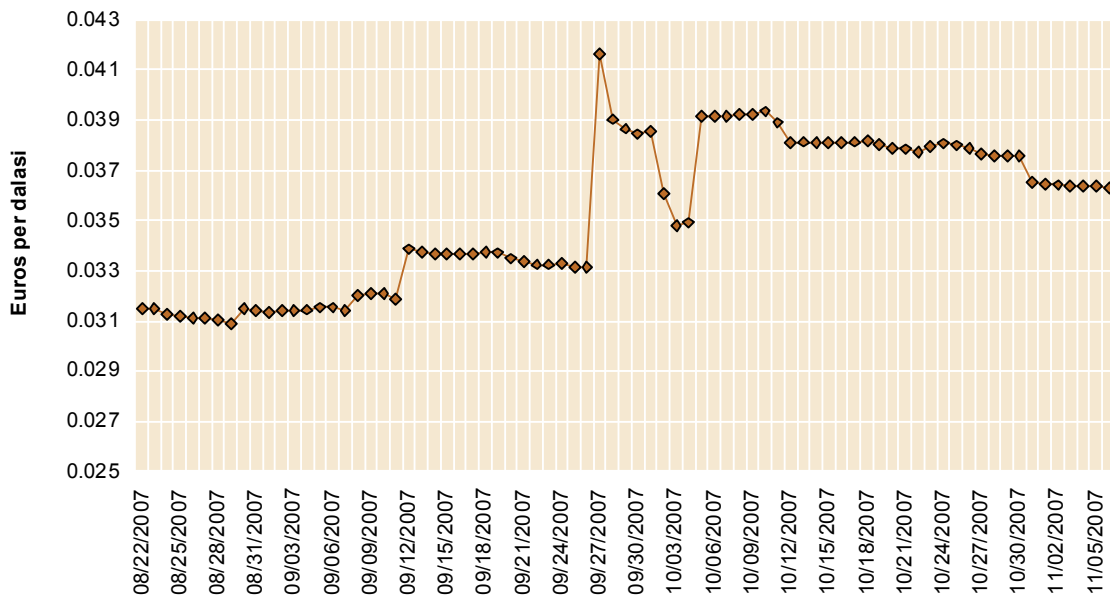
Figure 43: Foreign Direct Investment into the Gambia, (US\$ millions)



Source: UNCTAD

While direct foreign investment is, in general, welcomed, demand for local goods and services related to the drug trade could price many of these out of the reach of local buyers. Increased demand, as well as inflows of currency in payment for drugs received in the region, could increase the value of local currencies in countries outside the CFA zone. For example, the Gambian Dalasi saw a rapid appreciation in late 2007, apparently unexplained by local economic conditions. While the situation seems to have normalised again, this kind of appreciation could reduce the competitiveness of other exports, further crowding out licit production and trade.

Figure 44: Value of Gambian Dalasi in Euros (August – November 2007)



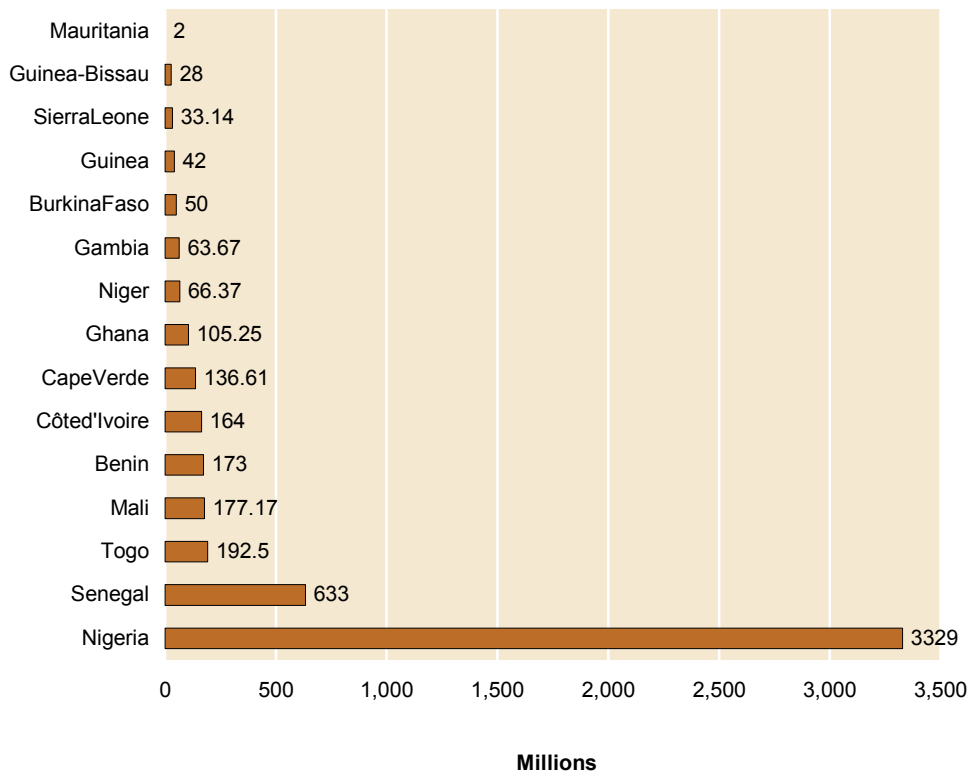
Source: OANDA

As in Guinea Bissau, the merchandise trade balance of Gambia deteriorated from a deficit of US\$ 78.7 million in 2003 to a deficit of US\$126.7 million in 2007, according to IMF balance of payment statistics. The import cover ratio fell to just 48.3% in 2007. The current account balance deteriorated from a deficit of US\$2.4 billion in 2003 to a deficit of US\$58.7 billion in 2007, equivalent to more than 8% of GDP. At the same time, the country's total reserves (minus gold) improved from US\$59.3 million in 2003 to US\$142.8 million in 2007 and the reserves held by deposit money banks almost doubled between 2003 and 2007. Since these improvements cannot be explained by growing exports, some external source of funding, such as foreign aid or the drug trade, must be responsible.

Dirty money also needs laundering, which means recruiting and corrupting professionals in the financial sector. Once the channels for disguising drug money have been established, they can be used for concealing all manner of criminal proceeds. Sustained exposure could deeply undermine the reputation of financial institutions throughout West Africa, crippling their development.

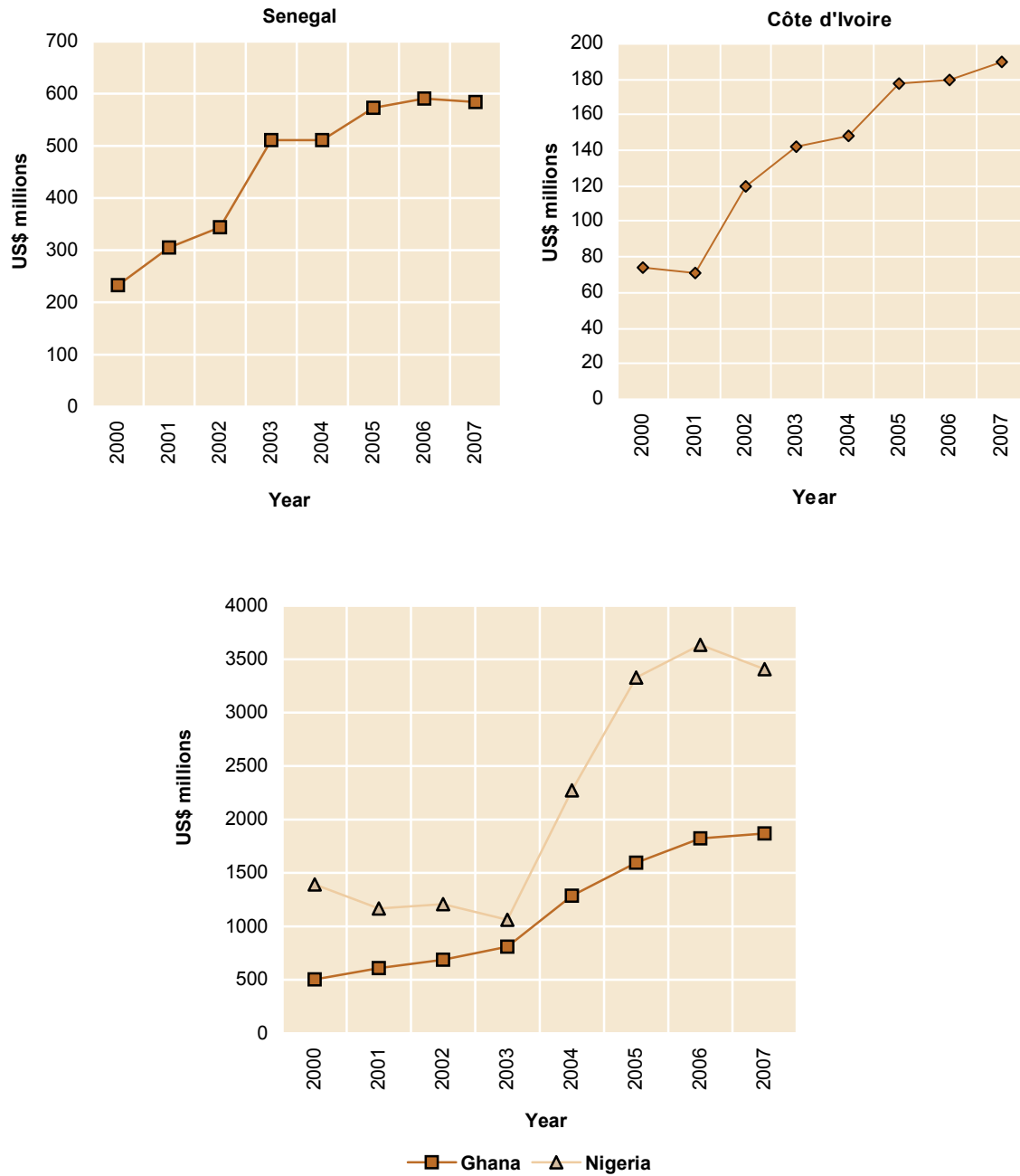
The most obvious route for small-scale laundering would be through well established remittance channels, as traffickers based in Europe remit funds to the region for cocaine received. Reported cash remittances from Europe have increased dramatically in recent years in a number of West African countries. This is best seen in the larger countries with better developed accounting systems. In Cote d'Ivoire, Ghana, Nigeria, and Senegal, there has been a doubling or tripling of remittances in the past several years. While all these countries have large expatriate populations, this sudden growth is difficult to explain. While regulating these flows would be in the interest of law enforcement, thousands of households within the region are dependent on them.

Figure 45: Total workers remittances received in 2006, by country (US\$)



Source: World Development Indicators

Figure 46: Worker remittances, actual and estimates



Source: Economist Intelligence Unit, World Data and IMF/IBRD

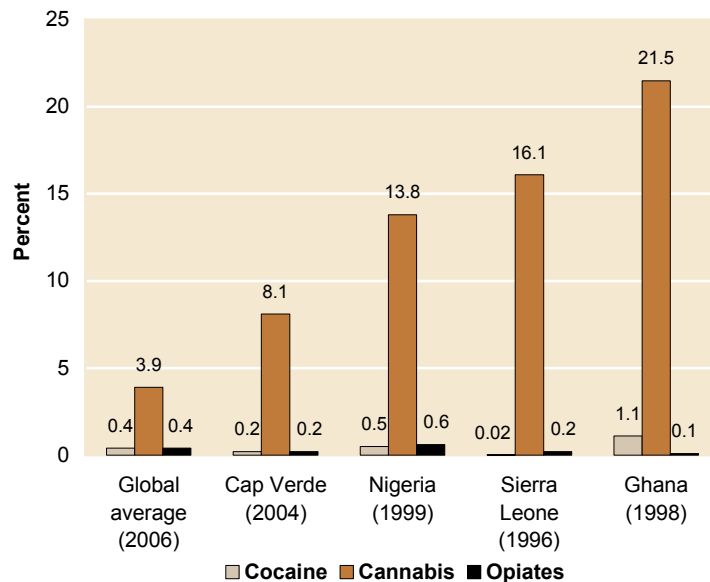
In the long run, economic dependence on drug money may reduce the political will to combat the trade. Indeed, access to positions where these funds are accessible could become a key issue in domestic politics. Economies re-structured to cater to smugglers are subject to collapse when international enforcement forces traffickers to re-route once again. While a superficial reading of the situation might interpret drug trafficking inflows as a gain for the region, the hazards related to these funds far outweigh the benefits.

Local drug use

Given the variety of sites at which cocaine has been seized, the small size of many consignments, and the variety of routes and techniques used for bringing it north, it appears that a good deal of cocaine is being widely disseminated throughout the region. This brings with an obvious risk of widespread drug addiction. In the past, the poverty of West Africa appears to have been insulated it from drug use to some degree. But the traffickers, their associates in the security forces, and others with access to cash, may soon succumb to the temptations of cocaine. The areas of the region generating export commodities, such as the diamond producing regions of Sierra Leone or the Niger Delta oil fields, may be particularly susceptible.

Data on the extent of drug use in West Africa are scant and mostly come from studies conducted in the 1990s. On the whole, drug use rates were as would be expected in an area where few can afford to spend their money on mind-altering drugs. The exception is clearly locally-grown cannabis, particularly in Ghana, which had one of the highest cannabis use rates in the world in 1998.

Figure 47: Annual adult (15-64) drug use prevalence, various years



Source: World Drug Report 2008

Note: Nigeria's opiates use rate is calculated for the population 10-years-old and above and cannabis use rate is from 2000.

The situation has probably changed since the 1990s, but unfortunately, there has been little research to say how and how much it has changed. Anecdotal reports of crack use in Guinea Bissau and elsewhere are frightening, but cannot give a clear indication of the magnitude of the problem. There is an urgent need for a region-wide assessment of the state of drug use, and for a follow up in the future to determine the rate and direction of change.

CONCLUSION

The discussion above illustrates just how advanced the drug threat is in West Africa. While some countries are more affected than others, every country in the region has cocaine flowing through it, often entering from another West African country. The networks in West Africa, involving thousands of individuals, are linked to even more sophisticated networks of West Africans resident in Europe. It is possible that West Africa will be abandoned as a transit area once its novelty has run thin, but it seems more likely that West African networks will undergo the transition that Mexican groups underwent before them, eventually wresting control of the market from the South Americans they once served.

It is also clear that the threat to security in a region like West Africa, where grip on the rule of law remains tenuous, is even greater than in Latin America. The blunt fact is that few economic activities in West Africa, aside from oil extraction, have the economic weight of cocaine trafficking. Given the limited likelihood of being detected and punished, participation in cocaine trafficking may seem to be a rational choice for many, particularly the demobilised forces and guerrilla armies of the many conflicts that have racked the region. For the better educated, money laundering may appear to be a high profit and low risk alternative to the toil and uncertainty of promoting local economic development.

To address this threat, West Africa is dependent on international cooperation to strengthen its law enforcement agencies. Much needs to be done with very few resources, so the region needs to strategise carefully for maximum impact. Best practice in legislation, interdiction, anti-corruption, and rehabilitation must be employed. Regional cooperation will be key, as no single nation in the region has the information or assets to address the problem alone. The importance of information sharing cannot be overstated – traffickers rely on national boundaries to protect their transnational smuggling and money laundering activities. The most basic data on drug production, trafficking and use are lacking for West Africa. The capacity to generate and track indicators on the state of the narcotics problem is vital, and the international community must continue to monitor the situation closely with African governments.

The people of West Africa have proven remarkably resilient in the face of great adversity, and may prove so again. This additional challenge is welcomed by no one, but the issue cannot be ignored. Sorting out drug trafficking will not solve all West Africa's problems, but failing to sort out drug trafficking will surely compound them. And strengthening the rule of law by strengthening law enforcement may have ripple effects far beyond the intent of the intervention. Bringing law and order to this region will go a long way toward securing it for investment and the development of healthy societies.

ANNEX : PARTIES TO UN DRUGS AND CRIME CONVENTIONS

(as of 2 November 2007)

Country	Single Convention on Narcotic Drugs, 1961 ^a	Convention on Psychotropic Substances, 1971	Convention against the Illicit Traffic in Narcotic Drugs and Psychotropic Substances, 1988	Convention against Corruption	Convention against Transnational Organized Crime
Benin	*	*	*	*	*
Burkina Faso	*	*	*	*	*
Cape Verde	*	*	*		*
Côte d'Ivoire	*	*	*		
Gambia	*	*	*		*
Ghana	*	*	*	*	
Guinea	*	*	*		*
Guinea-Bissau	*	*	*	*	*
Liberia	*		*	*	*
Mali	*	*	*		*
Mauritania	*	*	*	*	*
Niger	*	*	*		*
Nigeria	*	*	*	*	*
Senegal	*	*	*	*	*
Sierra Leone	*	*	*	*	
Togo	*	*	*	*	*

^a States parties to the Single Convention on Narcotic Drugs of 1961 or as amended by the 1972 Protocol.