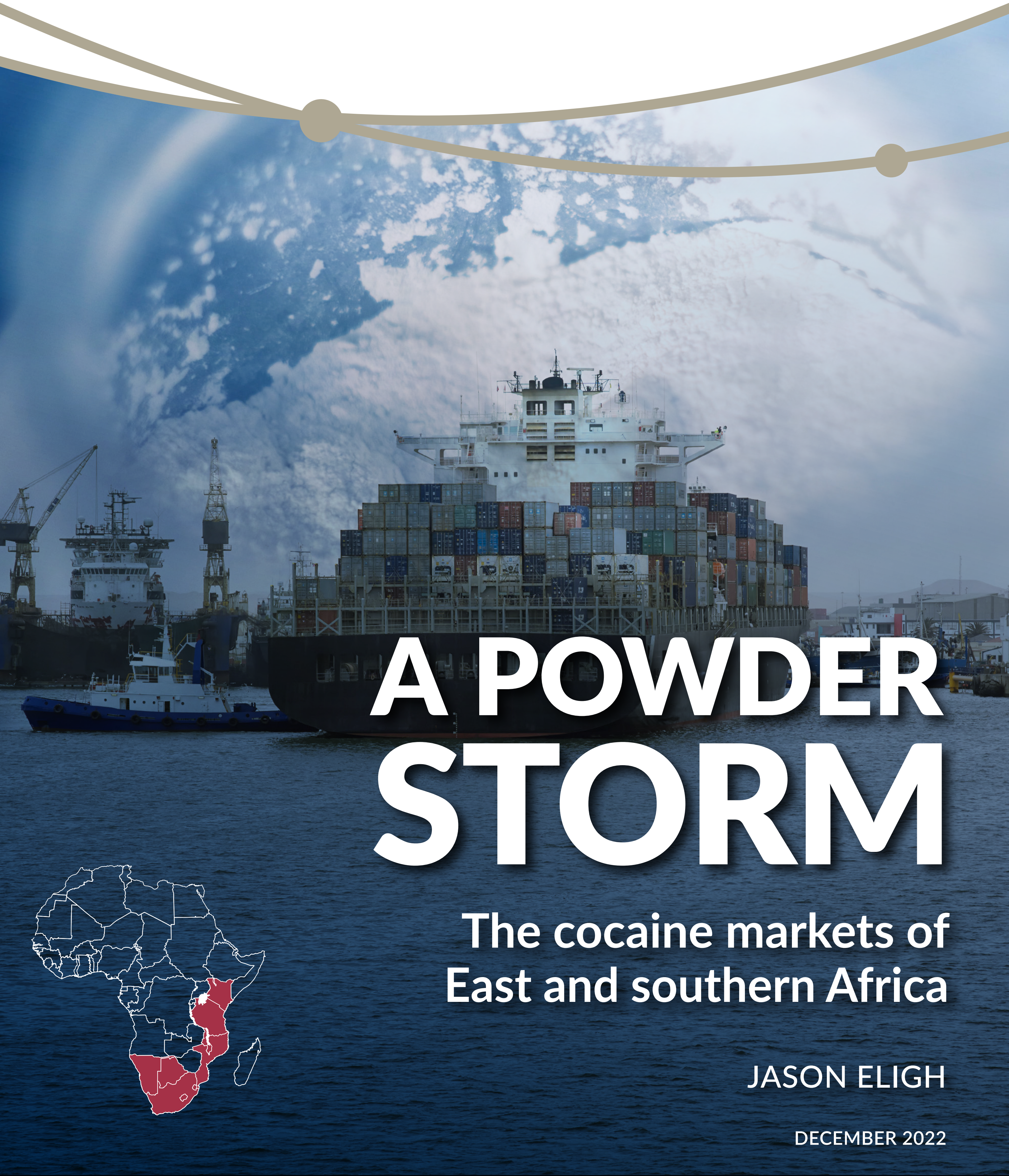
COMMODITY REPORT

GLOBAL INITIATIVE AGAINST TRANSNATIONAL ORGANIZED CRIME



A POWDER STORM

The cocaine markets of East and southern Africa

JASON ELIGH

DECEMBER 2022

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We wish to acknowledge the significant input to this research made by our people who use drugs (PWUD) field researchers. Dozens of their voices contributed to the research foundation of information and understanding that was necessary for this report to be completed. Without their partnership and perseverance, especially during the COVID-19 pandemic, this work could not have happened.

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ABOUT THE AUTHOR

Jason Eligh is a senior expert at the GI-TOC. He is an illicit drug market and policy analyst whose work focuses on understanding the contexts and characteristics influencing the development, growth and structural resilience of drug trade environments, particularly as these factors relate to sustaining harm.

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EXECUTIVE SUMMARY

A view of Guarulhos International Airport, São Paulo, Brazil: a key export hub for cocaine destined for Africa. © *Bloomberg via Getty Images*

There is a transition occurring in the production and distribution of cocaine. Despite the extensive population containment and control measures put into place across the globe in the wake of the COVID-19 pandemic, the flow of cocaine powder from Latin America to global markets appears to have been largely uninterrupted. This is despite the fact that measures to significantly reduce supply have been put in place by the governments of Colombia – a country that is still the primary cultivator of coca – and the United States,[1] the primary progenitor of and ally in the war on drugs.

The markets and supply chains for cocaine, as well as other illicit drugs, have proven to be remarkably resilient in the face of the growing patchwork of restrictions on movement and transport since March 2020 in the wake of the COVID-19 pandemic.[2] The many predictions by experts of supply chain disruption to drug flows and the potentially disruptive impact of this on consumer markets have not come to pass.[3] Cocaine distribution networks and related agents quickly found ways to bypass challenges raised by lockdowns and restrictions.[4] Coca cultivation and potential cocaine production even expanded during the first year of the pandemic, reaching record or near-record levels in the three primary cultivation countries of the Andean production region.[5]

Recently, a change has been observed in the prominence of international destination markets for cocaine. There has been a growing shift away from the US as the destination market of choice towards supplying domestic markets in Europe.[6] This has been enabled by maritime and air supply chains that allow the efficient movement of commodities direct to European Union (EU) ports and cities, but also through an apparent resurgence of traffic through indirect transit supply routes in the African countries along the Atlantic coastline, which are vulnerable to exploitation and well located for transit from other regions.[7] While the West African state of Guinea-Bissau has long been a prominent player in the transit of cocaine from the Andean region of South America to Africa,[8] and has been tagged as a narco-state because of its illicit drug trade dynamics, the story of cocaine in Africa today extends well beyond this country and its regional neighbours.

The expanding cocaine markets of East and southern Africa are starting to play an important role in the transnational flow of cocaine.[9] This region has generally been viewed by analysts as being peripheral to transit trade relative to the amount of cocaine that is believed to move through West and North Africa annually, based partly on the volumes of cocaine that have been seized in those regions.[10] However, information is emerging to suggest that this is not the case.[11] The region's growing popularity as a transit route is bolstered by capable but poorly monitored coastal container port facilities, weak marine enforcement capacity, political environments that favour illicit traders, and established maritime and air links to the destination markets of the EU, West Asia, East Asia and Australia.

As these countries become more prominent as transit points for cocaine, the use of the drug in their local markets increases. The seizure of more than five tonnes of pressed cocaine in South Africa in 2021,[12] while implied to be in transit to international markets, has raised questions about the size and characteristics of domestic cocaine markets.

Generally, East and southern Africa has been regarded as being a predominantly cannabis-consuming region, with some established demand for opiates (particularly heroin) and a geographically limited demand for synthetics (particularly methamphetamine). Yet, with some notable exceptions, there has been a dearth of relevant, recent analysis of domestic drug markets across the region to refute (or substantiate) these basic presumptive analyses.[13]

This is not a surprise to some observers.[14] After all, it is well known that most national governments in the region do not have adequate capacity to generate the data to monitor and understand drug markets in their jurisdictions.[15] This not only diminishes the ability of nations to design and implement an evidence-based response to the structures and characteristics of their illicit drug markets, but also prejudices the international and regional monitoring systems and tools that rely on such national data for collective analysis and threat projection.[16] There remains a belief also among some drug intelligence experts and agencies that the content and structure of these markets still can be analyzed using arrest and seizure statistics, however fragmented and unreliable they may be.[17]

Recent assessments of domestic drug markets in the region have demonstrated that some of the established knowledge about them tends to be premised largely on outdated, irrelevant, or poorly understood data. This has, in turn, led to potentially biased observations and the formulation of inaccurate assumptions and conclusions in the threat analyses of external analysts.[18] In fact, many countries in the region themselves suffer from similar gaps in their national surveillance schemes, affecting their comprehension of their own domestic drug markets.

The purpose of this report is to explore the current retail markets for cocaine across a number of countries in East and southern Africa. This is achieved by analyzing cocaine availability, retail pricing and distribution systems for domestic markets. The analytical summary of cocaine markets in the report is drawn from a series of fieldwork exercises across 16 countries in this region.
Data contributing to the analysis includes the identification of specific domestic retail market price points for cocaine; interviews to uncover details of domestic cocaine use, distribution systems and structures; and discussions with market participants of the common structural characteristics across the region that enable and sustain these markets.

The countries examined are Botswana, Comoros, Eswatini, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mayotte, Mozambique, Réunion, Seychelles, South Africa, Tanzania, Zambia, and Zimbabwe. Previous research has examined the flow of both heroin and meth in the region,[19] examining these illicit drug flows and the potential for them to sustain and entrench existing domestic markets. It has also assessed the structural characteristics of existing markets as well as the factors that contribute to the development of new consumer markets. The current research has a similar focus, looking exclusively at issues related to the cocaine market.

Methodology

The domestic cocaine market data presented in this report is based on information gathered from a series of methodological approaches. Fieldwork followed a modified Priorities for Local AIDS Control Efforts (PLACE) toolkit design,[20] and employed rapid assessment and mapping methodologies.[21] Information on cocaine market structures, distribution and use characteristics was generated from focus group discussions with more than 1 000 people who use drugs (PWUD) and personal interviews with more than 1 700 informants, including more than 400 drug couriers and distributors, 70 high-level drug importers, and 40 law enforcement personnel.

For a subset of six focus countries (Eswatini, Kenya, Lesotho, Malawi, South Africa and Tanzania), the retail market for cocaine was estimated by following a method used by the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA).[22] For people who use cocaine, population size estimates for these individual countries were developed through a series of focus group discussions and interviews with PWUD groups. A review of the validated fieldwork and other data was conducted with PWUD and other relevant experts to extrapolate the findings to the sub-national and, later, the national level. Consensus on best estimates for the lower and upper plausibility bounds were obtained using the Delphi method to generate a probability range (PR) for the various population sizes.

Time and budget limitations meant that for the remaining countries in the region, research focused on determining mean national retail price points for cocaine and identifying general market consumption characteristics and flow patterns only. No population size or consumption estimations were undertaken in these additional markets.

In the report, we use the following abbreviations:	
g	gram
kg	kilogram
km	kilometre
mt	metric tonne
US$	dollar
ZAR	South African rand
€	euro

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Key findings

1. **Cocaine is widely available and used across the region.** The limited presence (or wholesale absence) of cocaine seizures in the region is not an accurate reflection of the state of cocaine flows to and through the East and southern Africa region.

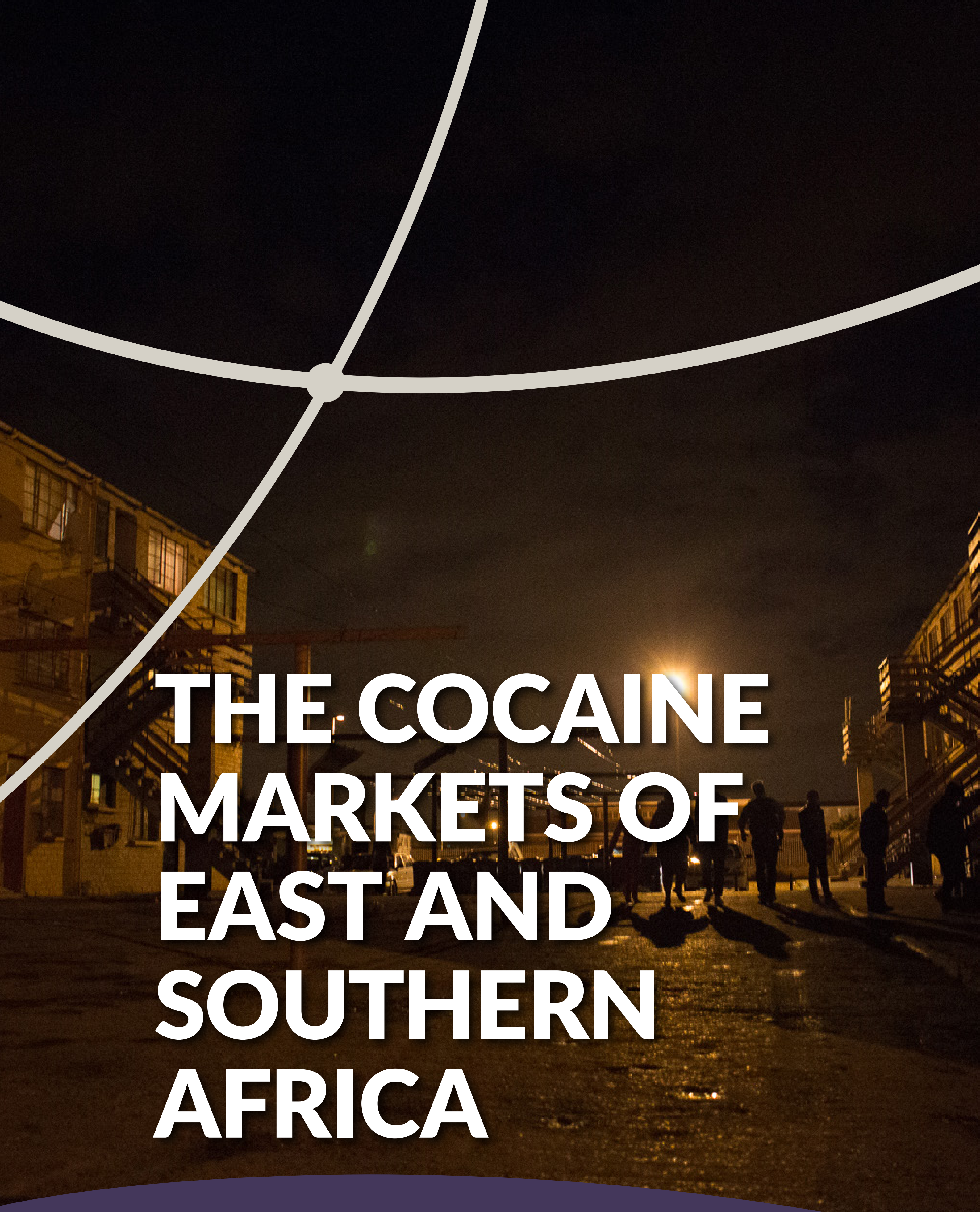
2. **Trafficking cocaine within and through the region is a vast enterprise.** Interviews suggest that there is a large volume of cocaine moving to and through the region. These flows appear to be regular, multi-modal and diverse in their volume and destinations. Their orientation can be generalized into three categories: containerized shipments, general maritime cargo vessel shipments, and micro-trafficking initiatives by air and by sea.

3. **The Mozambique Channel is a thriving cocaine corridor.** The coastal states that have territorial waters in the Mozambique Channel lack capacity to undertake any meaningful maritime monitoring or enforcement actions in the Channel or of its maritime approaches. The Channel, given its vulnerability to exploitation, should be viewed as a growing regional security threat. There is a risk that soon Madagascar will become a regional trans-shipment hub for cocaine and other illicit cargo, well beyond the tertiary role it is thought to fill now.

4. **Domestic drug market surveillance and data are limited.** This is a consequence of two problem areas: the poor production of national drug data, and the dissemination of what data is available. Most countries in the region cannot quantify even the most basic characteristic of their domestic drug markets: how many people in the country are using drugs? Improving surveillance systems across African drug markets is a necessary measure to enable us to have a better understanding of what is really happening in these markets today, rather than continuing to proceed on the basis of what we think we know about them.

5. **Regional cocaine markets are being sustained by dysfunctional governments and institutional complicity and corruption.** The regional cocaine trade is empowered by the collusion of state agencies, corruption and state capture, and fuelled by law enforcement incapacity, incompetence and, in some cases, indifference.

THE COCAINE MARKETS OF EAST AND SOUTHERN AFRICA



Cape Town is one of the main nodes for the import, export and distribution of cocaine throughout the region. © *Shaun Swingler*

The illicit trade in and use of cocaine is not a new phenomenon in this region. Although at one time, there was almost no cocaine presence in the region, shifts in the global cocaine market in the 1970s saw the emergence of a nascent trade on the African continent.[23] By the late 1980s, cocaine had started to become increasingly available in the East and southern African region,[24] with some countries seeing a rise in the domestic consumption of the drug alongside an increase in its trade.[25]

A dramatic increase in the availability, quality and use of cocaine was evident from the early 1990s.[26] Significantly, the transition to democracy in South Africa at this time marked the end of decades of national isolation. Borders opened, creating easy access to the country's domestic markets.[27] In early 1992, South African police reported that the trade in and use of cocaine had become a multibillion-rand industry in the country, and the speed of its growth was described as 'alarming'.[28]

The new democratic South Africa rapidly became the continent's biggest cocaine market, and West African brokers and traders responded by shifting some of their transit shipments away from Nigeria to South African shores.[29] When the newly installed democratic government in Nigeria was overthrown by the military at the end of 1993, one impact was that the influx of Nigerian traders to southern Africa increased significantly.[30] As a consequence, the market supply of high-quality cocaine into the region rose dramatically, leading to a drop in prices.[31]

Distracted by the challenges of policing the final days of the apartheid regime, the rapid growth of the cocaine market took South African authorities by surprise.[32] In 1997, 5.4% of all drug treatment admissions in Cape Town reported a history of cocaine use.[33] In 1998, this had grown to 14.5%; and similar increases were recorded in Gauteng in the same year, where 15.8% of people admitted to drug treatment facilities had a history of cocaine use. Both locations reported very high levels of crack cocaine use, in particular.[34] The domestic consumption of cocaine had also increased in Kenya,[35] along with other markets in the region.[36] By the turn of the century, East and southern Africa had a large and growing consumer base for cocaine powder. Crack cocaine was being produced in the region, and the movement of drugs through this part of the continent had become a feature of regional trade.

In the subsequent 20 years (2000–2020), the consumption of cocaine in both its powder and crack preparations continued to be a common feature of the drug markets in East and southern Africa. Yet, despite the widespread proliferation of the drug to markets across the region, there is not, to this day, an established and reliable surveillance programme or data available that can provide information on simple domestic cocaine market variables, such as the number of people who use it, how they use it or how much it costs. Each of these pieces of information would be fundamental components in assessing the structural dynamics, risks and threats around cocaine's domestic trade and consumption.

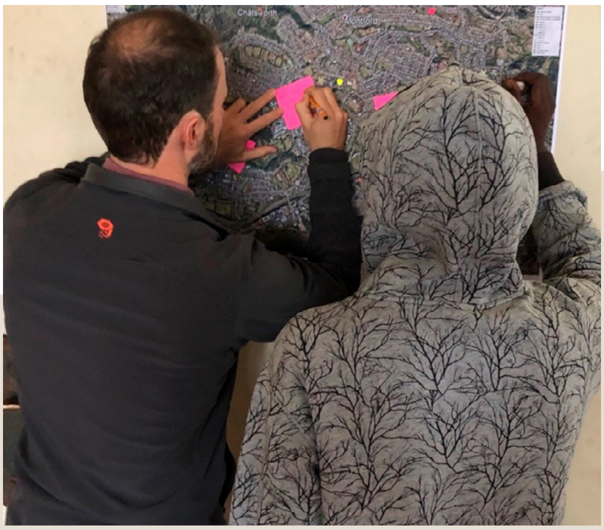
Understanding domestic cocaine markets: Focus countries

As is the case in all illicit drug market environments, law enforcement interdiction efforts may provide a glimpse of the domestic market system, but a holistic understanding of how a specific drug is sold, in what quantities it is sold, what prices are paid, how prices vary within and between markets, and how the distribution processes are organized, remains incomplete.

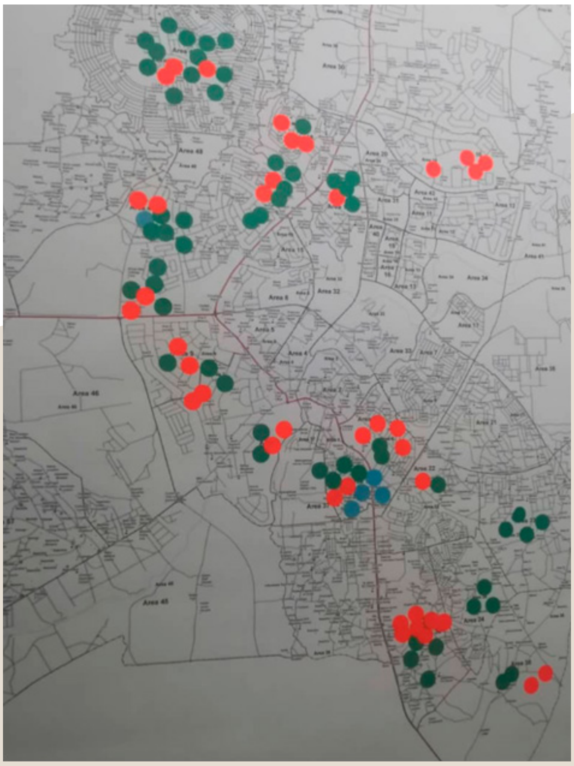
Understanding better the contextual and structural characteristics across East and southern African drug markets is the basis of the field research in this report as it attempts to examine cocaine markets across the region.

The research is premised on the view that illegal drug prices are critical to understanding domestic markets.[37] The structural characteristics of pricing in each country are important to understanding the contexts, geographies and dynamics of the different markets.[38] They provide insights into the patterns of variability, stability or instability of a particular drug market[39] and show links between markets and drug flows.[40] They are also important metrics in the examination and understanding of drug-related policy and action.[41]

Examining drug markets through the lens of pricing and distribution systems is therefore an important starting point to understanding the characteristics of availability and mobility of drugs within and across markets and countries,[42] how they move between them,[43] and how responsive markets and distribution systems are designed to disrupt or eliminate them.[44] The United Nations views information about illegal drug prices, as well as data on drug purity, as being powerful indicators of market trends and important enough to warrant core annual country reporting criteria to monitor the international response to these drugs.[45]



The identification and mapping of local drug market retail nodes was a feature of the fieldwork.



Interviews and focus group discussions with people who use drugs, distributors and other actors were used to generate and validate cocaine market data across the region.

In several instances, the field research monitored the environmental situation at research sites and, in particular, the COVID-19 response measures undertaken by local authorities and, in some cases, by organized crime groups. The purpose of these observations was to understand how these measures impacted on the local drug market. Steps were taken to mitigate coronavirus infection among the research team and interviewees.

Across the surveyed countries, the drug was present in two primary forms: powder cocaine, and crack cocaine. Powder-form cocaine is the hydrochloride (HCL) salt; crack cocaine is a crystallized form of cocaine HCL, generally made by combining cocaine HCL with water and sodium bicarbonate (i.e. baking soda). The mixture is boiled until a solid is formed. Once cooled, the solid is broken into small pieces, often called rocks or stones. The name 'crack' comes from the crackling sound made by the small crack 'rocks' when they are heated and smoked in a pipe, the most common way of consuming it.[46]

The embedded presence of crack cocaine in a domestic market is often a sign that there is a stable supply of cocaine powder. As a commodity, crack is cheap, easy to produce and simple to use. It can be sold also in smaller amounts (than powder) to a wider proportion of the population, particularly within lower-income sub-populations of a domestic market, and at a much greater profit. Crack enables distributors to diversify and expand an established powder consumer base.

The results of the research in the focus countries are included in the subsections that follow.

Eswatini

Apart from cannabis, the drug most commonly used in the Eswatini drug market is cocaine, both in its powder and crack form. A gram of powder cocaine ranged in price in the local currency, the *lilangeni* (SLZ), from a low of SZL 250 (€14) to a high of SZL 600 (€32). The price for crack cocaine saw a multitude of price points ranging from SZL 250 for a 'slop' of 0.5g, which is mostly consumed by injection, to a larger 'full moon' that weighs 1.5g, costs SZL 1 500 (€81) and is smoked. The mean national retail price per gram of powder cocaine was estimated at SZL 500 (€27), and that for crack cocaine was estimated at SZL 1 000 (€54).[47]

Most cocaine was smoked or snorted nasally, according to the research. Cocaine injections were done primarily with crack, and most notably in and around Nhlangano. The population size and use analysis concluded that in 2020, there were an estimated 14 474 people (PR 14 000–15 500) who used cocaine (crack or powder) in Eswatini, and they consumed approximately 3.3 mt (metric tonnes) (PR 3.2–3.6 mt)[48] of cocaine. The median volume of cocaine ingested by a regular user per day was estimated to be 1.5 g for those who used powder cocaine, and 2 g for those who used crack cocaine.

Mean price: powder	Mean price: crack	People who use cocaine	Est. annual consumption
€27	€54	14 474	3.3 mt

Kenya

While crack and powder cocaine are available in Kenya's domestic retail drug markets, the volume and frequency of use appears still to be low relative to that for other drugs.[49] Generally, the retail price of crack cocaine in the local currency of Kenya shillings (KES) ranged from KES 1 500–3 500 (€11–€26) for a *kete* (0.1 gram), and gram prices were reported to range from KES 5 500 (€41) in coastal locations such as Lamu, to KES 6 000 (€45) in the capital, Nairobi, with slightly higher unit prices in other urban centres. The injection of crack was reported to range from 15% to 45% of users. Powder cocaine prices ranged from KES 5 250 to 7 000 (€39–€54), with between 15% and 50% of powder cocaine users reporting that they had also injected it.[50]

The mean retail per gram price for powder cocaine in Kenya was estimated to be KES 7 000 (€54), and for crack cocaine it was estimated to be KES 6 000 (€45). The population size and use analysis concluded that in 2020, there were an estimated 10 000 people (PR 4 000–15 000) who used cocaine (crack or powder) in Kenya, and they consumed approximately 0.34 mt (PR 0.13–0.50 mt) of cocaine. The median volume of cocaine ingested per user per day was estimated to be 0.3 g.

Mean price: powder	Mean price: crack	People who use cocaine	Estimated annual consumption
€54	€45	10 000	0.34 mt

Lesotho

Powder cocaine is widely used and available across the country. The use of crack cocaine appears to be concentrated around the capital, Maseru. While the price of crack cocaine in the local currency, Lesotho *loti* (LSL), appeared to be constant at about LSL 50–100 (€3–€6) per stone (0.05 g), the price of cocaine powder ranged from LSL 200–300 (€11–€16) per quarter gram, with smoking and snorting the powder being the primary means of use. There was no injection of either form of cocaine reported in Lesotho.

The mean retail price per gram of crack cocaine was estimated to be LSL 1 500 (€82) and for powder cocaine it was estimated at LSL 1 200 (€65). The population size and use analysis concluded that in 2020, there were an estimated 17 500 people (PR 4 000–15 000) who used cocaine (crack or powder) in Lesotho, and they consumed about 10.3 mt (PR 8.8–11.8 mt) of cocaine in 2020. The median volume of cocaine taken by a user per day was estimated to be about 2 g.

Mean price: powder	Mean price: crack	People who use cocaine	Estimated annual consumption
€65	€82	17 500	10.3 mt

Malawi

Malawi has a growing base of cocaine users. In fact, it was estimated that there were nearly eight times as many people who used cocaine in Malawi as the number who used heroin. Many of these cocaine users consumed crack cocaine, particularly in and around the two major urban centers of Lilongwe and Blantyre. While most users of crack cocaine smoke it, at least a quarter of them injected it as their primary means of consumption.

The cocaine consumption market in Malawi is strong, and appears to outpace that for every other substance, except for cannabis. The price of crack cocaine in the local currency, Malawian *kwacha* (MWK), ranged from MWK 10 000 to 12 000 (€11–€13) per rock (0.1 g), and the price of powder ranged widely between MWK 15 000 and 60 000 (€16–€65) for a gram. The mean retail price per gram for crack cocaine in Malawi was estimated at MWK 100 000 (€108), and that for powder cocaine was MWK 45 000 (€49).

The population size and use analysis concluded that there are an estimated 5 000 people (PR 3 000–6 000) who use cocaine (crack or powder) in Malawi, and they consumed approximately 0.52 mt (PR 0.31–0.62 mt) in 2020. The median volume of cocaine used per regular user per day was estimated to be 0.5 g.

Mean price: powder	Mean price: crack	People who use cocaine	Estimated annual consumption
€49	€108	5 000	0.52 mt

South Africa

A gram of powder cocaine ranges in price in the local currency, the rand (ZAR), from ZAR 400 (€22) to more than ZAR 1 000 (€55), with the price being influenced by things such as the perceived quality of the drug and the level of familiarity between the retailer and the buyer. The price of crack cocaine ranged from ZAR 50 (€2.8) to ZAR 75 (€4.2) per stone (0.05 g). Crack is sold also in larger volumes called half moons and full moons. A half moon is a piece that weighs between 1 g and 2 g, depending on the quality of the crack, where it is being purchased and who is distributing it.

A regular buyer who purchases five or more pieces at a time will be charged a unit price of between ZAR 700 and ZAR 1 000 (€39–€55) per half moon, while a one-off buyer will be charged between ZAR 1 200 and ZAR 2 200 (€66–€121). A full moon weighs between 2.4 and 3.8 grams. A regular bulk buyer will pay a unit price of between ZAR 1 400 and ZAR 1 800 (€77–€99), and a once-off buyer a unit price of between ZAR 2 400 and ZAR 3 200 (€132–€177). The wholesale price for a kilogram brick of pure cocaine on arrival in Cape Town at the time of the research was between ZAR 350 000 and ZAR 400 000 (€19 000–€22 000).

The mean retail price per gram for powder cocaine in South Africa was ZAR 650 (€36), while the mean retail price for a gram of crack cocaine was ZAR 1 250 (€69). Crack cocaine was reported to be used in all South African cities and provinces, with smoking being the most regular method of use, but with some injecting it. It was estimated that three-quarters of all cocaine users in South Africa consume the drug in its crack form.

Powder cocaine was reportedly being used in all cities and provinces. Almost all powder cocaine use was reported to be snorted nasally.

The population size and use analysis concluded that in 2020, an estimated 350 000 people (PR 250 000–475 000) used cocaine (crack or powder) in South Africa, and they consumed approximately 18.8 mt (PR 13.4–25.5 mt) of the drug. The median volume of crack cocaine used by a regular user per day was estimated to be 0.4 g, while that for powder cocaine was 1.3 g.

In terms of purity, interviews with distributors suggest that the adulteration of cocaine powder in South Africa generally is done by local suppliers at a 1:1 or 1:2 ratio.[51] The ratio mix for crack cocaine could be as high as 1:3 or more in some cases. In this regard, at a wholesale price of ZAR 350 000/kg a distributor could adulterate a brick of cocaine at a 1:1 ratio, thus giving them two kilograms of cocaine powder for retail sale. At a mean price of ZAR 650/g for powder, this may generate a return of around ZAR 1.3 million, or €72 000, before expenses.[52] For crack cocaine, at an adulteration ratio of 1:3 and a mean retail price of ZAR 1 250/g, this one-kilogram brick investment could yield a return of ZAR 5 million, or €276 000, before expenses. Crack cocaine is a lucrative market commodity for local distributors.

Mean price: powder	Mean price: crack	People who use cocaine	Estimated annual consumption
€36	€69	350 000	18.8 mt

Tanzania

Powder and crack cocaine are widely available. The research showed that use was most prevalent in the coastal cities of Dar es Salaam and Zanzibar, as well as the Tanzania-Kenya tourist border area of Arusha, home to Mount Kilimanjaro. The price of powder cocaine in the local currency, Tanzanian shillings (TZS), ranged from TZS 150 000 to TZS 200 000 (€54–€72) per gram, and the price of crack cocaine was reported to be between TZS 18 000 and TZS 20 000 (about €7) per stone (0.1 g). The mean retail price per gram for powder cocaine was estimated at TZS 153 000 (€55), and the mean price per gram for crack cocaine was about TZS 180 000 (€65).

According to data from a 2014 consensus exercise, the number of PWUD in the country (including those using cannabis) was estimated to be 300 000 (range: 200 000 to 350 000), including 30 000 people who injected drugs.[53] The overwhelming majority of this consensus estimate was thought to use cannabis and heroin. In fact, cocaine was not even mentioned in that report. The population size and use analysis conducted as part of this fieldwork concluded that in 2020, there were an estimated 26 674 people (PR 25 500–31 298) who used cocaine (crack or powder) in Tanzania, and they consumed about 1.7 mt (PR 0.13–0.50 mt) of it. The median volume of crack cocaine used by a regular user per day was determined to be 1.5 g, and for powder cocaine users it was 1.6 g.

Mean price: powder	Mean price: crack	People who use cocaine	Estimated annual consumption
€55	€65	26 674	1.7 mt

Other countries

While in-depth analysis of retail market consumption features was not undertaken for other regional countries, retail price points and some basic analysis of use characteristics were done for them.[54] The results were the following:

	Botswana	Madagascar	Mauritius	Réunion	Seychelles	Zambia	Zimbabwe
Mean price	115	68	269	130	329	116	167
Perception of cocaine use	Stable	↑	Stable	↑	↑	↑	↑
Was crack available?	Yes	No data	Yes	No data	Yes	Yes	Yes

FIGURE 1 Field research-derived mean retail price (€/g) of cocaine powder in other regional states, 2021.

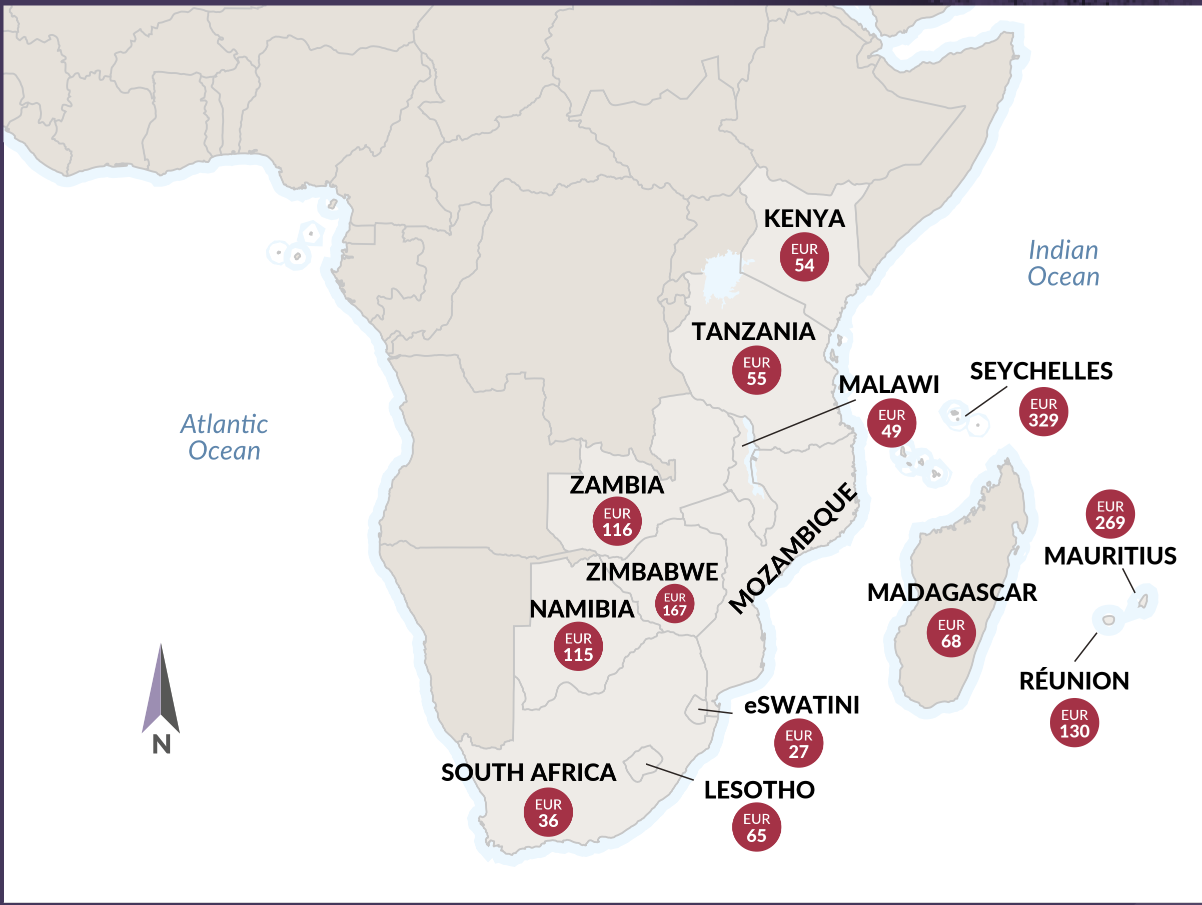


FIGURE 2 Mean national retail price of cocaine powder (€/g) in East and southern Africa, 2021.

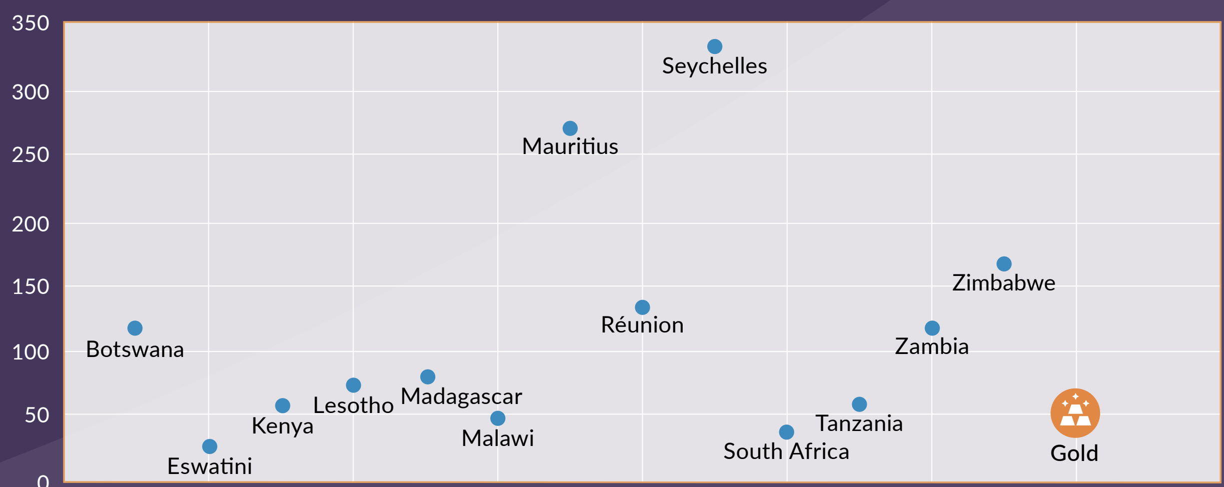


FIGURE 3 Comparing the mean national retail price (€/g) of cocaine powder to gold, 2021.

NOTE: Gold was valued at US$1 859.44 per troy ounce on 1 February 2021. This was divided by 31.103 to convert from US$/troy ounce to US$/g (US$59.78/g), and converted to €/g at the rate of exchange as at 1 Feb 2021 to be €49.25/g.

Cocaine powder was found to be available and consumed in every drug market of the region while crack cocaine was available in most of the markets surveyed, a demonstration of the reach of cocaine across the region. Mean retail price point values were found to be lower in the coastal countries, which have a long history of sea trade, and which are the principal disembarkation points for transnational cocaine flows to and through the region.

The embedded strength of the retail market in South Africa, the largest cocaine consumer market in the region, reflects both its position as a contemporaneous keystone in regional trade flows, as well as the longer duration of its historical relationship of trading and consuming cocaine relative to its neighbours.

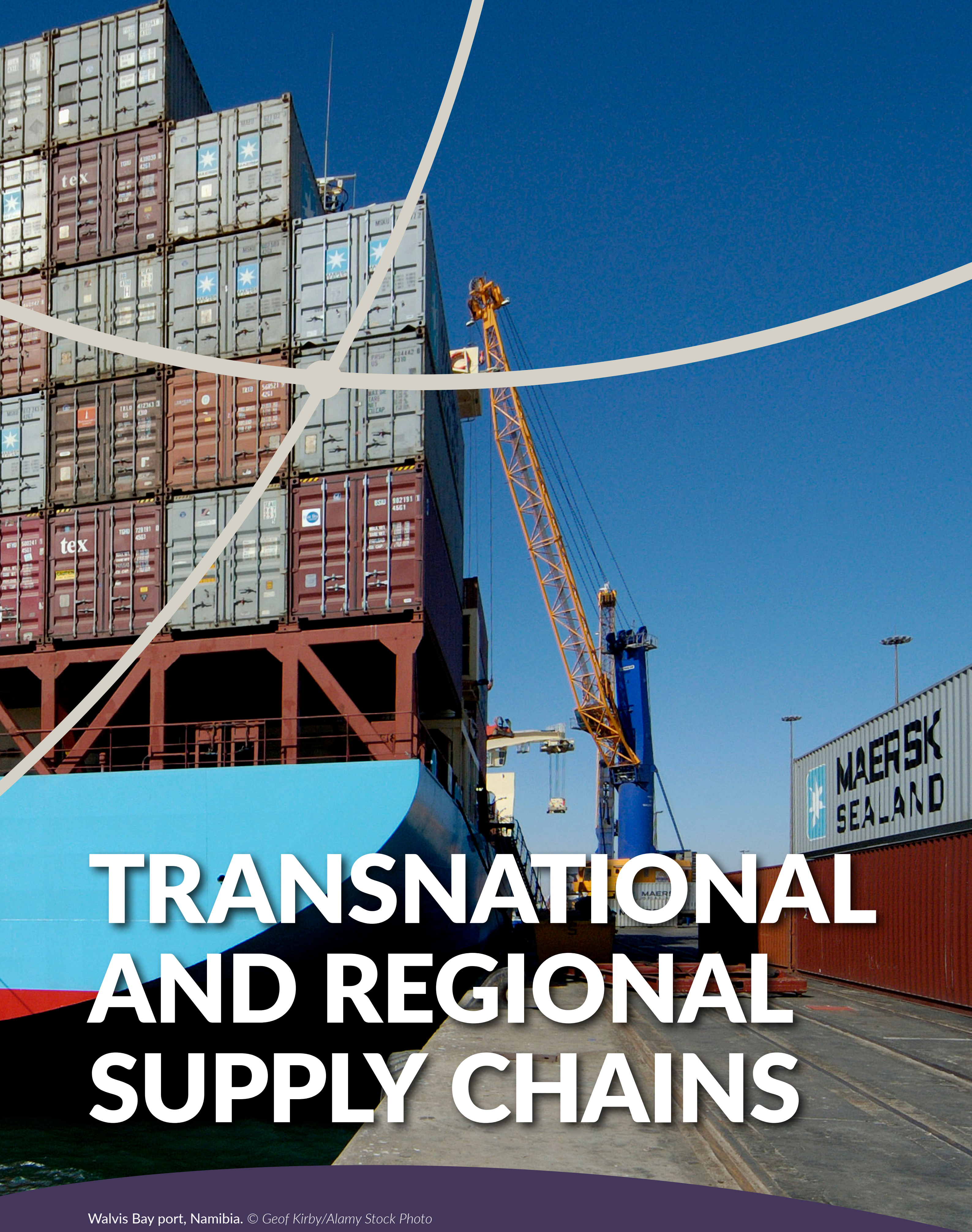
A fundamental commodity of both the regional and individual drug trade markets, cocaine is quite literally worth more than its weight in gold. Its use in the region has evolved over the past 30 years from an emergent trade in a few transit nodes with some limited spillover of local use, to a primary commodity regularly traded domestically and across the region. Today the region is balancing embedded and emergent cocaine markets across the entirety of its geography.

Still, cocaine use does appear to be plateauing in a small subset of the region as competition increases with methamphetamine as the stimulant of choice for opiate users. With polydrug[55] use a common feature found across the region's drug markets, crack cocaine has been a common substance of correspondent use among heroin using populations. However, with methamphetamine offering a longer duration effect compared to crack, leading to a decrease in the frequency of purchase and a corresponding decrease in the amount of money needed to maintain a practice of regular use, methamphetamine appears to have become a preferred substitute stimulant to crack cocaine in several urban markets.[56] This has been particularly true as the supply and flow of meth continues to expand in the region.[57] In making this observation however it remains equally important to state that while use may be stagnating in a limited way in some parts of the region there remain still populations where cocaine is just emerging as a substance of use; and there appear to be no structural limitations present that would restrict or restrain the continued expansion of the region's cocaine consumer market economy in the near future.

Substance	Eswatini	Kenya	Lesotho	Malawi	South Africa	Tanzania
Cocaine powder	27	54	65	49	36	55
Crack cocaine	54	45	82	108	69	65
Heroin	16	15	27	31	11	20
Methamphetamine	19	38	14	25	11	71

FIGURE 4 Comparison of the mean retail price (€/g) of common illicit substances within and across six drug markets of the region, 2021.

The adulteration of cocaine powder by adding filler material or other bulking agents to reduce the purity and increase the volume of powder for disribution is a common feature of the regional cocaine market. Here we see 3 g of powder being subdivided in a Kenyan coastal town, for distribution after having been adulterated.



TRANSNATIONAL AND REGIONAL SUPPLY CHAINS

Walvis Bay port, Namibia. © *Geof Kirby/Alamy Stock Photo*

The importation and transit of cocaine to and through East and southern Africa is not a new phenomenon. The market began to grow in the early 1990s as West African-based cocaine brokers and traders shifted their attention to southern Africa, particularly South Africa, and then to eastern Africa and Kenya, forming nascent transit hubs to access Europe.

In 2006, the prospect of a Lusophone cocaine trafficking link between Brazil and southern Africa was raised.[58] Angola and Mozambique joined the regional cocaine transit trade. In 2011, concern was expressed about what appeared to be growing connections between cocaine coming out of São Paulo airport (Brazil) and the increasing number of couriers who were found to be smuggling the drug in passenger baggage and on their bodies to destinations in southern Africa.[59] Brazil, as an intermediate channel to global cocaine supply chains, grew to become a main embarkation point for cocaine being moved to southern African by sea and air. In the wake of these movements, cocaine flows to East and southern Africa appear to have grown, particularly over the past decade.

Based on interviews with users, dealers, distributors and importers, as well as through focus group discussions, and engagement with regional law enforcement and security representatives, a profile of the domestic cocaine market flows and structures for 16 countries in East and southern Africa is included in the sections below, presented alphabetically.

Botswana

Often ignored in regional analysis, Botswana is increasingly contributing to the regional distribution of cocaine. The Nigerian networks that are bringing heroin into the country are believed to be bringing in cocaine too, using the same overland routes and transport modalities, with most shipments originating in South Africa's Gauteng province. The drugs move through Botswana to neighbouring Zambia and Zimbabwe.[60]

The capital, Gaborone, is the central distribution hub. Situated close to two international overland border gates with South Africa, supplies are imported almost

Botswana Defence Force patrolling the Caprivi Strip on the border.
© Steve Allen Travel Photography/ Alamy Stock Photo

exclusively overland from production and storage caches operated by Nigerian syndicates based in Johannesburg. Although landlocked, Botswanan cocaine distributors have the benefit of being on the pathway of a large volume of cargo that moves from the Port of Walvis Bay in Namibia. This port is situated at the head of the Trans-Kalahari Corridor, which passes through Gaborone to Johannesburg. In addition, the Four Points border crossing located at the eastern tip of Namibia's Caprivi Strip is a significant crossing for illicit drug flows, particularly cocaine, between Zambia and Botswana. The use of Sir Seretse Khama International Airport in Gaborone for transnational cocaine micro-trafficking[61] transiting through Johannesburg's OR Tambo International Airport is a risk that requires exploration.

A sachet of cocaine powder available in Gaborone, Botswana. Cocaine arrives in Botswana overland from Johannesburg in South Africa. It transits Botswana to other regional countries, including Zambia and Zimbabwe.

Comoros

Most of the cocaine trafficked into Comoros arrives from Zanzibar, an island off Tanzania's coast. It is there that these Comorien drug shipments are calved from larger transnational drug shipments by secondary regional networks, who repackage them in smaller volumes to be transported to the islands. These packages are often smuggled on the weekly ferry from Dar es Salaam in Tanzania, either concealed in bags or items of clothing, or combined with shipments of licit products.

Cocaine is also smuggled by crews who work on commercial shipping vessels that move between the islands. Often these are smaller volume loads. Although the main deep-water port in Comoros is located in Mutsamudu on the island of Anjouan, many of these smaller packages are destined for Moroni, the central drug consumption and distribution point for the islands.[62] Coordination of the importation of cocaine into Comoros appears to be undertaken by the same Tanzanian networks that also import heroin into the islands.

Eswatini

The importation of cocaine into Eswatini is controlled by a small number of high-level importers, most of whom also deal in the importation and distribution of heroin. Unsurprisingly, the capital of Mbabane is a central node for the importation and distribution of the drug in the country.

Cocaine is imported overland through the country's border crossings with South Africa and Mozambique. From Mozambique, the cocaine originates from shipments offloaded along the Pemba to Nacala coastline, as well as through Maputo International Airport. From South Africa, the cocaine is drawn from larger shipments arriving at Durban's port for onward distribution to regional and international markets.

Cocaine that is imported to Eswatini appears to be intended almost completely for local consumption. The country has a large domestic cocaine-using population, relative to its size. Interviews failed to identify any onward movement of cocaine through the international airport in Mbabane, although a transit flow from Mozambique through Eswatini to South Africa is likely but is an as-yet-undetected scenario.

Kenya

Kenya is a popular country for the landing and onward transnational transport of cocaine from South America (via Brazil) to and through the region. The Port of Mombasa and the cargo handling airport in Eldoret, north-west of Nairobi, are major nodes for these imports. There is strong evidence indicating that the Nairobi market, fed by cocaine supply chains through the Eldoret air hub, maintains a strong reciprocal cocaine trafficking relationship, along overland traffic links, with Mogadishu (Somalia), Juba (South Sudan), Kampala (Uganda), Addis Ababa (Ethiopia), and Dar es Salaam (Tanzania). These embedded and resilient market connections see a myriad of illicit and 'grey market'[63] goods (including an array of illicit drugs beyond just cocaine) flowing regularly between these regions as a socio-economic by-product of the diasporic connections between these major urban centres.

A new railway has improved cargo transportation links between Kenya's two largest cities, Nairobi and Mombasa, both of which are significant destination and transit locations for cocaine flows. The construction of the third phase of this rail link to Malaba on the border with Uganda, may facilitate the further movement of cocaine and other illicit drug shipments, as well as other illicit flows. Malaba, the Kenyan counterpart to Busia on the Ugandan side, is a significant smuggling transit point for cocaine moving from landing points along the Kenyan coast in smaller consignments (e.g. tens of kilograms) by truck to onward international transit locations through Kampala, and Kigali in Rwanda, as well as northward to Juba and Addis Ababa.

The trade in khat (known locally as *miraa*) plays an important role in facilitating and maintaining the traditional smuggling routes that are then exploited for the movement of cocaine and other illicit drugs to Kenyan coastal locations such as Lamu, Malindi, Mombasa, and Isebania. Kenya is also a significant micro-trafficking point for the distribution of cocaine by air and sea to the Indian Ocean Island states of Comoros, Madagascar, Mauritius and the Seychelles.

Collaboration between criminal networks and state-embedded actors is widespread in the Kenyan cocaine trade.[64] In fact, politics and crime are so interlinked they can appear to be inseparable.

Violence is a common feature of the drug market in Kenya in general, and of the cocaine market in particular. Foreign actors play active roles in promoting and prospering from cocaine trafficking in Kenya. They include criminal groups from Italy; smugglers from South Asian countries such as Pakistan, India and Iran; and citizens from regional states such as Nigeria and Guinea as well as neighbouring countries such as Tanzania and Somalia. In fact, the current level of institutionalized corruption in the country suggests that Kenyan security institutions – from the perspective of criminal flows, in particular – could be regarded as being components of a captured state.[65]

In August 2019, Kenyan police seized 3 kg of cocaine powder in Mombasa. It had been concealed in the false bottom of luggage carried by two air passengers. They had embarked in São Paulo (Brazil) and transited South Sudan and Uganda. *© The Star, https://www.the-star.co.ke/news/2019-08-03-police-arrest-two-with-3-kilogram-of-cocaine*

In July 2016, Kenyan police seized 100 kg of cocaine concealed in a container of sugarcane originating from Brazil and destined for Uganda. The container had transited Valencia (Spain) prior to its arrival. Assessments indicated that most likely this was an instance of a 'rip on, rip off' smuggling attempt that had failed to be executed during the container's brief transit in Spain. *© Africa News, https://www.africanews.com/2016/07/30/26-million-euros-worth-of-cocaine-busted-at-kenyan-port*

In a Kenyan border town cocaine is crushed into powder for testing prior to being adulterated. This is part of the process of preparation for packaging the cocaine into segments for local distribution.

Cocaine concealed in a jacket cuff. This public transport driver acts also as a local drug courier and delivers powder cocaine. He makes one trip every day and is paid KES 1 500 (€12) per trip.

Crack cocaine in Nairobi, Kenya. This 1g packet retails for KSH 6 000, or around €48.

Lesotho

The supply and distribution of cocaine is controlled by Nigerians based in Maseru. All the cocaine that is distributed in the country is supplied and delivered by mid-level dealers in nearby Bloemfontein, South Africa. The distribution chains in Bloemfontein are also run by Nigerians. The cocaine originates either from the port in Durban, from where it is transported to Johannesburg, or brought in by couriers through OR Tambo Airport in Johannesburg. Cocaine supply to Maseru is regular, occurring on a weekly basis. It is collected in Bloemfontein and transported by road to Lesotho, a distance of 140 km, or less than two hours' drive. Drivers enter Lesotho at the Maseru land border and delivery is made to a Nigerian focal point there for processing and distribution. Once in Maseru, the drug is distributed to the domestic market by the many lower-level street dealers.

Rarely are vehicles searched at that land border and informants say that officers are easily – and regularly – bribed. In Lesotho, the police conduct few investigations and hardly ever undertake a drug raid or other active, independent interdiction. On the rare occasion that a raid does occur at a domestic supply point, it has been reported that the police are easily paid off to allow the drugs to pass. It is worth noting that there is no formalized drug enforcement unit in the Lesotho Mounted Police Service. All drug-related cases are handled by the mounted police investigations unit, an entity that has little formal training on the nature of drugs or drug-related policing.

Madagascar

Madagascar is a growing transit point for cocaine and other illicit commodities. Despite having 17 ports along 5 000 km of coastline, it has little coastal or port surveillance capacity. Its main container port of Tamatave/Toamasina processes 400 000 twenty-foot container equivalent units (TEU) annually, or about four times as many containers as Maputo port does in Mozambique, and just over half of the amount handled in Cape Town.[66] With container and vessel loads originating directly from Latin American departure points (Brazil, in particular), cocaine makes its way to Madagascar along regular maritime routes through countries in East and southern Africa, especially South Africa.

Cocaine arrives in Madagascar mostly by sea, but onward transport is primarily by air, both to other Indian Ocean island states (particularly the Seychelles), and, to a lesser degree, Europe and the US. Cocaine is also imported in smaller quantities from Kenya and Tanzania by air through Ivato International Airport in Antananarivo, in cargo shipments and on or with passengers.

Malawi

Local interviewees frequently spoke about how common the transit of cocaine is through the country, entering and exiting through its two international airports in Lilongwe and Blantyre, as well as moving along its roadways that link it to coastal cocaine landing points in South Africa, Mozambique, Tanzania and Kenya. In particular, recent interview results indicate that there may be a dedicated flow of cocaine arriving overland directly from Mozambique, which has been offloaded at coastal locations between Pemba and Nacala, an area popular also for the import of Afghan heroin and methamphetamine. Malawi appears to be on a regional distribution route for both air and overland micro-trafficking for regional and transnational markets.

While the Malawi Police Service is significantly restricted in its capacity to interdict illicit drug flows into and through the country, recent seizures appear to indicate that the country occupies a far greater role in the regional and international micro-trafficking distribution of cocaine than has been acknowledged. Domestically, suspected in-transit regional and international couriers have been arrested with cocaine.[67] Internationally, suspected cocaine couriers of Malawian origin have been arrested, particularly upon arrival in South Asia.[68]

The international flow of Malawian drug couriers and their arrest and detention overseas has attracted the attention of the country's Ministry of Foreign Affairs and International Cooperation, which published a statement of concern to that effect.[69] Some interviewees alleged that the frequent shipment of smaller volumes (less than 5kg) of cocaine originating from – or transiting through - Malawi reduces the risk of these couriers being profiled as potential smugglers by border officials. This is partly because Malawian border officials lack the capacity to undertake stringent border screening for substance smuggling (thus few seizures are ever made),[70] and partly because they believe that cocaine is not a significant drug of concern in the country, given the low number of seizures made.[71]

This reflects the fact that Malawi tends to be viewed by international airport point-of-arrival screening authorities as a low priority origin country for drug smuggling than the departure points of Johannesburg, Nairobi and Addis Ababa. In considering these points, it is therefore possible to consider that there is a far higher frequency of cocaine micro-trafficking loads transiting Malawian airports and border posts than currently is believed.

Crack cocaine is sold in Lilongwe (Malawi) in twists, so named because of the plastic twists – often fashioned from plastic bags – in which the drug is encased.

A crack cocaine rock photographed outside of its plastic packaging. Lilongwe, Malawi.

Mauritius

Mauritius is not considered to be a major consumer destination nor, according to local authorities and a recent independent organized crime threat assessment report, a major transit market for cocaine.[72] Domestically, its use is limited in scope, almost exclusively powder-based, and isolated to a small population subset of the island's wealthier communities. Cocaine is primarily imported by air through Sir Seewoosagar Ramgoolam International airport passenger concealment with concerned routings originating in or transiting through Nigeria, Kenya and South Africa. Smaller amounts are imported also by post.

The single largest seizure of cocaine in the country occurred in Pailles in July 2019 when 90kg was found concealed in a recently imported excavator, which echoed a seizure that occurred in Australia in the same month, both of which had connections to South Africa.[73] That the seizure was made on company premises after the excavator had already cleared customs and import controls raises additional concerns about the roles of both the Anti-Drug Smuggling Unit (ADSU) of the police and the Customs Anti-Narcotics section of the Mauritius Revenue Authority in the import process. Both agencies were criticized for institutionalized corruption and the facilitation of drug trafficking flows in the Commission of Inquiry on Drug Trafficking report released in 2018. The report went so far as to recommend the dissolution and replacement of these agencies with a new government body.[74]

That no other large volume seizures of cocaine have been recorded in the country does not indicate an absence of significant cocaine flows to and through the islands. However, interviews indicated that if such a regular flow does exist, it is likely to be focused on the domestic market, and possibly onward distribution to neighbouring island nations. Currently, trade in other illicit substances, including synthetics, dominates Mauritian drug market flows.

Mayotte

The French Overseas Territory of Mayotte is not yet a major consumer destination or transit market for cocaine trafficked through the region. The local drug market is dominated by heroin and synthetic cannabinoids, and the trade in these drugs is being promoted by an increasing number of domestic and regional networks. However, the growing diversification of these networks regionally, and to an increasing degree, locally, presents a strong risk that existing brokerage and import networks for heroin and synthetics may evolve to diversify their supply chains through the inclusion of cocaine.

This commodity portfolio expansion technique has been seen already with regional Pakistani and Iranian networks, who have incorporated methamphetamine produced in Afghanistan into their established heroin supply chains.[75] It is also reflected in the recent move by some South African-based importers toward an emerging supply chain overlap between Brazilian-origin cocaine flows to Southern Africa and the addition of Brazilian-sourced Mexican methamphetamine into these same channels.[76]

The use of Mayotte as an alternative transit route for smuggling cocaine into the European Union through France is a considered risk. While the absence of a large container port facility on the island does reduce the threat of cocaine entering in contaminated container shipments for onward movement, the fact that there are direct flights from Mayotte's Dzaoudzi-Pamandzi International Airport to EU destinations does present an opportunity for passengers to smuggle small volumes in their luggage or through bodypacking techniques.

Mozambique

Cocaine arrives in Mozambique by sea and air directly from Brazil. Large volume (multi-tonne) shipments arrive in shipping containers offloaded at Pemba and Nacala ports on the northern Mozambique coast. Beira and Maputo ports also see cocaine cargo arrivals. Shipments arrive as well by way of offshore exchanges from a 'mother ship' to smaller fishing vessels, which then transport the cocaine loads to beaches along the Pemba to Nacala shoreline. From there the cocaine is collected and delivered to nearby private warehouse facilities for storage.

The loads are often repackaged into smaller shipments for distribution by trucks moving through Nampula and then heading west to Malawi and its key international airports – Kamuzu in Lilongwe and Chileka in Blantyre – as well as to Zimbabwe. Shipments also head south to Maputo and Eswatini and most importantly, to South Africa. Johannesburg is a primary regional destination as it houses both the City Deep Container Depot and OR Tambo International Airport. Both facilities are notorious for high levels of corruption, and as places from which regular Mozambican cocaine loads are moved to markets abroad.

As noted earlier in this report, smaller volumes of cocaine are moved by air passengers, with the drugs concealed in their luggage, carried on their bodies, ingested, or inserted into body cavities. The micro-trafficking by air of cocaine from Brazil to southern Africa, through the main airports in Johannesburg, Maputo and Addis Ababa, is a regular source of supply to the region.

The long-term presence in Mozambique of the Brazilian cocaine trafficker Gilberto Aparecido Dos Santos (aka Fuminho), who was a close ally of the powerful Brazilian drug gang First Capital Command (Primeiro Comando da Capital), which dominates São Paulo and its port of Santos, could be seen as evidence of the value placed on Mozambique as a drug route. The country has become a regional transit node for the gang's cocaine shipments from Santos port both to the regional market – particularly South Africa – and to Europe and beyond. With its mix of pliable local officials, moderately developed infrastructure, multi-modal transport connections to European markets, a shared language, and a habit of looking the other way when it comes to the movement of illicit goods such as heroin, the gang obviously sees Mozambique as a viable transit point for its cocaine flows.

However, it is important to observe that there are a series of local brokers and facilitators who contribute to the structures that exist to promote and protect the trafficking of cocaine and other drugs in the northern coastal area. They form a constant facilitation presence, and as such no single criminal group can be said to control the flow of cocaine into and through Mozambique. It is a diversity of criminal interests who make use of multiple Mozambiquan supply and distribution channels, including those of Asian, European and African heritage. Therefore the overarching control of the trade, if it can be said to exist in that sense, rests instead with the tight collection of domestic business brokers, government and party officials and other political elites whose actions are central to the sustainability of the cocaine trade across the country.

Cocaine found concealed in luggage by passengers couriering it from São Paulo, Brazil, to Mozambique. **a**: 1 kg brick found in the false bottom of a suitcase, seized in March 2019; **b**: 6 kg hidden in the false bottom of two backpacks, seized in August 2019; **c**: More than 5 kg concealed in the false bottom of a suitcase, seized in March 2021. © *https://www.gov.br/pf/pt-br/assuntos/noticias/2019/03/pf-prende-duas-pessoas-por-trafico-internacional-de-drogas-no-aeroporto-de-guarulhos; https://www.gov.br/pf/pt-br/assuntos/noticias/2019/08/pf-prende-homem-por-trafico-de-drogas-no-aeroporto-de-sp; https://www.gov.br/receitafederal/pt-br/acesso-a-informacao/acoes-e-programas/acoes-da-receita-federal/noticias/2021/marco/8a-regiao-fiscal/receita-federal-apreende-mais-de-7-kg-de-cocaina-em-adega-climatizadora-e-fundos-falsos-de-bolsas-em-cumbica*

In October 2021, Brazilian Federal Police seized 5 tonnes of cocaine concealed in a cargo of soap ready to be shipped from Rio de Janeiro to Mozambique. This was the largest volume cocaine seizure ever in the state of Rio de Janeiro. © *Club of Mozambique,https://clubofmozambique.com/news/watchbrazilian-police-make-biggest-ever-cocaine-seizure-on-shipbound-for-mozambique-202359*

25 kg of foil-wrapped cocaine bricks seized by the National Criminal Investigation Service as it was being transported following its arrival on a beach near Pemba, Mozambique, in April 2021. © *Club of Mozambique, https://clubofmozambique.com/news/mozambiquesernic-seizes-25-kg-of-cocaine-in-pemba-watch-190571*

The offloading of cocaine bundles from a mothership into fishing boats like those pictured here for ferrying to shore is a common method of importing cocaine across the coastal countries of the region. In Mozambique, these loads end up on the beaches of the Pemba to Nacala coastal corridor for pick-up and transport to storage warehouses. In Kenya and Somalia, cocaine is offloaded on the smaller wharves of Kilifi, Malindi and Lamu, and from there to the secured premises of importers.

Réunion

The French Overseas Territory of Réunion is not a major transit market for cocaine trafficked through the region. However, in an interesting development, seizure data and related GI-TOC research indicates that the drug is mostly imported into Réunion from France rather than from African transit points. Cocaine powder is imported in low-volume shipments and is sent largely by post or courier (e.g. fast parcel delivery) packages, as well as by air through contaminated cargo shipments, passenger luggage, and body packing. With an annual passenger volume of 2.3 million, Roland Garros International Airport in the capital, St Denis, gives ample cover for micro-trafficking cocaine couriers to ply their trade.[77]

Although the reported volume of domestic cocaine seizures remains low, interviews with law enforcement professionals and other related informants highlight that the availability and use of cocaine has become more prevalent and widespread locally since 2015. As the domestic demand for cocaine grows, so the cocaine supply chain is beginning to respond.

Seychelles

In the Seychelles, cocaine has a significantly smaller market than heroin, although local stakeholders agreed that it is growing. The trafficking of cocaine to the Seychelles has been described as a relatively new phenomenon, reportedly increasing in popularity among users since early 2019, with notable growth in the production and use of crack cocaine.

Some interviewees believed that cocaine had become more widely available in the domestic market following a recent decline in heroin prices in the past few years, with trafficking networks having diversified their drug portfolio to include cocaine – and crack in particular – owing to its greater profitability. As is the case for some other countries in the region, interviewees indicated that Brazil was the primary point of origin for cocaine entering the Seychelles. Recent seizures appear to support this allegation, identifying Bole International Airport in Addis Ababa as a significant transit point.

A gram of cocaine powder photographed in the Seychelles capital, Victoria. This sample was priced at 5 000 Seychelles rupees, equivalent to €248 per gram.

South Africa

South Africa is the network cornerstone for the distribution and consumption of cocaine in the East and southern African region, and has been a recognized cocaine transit country since at least 1994.[78] It is also a principal transit destination for other regions in Africa as well as markets in Europe, East Asia and Australia. But it also has a large and growing domestic market, both for power and crack cocaine.

The seaports of Durban, Ngqura and Cape Town, the airports of Johannesburg and Cape Town, and the overland border crossings of Beitbridge (with Zimbabwe), Lebombo and Kosi Bay (with Mozambique), Maseru Bridge and Peka Bridge (with Lesotho) and Pioneer Gate (with Botswana), are important nodes for the import, export and distribution of cocaine throughout the region.

The drug arrives in South Africa in large volumes – loads of hundreds of kilograms and more – from Santos port in Brazil in shipping containers, either as a rip-on/rip-off-style shipment, where the container seals are breached and then resealed with fraudulent replacements, or concealed within licit cargo. It is also transferred at sea from a 'mother ship' onto smaller vessels that move it onshore for local storage and onward transport. The Western Cape coastline, with its plethora of fishing vessels, is a conducive environment for the latter; while the port of Durban, which is the busiest in South Africa and processes upwards of 2.9 million TEU annually,[79] is an easy entry point for the former.

The Port of Ngqura on the south-east coast currently handles 745 000 TEU annually, but there are plans by the National Port Authority to expand it to handle much of the container traffic from nearby Gqeberha port, which will challenge Durban's dominance of container traffic.[80] This means the challenge of screening and identifying contaminated containers will also increase as the port's handling capacity increases.

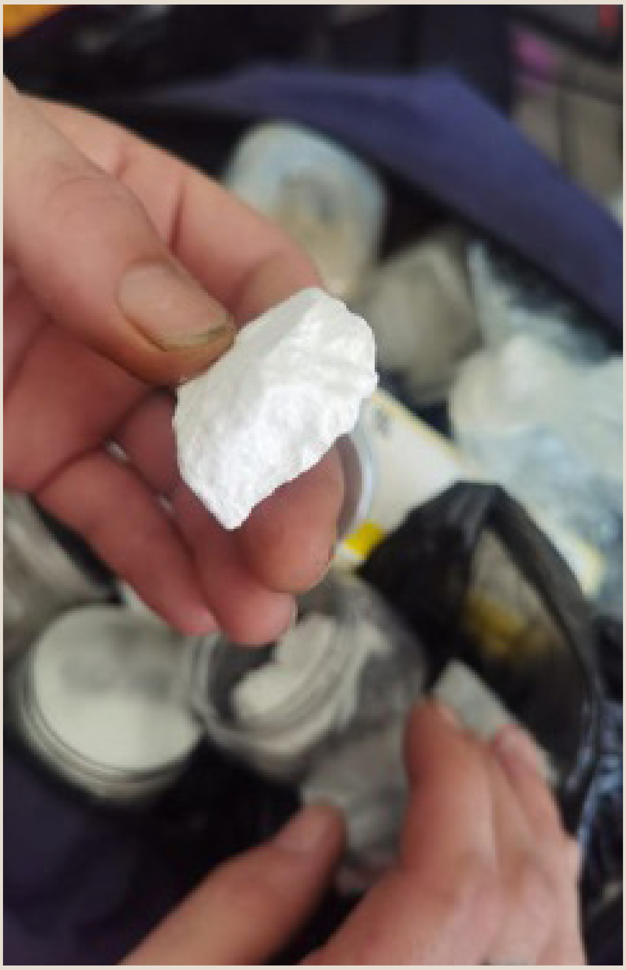
Direct flights between São Paulo and Johannesburg on South African Airways, which was an efficient cocaine trafficking route, ended in February 2020 due to the airline's financial woes. Qatar Airways through Doha and Ethiopian Airlines through Addis Ababa are now the more efficient flight options between the two countries. All four of these airports (Addis Ababa, Doha, Johannesburg and São Paulo) see a high frequency of illicit drug couriers transit their arrival/ departure halls. Cocaine is imported into South Africa also by regional air passengers, originating in departure points such as Nairobi, Lilongwe, and Dar es Salaam, and often by trusted individual couriers who make regular round trips.

The overland importation of cocaine originates from shipments that are landed in Mozambique, Tanzania and Kenya. Loads onshored along the Pemba-Nacala coastline of Nampula province in the north make their way to South Africa by private vehicle. Some of the cocaine landed in Zanzibar and Dar es Salaam in Tanzania has been reported to move overland northwards into Kenya, and then shipped in small consignments back south by public transport and private truck following a circuitous routing that transits Malawi, Zambia, and Zimbabwe before arriving in South Africa.

Alongside being a significant importer of cocaine, South Africa is also a significant exporter of cocaine via the same transport methods. Cocaine is shipped regionally and transnationally from South African air- and seaports. It is alleged that South African territorial waters are home also to ship-based and container-based shipments of cocaine that regularly transit their maritime waters, often without ever landing ashore. Lacking the surveillance and interdiction capacities, funding, equipment and political will necessary to patrol and police its waters effectively in this regard, it is inevitable that these flows will continue to file past the South African coastline, destined for landing points in South and East Asia, and further up the Swahili coastline.

Transport by air of cocaine from South Africa to the Indian Ocean islands by travellers is a growing concern, though the incidence appears to be much lower than the flow of cocaine moving from South Africa to other continental market destinations and relative to flows to these islands originating in Kenya and Tanzania.

In addition to being a supply chain node for cocaine export to the region, South Africa continues to be a significant transit point for cocaine destined for Australian markets. The Australian Criminal Intelligence Commission (ACIC) identified South Africa as the 'key embarkation point' by weight for cocaine seized during the 2018/19 surveillance year.[81] While downgraded by the Commission in its subsequent 2019–2020 surveillance report as a result of data showing lower volumes with a South African origin being seized,[82] interviewees in South Africa say that these operations are unlikely to have stopped.[83] It is believed that air cargo and air passenger concealment from South Africa to Australia[84] continue to take place.



Pressed bricks of cocaine shipped from Brazil and being processed for further distribution after having arrived in Cape Town.

In April 2019, Australian authorities in Sydney seized 68 kg of cocaine bricks concealed in a shipment of wooden furniture that had arrived by container from South Africa. © *https://www.thedcn.com.au/news/law-regulation-trade/large-cocaine-cargo-hidden-in-shipping-container*

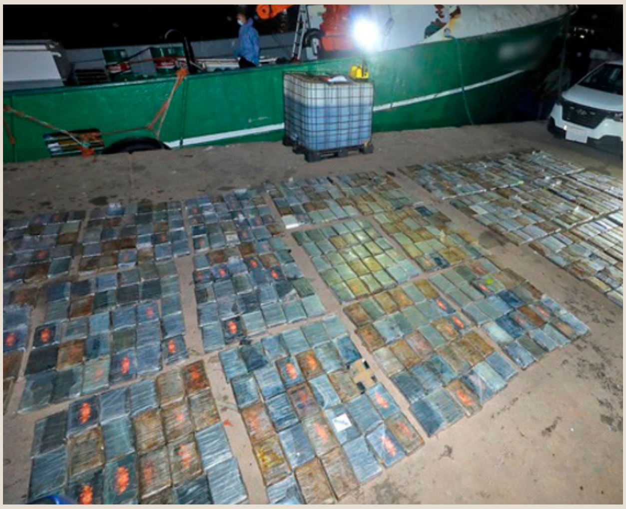
In South Africa, over three-quarters of those who use cocaine use it in its crack form, and use an average of 0.4 g a day. Contrary to popular opinion, cocaine is no longer a drug of the privileged elite. It is now a core commodity of the region's domestic drug markets, particularly in its more popular crack form.

A 1 kg brick of cocaine after being unpackaged on arrival in South Africa. The wholesale price of a brick in Cape Town was between ZAR 350 000 and 400 000, or €19 000 to 22 000.

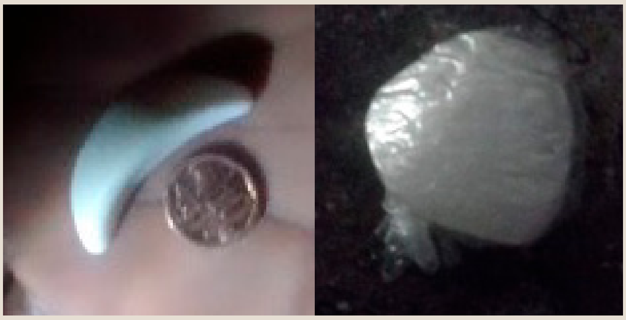
A 'half-moon' of crack cocaine in Johannesburg. A half-moon normally weighs between 1 g and 2 g, depending on the quality of the crack and where it is being purchased. A regular buyer who purchases five or more pieces at a time will be charged a unit price of between ZAR 700 and 1 000 (€39–55) per half-moon; a one-off purchaser will be charged between ZAR 1 200 and 2 200 (€66–121).

Bags of crack cocaine ready for distribution to street sellers in Durban. These were seized by police in December 2020. *© South African Police Service*

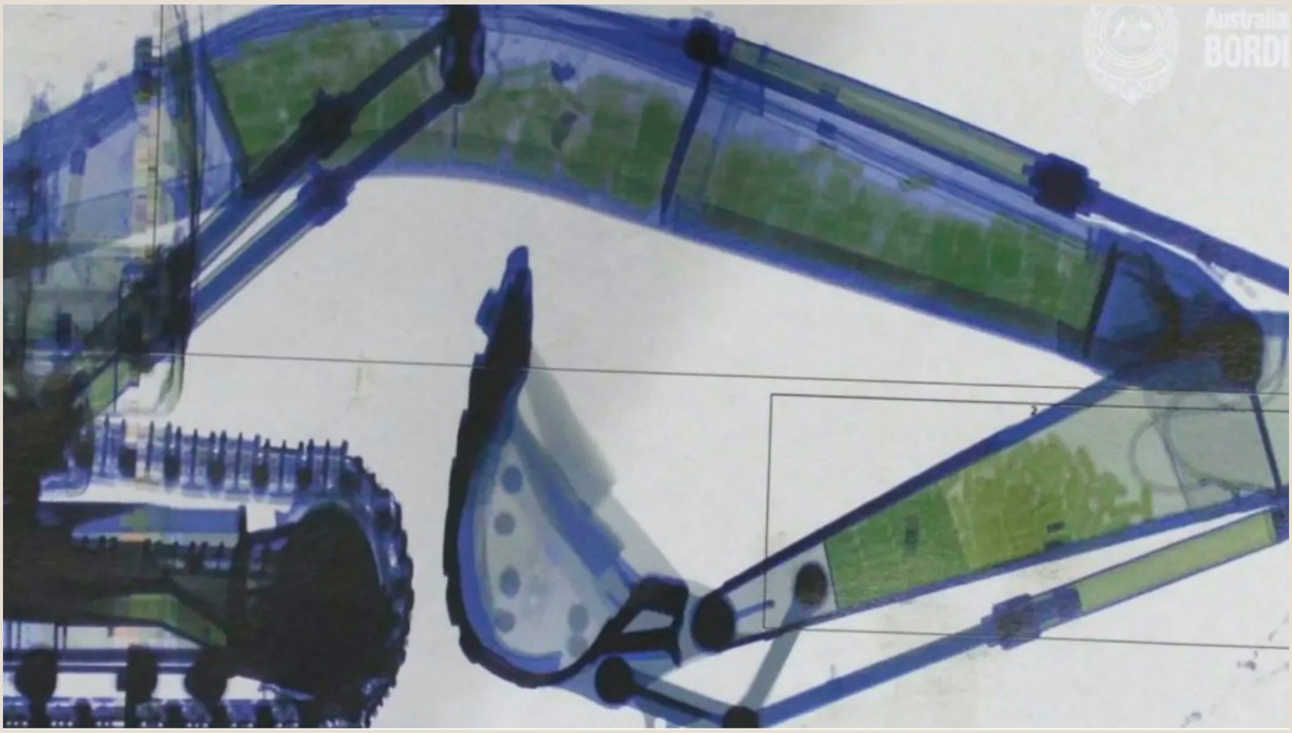
Australian police seized 144 kg of cocaine bricks concealed within the pistons of cylinders for a hydraulic ram located in a container shipment destined for Sydney and arriving from South Africa in October 2020. *© The Sydney Morning Herald, https://www.smh.com.au/national/nsw/sydney-man-charged-after-144-kilograms-of-cocaine-found-in-imported-machinery-20201025-p568dq.html; Daily Maverick, https://www.dailymaverick.co.za/article/2021-12-14-south-africas-lucrative-drugs-highway-to-the-land-down-under*



In March 2021, South African police seized 973 pressed bricks of cocaine weighing nearly a tonne from the hull of a fishing vessel in Saldanha Bay. The vessel, crewed by Bulgarian and Myanmarese members, had received the load from a ship-to-ship transfer at sea and had intended to transit it through South Africa en route to a presumed final destination in Eastern Europe. *© IOL, https://www.iol.co.za/capeargus/news/bulgarian-drug-dealers-caught-in-r580-million-cocaine-bust-sentenced-0532c96d-6733-540c-84c7-88f3f790b432*



Two images of a full moon of crack cocaine. Both pieces weigh approximately 2 g. The image on the left showing a moon-shaped sample is the more commonly available version to be found across much of the domestic drug market. The quality of this version tends to vary in terms of perceived purity, with batches ranging in purity from a strong 1:1 ratio to a much weaker 3:1 ratio. The image on the right is a flatter version of a full moon. This type is reported to be available only from Tanzanian suppliers. Its purity is believed by users to be closer to a 1:1 ratio (i.e. very good quality). The wholesale price paid by local dealers, who purchase it from local suppliers in bulk amounts of five or more pieces, is around R 1 400 a piece. It is sold for ZAR 2 000–2 500 a piece at the retail level.



An x-ray scan showing 384 kg of cocaine bricks found concealed inside the lifting arm of an excavator that was shipped in July 2019 from South Africa to Australia. The concealment was discovered during arrival examination of the excavator at the Port Botany container facility in Sydney, Australia. *© The Sydney Morning Herald, https://www.smh.com.au/national/nsw/over-380kg-of-cocaine-worth-144m-found-inside-excavator-in-nsw-20190715-p527g4.html*

Tanzania

With an annual container handling volume of 9.6 million TEU, the port of Dar es Salaam, and neighbouring Zanzibar (75 000 TEU), are significant entry points for cocaine-contaminated container shipments into the region. Cocaine loads arriving in Zanzibar, a designated freeport rife with corrupt agents, brokers and practices, are easily moved ashore in Dar es Salaam without the need for additional import procedures. From there, the cocaine is transported overland by public transport north to Kenya through Tanga province to the Mombasa/ Kilifi coast and then to Nairobi. It moves west by truck into Kenya at Migori to El Doret and Uganda and also by truck south into Zambia, Malawi and Zimbabwe. While some interviewees reported an onward low-volume coastal flow of cocaine by small boats from Tanzania to South Africa, the veracity of this claim could not be determined during the current research.

Tanzania also is a transnational export source for the micro-trafficking of cocaine to destinations in South Asia and East Asia, with couriers transiting through either Addis Ababa or Johannesburg, often connecting through Doha in Qatar to their final destination. It is also a destination for passenger flights originating in Brazil and transiting through Addis Ababa.

A Tanzanian man was arrested by Hong Kong Customs officers in January 2020 after attempting to smuggle 980 g of cocaine powder into the country. He had ingested the powder, which had been contained in pellets (pictured here). He had flown from Tanzania to Hong Kong via Bole Airport in Ethiopia. *© South China Morning Post, https://www.scmp.com/news/hong-kong/law-and-crime/article/3045089/hong-kong-customs-arrest-traveller-tanzania-nearly-1kg*

Zambia

Zambia has not been seen as a significant destination for cocaine, nor a transit country. However, this may be an inaccurate assessment. Kenneth Kaunda International Airport in Lusaka is a vulnerable structural feature of the local drug market. A well connected and reasonably modern facility, the airport has direct flights to many continental air hubs, as well as to Dubai and Istanbul. Law enforcement and customs measures are lax, and the inland location – away from more established drug trafficking transit points – makes it an attractive potential node to be exploited for the cocaine trade.

Interviewees in the field said cocaine arrives in Zambia overland in trucks and on public transport from South Africa, through Botswana and Zimbabwe, as well as through Tanzania, Mozambique, and Malawi. This cocaine is for domestic consumption as well as for further onward transit, often overland to South Africa or by air through Johannesburg en route to an international destination, with South Asia, and India specifically, being popular stops. It arrives also in Lusaka on passenger flights from regional destinations, particularly Johannesburg.

The drugs are transported easily from Tanzania and Mozambique by road, crossing just one shared border, which is generally managed by easily corrupted agents. As is the case with heroin, it is believed that the volume of cocaine in these regular shipments is less than 10 kg per truck. Domestic cocaine distribution appears to be focused on Lusaka and its surroundings, though cocaine in both powder and crack form is reported to be used widely across the country.

There is some indication that cocaine from West Africa is imported into Zambia overland from the mining town of Lubumbashi in the south of neighbouring Democratic Republic of Congo (DRC). However, it is equally likely that small cocaine loads move through the southern tip of the DRC, known as the Katanga Boot, via the Congo Pedicle Road that bisects it to link Zambia's mining towns.

The movement of cocaine couriers from Zambia to South Asian destinations through Johannesburg and Doha is a concerning feature of the role of Zambia in the regional trade, particularly as this routing appears to be shared by couriers from other neighbouring countries. The Doha connection opens the potential for this courier traffic to target any global location.

Crack cocaine rock for purchase in Lusaka, Zambia. The powder cocaine processed into crack cocaine is imported into Zambia from Kenya by local couriers using trucks, public transport, by migrant workers, and by truck and public transport from South Africa. In both instances, the cocaine transits several neighbouring countries.

Powder cocaine for sale in the retail drug market of Bulawayo, Zimbabwe. Much of the cocaine available here comes overland in trucks and by public transport either from Kenya or South Africa, often transiting Harare first.

Cocaine powder available in Harare, Zimbabwe. Cocaine is shipped into Zimbabwe overland from South Africa by local couriers using trucks, on public transport, or by returning migrant workers; and by truck and public transport from coastal Kenya. Drug couriers travelling by air smuggle it internally or concealed in their luggage. Often these couriers travel from Brazil to Zimbabwe via the major continental air hubs in Addis Ababa and Johannesburg.

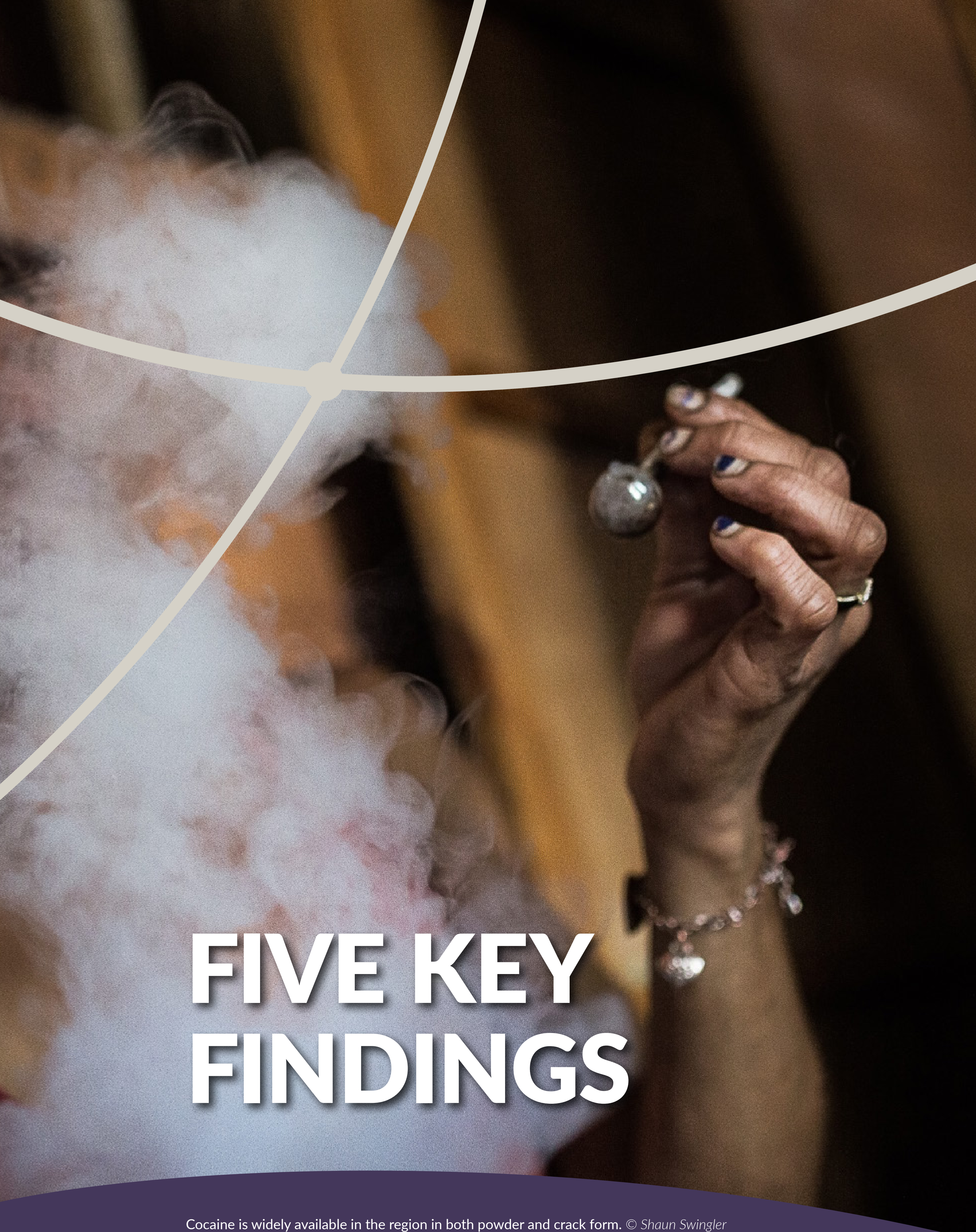
Zimbabwe

Zimbabwe is recognized both as a cocaine transit and destination market. Similar to neighbouring countries, there is a significant flow of micro-trafficked cocaine into the country by air passengers coming from Brazil. The drugs come also from regional cocaine distribution hubs, particularly Angola, Kenya, South Africa and Tanzania. Cocaine enters also overland by truck, public transport vehicles and in the baggage of cross-border traders and migrants returning to the country from South Africa, Mozambique, Zambia and Botswana.

A modest number of arrests of micro-trafficking couriers importing cocaine into the country have taken place at Robert Mugabe International Airport in Harare,[85] as well as the Beitbridge road border crossing with South Africa.[86] It is likely that Zimbabwe is also being used as a micro-trafficking embarkation point for the regional transit of cocaine to international destinations. Arrests of Zimbabwean couriers abroad, and information gained from local interviews, point to this as an issue of concern. India, in particular, seems to be a popular destination market from Zimbabwe.[87]

The domestic cocaine market is alleged to be dominated by a collection of competing interests among high-level government officials and members of the ruling party, the Zimbabwean African National Union–Patriotic Front (ZANU-PF), with the peripheral involvement of other brokers and facilitators. There is some investment in the trans-shipment of cocaine originating from Harare's airport to other destinations in Africa, but this research was unable to provide an estimate of the frequency or volume of such flows. There appear to be few barriers to entry to the trade. Fieldwork determined that cocaine with varying levels of purity is reported to be available to the same retail consumers at roughly the same retail price points.

Given the country's political and economic instability, endemic levels of corruption and the fragility of its broader economic and infrastructural systems, it is unlikely that the cocaine market specifically, and the domestic drug market generally, will become more stable or better organized until these political and economic risks are adequately addressed. But this could be a future area of regional concern.



FIVE KEY FINDINGS

Cocaine is widely available in the region in both powder and crack form. © *Shaun Swingler*

The objective of this research is to contribute to an improved understanding of cocaine flows to and through East and southern Africa by analyzing information on the means, frequency and volume of cocaine consumption, and trade market characteristics in several locations across the region. In considering this objective, we draw five key findings from the research.

1. Cocaine is widely available and used across the region

Far more cocaine is moving to and through the region than is acknowledged by current analysis. Publicly, there is no estimate of the volumes in this regard, and much of the current discourse about African cocaine flows tends to focus primarily on patterns in West and North Africa.[88] Interviews and data analysis generated through this fieldwork, however, suggest the cocaine market in East and southern Africa is substantial.

More specifically, the findings here suggest that the limited presence (or wholesale absence) of cocaine seizures in the region is not an accurate reflection of the volumes of the drug moving around and through the region. In fact, it appears that the absence of frequent high-volume seizures indicates that efforts to reduce the supply of the drug in the region have been relatively ineffective, rather than that significant cocaine supply chains simply do not exist, as some have assumed.

The population size estimates for the focus countries of Eswatini, Kenya, Lesotho, Malawi, South Africa and Tanzania as well as retail market price point and supply chain analysis in an additional 10 countries demonstrates that cocaine use is widespread in domestic markets across the region. This challenges the prevailing view that the frequency and volume of domestic cocaine use in this area is limited and, by extension, that flows of the drug to the region are equally limited in volume and frequency.

The inconsistency of this finding with current perceptions, and the related potential public health and public security consequences, must be considered. The reality is that cocaine is widely available in the region in both powder and crack form. In fact, in many countries its method of consumption has shifted from the traditional snorting of the substance to the more concerning use of intravenous injection as the primary means of use. It is evident that cocaine has been for some time a widely used and traded substance. It should be viewed, alongside cannabis and heroin, as a foundation commodity for many of the region's domestic drug markets.

How much 'pure' cocaine might be needed to meet South Africa's local annual demand?

As an exercise in extrapolation, we can use the initial estimations derived from this research to develop a rough projection of how much pure cocaine might be needed to meet domestic consumer market demand in the largest cocaine market in the region – South Africa.

This research estimates that in 2020, South Africa had a mean population of 350 000 people who use cocaine, with a range from a minimum of 250 000 to a maximum of 475 000 users. Annually, it is estimated that these users consume a mean 18.77 mt of cocaine in the domestic market, an amount that may range from a low of 13.41 mt to a high of 25.47 mt.

Recent national cocaine purity data reported by the South African Police Service (SAPS) and recorded by the UN indicates a purity range from 40% to 80% for cocaine in South Africa's domestic retail market, with a mean purity level of 55%.[89] Based on these values, we may estimate a possible pure cocaine supply range that is necessary to meet the national consumer demand for the drug.

Consumption scenario	Number of consumers	Amount consumed (mt/y)	Purity (%)	Pure cocaine needed (mt/y)
High estimate	475 000	25.47	80	20.38
Mean	350 000	18.77	55	10.32
Low estimate	250 000	13.41	40	5.36

FIGURE 5 Estimation of the possible amount of pure cocaine consumed in South Africa in 2020.

In order to meet its annual retail consumer demand, the market would need somewhere between 5 mt and 20 mt of pure cocaine, much of which would be processed locally with bulking additives to increase volumes for local distribution, a process that would decrease its purity. In addition to providing some speculative insight into cocaine demand, this value range may also be used as a supply-side denominator to contribute to an additional calculation.

How much pure cocaine is moving through South Africa?

SAPS has alleged that at least 20% of cocaine that arrives in South Africa is diverted to the domestic market.[90] The majority of it, they assert, is in transit. Thus, if this 20% disaggregation is to be believed, and based on an assumption that the domestic retail cocaine market in South Africa needs between 5 mt and 20 mt of pure cocaine to meet its annual demand, then we might use these parameters to work out a rough estimate of the volume of pure cocaine that transits through the country in a year.

Consumption scenario	Pure cocaine needed (mt/y) domestically	Estimated volume of pure cocaine transiting through South Africa (mt/y)
High estimate	20.38	101.9
Mean	10.32	51.6
Low estimate	5.36	26.8

FIGURE 6 Estimation of the possible amount of pure cocaine that transited South Africa in 2020.

While entirely speculative, based on these parameters and using the calculated consumer consumption demand as the base metric, it is possible to say that potentially between 27 mt and 102 mt of pure cocaine bricks are transiting through South Africa to other markets, with an additional amount of 5 mt to 20 mt remaining in the country for domestic consumption. Thus, South Africa could be seeing a total of between 32 mt and 122 mt of pure cocaine moving through its borders each year.

While this large range is premised on data with several significant caveats as to its representativeness, these figures should be viewed in the context of an attempt to delineate, in the absence of any other existing estimates in this regard, two theoretical volume extremes – an initial low and high boundary point. The intention here is to contribute to the initiation of a discussion about what might be the real volume of cocaine potentially flowing into and through South Africa, rather than to define this volume directly.

2. Trafficking cocaine within and through the region is a vast enterprise

Not only is cocaine a widespread commodity in the region, but it is also evident that there are large volumes of the drug moving to and through East and southern Africa. Interviews indicate that these flows appear to be regular, multi-modal, and diverse in their volumes and destinations.

The orientation of the movement of the drug can be generalized into three categories:

- Containerized shipments: These are loads originating from Brazil (Santos and Rio de Janeiro) and a smaller number of other transit port facilities. Other Latin American ports have been alleged as secondary origin points for cocaine shipments arriving in the region. The cocaine is often concealed in or among a shipment of licit goods, either as a directly designed shipment of contaminated cargo or in a rip on/rip off arrangement where the container seals are broken and replaced fraudulently. Sometimes the cocaine is concealed inside the container housing itself.

  Containerized shipments carry large loads, often at least a tonne or more, and they tend to be operated or facilitated by established trafficking groups that have long dominated both illicit and licit activity along the coast, and have strong political ties. The cargoes tend to be transnational, often either stored or recanned for further container-based transit either by sea or overland, and often with smaller volumes carved off the main supply for payment to or to sell to local suppliers. Popular ports for these operations are Walvis Bay in Namibia, Durban in South Africa, Pemba and Nacala in Mozambique, Dar es Salaam and Zanzibar in Tanzania and Mombasa in Kenya.

A seizure of 412 kg of cocaine bricks concealed in a container of photocopy paper shipped in June 2018 from Santos, Brazil, to Walvis Bay, Namibia, via Cape Town, South Africa. © *Namibian Police Force*

- General cargo vessel shipments: These loads originate in South America – often Brazil – and arrive as general cargo on various types of vessels. They tend to be smaller cocaine loads (hundreds of kilograms or more). These loads are typically transferred at sea from larger to smaller vessels for ferrying ashore or offloaded onshore at smaller wharves or beaches. These types of shipments tend to be executed by a diverse range of newer entrants to the cocaine (and other drug) trafficking trade environment. They are sometimes, but not typically, locals.

  The loads are a mixture of destination-specific and transit-oriented shipments. After landing, they are separated and shipped overland by truck or private vehicle to regional markets, notably South Africa, and exported by micro-traffickers. Popular areas for these types of maritime shipments are the east and west coasts of South Africa, Mozambique's northern coast between Angoche and Pemba, the coastal waters off Zanzibar and Madagascar, the Kenyan coast from Kilifi to Lamu and the coastal waters of the Somalia-Kenya maritime area.

- Micro-trafficking initiatives: These are the most diverse in their destination and origin profiles, their modes of delivery, and their volume and frequency. Micro-trafficking efforts generally involve cocaine loads of less than 5 kg, though some shipments have been seen in the range of tens of kilograms. Generally, the shipments are manifested in three ways:

  - Using the postal system or a courier (ie fast parcel delivery firm). Regional incidents of this type often involve small amounts of less than one kilogram and the cocaine is concealed within prepackaged, licit items. Such shipments tend to be transnational, either as imports to the region from Latin America, or exports from the region to global destinations such as Australia, India or Canada.

  - Smuggled by airline passengers or flight crews. This involves the concealment of small amounts of cocaine (usually less than 5 kg, and often closer to 1–2 kg) in personal luggage, somewhere on the body, or inside the body – either inserted into an orifice or ingested in the form of multiple condom-wrapped pellets. This is a common method for moving the drug, often via São Paulo airport in Brazil to Africa, where it transits through the air hubs of Addis Ababa and Doha to regional destinations such as South Africa, Mozambique and Kenya. This route was alleged to have been commonly used to move cocaine from Brazil to South Africa by passengers and crews on South African Airways' direct flights to the country, until that route was discontinued.

    This mode of smuggling is popular also for the transnational export of cocaine from the region. Larger loads of cocaine that have arrived by ship (or in unaccompanied air cargo) are broken up into smaller volumes and filtered through regional airports, decreasing the risk of detection.[91] Airports involved include those in Lilongwe and Blantyre in Malawi, Lusaka, Nairobi's Wilson Airport, Gaborone in Botswana and St Denis in Réunion.

Low-level couriers make regular deliveries, transferring cocaine in multi-gram amounts further down the distribution chain. This courier transports cocaine by concealing the packaged powder under his trouser leg.

Powder cocaine often is moved through and between regional markets by public transport, particularly on minibuses. In this example, the driver was being paid the equivalent of €12 per gram of cocaine delivered. The shipment photographed here, packaged in orange plastic and stored under a passenger seat, is being delivered from a major city to a coastal town.

Pictured here are law enforcement personnel operating an informal checkpoint on an informal border crossing route, and taxing traders as they pass.

- In unaccompanied baggage. The use of passenger luggage is a common tactic. It requires the use of an inside source – a compromised or complicit staff member – at origin and destination airports. This individual ensures the bag is placed on the designated flight at origin, and a similar agent at the destination awaits the shipment and ensures its safe removal from the hold and the airport premises to the intended recipient. This was a common method allegedly used to move cocaine from Brazil to South Africa on the direct flights of South African Airways before the route was terminated. Interviewees have alleged that this method of concealment continues to be used today to move cocaine (and other drugs) from South Africa to Australia. Allegations were made by some interviewees that this mode was employed for the distribution of cocaine from the region to European countries via Bole and Doha airports, although it was not possible to confirm these allegations during the course of this research. The risk posed by these flows should be considered for further investigation.

  South Africa appears to be the most popular regional destination for this method of importing cocaine, followed by Mozambique. South Africa is also a prominent regional exporter of cocaine, particularly through Johannesburg's international airport. Bole International Airport in Addis Ababa is also a main hub for micro-trafficking using passengers and unaccompanied cargo.

It has become evident from this research that cocaine is not an outlier commodity flowing intermittently through the drug markets of East and southern Africa. It is popular with consumers and a growing part of the regional drug trade. These findings suggest that existing perceptions of the region as a peripheral component of the continental (and global) cocaine trade need to be reviewed.

3. The Mozambique Channel is a thriving cocaine corridor

The Mozambique Channel has been identified as the next security hotspot.[92] An important container and tanker maritime transit route linking the Atlantic Ocean to the Indian Ocean and beyond, its strategic importance as a global shipping corridor was reinforced by the temporary closure of the Suez Canal in March 2021.[93] While it is a main trade route for licit trade, a large volume of illicit goods, and drugs in particular, also move through the channel.[94] This includes westerly transnational flows of heroin and methamphetamine from Afghanistan, and Chinese- and Indian-sourced precursors for synthetic drug production. It also includes easterly flows of cocaine from Brazil and other Latin American embarkation points. Another feature of the channel is its use by a wide range of smaller traditional fishing and cargo vessels moving illicit drugs intra-regionally.[95]

This growing perception of the channel's strategic importance exists alongside a growing realization of its significant surveillance and security vulnerabilities. Coastal states bordering the route lack the capacity to undertake any meaningful marine monitoring and enforcement actions in their territorial waters along the channel, or in either of its maritime approaches.[96] For example, none of these states has a meaningful coast guard. The Madagascar Navy has just seven patrol boats and one coastal patrol craft to cover its 5 500km^2 of territorial waters, while Mozambique has 13 patrol craft and South Africa has four.[97]

There have been discussions about the adoption of active and passive technological solutions for maritime surveillance. These include the use of unmanned aerial vehicles and camera systems, passive coastal radar sensors, and the real-time monitoring of automatic identification system signatures. However, the economic and technical viability of such solutions for affected countries remains fiscally and technologically impractical at this stage.[98] Further, with defence budgets shrinking as governments focus on other priorities, particularly in the wake of the COVID-19 pandemic, the prospect of a coordinated, dedicated and capable subregional coastal and maritime response to intercept illicit drug shipments through the channel remains remote.

As a result of this, the Mozambique Channel should be viewed as a growing regional security threat. The chronic maritime and port surveillance and interdiction deficiencies of countries along the channel are likely to increase Madagascar's importance as a transnational breakbulk, storage and distribution node for cocaine. This raises the likelihood that the country will soon become a regional trans-shipment hub for cocaine and other illicit cargo, well beyond the tertiary role it is thought to fill now.

Thirty cocaine bricks were found stuffed in the cooler housing of a sea container that was being transported from Santos, Brazil, to a port in China in February 2021. The cocaine was offloaded by police at Ngqura port, South Africa. *© South African Police Service*

In December 2021, two bundles of cocaine bricks totalling 46 kg were found washed ashore at Jeffreys Bay, in the Eastern Cape. Police indicated that the source of the shipment was undetermined. The presence of a GPS transmitter in the bundle appears to indicate that the cocaine was part of a larger load that was jettisoned in the waters offshore by a transiting vessel for later collection at sea to be ferried ashore by smaller boats, but was missed. *© South African Police Service; Times Live, https://www.timeslive.co.za/news/south-africa/2021-12-15-cocaine-worth-r20m-washesashore-on-jeffreys-bay-beach*

4. Domestic drug market surveillance and data are limited

The absence of current empirical data on the use of and trade in cocaine across the region is a symptom of a wider problem. Specifically, it shows the paucity of available, relevant and current drug market surveillance data for all drugs across the region. This is a consequence of the poor production of national drug data and inadequate dissemination of what is available.

The first problem is the fact that many regional states lack either the financial or human resources, technical capacity, or national institutions and systems necessary to undertake regular data collection or monitor local drug markets. As a result, no data is collected. It is particularly noteworthy that most countries in the region cannot quantify the most basic fact about their domestic drug markets – how many people in the country are using substances? For example, in a review of all available population size estimates published between January 2009 and December 2017, researchers identified only five studies that gave an estimate of the number of PWUD in the East and southern African region.[99] Of the five, three were in Kenya and two in Tanzania.[100]

Where data does exist, access to it and the distribution of it is a second limitation to regional drug market surveillance. Often, policymakers, reporting bodies and other potential consumers of such data are unable to access it, or even know of its existence. One reason for this is fragmentation. Data often can be collected by several national entities, such as law enforcement or health departments, but there is no clear coordination or reporting relationship in place for its collation and dissemination.

This is complicated by obstructions to data as a result of bureaucracy and other types of government obstruction. This occurs often with law enforcement-related data sets. Internally, this absence of or lack of access to empirical evidence is a challenge for national policymakers, public health and public security individuals and institutions alike, hampering their ability to design, implement and monitor the impacts of domestic drug-related policies and programmes. The situation also has external challenges, raising problems that go beyond just the issue of cocaine.

Every country in the region is encouraged by the UN to complete and submit a voluntary UN Annual Report Questionnaire (ARQ) on national drug demand and supply indicator data that is distributed each year by the UN Office on Drugs and Crime (UNODC). The data from the ARQ is a key element of the UN's annual World Drug Report, launched each June on World Drug Day. Across the region, response rates to this annual reporting exercise are poor. In fact, over the past six years of ARQ reporting periods (for data included in the World Drug Report published between 2016 and 2021),[101] only three of the 21 countries in the region ever submitted a response that was adjudged by the UN to have been 'substantially complete'.[102] Taking into account incomplete submissions,[103] over this six-year period only 10 regional countries in total submitted a response at all.[104] Put differently, more than half of the region has failed to submit even one ARQ response in the past six years.[105] This highlights the scale of the problem.

In 2016, the African Union established the Pan-African Epidemiological Network on Drug Use (PAENDU). Its creation was in response to the AU's recognition of the paucity of drug-related data production and availability in Africa, and the need for a continental system of surveillance to address this problem. Fifteen of the 21 countries in the East and southern African region had become members of the network by the end of 2021, with 11 of them having received AU assistance to establish their own national drug epidemiological networks.[106]

The reporting focus of this AU annual surveillance exercise is not that different from the demand and supply data requirements that constitute the ARQ submission, and, as such, it suffers from the same limitations on data availability and accessibility. While there are good intentions involved in the participation by countries in this surveillance project, technical capability is a far greater indicator for how beneficial such an arrangement will be in mitigating the dearth of current and relevant data in the short term. Good intentions may be important, but they cannot make up for chronic institutional incapacities and technical deficiencies in statistical monitoring and programme design.[107] These can only be resolved through sustained financial investment in the development of capable systems and people over time.

Country	WDR 2021	WDR 2020	WDR 2019	WDR 2018	WDR 2017	WDR 2016
Angola	No	Partial	Partial	Partial	No	No
Botswana	No	No	No	No	No	Partial
Burundi	No	No	No	No	No	No
Comoros	No	No	No	No	No	No
DR Congo	No	No	No	No	No	No
Eswatini/Swaziland	No data	No data	No data	No	No	Partial
Kenya	Yes	Yes	Partial	Yes	Yes	Yes
Lesotho	No	No	No	No	No	No
Madagascar	No	Partial	Yes	Partial	Yes	No
Malawi	No	No	No	No	No	No
Mauritius	No	Partial	No	Partial	Partial	No
Mozambique	Partial	Partial	No	Partial	Partial	No
Namibia	No	No	No	No	No	No
Rwanda	No	No	No	No	No	No
Seychelles	No	No	No	No	No	No
South Africa	No	Yes	Yes	Yes	Yes	No
South Sudan	No	No	No	No	No	No
Tanzania	No	No	No	No	Partial	No
Uganda	No	No	No	No	No	No
Zambia	Partial	Partial	Partial	Partial	Partial	No
Zimbabwe	No	No	No	No	No	No

FIGURE 7 ARQ response rate for countries of East and southern Africa for the reporting period of the World Drug Reports (WDR) published from 2016–2021.

Country	PAENDU member	National drug surveillance network established with AU support
Angola	Yes	x
Botswana	Yes	x
Burundi	No	
Comoros	Yes	x
DRC	No	
Eswatini	Yes	x
Kenya	Yes	Pre-existing
Lesotho	Yes	x
Madagascar	Yes	x
Malawi	Yes	x
Mauritius	Yes	Pre-existing
Mozambique	No	
Namibia	Yes	x
Rwanda	No	
Seychelles	No	
South Africa	Yes	Pre-existing
South Sudan	No	
Tanzania	Yes	x
Uganda	Yes	x
Zambia	Yes	x
Zimbabwe	Yes	
	15/21 members	**11/15 supported by AU**

FIGURE 8 African Union Pan-African Epidemiology Network on Drug Use (PAENDU) membership status among East and southern African countries, 2021.

While current formal drug market data may be absent across much of the region, this does not preclude glimpses of the situation being provided by periodic, geographically specific and often project-based rapid assessment or consensus-driven estimation exercises. Often, they are done with a single government partner (most commonly, the Ministry of Health or a public security-oriented ministry) and under the guise of narrow public health project activities. An example is funding application needs for an HIV-related programme body such as the Global Fund or the US President's Emergency Plan for AIDS Relief (PEPFAR).[108] These have tended to focus on defining the smaller population subset of people who inject drugs, rather than on defining the much broader constitution of PWUD.

The heavy reliance on external funding to promote drug market surveillance programmes is a third limitation – alongside data production and access – of many countries in the region to produce and distribute regular and reliable data on their drug markets. Often it is the poorest countries with the fewest resources that have the greatest need for investment in domestic surveillance, and lack the capacity and funding to do it. The absence of regular national budget funding across most regional countries for drug market surveillance programming, and the continued evaporation of international funding efforts to regional countries in this regard, is an indication that these surveillance deficiencies should be expected to continue.

While no single dataset or metric can provide a comprehensive picture of cocaine (or other illicit drugs) flows in the region, or of the many domestic illicit drug markets that constitute the regional market, each available data source does have its benefits and limitations and each can contribute to an improvement in overall comprehension. It is only through the layering of multiple data, across a variety of perspectives, that we are able to enhance our understanding of the extent of the supply and demand trends within and across the region's illicit cocaine and drug markets. As such, improving surveillance systems across African drug markets is a necessary measure if we are to begin to understand better what is really happening in these markets today, rather than continuing to proceed on the basis of what we think we know about them.

A glimpse of surveillance challenges in the region

A small example of the surveillance challenges in the region can be drawn from the experience of gathering current retail cocaine prices for South Africa. One of the few countries that attempts to make an ARQ submission to the UN each year, efforts are being made in South Africa to improve the breadth and utility of data available to monitor domestic drug markets. During the fieldwork for this report, two approaches were used to collect retail price data for cocaine in the country. The first involved data gathered by SAPS, which was intended to inform a proposed national monitoring database on drug market substances. The second involved price data collected by a network of trained PWUD field researchers. Both resources collected data regionally and locally.

Law enforcement-derived data

The collection of this data forms one component of a programme of cooperation between the GI-TOC and the SAPS, and is the foundation of a three-year programme of support that aims to build and maintain a national drug price monitoring database for the country. In South Africa, as in the rest of the region, much is unknown about the market system supporting and facilitating the importation, distribution and use of cocaine and other illegal substances.

As is the case in all drug environments, law enforcement interdiction efforts may provide sporadic glimpses of the domestic market system. However, a holistic understanding of how cocaine is sold, in what quantities it is sold, what prices are paid and how these vary within and between markets, and how the distribution processes are organized, remains incomplete. Gaining a better understanding of the contextual and structural characteristics of South Africa's drug markets not only grounds this relationship with the SAPS: it underpins the reasoning behind the regional research in this report.

PWUD-derived data

The data from PWUD sources was collected across the same timeframe, and in many of the same locations, as that collected and reported by SAPS in their price monitoring research. The PWUD data on retail prices showed the wide range of available pricing in research locations. However, it also revealed some significant variations in local price points compared to that of the SAPS in several instances and across many locations. This is highlighted by comparing retail price ranges in three of the biggest urban cocaine markets in South Africa.

While these price points were gathered by different entities, they were collected using similar research approaches in the same markets over the same timeframe. There are at least three possible factors contributing to the variation described above:

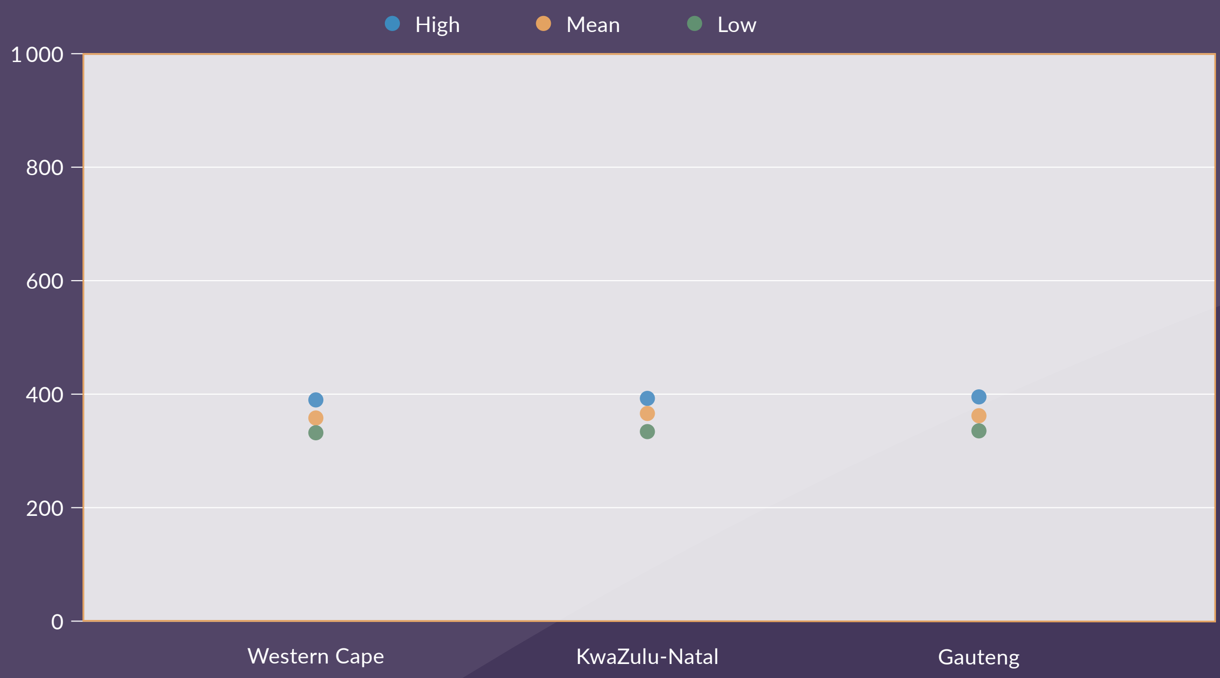


FIGURE 9 Retail price data (ZAR/g) for powder cocaine in three major South African drug markets, January 2021, reported by SAPS.

FIGURE 10 PWUD-reported retail price data (ZAR/g) for powder cocaine in three major domestic drug markets of South Africa, January 2021.

- Purity: Researchers were unable to get permission from national law enforcement authorities to test the purity of drug samples. As a result, they were unable to examine potential correlations between retail prices and cocaine purity levels, something that is an important element of drug market analysis. Thus, the absence of price correction of data sets for purity leaves the potential for misrepresentation caused by a like-to-like price comparison of vastly pure and vastly impure samples. This raises the possibility that there was a substantial difference in purity between samples collected by the SAPS and those collected by PWUD researchers.
- Weight measurement: PWUD field researchers used digital scales to weigh each sample with and without its packaging in order to equate retail prices with product weight. As with heroin and methamphetamine, cocaine powder and crack sell for a much higher unit price when retailed in units of less than a gram of weight.[109] Reported retail gram prices, therefore, were calculated by extrapolating these price/weight data points to a gram weight equivalency. SAPS researchers did not verify retail sample weight by using scales or other measures. Thus, the absence of a price-per-weight verification significantly affects SAPS data with regard to collecting and reporting accurate gram weight conversions.
- Price point source: PWUD researchers participated in a process of mapping each retail market environment prior to fieldwork. This included mapping the primary cocaine market distribution sites in a particular sub-market, as well as the variety of distributors therein. These peer researchers then interviewed a diversity of local cocaine users and distributors, and collected price point data and images at each of the sample sites.

SAPS cocaine price data was provided by street-level law enforcement agents and informants, in a simplified manner, and without user or distributor interview filters to validate the recorded price samples. Alongside the abovementioned weight verification deficiency, this price point source bias may be an additional limitation to the SAPS data. While each price they collected may reflect one particular retail price within the market, the absence of a spatially diverse approach with user and distributor in-person price verification, and the limited number of price points collected per site sample, increases the likelihood of a significant bias in terms of the accuracy and potential representativeness of SAPS results.

In light of these differences, further price sampling verification was done by PWUD researchers in a subset of cocaine market locations following the conclusion of the formal fieldwork phase. The purpose was to determine whether, given the discrepancies with SAPS data, PWUD price points may have been incorrectly calibrated. Additional user and dealer interviews were undertaken, more samples were weighed, and inventories were done. Users were asked an informal series of questions about their perception of the purity of cocaine in samples.

Further research found that the follow-on price point data identified by PWUD was consistent with their earlier reported numbers. While price points in the range reported by SAPS were identified as well, this additional period of examination showed that the SAPS values were a limited subset of the wider and more diverse retail price points available in the marketplace.

The same type of retail price value discrepancy was found when examining drug price data provided by law enforcement agencies from other countries in the region.[110] Thus, while some retail price data is occasionally released by a subset of law enforcement bodies across the region, the representativeness of these values should be considered carefully in the context of regional surveillance and analysis efforts.

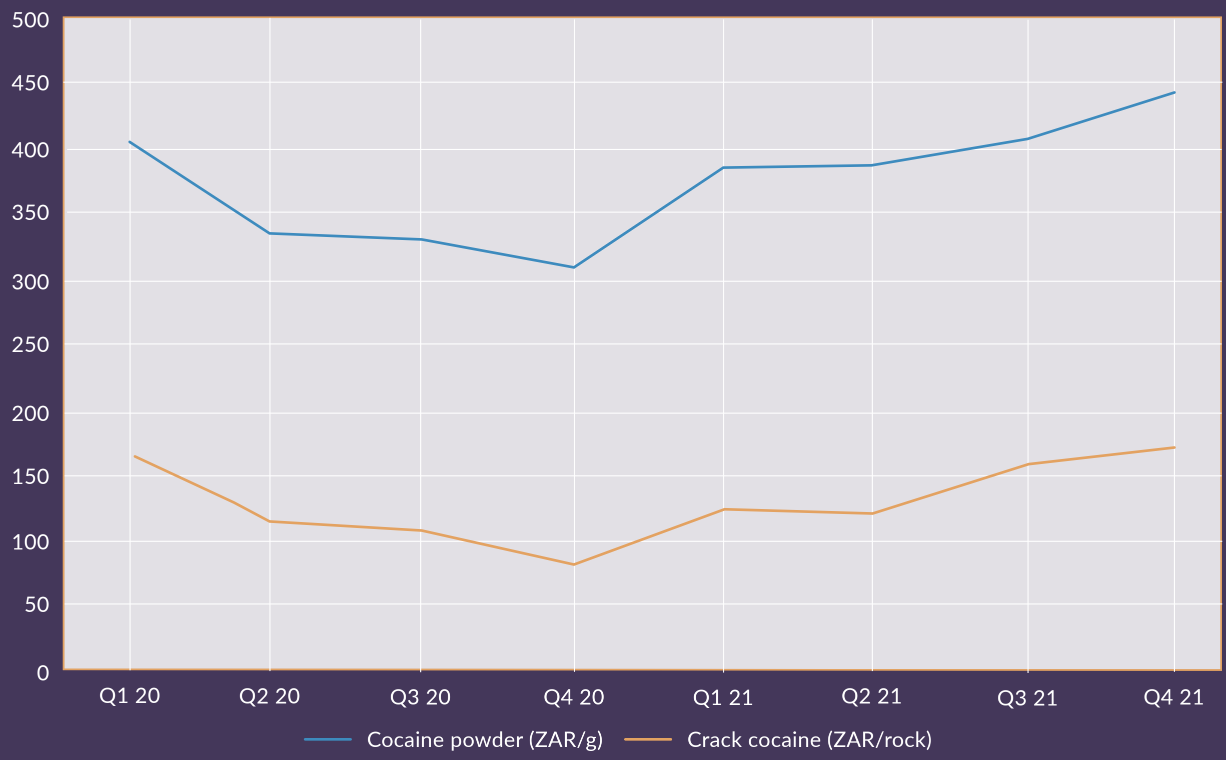


FIGURE 11 Quarterly retail national retail price for cocaine powder (ZAR/g) and crack cocaine (ZAR/rock), South Africa, 2021–2021.

5. Regional cocaine markets are being sustained by dysfunctional governments, and institutional complicity and corruption

Complicit, compromised or corrupted political elites, government bureaucrats, prominent businesspeople and security officials play a significant role in supporting and sustaining the regional cocaine trade. These individuals and, by extension, their captured institutions, are key enablers of the regional and transnational cocaine trade from its Andean origins to regional and global market destinations. The trade is fuelled by the collusion of corrupt and captured state agencies with drug networks, exacerbated by weak law enforcement capacity, incompetence, and in some cases, indifference.

Curious incidents and allegations of judicial and ministerial corruption related to the drug trade regularly arise in the region. For example, in Zimbabwe a Venezuelan woman arriving from Brazil was caught at Harare airport in June 2018 with nearly 6 kg of cocaine in her luggage. She was fined only US$700 and deported by the magistrate who presided over her case.[111] This sentence was significantly milder than other sentences handed down for similar offences. In the previous year, a Zimbabwean woman found smuggling 3.8 kg of cocaine from Brazil to Harare was sentenced to 10 years' imprisonment,[112] while another was sentenced to four years in jail for smuggling just 274 g of cocaine into the country.[113] The magistrate eventually was arrested and charged with abuse of office, which a government spokesperson equated to corruption.[114]

In October 2021, the Malawian government opted to deport two Nigerian 'drug kingpins' rather than pursue prosecution, a move that was regarded unfavourably by the public.[115] In February 2021, Malawian cabinet minister Timothy Mtambo was implicated by the Malawian press for allegedly shielding his bodyguard, who was previously arrested on drug-related charges.[116]

In Mauritius, the Commission of Inquiry on Drug Trafficking concluded that the two main law enforcement bodies responsible for leading the country's efforts against drug trafficking should be disbanded due to irreparable levels of institutional corruption.[117]

There are persistent incidents and allegations of corruption among regional law enforcement institutions and their staff. In one instance, at least 16 South African police officers assigned to OR Tambo International Airport in Johannesburg were arrested on charges of systematic theft of cocaine and other drugs that had been confiscated from drug couriers at the airport.[118] In Mozambique, police were accused of stealing and selling 100 kg of seized heroin and methamphetamine.[119]

A Zimbabwean police officer was arrested for smuggling drugs to India.[120] There was the curious case of more than half a tonne of seized cocaine allegedly being stolen from a secure police locker during a weekend break-in at an office housing South Africa's elite organized crime unit, the Hawks.[121] Eleven Malawian police officers were arrested for the alleged theft of MWK 1 billion (€1 million) from the Malawi Police Service budget.[122]

In fact, law enforcement corruption is seen by much of the region's population as an endemic feature of policing. In many countries, law enforcement bodies are perceived as being the most corrupt of all national institutions. This is the case in Kenya,[123] Lesotho,[124] Mauritius,[125] Namibia,[126] Uganda,[127] Zambia[128] and Zimbabwe,[129] among others.

Three South African police officers were arrested in July 2021 after they were found transporting 23 bundles of cocaine (totalling 552 pressed bricks) from Durban to Johannesburg in a convoy of government vehicles. This shipment constituted nearly 600 kg of pure cocaine.
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In June 2021, South African police seized 541 kg of cocaine concealed in a container of animal food at the port of Durban.Commingled with the licit cargo, the cocaine was bundled in canvas bags, and branded with TikTok and Jaguar labels. Five months later, this seized load was alleged to have been stolen from a secure police locker during a break-in at an office of the country's elite organized crime unit, the Hawks.
©TimesLive,https://www.timeslive.co.za/news/south-africa/2021-11-10-r200m-cocaine-stolen-from-hawks-offices-in-kzn-was-fromdrugs-seized-in-june-bust

CONCLUSION

Drug policies that focus on domestic enforcement and interdiction of supply are not working, as drug supply and consumption appear either to be stable or increasing across the region.
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The volumes of cocaine flowing into and through East and southern Africa appear to be significant. The findings of this fieldwork, as well as those from other recent research initiatives, affirm that the coastal ports in South Africa, Mozambique, Tanzania and Kenya seem to be the primary nodes of domestic, regional and onward transnational distribution of cocaine.[130] The frequency of inter-regional smuggling of cocaine overland and on passenger flights appears to be high, with couriers moving drugs through the region to Europe, South Asia and Australia. The intra-regional movement of cocaine is a significant feature of the trade, with regular volumes moving overland from ports and coastal storage points.

The policy shift towards continental free trade arrangements, and the consequent push for easier movement across borders, will have implications, too, for the movement of cocaine and other illicit goods between countries in the region. Making it easier for goods and people to move across borders in Africa will make it harder to control the flow of illicit goods through checkpoints.

An added problem is that conservative drug policies that focus on domestic enforcement and interdiction of supply are not working. Drug usage and supply appear either to be stable or increasing across most markets. The diversity of substances available is increasing, such as flows of methamphetamine from Afghanistan and Brazil, heroin from Afghanistan, and new synthetic substances are appearing in the market. Current drug policies, and the regional political partnerships that are derived from it, seem to be failing in their efforts to monitor, prevent, seize or disrupt cocaine flows to and through the region. Alternative approaches are now required.

In conclusion, research shows that the cocaine markets of East and southern Africa occupy an important role in the successful transnational flow of cocaine. The region is not a peripheral transit trade route for drugs, and it is not simply a marginal element of the expanding global cocaine trade. Instead, it sits at the intersection of maritime and aerial flows of drugs from South America to Asian, European and Australian destinations, while also being a growing destination market itself.

The cocaine markets of the region are structurally sound and, in several instances, economically and politically embedded, with established links to complicit, corrupted and captured state actors and institutions. This region is no longer on the periphery of the global cocaine trade: it is a critical part of the chain.

NOTES

1 In its 2021 International Narcotics Control Strategy Report, the US Department of State called for the resumption of spraying as a core tool to respond to the expanding hectarage of coca cultivation in Colombia, a practice that Colombia suspended in 2015. In April 2021, a month after the publication came out, the Colombian Ministry of Defence announced its intention to resume the use of aerial glyphosate spraying of coca fields.

2 EMCDDA, European drug report 2021: Trends and developments, EMCDDA, Lisbon, 2021.

3 See, for example, Robert Muggah, The pandemic has triggered dramatic shifts in the global criminal underworld, *Foreign Policy*, 8 May 2020, https://foreignpolicy.com/2020/05/08/coronavirus-drug-cartels-violence-smuggling/; Anthony Faiola and Lucien Chauvin, The coronavirus has gutted the price of coca. It could reshape the cocaine trade, *The Washington Post*, 9 June 2020, https://www.washingtonpost.com/world/the_americas/coronavirus-coca-crash-bolivia-colombia-peru-latin-america/2020/06/09/8c7da42c-a11f-11ea-be06-af5514ee0385_story.html.

4 Jason Eligh, Crisis and opportunity: Impacts of the coronavirus pandemic on illicit drug markets, GI-TOC, 2020.

5 Estimates included record coca cultivation and cocaine production in Colombia (245 000 ha and 1 010 mt) and Peru (88 200 ha and 810 mt), and near-record levels in Bolivia (39 400 ha and 312 mt). ONDCP, ONDCP releases data on coca cultivation and potential cocaine production in the Andean region, ONDCP press release, 25 June 2021, https://www.whitehouse.gov/ondcp/briefing-room/2021/06/25/ondcp-releases-data-on-coca-cultivation-and-potential-cocaine-production-in-the-andean-region/.

6 Jeremy McDermott et al, The cocaine pipeline to Europe, GI-TOC and InSight Crime, 2021.

7 Lucia Bird, West Africa's cocaine corridor: Building a subregional response, GI-TOC, 2021.

8 Mark Shaw and A. Gomes, Breaking the vicious cycle: Cocaine politics in Guinea-Bissau, GI-TOC, 2020; Summer Walker, *Mission not accomplished? UNIOGBIS closes amid uncertainty in Guinea-Bissau*, GI-TOC, 2021.

9 The arrest in Mozambique of a top Brazilian cocaine trafficker raises questions about the region's role as a cocaine trans-shipment point, Observatory of Illicit Economies in East and Southern Africa, Risk Bulletin, Issue 8, 2020, 9–14.

10 For example, in a recent United Nations and Europol analysis of cocaine flows from Latin American origin points to European market destinations, there was no mention of any cocaine supply chains transiting through East or southern Africa to Europe. This should not be surprising given both the geographic proximity of west and north African nations to the European mainland, and the consequential security threat focus by EU forces recently on this nearby coastal periphery. Both factors contribute to a reinforcement of what has remained the status quo view on cocaine transit to Europe. While cocaine transit through myriad west and north African states is clearly a feature of some trans-Atlantic supply chains to Europe, as evidenced by recent seizure data, the comparative paucity of cocaine seizure data available from East and southern African nations should not in and of itself preclude the discussion about whether or not there are European supply chain connections through any of these popular bulk goods transit destinations as well. Yet, the report concluded with a recommendation to consider only how the role of west and north African countries have evolved as transit countries to Europe, without considering any potential wider continental flow dynamics. See UNODC and Europol, The illicit trade of cocaine from Latin America to Europe: From oligopolies to free-for-all? Cocaine Insights 1, UNODC, September 2021.

11 For example, see the analysis of cocaine flows transiting ports in eastern Africa included in Alastair Nelson, Triangle of vulnerability: Changing patterns of illicit trafficking off the Swahili coast, GI-TOC, June 2020; see also the description of cocaine flows through the Indian Ocean islands in Lucia Bird et al, Changing tides: The evolving illicit drug trade in the western Indian Ocean, GI-TOC, June 2021.

12 This number includes the 'Saldanha seizure' (973 kg) in March (https://www.dailymaverick.co.za/article/2021-03-02-king-coca-branding-and-other-clues-in-huge-r583m-cocaine-bust-off-saldanha/); the 'ski boat seizure' in Johannesburg (800 kg) in June (https://www.iol.co.za/news/south-africa/gauteng/pics-cops-find-cocaine-worth-r400m-in-12-foot-ski-boat-being-towed-by-bakkie-on-the-n1-6926dcee-0383-5885-9e73-f69a3afad769); the 'TikTok seizure' in Durban (541 kg) in June (https://www.news24.com/witness/news/durban/millions-of-rands-worth-of-cocaine-seized-at-isipingo-near-durban-20210623); the 'dirty cops seizure' (552 kg) in July (https://www.news24.com/news24/southafrica/news/cops-traffic-chief-among-those-arrested-in-r200m-

cocaine-bust-20210709); the 'car parts seizure #1' (715 kg) and 'car parts seizure #2' (1 mt) in July (https://www.news24.com/news24/southafrica/news/cocaine-worth-r500-million-disguised-as-truck-parts-seized-at-durban-harbour-20210808); and, the 'wooden flooring seizure' (600 kg) in November (https://www.saps.gov.za/newsroom/msspeechdetail.php?nid=36661).

13 The GI-TOC has undertaken research to challenge these limited views of Africa's peripherality by generating current data to contribute to fact-based discussions grounded in the current reality of African drug markets. Reference is made in this paper to many of these GI-TOC research initiatives and reports.

14 It is important to note also that as early as 2011, the prospect of an emerging cocaine route linking Latin American suppliers with southern Africa through Brazilian flows was raised by researchers at InSight Crime. See Hannah Stone, Brazil arrests point to southern Africa cocaine trade, Insight Crime, 3 August 2011, https://insightcrime.org/news/analysis/brazil-arrests-point-to-southern-africa-cocaine-trade/.

15 For example, basic surveillance systems that generate relevant, regular data on the estimated number of PWUD, what drugs are used, how they are used, and the retail price and purity statistics for these substances are absent. In their place arrest figures, seizure data and treatment statistics are employed instead, even though these metrics are inadequate proxies for missing market-based analytics.

16 The annual World Drug Report is one such instrument that is perceptually biased by an absence of data from these states. For its analytical projections, it relies a great deal (though not exclusively) on information derived from the voluntary annual reports questionnaire (ARQ), which member states are asked to complete on many aspects of national drug responses, specifically national drug demand and supply. Response rates are notoriously low across Africa, however. The response rate for African ARQs that contributed to the WDR that was released in June 2021 can be taken as one example. Only 10 of 55 African countries submitted an ARQ response for the June 2021 World Drug report, and of these 10, only two (Kenya and Morocco) had an ARQ submission that the UN adjudged to be 'substantially' complete. Thus, of the 21 countries that make up the East and southern African region, only one – Kenya – provided data to the UN. See Statistical Annex 10.1: Responses to Annual Report Questionnaire (table), in World Drug Report 2021, UNODC, 2021, https://www.unodc.org/unodc/en/data-and-analysis/wdr2021_annex.html. Further, it should be noted that the ARQ data collected from countries for the 2021 report cycle was for the calendar year 2019. The length of time necessary to craft such a report, alongside the political intricacies of encouraging and acquiring member state submissions, precludes the use of a more recent data set.

17 In fact, a recognition of the dearth of reliable data on Africa's illicit drug trade and consumption and the overreliance on 'fragmentary and unreliable seizure and arrest statistics' has been highlighted previously, most notably by Gernot Klantschnig, Margarita Dimova and Hannah Cross, Africa and the drugs trade revisited, *Review of African Political Economy*, 43, 148, 176–173, 2016.

18 As an example, two recent GI-TOC analyses have challenged status quo positions promoted by regional security analysts. These include, among others, the confirmation of an Afghan-origin methamphetamine supply chain to Africa (when experts asserted none existed), and the refutation (despite some analysts asserting it) of a linkage between Islamist insurgents in northern Mozambique and drug trafficking flows transiting through the region. See Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021; and, GI-TOC, The evolution of the illicit economy in northern Mozambique, Risk Bulletin, GI-TOC, March–April 2021, 2–11.

19 Simone Haysom, Peter Gastrow and Mark Shaw, The heroin coast: A political economy along the eastern African seaboard, GI-TOC and ENACT, 2018; Simone Haysom, From the maskani to the mayor: The political economy of heroin markets in East and Southern Africa, ENACT, 2020; Jason Eligh, A shallow flood: The diffusion of heroin in eastern and southern Africa, GI-TOC, 2020; Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021.

20 United States Agency for International Development (USAID), the United States President's Emergency Plan for AIDS Relief (PEPFAR), and Measure Evaluation, Priorities for local AIDS Control Efforts (PLACE) tool kit, 2019.

21 Andrew Scheibe et al, Using a programmatic mapping approach to plan for HIV prevention and harm reduction interventions for people who inject drugs in three South African cities, *Harm Reduction Journal*, 14, 35, 2017.

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25 Ted Leggett, *Rainbow Vice: the Drugs and Sex Industries in the New South Africa*, Zed Books, London, 2002.

26 Mark Shaw, Regional traffic: towards an understanding of West African criminal networks in southern Africa, *African Security Review*, 10, 4 (2001), pp 74–94, p 81.

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31 Ibid., p 298.

32 Ibid.

33 Charles Parry, Andreas Plüddemann and Bronwyn Meyers, Cocaine treatment admissions at three sentinel sites in South Africa (1997–2006): Findings and implications for policy, practice and research, *Substance Abuse Treatment, Prevention and Policy*, 2, 37, 2007.

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45 United Nations, Methodology – World Drug Report 2017, UNODC, Vienna, 2017, p 39, https://www.unodc.org/wdr2017/field/WDR_2017_Methodology.pdf. For a presentation of retail drug price data in the World Drug Report, see the statistical annexure included as part of the UN's annual World Drug Report for 2021 and years prior.
46 It is important to note that at the retail level, both forms of cocaine often are heavily adulterated through the addition of bulking agents for sale. This decreases the purity of the substance as it moves through the value chain to the end consumer. While understanding purity contributes to a better understanding of local marketplaces, resistance from domestic law enforcement agencies across the region means the research was unable to incorporate formal, independent purity profiling into the analytical framework. Observations using interviews and pre-existing profiles, however, are made on this element in the narrative.
47 For some perspective on how Eswatini domestic cocaine pricing relates to the wider range of drugs available on the local market, we may compare it with the price of a gram of heroin, which ranged from SZL 250 (€14) to SZL 400 (€22).
48 It is important to note that this annual cocaine consumption estimate does not account for purity. Thus the estimated total volume of cocaine consumed should not be interpreted to mean consumption of 'pure cocaine'. As in most markets, powder and crack cocaine both are regularly and heavily adulterated prior to their distribution for retail sale to end consumers. As a result, while a gram of cocaine at the end-consumer level will contain some volume of pure cocaine, this will exist alongside a varying proportion of diverse additives and other bulking agents. The volume of pure cocaine that is consumed will be a much smaller subset of this mean and range. This caveat is relevant to the consumption volume values established for each of the six countries (Eswatini, Kenya, Lesotho, Malawi, South Africa, Tanzania) in which such estimates were possible to be derived.
49 For example, it was estimated that 12 times as many people (120 000) used heroin in Kenya than used cocaine. See GI-TOC, Insights into the market value of heroin, cocaine and methamphetamine in six countries in southern and eastern Africa, GI-TOC, 2022.
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51 For example, a 1:1 ratio refers to the mixing of one part cocaine with one part bulking agent, effectively diluting the purity of the cocaine by half. A 1:2 ratio would be mixing one part cocaine powder with two parts bulking agent, thereby diluting the cocaine by two-thirds and yielding three kilograms of product.
52 By comparison, this same brick of cocaine, at a 1:1 mix ratio in Australia, and a retail powder price of around AU$400/g, would yield AU$800 000, or €500 000, before expenses.
53 National AIDS Control Programme (NACP), Consensus estimates on key population size and HIV prevalence in Tanzania, NACP, Dar es Salaam, July 2014, p14.
54 Mean retail price data was unable to be acquired and validated for Comoros, Mayotte, and Mozambique. Ongoing research is attempting to validate current cocaine retail price points for these three countries, as well as for Angola, Namibia, Rwanda and Uganda.
55 Polydrug use refers to the practice of using more than one substance at the same time, or one after the other. There are many reasons why someone would use more than one substance, including to enhance the desired effects of a substance, or to stop or decrease the negative effects of a substance. The reasons for regional polydrug use were outside of the scope of the current research.
56 Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021.

57 Ibid.
58 Joanne Wright, Cocaine traffickers develop new routes from Brazil, *Jane's Intelligence Review*, 18, 1, 2006, pp 6–12.
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61 For the purposes of this research, 'micro-trafficking' refers to the smuggling of cocaine in volumes of less than 5 kg. Most often this is undertaken by drug couriers, often known as drug mules, who conceal the cocaine in their baggage, or on or in their bodies. The term 'mule' tends to imply an individual with no agency in the smuggling process. However, through the course of interviews with 'successful' individuals, defined as personal couriers who had been able to undertake at least one delivery without being detected by law enforcement, it was found that each of them was aware of what they were doing, and the potential penalties if caught but felt the potential to earn a significant cash payment upon successful delivery was worth the perceived small risk of being caught and imprisoned.
62 Lucia Bird et al, Changing tides: The evolving illicit drug trade in the western Indian Ocean, GI-TOC, 2021.
63 'Grey market' refers to those unauthorized distribution channels where legal goods are diverted from established licit trade flows to illicit streams for trade. See Yingjia Wang, Jiaxin Lin and Tsan-Ming Choi, Gray market and counterfeiting in supply chains: A review of the operations literature and implications to luxury industries, *Transportation Research Part E*, 133, 101823, 2020.
64 This alleged relationship between criminal elements and Kenyan state authorities has been written about extensively, including most directly by Peter Gastrow in 2011. See Peter Gastrow, Termites at work: A report on transnational organized crime and state erosion in Kenya, International Peace Institute, New York, 2011.
65 Africa Centre for Open Governance (AfriCOG), State capture: Inside Kenya's inability to fight corruption, AfriCOG, Nairobi, 2019.
66 Data taken from the Logistics Capacity Assessment tool of the UN World Food Programme, and COGOPORT. See https://dlca.logcluster.org/display/public/DLCA/2.1.1+Madagascar+Port+of+Toamasina; https://www.cogoport.com/ports/maputo-mzmpm; and https://www.cogoport.com/ports/cape-town-zacpt.
67 For example, O Khamula, British citizen arrested at Malawi airport trying to smuggle drugs, *Nyasa Times*, 7 November 2020.
68 For example, S Adhikari, Major drug bust at Mumbai airport, Malawi woman caught with Rs 6 crore worth of cocaine, *India Times*, 25 November 2020.
69 Embassy of the Republic of Malawi in the US, Increase in incidents of arrests abroad of Malawian nationals on drug trafficking offences, Embassy of the Republic of Malawi in the United States, Washington DC, 20 July 2018, http://www.malawiembassy-dc.org/in-the-news/increase-in-incidents-of-arrests-abroad-of-malawian-nationals-on-drug-trafficking.
70 This capacity limitation was discussed in further detail in Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021.
71 In fact, several Malawian authorities interviewed for this research insisted that there was little to no cocaine use occurring in the country, and almost no cocaine moving through its borders.
72 Global Organised Crime Index: Mauritius, GI-TOC, 2021, https://ocindex.net/country/mauritius/assets.
73 Defi Quotidien, *Saisie record de cocaine à Pailles: 90 kilos valant Rs 1,35 Md interceptés*, Defimedia, 11 July 2019, https://defimedia.info/saisie-record-de-cocaine-pailles-90-kilos-valant-rs-135-md-interceptes. See also Peter Brewer, More than 380kg of cocaine worth $144m found inside excavator in NSW, *Sydney Morning Herald*, 15 July 2019, https://www.smh.com.au/national/nsw/over-380kg-of-cocaine-worth-144m-found-inside-excavator-in-nsw-20190715-p527g4.html.
74 The Commission of Inquiry on Drug Trafficking Report, Commission of Inquiry on Drug Trafficking, Mauritius, 24 July 2018.
75 Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021.
76 The substance of this commodity supply-chain overlap of methamphetamine being included with cocaine shipment flows from Brazil to South Africa was derived from as-yet unpublished field interviews with drug importers in South Africa throughout 2021. It is notable to add here that the importers insist that the high-quality meth they are importing from Brazil is Brazilian meth, and not Mexican-sourced meth. Whether or not meth is being produced in Brazil, by Brazilian criminal actors, Mexican cartel proxies or otherwise, is yet to be determined.
77 Passenger volume data sourced from https://gettocenter.com/airports/continent/africa.
78 Stephen Ellis and Janet MacGaffey, Research on sub-Saharan Africa's unrecorded international trade: Some methodological and conceptual problems, *African Studies Review*, 39, 2, pp 19–41, 1996, p 37.
79 International Trade Administration, South Africa – Country commercial guide, 10 September 2021, https://www.trade.gov/country-commercial-guides/south-africa-ports-and-marine.
80 See Transnet, Port terminals, https://www.transnetportterminals.net/Ports/Pages/Ngqura_Container.aspx; Transnet National Ports Authority, https://www.transnetnationalportsauthority.net/OurPorts/Ngqura/Documents/Port%20of%20Ngqura%20Brochurev4_SinglePages.pdf.

81 ACIC, Illicit drug data report: 2018–2019, ACIC, Canberra, September 2020, p 77.

82 ACIC reported that detections of cocaine by weight in air and sea cargo dropped from 84% in 2018–2019 to 40% in 2019–2020, a decrease that might alter the perception of South African-origin influence on the export of cocaine to Australia, but not necessarily indicate that such flows had decreased or ceased. See ACIC, Illicit drug data report: 2018–2019, ACIC, Canberra, September 2020, p 77; and, ACIC, Illicit drug data report: 2019–2020, ACIC, Canberra, October 2021, p 89.

83 One frequent small-volume drug exporter in South Africa indicated that their network had capacity and connections to send any substance (heroin, methamphetamine and cocaine) globally, in bespoke amounts of up to 5 kg at a time and to arrange delivery in a matter of days. Others were alleged to be able to do bigger volumes. The secret to their success was compromised baggage agents at international air terminals, and Australia was featured in their network.

84 See for example the cocaine importation syndicate exposed by Australian police in May 2019 that organised shipments of tens of kilograms of cocaine between South Africa and Australia using a network of compromised baggage handlers. https://www.abc.net.au/news/2019-05-23/racehorse-owner-damion-flower-charged-after-cocaine-bust/11141780.

85 For example, a South African woman arrived by air from Angola with 5.4kg of cocaine concealed in sewing bobbins; a Venezuelan woman arriving by air from Brazil had 5kg of cocaine in her baggage and a South African woman arriving from Brazil had 3.8kg of cocaine in her bags. See, for example, Fungai Lupande, Woman caught with 5kg of cocaine, *The Herald*, 3 January 2018, https://www.herald.co.zw/woman-caught-with-5kg-of-cocaine. A Brazilian man arrived with 4.3 kg of cocaine in his luggage, see Mary Taruvinga, Brazilian national arrested with $32 million cocaine, *New Zimbabwe*, 8 April 2021, https://www.newzimbabwe.com/brazilian-national-arrested-with-32-million-cocaine/.

86 Thupeyo Muleya, Chitungwiza man busted with cocaine at Beitbridge, *The Herald*, 4 September 2021, https://www.herald.co.zw/chitungwiza-man-busted-with-cocaine-in-beitbridge.

87 Nyore Madzianike, Sisters linked to cocaine syndicate nabbed, *The Herald*, 8 April 2021, https://www.herald.co.zw/sisters-linked-to-cocaine-syndicate-nabbed; Zimbabwe Mail, Cop up for drug smuggling, *Zimbabwe Mail*, 1 May 2021, https://www.thezimbabwemail.com/law-crime/cop-up-for-drug-smuggling.

88 UNODC and EUROPOL, The illicit trade of cocaine from Latin America to Europe: from oligopolies to free-for-all?, Cocaine Insights 1, UNODC, September 2021.

89 UN, Statistical Annex 8.1: Prices and purities of drugs, *World Drug Report 2021*, UNODC, 2021, https://www.unodc.org/documents/data-and-analysis/WDR2021/8.1_Prices_an_purities_of_Drugs.pdf.

90 This percentage is drawn from the following statement: 'Since March over 4 tons of cocaine have been seized in South Africa and most of these drugs would have been destined for other countries whilst at least 20% would have remained behind as payment to the traffickers and consumption in the domestic market.' See SAPS, Half a billion worth of drugs seized at Durban Harbour, Media Statement, Directorate for Priority Crime Investigation (HAWKS), SAPS, 8 August 2021. There appears to be no research publicly available to substantiate this claim; nevertheless, it appears to be believed and is proffered by SAPS as an estimated metric to be disaggregated from seizures. Thus, the estimation exercise uses this value for the purposes of a hypothetical extrapolation.

91 While much is often made of successful 'drug mule' detections at airports such as Bole and Doha, with the implication being that profiling, intelligence-sharing, prevention and interdiction measures have been successful deterrents in the disruption of such micro-trafficking ventures, interviews conducted in the region with successful micro-traffickers (i.e. couriers who had not been caught) indicate that the frequency and flow of such successful couriers is significantly greater than is predicted by current intelligence assessments.

92 David Brewster, The Mozambique Channel is the next security hotspot, *The Interpreter*, 19 March 2021, https://www.lowyinstitute.org/the-interpreter/mozambique-channel-next-security-hotspot.

93 In March 2021 the Suez Canal was blocked for six days when a 20 000 TEU capacity container ship, the MV *Ever Given*, was grounded. Twelve per cent of global trade, and one million barrels of oil, pass through the canal every day. The blockage was estimated to have held up US$9.6 billion in trade each day the ship was stuck.

94 Lucia Bird et al, Changing tides: the evolving illicit drug trade in the western Indian Ocean, GI-TOC, June 2021.

95 Simone Haysom, Peter Gastrow and Mark Shaw, The heroin coast: a political economy along the eastern African seaboard, GI-TOC, July 2018; Alastair Nelson, A triangle of vulnerability: changing patterns of illicit trafficking off the Swahili coast, GI-TOC, June 2020.

96 Hugo Decis, The Mozambique Channel – troubled waters?, *International Institute for Strategic Studies*, 7 May 2021, https://www.iiss.org/blogs/military-balance/2021/05/mozambique-channel-maritime-security.

97 Statistics are sourced from the Military Balance+ database operated by the *International Institute for Strategic Studies* and cited in Hugo Decis, The Mozambique Channel – troubled waters?, International Institute for Strategic Studies, 7 May 2021, https://www.iiss.org/blogs/military-balance/2021/05/mozambique-channel-maritime-security.

98 For example, see Reutech, Affordable technologies can help with South Africa's maritime security shortcomings, Reutech Radar Systems press release, 10 June 2021, https://www.defenceweb.co.za/featured/affordable-technologies-can-help-with-south-africas-maritime-security-shortcomings.

99 Nikita Viswasam et al and the Global HIV Research Group, The uptake of population size estimation studies for key populations in guiding HIV responses on the African continent, *PLOS One*, 15, 2, e0228634, 2020.

100 Ibid., 8–9.

101 For example, the ARQ data included in the World Drug Report 2021 released in June 2021 was collected throughout 2020 and represents reporting on the 2019 calendar year. For ease of explanation, we simply refer here to the report release year rather than the year for which the submitted data in that report refers.

102 These three countries are Kenya (2016–2018, 2020–2021), Madagascar (2017 and 2019) and South Africa (2017–2020).

103 An incomplete submission indicates that a country submitted an ARQ response for the reporting year in question, but the submission was adjudged by the UN to be incomplete. This could be due to several reasons, but normally was the result of an incomplete questionnaire response.

104 Countries of the region that have ever submitted at least one response to the ARQ process in the six years from 2016–2021 are: Angola (2018–2020), Botswana (2016), Eswatini (2016), Mauritius (2017–2018, 2020), Mozambique (2017–2018, 2020–2021), Tanzania (2017) and Zambia (2017–2021). Burundi, Comoros, DR Congo, Lesotho, Malawi, Namibia, Rwanda, Seychelles, South Sudan, Uganda and Zimbabwe have failed to submit at least one ARQ response over this period.

105 ARQ response status by country is included in the statistical annex to each WDR between 2016 and 2021. It was from these annexes that these numbers have been compiled.

106 Personal communication, African Union Commission, December 2021.

107 Some progress has been made in the development of local institutional capacity in the West African region under the regional PAENDU equivalent there, the West African Epidemiological Network on Drug Use that was established under the Economic Community of West African States. The consideration of a similar approach in East and southern Africa has the challenge of dual Regional Economic Community bodies – the East African Community and the Southern African Development Community – as well as the intergovernmental Indian Ocean Commission, which includes Comoros, France (through Réunion), Madagascar, Mauritius and Seychelles. Achieving a universal approach to drug market surveillance in this region must overcome these regional political challenges.

108 For example, in 2014 a consensus population size estimate exercise to gauge the number of people who used drugs in the country was undertaken in Tanzania under the auspices of a US-funded health project. National AIDS Control Programme (NACP), Consensus estimates on key population size and HIV prevalence in Tanzania, NACP, Dar es Salaam, 2014.

109 This retail characteristic is explained in detail in two recent reports: Jason Eligh, A shallow flood: The diffusion of heroin in Eastern and Southern Africa, GI-TOC, 2020; and Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021.

110 For example, comparing the national law enforcement agency domestic retail price of heroin per gram reported by Madagascar, Mauritius and Seychelles, with the price derived from fieldwork in those places, yielded price deviations that ranged from −73% to 197%. See GI-TOC, Drug pricing data: Why the methodology matters, Observatory of Illicit Economies in East and Southern Africa, Risk Bulletin, Issue 16, February-March 2021, p 12. Unpublished fieldwork data from Kenya and Tanzania demonstrates similar discrepancies.

111 Mary Taruvinga, Venezuela woman caught with 5kg cocaine worth $469k escapes with $700 fine, *New Zimbabwe*, 28 February 2019, https://www.newzimbabwe.com/venezuelan-woman-caught-with-5kg-cocaine-worth-469k-escapes-with-700-fine.

112 Newsday, Woman jailed 10 years for smuggling cocaine, *Newsday*, 28 June 2018, https://www.newsday.co.zw/2017/06/ woman-jailed-10-years-smuggling-cocaine.

113 $300k drug mule convicted, *The Herald*, 27 June 2018, https://www.herald.co.zw/300k-drug-mule-convicted.

114 Costa Nkomo and Ndatenda Njanike, Magistrate arrested for fining Venezuelan dealer found with $500k cocaine, *New Zimbabwe*, 22 December 2020, https://www.newzimbabwe.com/magistrate-arrested-for-fining-venezuelan-dealer-found-with-500k-cocaine.

115 Mwayi Mkandawire, Malawians shocked over decision to deport Nigerian drug kingpins without prosecution, Malawi24, 23 October 2021, https://malawi24.com/2021/10/23/malawians-shocked-over-decision-to-deport-nigerian-drug-kingpins-without-prosecution.

116 Mtambo's aide bolted drug related arrest, *Nyasa Times*, 16 March 2021, https://www.nyasatimes.com/mtambos-aide-bolted-drug-related-arrest/.

117 Commission of Inquiry on Drug Trafficking, The Commission of Inquiry on Drug Trafficking Report, Mauritius, 24 July 2018.

118 Nicole McCain, Cops arrested after allegedly stealing confiscated drugs, News24, 8 August 2020, https://www.news24.com/news24/southafrica/news/cops-arrested-after-allegedly-stealing-confiscated-drugs-20200808.

119 Joseph Hanlon, Mozambique: Police sold 100kg of seized drugs on black market, *Carta de Moçambique*, 21 April 2020, https://allafrica.com/stories/202004270835.html.

120 Cop up for drug smuggling, *Zimbabwe Mail*, 1 May 2021, https://www.thezimbabwemail.com/law-crime/cop-up-for-drug-smuggling.

121 Orrin Singh and Aron Hyman, R200m cocaine stolen from Hawks offices in KZN was from drugs seized in June bust, TimesLive, 10 November 2021, https://www.timeslive.co.za/news/south-africa/2021-11-10-r200m-cocaine-stolen-from-hawks-offices-in-kzn-was-from-drugs-seized-in-june-bust.

122 This current scandal comes three years after an earlier MPS corruption scandal that saw the misappropriation of MWK 2.7 billion (€2 million). See Malawi24, K1 billion corruption scandal hits Malawi Police Service, Malawi24, 31 July 2021, https://malawi24.com/2021/07/31/k1-billion-corruption-scandal-hits-malawi-police-service.

123 Peter Githinji, Corruption in the Kenya Police Force and impacts on Kenyan security: Investigating the need for police reforms, Air War College, Alabama, 21 March 2017, https://apps.dtic.mil/sti/pdfs/AD1042018.pdf; and Kempe Ronald Hope Sr., The police corruption 'crime problem' in Kenya, *African Security*, 11, 1 (2018), pp 84–108.

124 Herbert Moyo, Judges, police, MPs most corrupt: survey, *Lesotho Times*, 29 January 2019, https://lestimes.com/judges-police-mps-most-corrupt-survey/.

125 A national Commission of Enquiry was launched to investigate drug-related corruption in the country. Its findings detailed the myriad agents and structures of systemic drug-related corruption that were found to permeate the Mauritius Police Force (among many other government institutions) and it detailed recommendations to be taken to respond to this corruption, one of which included the elimination of the Anti-Drug and Smuggling Unit of the Mauritius Police Force and its replacement by a new body. Few of the Commission's core recommendations have been enacted. See Commission of Inquiry on Drug Trafficking Report, Mauritius Commission of Inquiry on Drug Trafficking, 24 July 2018, http://download.pmo.govmu.org/Commission%20of%20Enquiry%20on%20Drug%20Trafficking%20Report.pdf.

126 Namibia's National Corrupt Perception Survey found that the public perceived the national police to be the most corrupt institution in the country. Theresa Tjihenuna, Police are most corrupt – survey, *The Namibian*, 12 December 2016, https://www.namibian.com.na/159245/archive-read/Police-are-most-corrupt-–-survey.

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130 See Alastair Nelson, Triangle of vulnerability: changing patterns of illicit trafficking off the Swahili coast, GI-TOC, June 2020; the description of cocaine flows through the Indian Ocean islands in Lucia Bird et al, Changing tides: the evolving illicit drug trade in the western Indian Ocean, GI-TOC, June 2021; Jason Eligh, A synthetic age: The evolution of methamphetamine markets in Eastern and Southern Africa, GI-TOC, 2021; and Jason Eligh, A shallow flood: The diffusion of heroin in Eastern and Southern Africa, GI-TOC, 2020.

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