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AFGHAN METHAMPHETAMINE, A THREAT TO EUROPE?

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PRESENTATION OF THE OBSERVATORY

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Since the Soviet Union's invasion in 1979, drug production and trafficking have deeply marked the contemporary history of Afghanistan (Labrousse, 2005). Today, this country is the world's largest producer of opium¹ and heroin² (UNODC, 2022). Recently, methamphetamine, an extremely potent amphetamine stimulant whose direct precursor is ephedrine, made from ephedra, a plant which grows wild in mountainous regions of the country, has been added to these substances. In 2020, 1.2 ton of methamphetamine were seized in this country, compared with 182 kg in 2018 (UNODC, 2022), a far cry from the 4 kg recorded in 2013 and 2014³. This rapid influx of Afghan methamphetamine is particularly noteworthy because Afghanistan is also a major supplier to the European drug market, particularly via the land route through Iran and Turkey to the Balkan region. This new reality is taking place in a context in which the methamphetamine market, currently small in Western Europe, is undergoing major changes, particularly with the development of significant production in the Netherlands and Belgium (Laniel, 2021) and increased use in some European Union countries (EMCDDA, 2022).

SOCIAL AND ENVIRONMENTAL FACTORS

The first signals of methamphetamine production appeared in 2013-14, with the detection of production laboratories by Afghan authorities in the western provinces of Herat and Nimruz, and the first seizure of methamphetamine in the country (UNODC, 2017). In its annual report on precursors for 2016, the International Narcotics Control Board (INCB) reported that: "[...] in Afghanistan, authorities are increasingly concerned about the trafficking, abuse, and illicit manufacture of methamphetamine in the country. There are reports that pharmaceutical preparations containing ephedrine and pseudoephedrine have been used in the illicit manufacture of methamphetamine. According to these authorities, the illicit production of this substance in Afghanistan takes place mainly in provinces along the Iranian border, often in areas outside government control, and much of the substance is then smuggled into the Islamic Republic of Iran" (INCB, 2017).

At that time, production was rudimentary, based on the extraction of ephedrine⁴ from cough medicine, usually imported from Iran and Pakistan. The situation changed when the Afghan government decided to introduce stricter controls on imports of medicines and their resale in the country, resulting in higher costs for producers. From then on, some players in the sector encouraged

¹In 2021, Afghanistan, with 6,800 tons, produced 85% of the world's opium.

²And, probably, with Morocco, one of the world's largest producers of cannabis resin.

³"Afghan drug barons are branching out into methamphetamine", *The Economist*, September 5, 2019.

⁴Ephedrine is one of the alkaloids from plants of the genus *Ephedra*. It is legally used in various countries for the treatment of asthma, obesity or during surgery to maintain a high blood pressure.

farmers to harvest ephedra, a plant that grows abundantly in the wild at an altitude of 2,500 metres in the mountains that cover the centre of the country and extend to the borders of Tajikistan. The plant is sold to wholesalers, who in turn supply those with the know-how and means to extract the ephedrine. Once extracted, it is purchased by methamphetamine producers. For the latter, the advantage is obvious. The local availability of the key precursor partially frees them from dependence on import channels and, given the simplicity of the extraction process, lowers their production costs. Some have reported halving their costs (EMCDDA, 2021).

Afghan methamphetamine therefore appears to be highly competitive on the global market. The price per kilogram at the exit of the laboratory was \$275 in 2019, compared to \$3,000 in Burma (Mansfield, 2022). An economic sector is thus emerging and is profitable to all players: from the farmer to the chemist. Ephedra is indeed a plant that is well adapted to the recurrent droughts that Afghanistan experiences. It proliferates in arid areas and is not alien to the peasant economy since, when it was not used as fuel, it was sold to pharmaceutical companies which shipped it to India. The development of the methamphetamine industry thus meets the interests of a poor peasantry surviving on steep and unproductive land, for whom the collection of ephedra, like poppies in other regions, can constitute a complementary means of subsistence. In 2018, a kilogram of ephedra sells for \$1.80, while the income generated by the plant for the rural populations concerned is estimated at \$22 million (Mansfield, 2022). British researcher David Mansfield explains that "the ephedrine industry has been a life raft" for rural populations in the mountainous regions of Afghanistan (Vorobyov, 2021). Finally, for manufacturers, often heroin producers, methamphetamine offers decisive advantages that encourage them to trade it for heroin: "The quantities of precursors needed to produce ATS (amphetamine-type stimulants) are [...] far lower than those required for opium derivatives. And if the transformation of opium allows to obtain only one type of substance, it is not the same with the ephedrine of ephedra, which can also be transformed into methcathinone (ephedrone). [...] In fact, the transformation processes are characterised by a very high degree of flexibility, incomparable to the complexity of the extraction and refinement process required to obtain heroin" (Chouvy, Meissonnier, 2002). Local governments also benefit, as trucks leaving the Hindu Kush foothills loaded with bales of ephedra to reach wholesale markets are subject to a \$5,700 tax (Mansfield, 2022).

EMERGENCE OF ANOTHER ILLEGAL ECONOMY

Ephedra is harvested in the mountain villages of Ghor and Northern Helmand provinces in western Afghanistan. The production is then sold to dealers near the villages during the harvest season, which lasts from late July to October. In the west, the town of Qal'eh-ye 'Abdul Wadud Khan in the Bala Buluk district of Farah Province is the hub of the trade, hosting one of the largest wholesale ephedra markets in the country. At the same time, ephedrine production is expanding. In the provinces of Nimruz and Farah, for example, the districts of Bakwa and Khash Rod alone are said to be home to as many as 448 ephedrine laboratories, with an estimated potential production of 1,000 tons of methamphetamine per year (Mansfield, 2022). This would make Afghanistan the world's largest producer of the substance. This ephedrine boom is also benefiting bazaar traders who sell the materials and other precursors (methylamine, hydrochloric acid, etc.) needed to make synthetic drugs. Hundreds of truckloads of ephedrine then leave the production centers. They supply the methamphetamine labs that thrive in the west and east of the country to Iran and Pakistan, which are both consumer markets and transit zones for Europe, the Middle East (Loveluck, Salim, 2022), Africa, Indonesia, and Australia.



EXPORT ROUTES AND ACTORS

It appears that methamphetamine is mostly produced and exported through traditional heroin smuggling channels. In 2019, moreover, in Farah province, a shift of some heroin producers to methamphetamine manufacture has been noticed⁵. Further downstream, it appears that the channels involved in exporting the product are the same as for heroin. As seizures show, sea shipments from Pakistani ports to East and Southern Africa, Indonesia and Australia frequently contain heroin and methamphetamine. Both countries have seen large seizures of Afghan methamphetamine in the past two years, while in South Africa, where local demand is growing, it seems that heroin importers are involved in trafficking Afghan methamphetamine. They seem to be diversifying their drug supply as shown by the frequency of joint shipments of methamphetamine and heroin moving through the vessels (Eligh, 2022). In contrast, much less information is available about the actors supplying the Iranian, Turkish and European markets via the main land route. Nevertheless, it is clear from the seizures made by Iran and Turkey in 2020 and 2021 that the Balkan route for Afghan methamphetamine is active. In Iran, for example, seizures have exploded. Between March 2019 and March 2020, they increased by 208% to more than 17 tons, 90 per cent of which is believed to be of Afghan origin (UNODC, 2022). In Turkey, seizures have also increased sharply in the last two years, with 4.1 tons in 2020 and 5.5 tons in 2021, compared to 566 kg in 2018 and 1 ton in 2019 (NPT, 2021). This is also confirmed by the Turkish Focal Point of the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA), which notes in its latest annual report that the Balkan route has begun to be used for methamphetamine trafficking from Afghanistan and Iran (NPT, 2021). This methamphetamine is not only in transit: a real consumer market is expanding in Turkey. The Ministry of Interior has identified this as the main public health threat for the coming years (TNP, 2021).

WHAT IMPACT ON EUROPE?

Compared to cannabis and cocaine markets the methamphetamine market is extremely limited in the European Union (EMCDDA, Europol, 2019). The synthetic drug market there is largely dominated by those for MDMA/ecstasy and amphetamines. Prevalence of use is marginal, except in some central European countries such as Czechia and, to a lesser extent, Slovakia, where there is both demand and local, rather artisanal, production of methamphetamine. However, increases in use have been noted in Germany and the Baltic States and, to a lesser degree, in Western European countries (EMCDDA, 2022). Given the scale of the flows into Turkey, some of which are destined for

⁵The Economist, op.cit.

the European market, it is likely that there will be strong supply pressures to spread methamphetamine among synthetic drug users in the coming years, especially in Central Europe.

UNCERTAINTIES: SACRIFICING METH FOR OPIUM?

However, the year 2022 appears to have seen a reversal in methamphetamine production as a result of the Taliban regime's policies. The world's media focused on opium following the April 2022 decision by the supreme leader, Haibatullah Akhundzada. This decision was reiterating the August 2021 commitments to ban poppy cultivation, trade, and processing. Although, it was not sufficiently emphasized that the fatwa applied to all types of drugs and, most notably, that the Ministry of Agriculture had issued a ban on the collection and marketing of ephedra products in December 2021.

The April 2022 *opium ban* was met with much skepticism, especially because of its lateness, as the opium harvest had already been completed in most parts of the country by the time the ban was announced. It is true that small-scale poppy eradication campaigns took place immediately after April in the southwestern regions of Afghanistan, where favorable weather conditions allow for a second harvest, but these appear to have been more of an external communication campaign linked to the desire to ease the international sanctions regime (Mansfield, 2022). In contrast, the December 2021 ban on the ephedrine and methamphetamine industries appears to have been implemented in at least some provinces. As a result, the ephedra wholesale hub in southwestern Afghanistan, Qal'eh-ye 'Abdul Wadud Khan, saw its activity decline dramatically by early 2022. In the fall, a period of high activity due to the ephedra harvest, there were no signs of recovery. Moreover, it appears that this prohibitionist policy has spread to many other provinces, creating tension in the market with a tripling of the price of methamphetamine (\$857 versus \$250). This raises several questions: Why did the Taliban focus on the methamphetamine industry rather than opium production? Will this prohibition be sustainable and enforceable? To the first question, the answer seems relatively obvious. The Taliban have allowed the 2022 opium crop to continue for the simple reason that they cannot do otherwise or they will alienate both a significant portion of the peasantry and the local warlords who derive part of their income from taxes on opiates: "The drug trade is simply too deeply embedded in the accumulation and survival strategies of the Taliban, the state, the militias currently being formed to fight the Taliban, and the general population. This will unfortunately fuel the global heroin market as well as the growing drug problem in Afghanistan and neighboring countries" (Goodhand, 2021). The activities generated by poppy cultivation are estimated by the UNODC to be equivalent to 350,000 full-time jobs, in a context where, after 40 years of war, the state of rural Afghanistan is more dramatic than ever (UNODC, 2020). This observation leads to a possible answer to the second question. The ban on the collection of ephedra, the closure of certain wholesale markets and the ephedrine production laboratories reported in the western provinces would be

related to the less strategic nature of this new industry for the survival of the regime. However, it is impossible to say whether the impact of this policy on the nascent methamphetamine industry will be sustained. It will also depend on the willingness of the international community to ease economic sanctions and the unlikely start of a short-term economic recovery in the country. In the meantime, the drug trade will remain an indispensable resource for its survival and the European Union a strategic outlet for its illicit exports. Of the country's 39 million people, nearly a quarter are considered to be food insecure (Fouchère, 2022).

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