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Directorate of Intelligence

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CIA|DI --- IN S I T R E P 93-006

International Narcotics Review



June 1993

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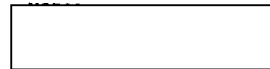
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**International Narcotics
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Perspective—The Approaching Revolution in the Cocaine Industry 

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Perspective

The Approaching Revolution in the Cocaine Industry

New methods of producing cocaine and cocaine base, together with the spread of coca farming to new areas and more productive fields, may significantly complicate law enforcement efforts to control the cocaine industry and could lead to dramatic increases in cocaine production—even if coca cultivation declines significantly.





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
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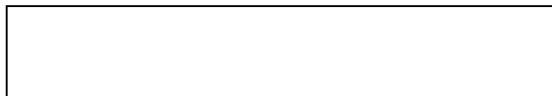
Improving Coca Cultivation

Enhancements in coca farming will also lead to a greater supply of cocaine. As law enforcement and eradication pressures mount in traditional growing areas in Peru, Bolivia, and Colombia and as older fields there become worn out and less productive, growers are moving to new areas, both within the traditional growing countries—farmers in Peru's Huallaga Valley have been moving in recent years to the Aguaytia Valley, for example—and elsewhere, especially to Brazil, Venezuela, and Ecuador. 

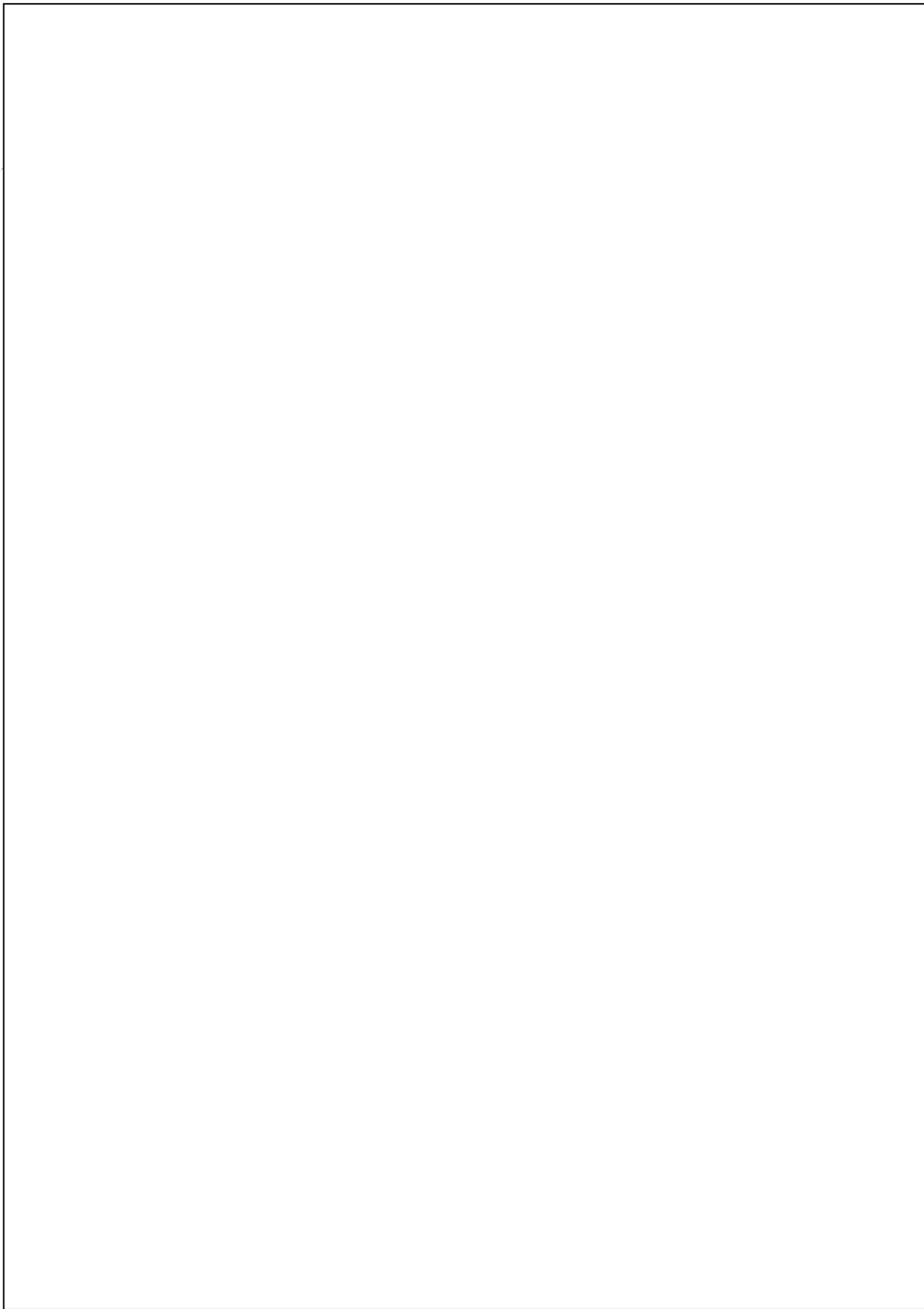
Substituting higher-yielding varieties of coca for low-yielding strains also offers coca farmers room for growth. For example, the cocaine alkaloid yield from the primary variety of coca grown in Colombia is much lower than that of coca varieties found in Peru and Bolivia. Bolivia has only about 20 percent more area under cultivation than Colombia but produces four to seven times more cocaine. Cocaine growers could someday follow the decades-old lead of marijuana growers by embarking on a program of selective breeding to increase yields of existing varieties of coca. 

Outlook

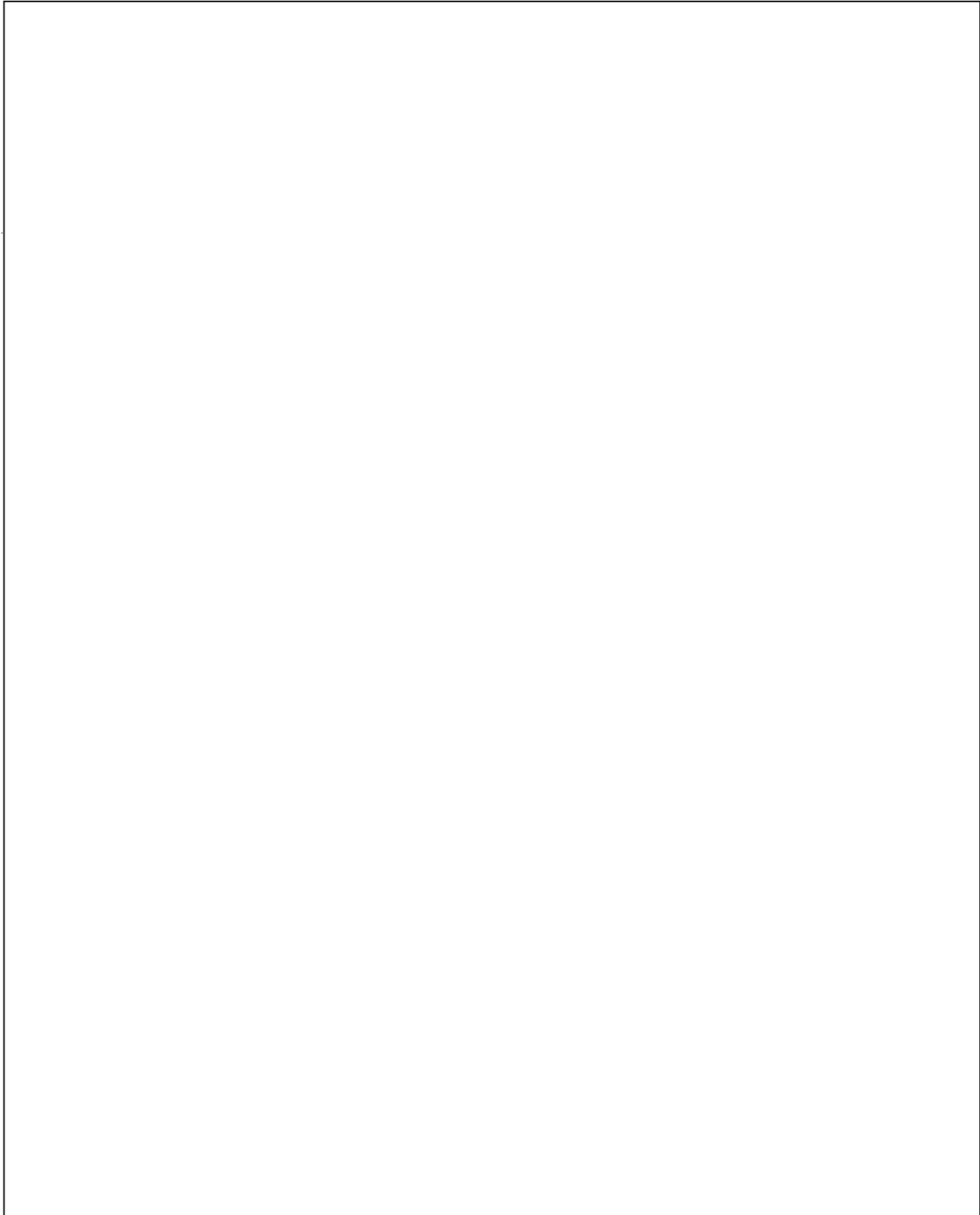
More effective law enforcement operations may serve as a catalyst for revolutionizing the cocaine industry as traffickers move to improve their production techniques to compensate for cocaine lost to law enforcement successes. Traffickers and growers probably have not yet fully exploited these opportunities because they have had few economic incentives to invest in them—despite growing cocaine seizures, there is little evidence that traffickers are having difficulty meeting US demand. 

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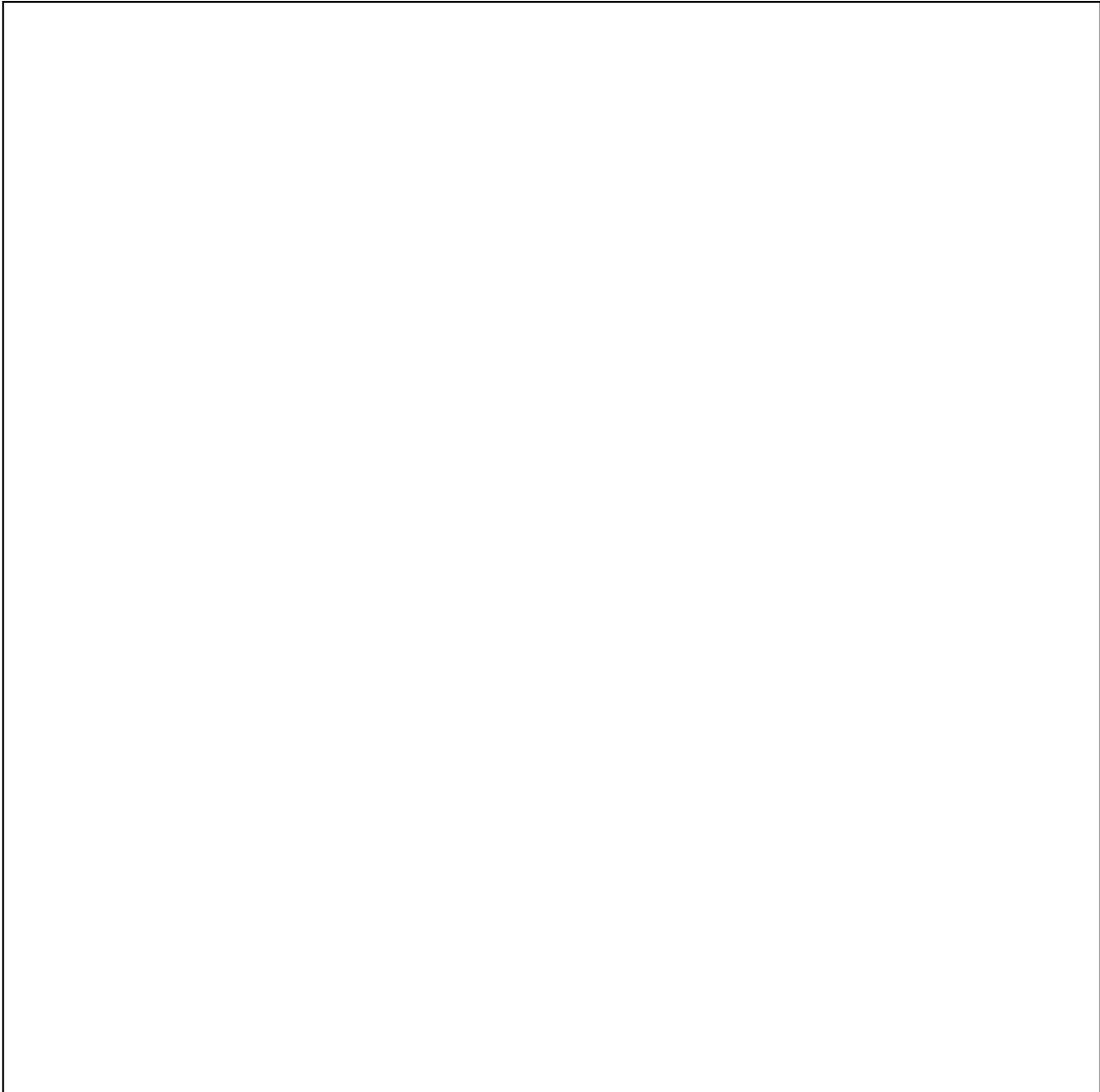


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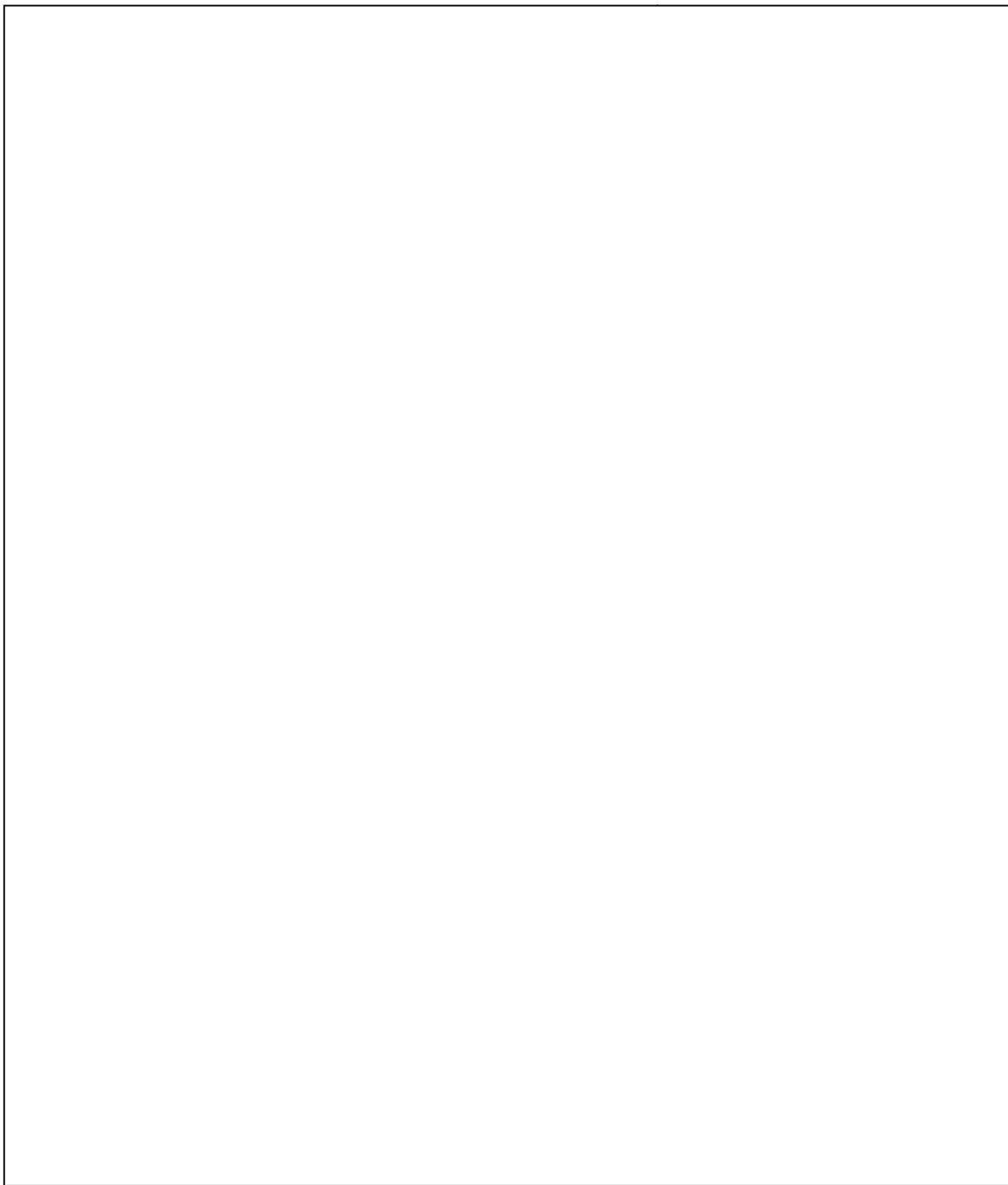
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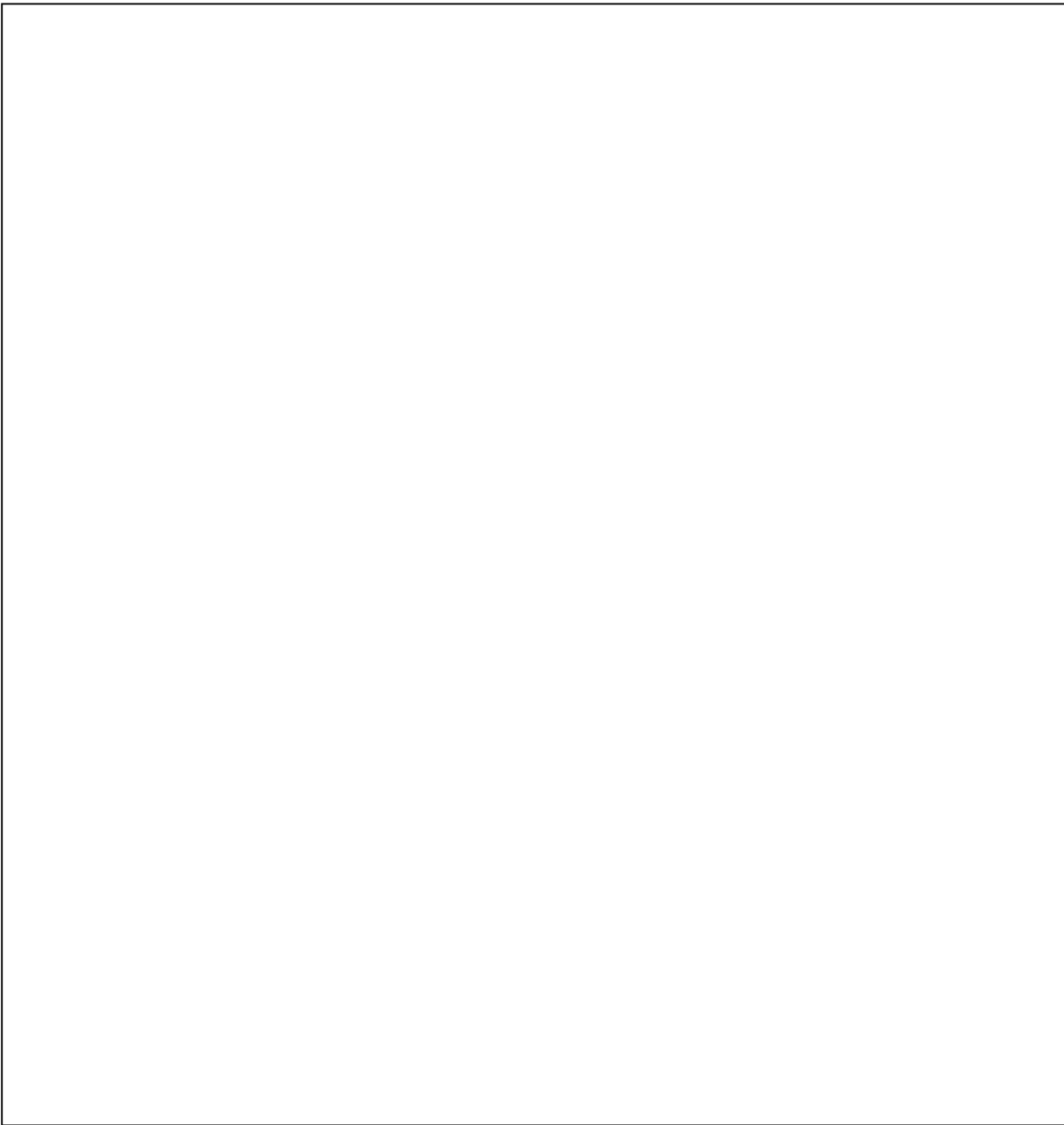
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