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GLOBAL INITIATIVE AGAINST TRANSNATIONAL ORGANIZED CRIME

THE MEKONG METHAMPHETAMINE ECONOMY

RETHINKING THE NARRATIVE

MNET -CTC MEKONG NETWORK TO COUNTER TRANSNATIONAL CRIME

Jason Eligh

JANUARY 2026

DISCLAIMER

This publication has been funded by the Australian Government through the Department of Foreign Affairs and Trade. The views expressed in this publication are the authors' alone and are not necessarily the views of the Australian Government.

ACKNOWLEDGEMENTS

This research report is the product of fieldwork and expertise that has involved a number of partners, peers and informants across civil society, government bodies and illicit drug trade environments. The author wishes to recognize the important contribution and support provided by John Whelan, Ne Lynn Aung, Patrick Winn, Jovan Milosevic, Louise Taylor, Vi Cuong Tran, Ruggero Scaturro and Alastair MacBeath; as well as respondents from the US Drug Enforcement Administration, the Australian Federal Police, the New Zealand Police and New Zealand Customs Service, the Central Committee for Drug Abuse Control of Myanmar, the Office of the Narcotics Control Board in Thailand, the Bangladesh Department of Narcotics Control, the Ministry of Public Security in Vietnam, the Royal Canadian Mounted Police, the Mauritius Police Force and the South African Police Service. Appreciation and thanks are given also for the support provided by field interview peers and research participants in Myanmar, as well as the Global Initiative Against Transnational Organized Crime (GI-TOC) Publications team, Tuesday Reitano and Kosyo Ivanov.

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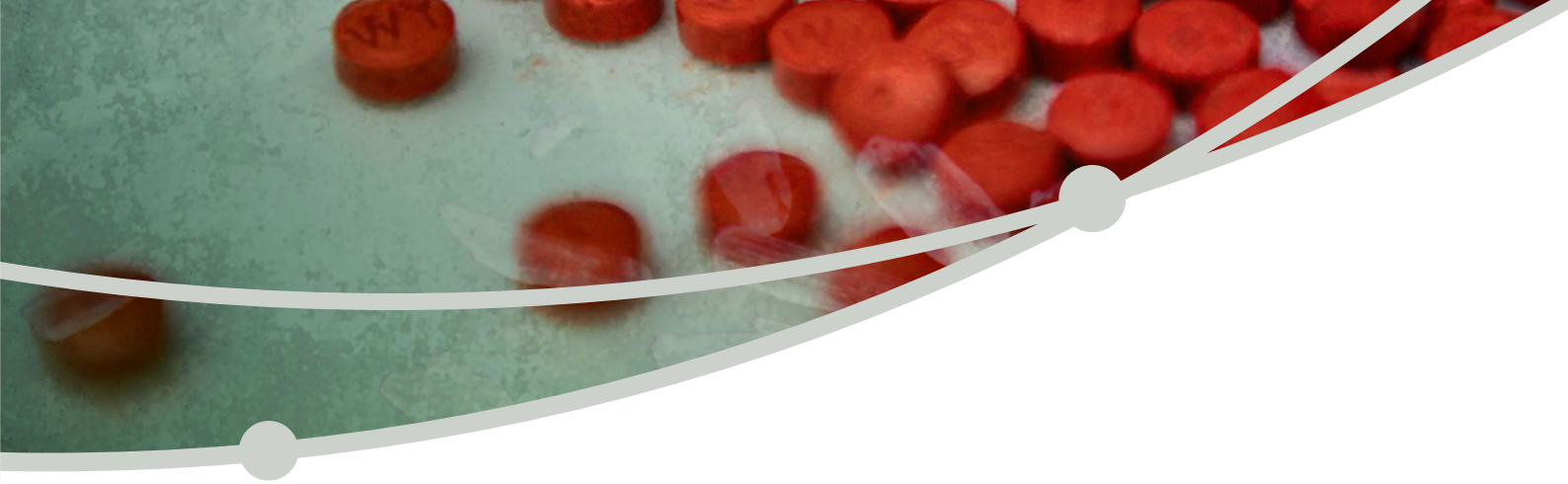
ACRONYMS AND ABBREVIATIONS

AFP	Australian Federal Police
BGF	Border Guard Force
CCDAC	Central Committee for Drug Abuse Control (Myanmar)
CIDCA	China International Development Cooperation Agency
CND	UN Commission on Narcotic Drugs
MDMA	3,4-methylenedioxymethamphetamine
PE	Pseudoephedrine
P2P	Phenylacetone/phenyl-2-propanone
PWID	People who inject drugs
USAID	US Agency for International Development
USIP	US Institute for Peace
UWSA	United Wa State Army



EXECUTIVE SUMMARY

The Mekong region, particularly Myanmar's Shan State, is the epicentre of what has become one of the largest and most sophisticated illicit drug economies on the planet. This area produces staggering quantities of methamphetamine, supplying markets across South East Asia, the Pacific and, increasingly, as this research documents, the world.

Narratives used to describe and analyze this phenomenon both in academic circles and policy discussions are often grounded in an assumption that we know more about the situation than is supported by verifiable evidence. This report proceeds from a different premise: that our understanding of the Mekong's methamphetamine trade is dangerously incomplete, speculative and in need of critical re-examination.

This analysis seeks to deconstruct the dominant narratives surrounding the Mekong region's methamphetamine trade. Examining assertions concerning production and distribution, it scrutinizes the speculative foundations upon which many current academic and policy frameworks have been built. The research identifies and questions misrepresentations that obscure our understanding of the complex reality on the ground – the most significant of which is the assumption that there was a surge in production resulting from Myanmar's 2021 coup.

The report then outlines some of the structural characteristics of the methamphetamine trade as they appear today. It focuses on the operational dynamics, drivers and opportunities that define the Mekong meth economy. In doing so, the goal is to provide a more empirically grounded picture of the situation, while also acknowledging the significant gaps that continue to undermine our collective knowledge of this drug trade and its dynamics.

The report asserts that the Mekong meth trade's true structural reality has developed and expanded over several decades. The balance of evidence suggests that production is on a long-term upward trajectory covering the period both before and after the coup, rather than a trend-busting post-coup surge.

Increases in production volume have come alongside a series of improvements in processes, management and operations. These adaptations have included the outsourcing of production to local criminal enterprises, a mastery of chemical substitution and the trade's seamless integration into global supply chains and their related illicit systems.

This means that Mekong meth has continuously operated on a plane far removed from the dominant narratives that have shaped regional counternarcotics operations and analysis. Interventions focused on a simplified, localized threat have consistently failed because the economic enterprise they seek to disrupt is a far more complex, resilient, ambitious and expansive one.

The objective of this exercise is not simply to generate another narrative, but to situate findings within the context of existing security responses and recent market adaptations. This approach could provide a basis for rigorously examining how the industry is developing and – most importantly – how it is forging links with the transnational supply chains that connect it to new demand centres across the globe.

The analytical corrective provided by this report demands a fundamental rethink of region-centric and security-based policy and response. Evidence no longer supports viewing the Mekong meth trade as a contained, regional phenomenon. Instead we must view this industrial geography as an operational epicentre for the production of a global illicit drug commodity, with existing supply chains and illicit actor networks already extending far beyond its immediate Asia-Pacific marketplaces.

Effective interventions must prioritize multi-jurisdictional action against the abuse of pre-precursor chemical supply chains, the online and underground banking systems that launder profits, and the logistical routes and complicit institutions that enable these commodities to be carried to new demand centres worldwide. Until the international community confronts the Mekong meth trade for what it has already become – a sophisticated, globally integrated criminal powerhouse – any localized disruption-oriented response will remain fundamentally inadequate.

A mixed methods approach to an opaque environment

To move beyond speculation and build a more accurate assessment, this research employed a mixed methods approach specifically designed to map the tangible, structural components of the methamphetamine economy. The approach was grounded in three methodological procedures.

The first procedure consisted of a series of interviews with international and domestic law enforcement officials, civil society actors, ethnic armed group representatives, illicit market actors and various subject matter experts. This strand also included the consultation of secondary sources and official drug-related datasets in Burmese, Thai, Vietnamese, Bengali, Hindi and Mandarin languages. Most of these datasets were health or law enforcement focused.

The second aspect of the research involved direct field-based observation, informal interviews and reporting activities. It emphasized informant-led insights on methamphetamine production, distribution and storage locations. Additionally, the researchers attempted to identify the presence, roles and responsibilities of methamphetamine-focused clandestine laboratories, actors and organizations in key parts of Shan, Kaya and Kayin states (see Figure 6). This included the geolocation of laboratories and storage sites, and an understanding of supply chain dynamics for both production and distribution.

The third research pillar was built on collecting open source web and social media data in Burmese through the use of a custom web-scraping programme. Data targets included posts and content from targeted accounts, as well as general information collected from outlets ranging from Facebook to official websites and various group chat boards. This data was collated by date, translated into English using artificial intelligence translation software and verified by bilingual (Burmese–English) research

assistants. This contributed to the thematic aggregation, triangulation and validation of information through an overlap with the information collected using the first and second research methods.

Triangulation was crucial to validating the overall process. Findings from one data stream were rigorously cross-validated against the others; for instance, an insight from an informant interview could be tested against patterns emerging from the open source data, while the geolocation of a laboratory could corroborate claims made by both official sources and illicit actors. This methodological discipline of constant cross-referencing ensured that the final analysis is grounded in corroborated evidence rather than singular, unverified claims.

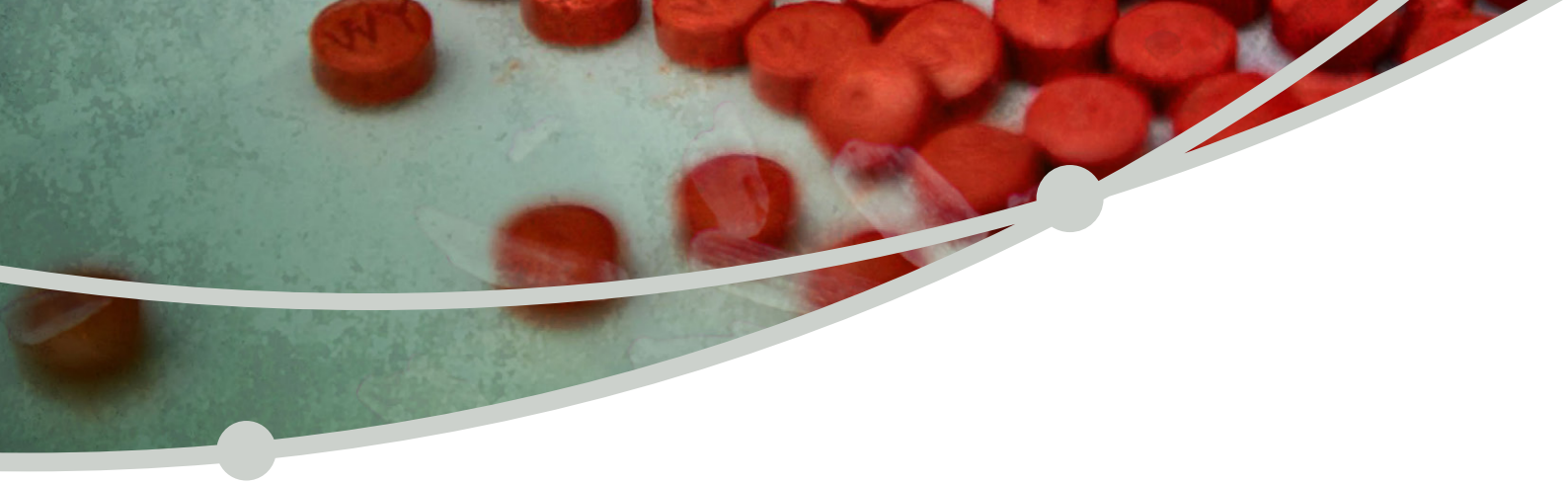
Limitations of the research

Researching methamphetamine trafficking in Myanmar faces severe limitations rooted in its illicit nature and operations in complex conflict zones. Primary challenges included gaining access to reliable data and securing candid interviews with key stakeholders.

For state actors, particularly Myanmar's military and Border Guard Force (BGF) officials, the pervasive culture of institutional secrecy and fear of exposing corruption meant that nearly all potential interviewees declined to participate. Several prominent ethnic armed organizations proved equally inaccessible.

Even when the research team secured interviews, there remained a great challenge in navigating interviewee testimonies, many of which were found to be factually unreliable or, the interviewers believed, purposefully biased. Physical dangers compounded these issues. Fieldwork undertaken by primary researchers and by locally engaged researchers required navigation of challenging physical and sociocultural environments. Researchers inside Myanmar had to contend with insecurity along the Thailand–Myanmar border areas. The research overlapped with increased efforts during this period by Chinese, Thai and Myanmar authorities to identify, disrupt and eliminate substantial criminal enterprises specializing in cyberfraud in these areas.

It is important to highlight the limitation arising from the fact that official interviews were not granted with representatives of Myanmar's military, various BGFs or government militias. Thai border authorities likewise did not participate. However, interviews were obtained with representatives of various official departments and law enforcement bodies of other governments in the region. To shield against possible repercussions, some interviewees (notably officials and other informants) remain anonymous in this report.



DECONSTRUCTING THE DOMINANT NARRATIVE

Current security narratives surrounding methamphetamine in the Mekong tend to be grounded in the perception that regional production and supply have increased specifically as a consequence of the February 2021 coup in Myanmar.[1] In support of this perspective, the authors of these narratives point to an increase in the number and volume of cross-border seizures in the Mekong region, alongside an observed increase in general insecurity and violence.[2]

The so-called 'surge hypothesis' emerged in the months following the coup. Its core premise is that the Myanmar coup contributed to an unprecedented and immediate increase in the production of methamphetamine by organized crime groups in Myanmar and the trafficking of this meth throughout the Mekong region. Generally speaking, the surge hypothesis is premised upon three tenets of causation.

The meth surge hypothesis

- An environment of chaos and instability emerged, drawing the attention of law enforcement away from counternarcotic activities and creating a more permissive operating environment that encouraged Shan State drug traffickers to increase methamphetamine production and external trade.
- There was a consequent increase in the frequency and volume of methamphetamine seizures in the region.
- There was a decrease in the retail price for methamphetamine as well as an increase in its purity in the region, reflecting this enhanced supply.

This correlation narrative and its causal connections became the foundation for the argument that the coup was directly responsible for an unprecedented surge in illicit drug production, specifically the manufacture and distribution of methamphetamine from Myanmar into the broader Mekong region. Largely unchallenged, this interpretation has been picked up and promoted by mass media in recent years.[3]

Examining the evidence: the limits of seizure data and official reports

Some analysts employ a 10% seizure to production volume ratio, an anecdotal deduction similar to that used for iceberg mass projection.[4] However, seizures are an unreliable measure of drug market activity.[5] Moreover, any potential correlation between trends in production volume and seizures does not imply causation.

'Supply-side indicators, such as illegal drugs seizures … are reflective of law enforcement operational activity and subject to the influence of budgetary, personnel and political considerations,' note Nazlee Maghsoudi et al.[6] 'While such indicators can offer important insights, such as into trafficking routes or drug market trends, they may also be entirely independent from the true scale and nature of the illegal drug market.'

Italian scholars Luca Raineri and Francesco Strazzari pose two pertinent rhetorical questions: 'Significant ambiguities remain in the interpretation of seizure figures: does an increase in seizures imply that drug trafficking is rising or that law enforcement is being more effective? Does a decrease in seizures indicate a contraction of drug trafficking, or a greater degree of concealment and corruption?'[7]

Further difficulties in estimating meth production arise from the fact that it is not tied to the cultivation of an agricultural crop (like opium is tied to poppy cultivation) or conducted outdoors in an environment conducive to external surveillance. Additionally, meth production is not dependent on the availability or use of any single chemical precursor.

In short, seizures provide evidence of law enforcement presence and they can be a measure of success in relation to law enforcement investment. Additionally, in the same way that seizure data is not a proxy for extrapolating evidence on production volumes, an absence of seizures does not amount to evidence of the absence of substance production or supply.[8]

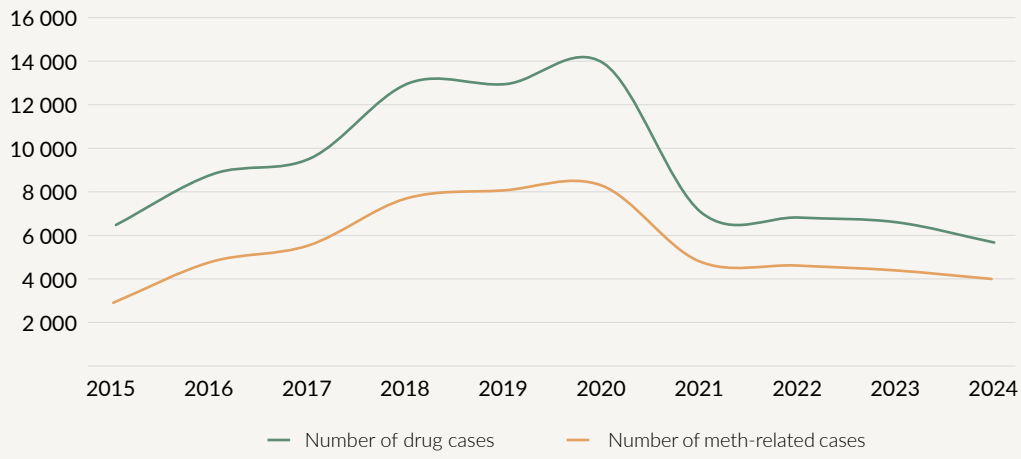


FIGURE 1 Annual number of methamphetamine-related seizures (tablets, crystal and powder) in Myanmar, as reported by Myanmar's Central Committee for Drug Abuse Control (CCDAC), 2015–2024.

SOURCE: CCDAC annual reports, 2015–2024

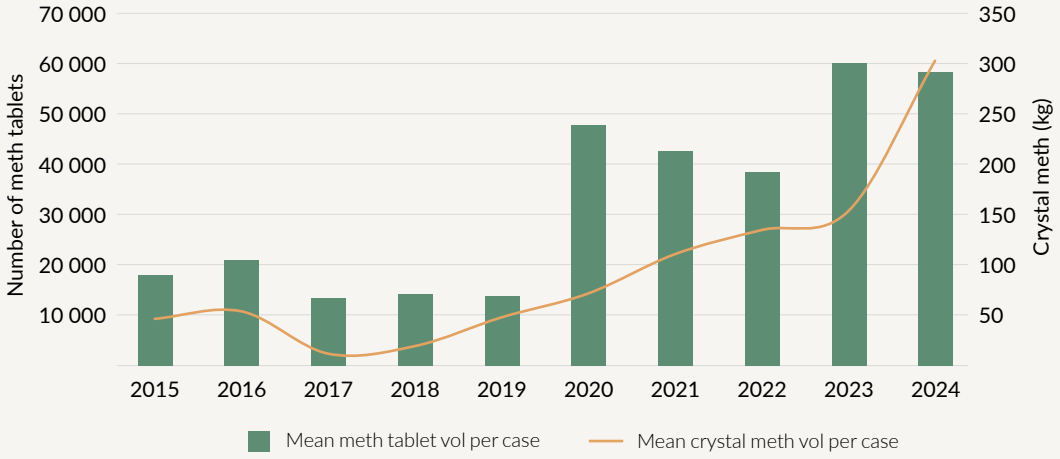


FIGURE 2 Annual mean volume of meth tablets and crystal meth seized per case in Myanmar, as reported by the CCDAC, 2015–2024.

SOURCE: CCDAC annual reports, 2015–2024

Challenges posed by official drug data

There is a significant absence of available quantitative and qualitative data on drug markets in the region generally, extending to the prime meth production locations in Shan State. Countries across the Mekong region have not developed either the necessary capacity or the physical capability to collect basic information about their own drug markets. In fact, the governments of several of these nations probably have little desire to do so.

Some countries (e.g. Myanmar, Thailand and Vietnam) have in the past attempted to quantify national estimates for the number of people who inject drugs (PWID). However, this exercise was not pursued for trend surveillance purposes; instead, it was most often carried out in conjunction with application processes for large donor grants (e.g. from the Global Fund, the World Bank and the President's Emergency Plan for Aids Relief).

National estimates for PWID were used as a financial denominator to calculate requests for funds to support national public health-based programming around the prevention and treatment of HIV. In such cases, the quantification of PWID was a means to funnel tens of millions of dollars of foreign funding into the state budget to support the development and roll-out of national harm reduction programme activities, such as syringe distribution and opiate substitution therapy. However, these funding-specific exercises bear no relation to the overall number of people who use drugs (a much larger population).

Additionally, retail drug price data provided by law enforcement agencies is fallible. Often this data is collected through police informants or because of a specific police operation. These channels do not necessarily yield a representative sample of often diverse retail prices.

Relying upon government chemical analysis data on testing of illicit substances is a further analytical limitation. It introduces bias because the analyzed samples are taken only from law enforcement seizure events. The findings cannot be extrapolated to convey characteristics of the chemical composition of the meth that makes up the remainder of the market supply.

Methodologically speaking, undertaking a credible price and purity monitoring programme would require several important components. Such components would include development of and adherence to robust price and sample collection, handling, testing and chain-of-custody protocols; standardized testing methods, locations and devices; data security, control and validation procedures; and an array of ethical, legal and personal conduct clearances. It is important also to ensure that samples are as geographically dispersed as possible within the national drug market environment.

Given the general fluctuation of prices and purities that exist in every illicit marketplace, any credible programme would also need to be designed around the collection of longitudinal data rather than cross-sectional data.[9] This would enable monitors to identify acute changes in the indices compared to a contextual background of potentially chronic micro and macro volatility in data. It would also enable them to identify 'normal' drug price and purity ranges. None of this occurs in the Mekong region.

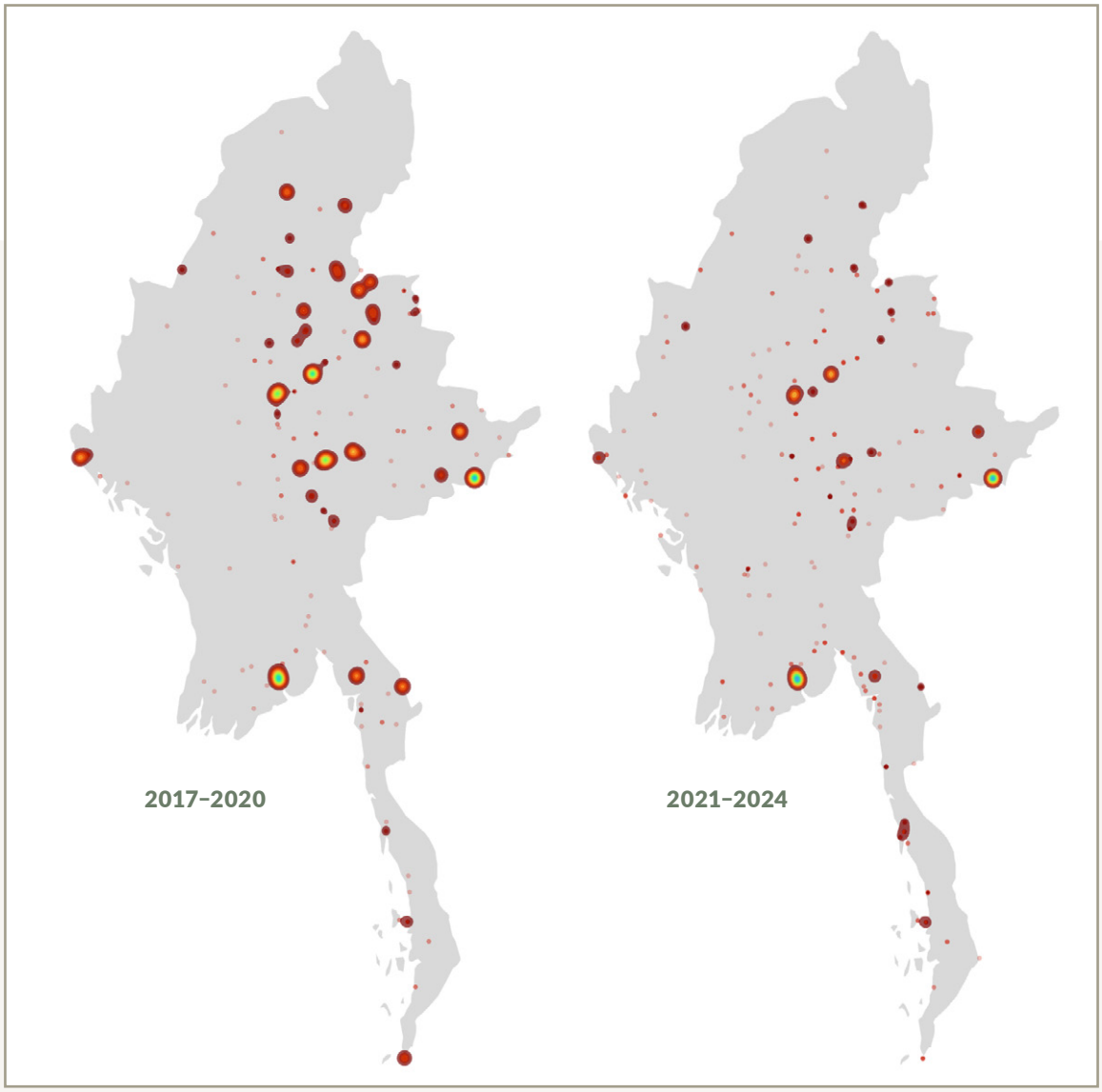


FIGURE 3 Geolocation of methamphetamine seizure events in Myanmar, identified from aggregated social media reporting for the periods 2017–2020 and 2021–2024, showing a significant reduction in seizures in the Shan State region during the latter period.

SOURCE: Data derived from multilingual web-scraping of social media and other web-based resources, cross-referenced to remove duplicates and fixed geographically to the specific location or the nearest geographic point

Lower reported prices in Thailand over the period 2021–2024 correspond with the same post-COVID or post-coup time period in which there was a significant and repeated annual reduction in the volume of drug seizures recorded in Myanmar (see Figure 3) compared to the four-year period prior to COVID.[10] Sustained price reductions during the period 2021–2024 may well reflect an increase in the amount of meth flowing from Myanmar into Thailand. This could be a consequence of a significantly reduced volume of Myanmar's methamphetamine supply being interdicted domestically, rather than because of a surge in production.

Price declines in Thailand might also be partly due to a re-routing of some of Myanmar's meth output through the southern border into Thailand, a switch from the traditional direct route into China from Myanmar. Increased Chinese law enforcement activity on the border, stemming from efforts to suppress cyberfraud compounds, has fundamentally affected the meth trade supply chain structure,[11] reducing the flow of methamphetamine directly into China, particularly via the northern Shan State border crossing around Muse. Another factor curtailing the flow of Myanmar's meth directly into China could be an increase in conflict in Shan State and territorial gains by the Three Brotherhood Alliance (see below: Operation 1027: clashes interrupt meth trade).[12]

Supply routes to consumers in southern China therefore shifted to crossing Myanmar's southern borders with Thailand and Laos, ahead of delivery into China through both Laos and Vietnam. Other suppliers – invested in the meth trade but not necessarily in the primacy of Chinese demand centres – contributed to an increase in westerly flows to both Bangladesh and Indian marketplaces, along land-based and maritime routes through the south-west of the country.

It is also worth noting that Myanmar experienced a significant decline in the unit retail price of illicit meth tablets, crystal meth, heroin and ketamine since well before the February 2021 military coup, a decline that accelerated during the COVID-19 pandemic from 2020. As such, the observation of a retail price decline since the coup is simply a continuation of a process that had already been in place for several years (and has now been a sustained phenomenon for nearly a decade – see Figure 4). The sustained decline in prices of drugs including ketamine and heroin also undermines the narrative of a methamphetamine specific production surge since 2021.

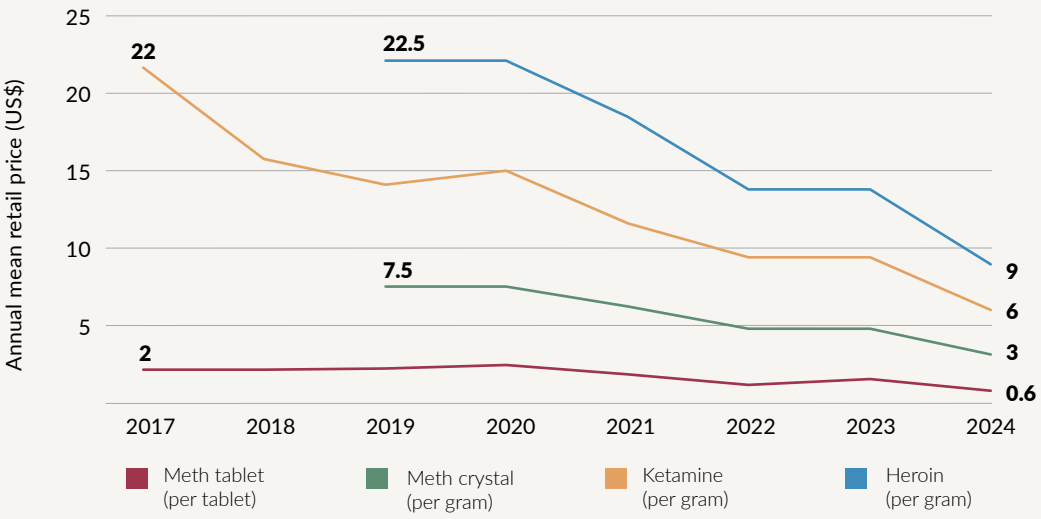


FIGURE 4 Annual mean price changes in Myanmar for four illicit substances, 2017–2024.

SOURCE: UN Office on Drugs and Crime (UNODC) regional reports, 2018–2025

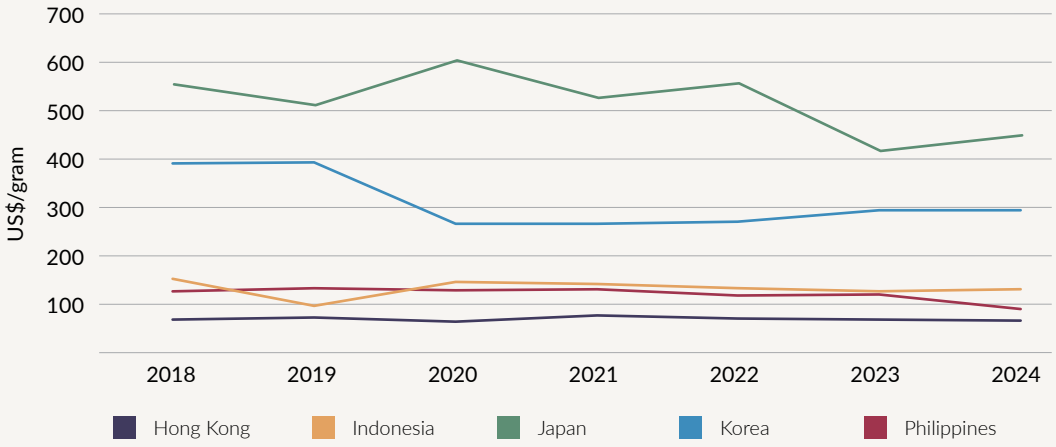


FIGURE 5 **Comparison of annual mean retail price of crystal methamphetamine in a subset of Mekong meth destination markets, 2018–2024.**

SOURCE: UNODC regional reports, 2018–2025

An examination of retail price changes for 1 gram of crystal meth across a subset of Mekong meth consumer marketplaces over the same period is also worth noting (see Figure 5). The data do not display any discernible relationship between meth prices and the coup year of 2021 in any of the domestic markets charted.

Finally, the simplistic cause and effect argument for a post-coup, conflict-inspired meth production surge has several additional contextual problems. First, it rests upon a worrying miscomprehension of the internecine conflict dynamics in Shan State, and the role that the military junta, its proxies and counternarcotic forces play there. Simply put, the political reality of Shan State is such that the presence or absence of the Myanmar Police Force and/or its counternarcotics agents would have no significant disruptive impact on the production, distribution and trafficking of meth. The meth economy is a significant feature of the Myanmar state as well as an important governance influence that sustains armed group dynamics across the contested geographies of the region. Accepting the reality of this political dynamic also requires acceptance of the fact that a post-coup waning of counternarcotic oversight is illogical. Such oversight has long been absent from large swathes of the state by design and in practice.

This study does not dispute the deadly reality of conflict and chaos caused by Myanmar's coup, much of it perpetrated by the new junta. However, while this was a tragic post-coup feature of large parts of central and western Myanmar, it did not reflect life in the drug producing areas of the country – specifically, Shan State and the BGF enclaves in Kayah and Kayin (see Figure 6). In these areas, a remarkable relative stability endured, enabling the integrity of illicit market structures and patronage frameworks to remain undisturbed throughout the coup and the initial post-coup period. This is because the progenitors of the coup were at the same time some of the progenitors of the illicit market.

The coup essentially meant a continuation of 'business as usual'. The idea that the coup triggered a surge in meth production by displacing law enforcement overseers from production zones – or creating an attractive operating environment of chaos and instability that did not previously exist and that transformed into a climate that 'worked' for traffickers – is not supported by the evidence.

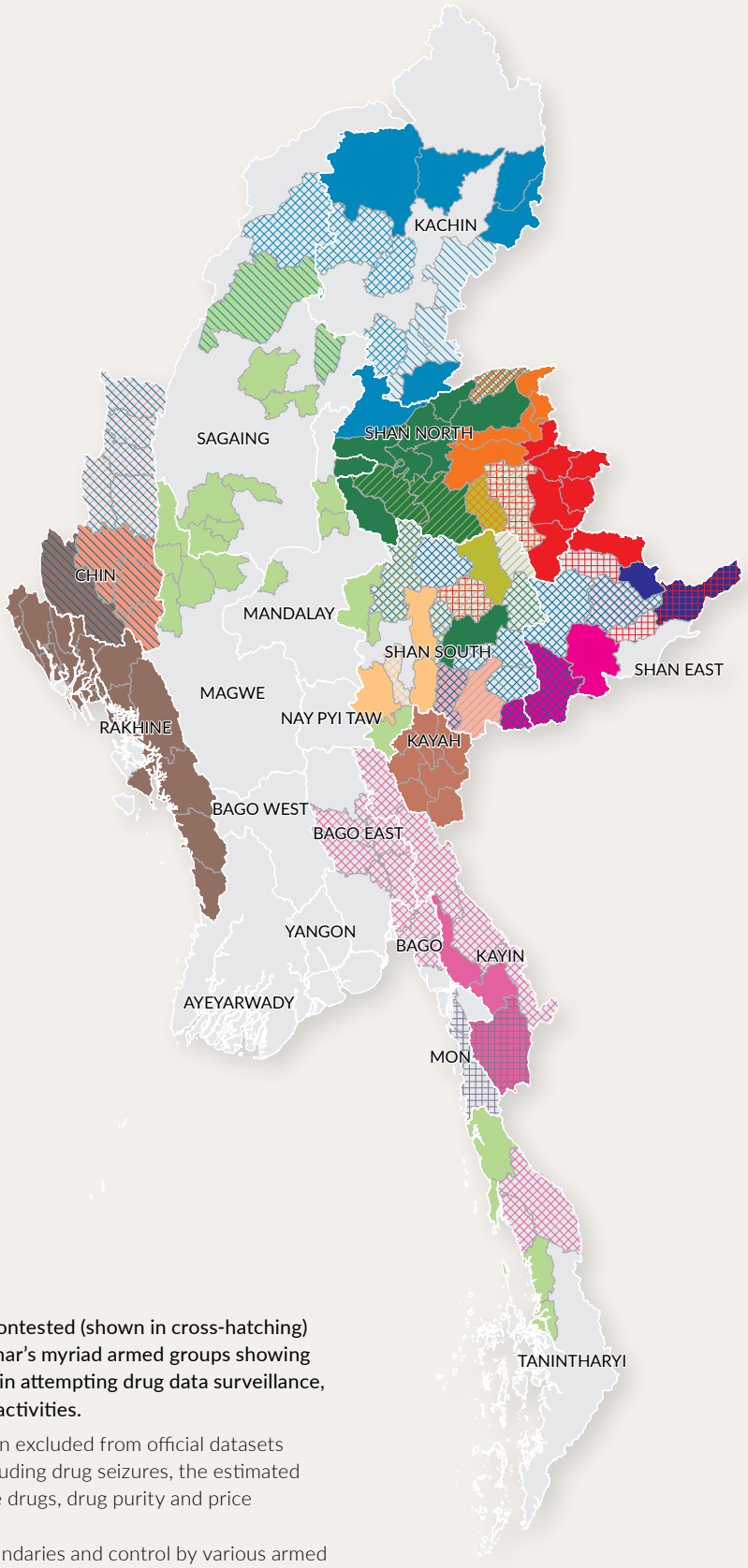


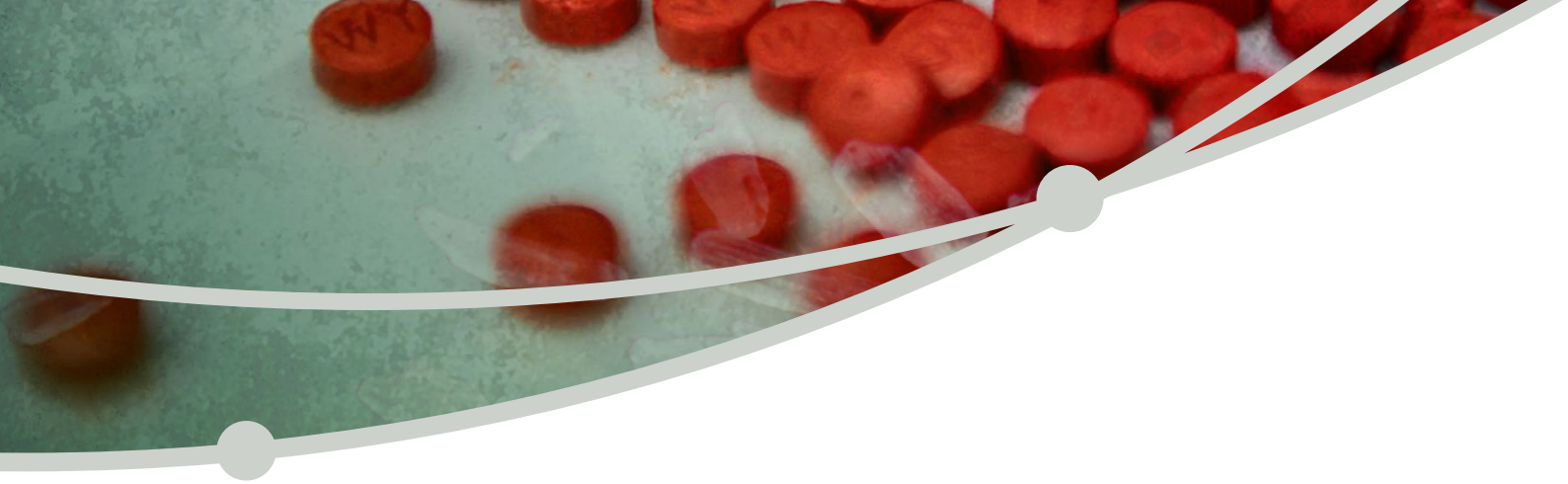
FIGURE 6 Occupied and contested (shown in cross-hatching) areas of control by Myanmar's myriad armed groups showing the complexities involved in attempting drug data surveillance, disruption or interdiction activities.

NOTE: These areas are often excluded from official datasets that address variables, including drug seizures, the estimated number of people who use drugs, drug purity and price indexing efforts.

SOURCE: The territorial boundaries and control by various armed groups were derived from research interviews and informant approximations, June 2025

Challenging current perspectives

Central to the existing narratives surrounding the Mekong meth industry is the erroneous premise that drug seizure statistics are a reliable proxy for production volume. This report argues, in line with established expert consensus in drug market analysis, that no such causal relationship exists. Equally, it questions the argument that falling retail prices in Mekong markets definitively prove a post-coup production surge. The production surge thesis ignores more plausible alternative explanations, such as a documented post-coup decrease in domestic seizures of meth within Myanmar, alongside a change in meth supply chain directional flows, which would naturally lead to a higher volume of product successfully moving south (rather than their traditional north or east routing). Finally, the coup did not prompt a withdrawal of law enforcement from (or chaos in) production zones. The architects of the coup were often the same actors who patronize and profit from the meth trade, enabling a continuation of lucrative 'business as usual' in these enclaves rather than the creation of a newly permissive environment.



THE STRUCTURAL REALITY OF THE MEKONG METHAMPHETAMINE ECONOMY

An industrialization push by producers through the 2010s, involving the scaling up of equipment and maximization of revenue-generation supply chains, gave way to what has been described by some as a generational shift in both production modality and oversight. Despite narratives that have speculated otherwise,[13] the COVID-19 pandemic did alter the way the Mekong meth business was organized by the myriad actors that shape it. Elements of criminal convergence appeared, alongside an influx of a newer generation of criminal entrepreneurs. Competition also increased, both regionally and internationally, as did opportunity. Fundamentally, these elements again differ in many ways from that currently depicted in the dominant narratives of media and multilateral observers.

The Mekong meth business is a well-organized and profitable one. The foundations of the trade as it is organized in Myanmar remain largely intact. Myanmar's military and its many BGFs have a stranglehold over the structure of production and distribution, particularly in the business of precursor importation and meth production or transport taxation. The United Wa State Army (UWSA) likewise retains a strong hand in the trade domestically.

Historical organization and control of the industry have been discussed in earlier academic research. Much of the basic mechanics of production and trafficking operations remain true to this day.[14] Major modifications to various core aspects of the traditional business model are discussed below.

Commodity diversification

The historical move from opium and heroin to methamphetamine marked a significant paradigm shift in the Mekong drug economy. It also represented an economic game changer for the UWSA and subsequent players. Relatively simple and cheap to manufacture, the production profile of meth benefited from the removal of any structural dependence upon agricultural crop cycles, a feature that limited the mobility, timing and supply chain dynamics of more traditional agricultural-based drug production enterprises, such as that for opium and heroin, both of which were dependent upon the opium poppy.

This meant that a much slimmer manufacturing footprint was possible, making the production of meth more efficient than heroin. In the mid-1990s, regional political and law enforcement attention tended

A Wa soldier displays *yaba* tablets, a combination of methamphetamine and caffeine. A staple drug commodity of the Golden Triangle, these tablets have dominated Mekong methamphetamine markets for years. © *Ye Aung Thu via Getty Images*

to focus on the disruption of production and flows of opiates rather than this new synthetic stimulant. This provided a further incentive to alter course by producing meth rather than heroin.

Meth tablets (i.e. *yaba*) were the foundation commodity of this new economy, along with the emergence of a new generation of local leaders. However, the UWSA's approach to meth modernized to adopt crystal methamphetamine production.[15] With Chinese expertise, particularly in terms of equipment and synthesis process improvements, the UWSA soon advanced its production capabilities.[16] The inclusion of new and more industrialized synthesis operations enabled faster and purer output, which meant more efficient production and increased revenue per cycle. Production potential expanded as more local groups – including those affiliated with the UWSA, but also those aligned with Myanmar's military – moved their interests and operations into the Mekong meth economy.

While the Mekong is best known for its methamphetamine production profile – providing tablets, powdered meth (to be tabletted) and crystal meth – additional products have emerged over time. Mekong seizure data reveals that ketamine and 3,4-methylenedioxymethamphetamine (MDMA/ecstasy) have been available in this marketplace for many years, with the latter product tabletted in the Shan state border region. Several new substances have entered the Mekong meth production and supply portfolio. Diverted synthetic pharmaceuticals are gaining prominence today. These include benzodiazepines (diazepam, lorazepam and alprazolam); synthetic opioids (tramadol and fentanyl); and antidepressants (sedil and zolam).[17] More alarming, however, is the recent emergence of polydrug concoctions known as 'happy water' and 'happy 5'.

These synthetic polydrug concoctions feed growing global demand.[18] The 'happy' tablets (see the photos below) were synthesized in a clandestine laboratory located on the Myanmar side of the Myanmar–Laos border.[19] Shrink-wrapped in bundles of 2 000, chemical testing of these tablets has revealed a potent list of ingredients, including caffeine, methamphetamine, diazepam, tramadol, MDMA and ketamine.[20] Testing also revealed that the chemical composition of these tablets varies significantly across Mekong countries,[21] a feature that perhaps results from the increased number and diversity of entrepreneurial criminal actors active in the Mekong's synthetic drug production environment.

'Happy water' tablets (left) and 'happy 5' tablets (right) packaged by a wholesaler in advance of distribution. These synthetic concoctions appear to have emerged during the COVID-19 lockdown in late 2021.
Photos supplied

A shift from the singular production of meth to the synthesis of a growing diversity of alternative synthetic drug commodities in the Mekong marketplace represents a further move away from the traditional production model. This shift reflects growing decentralization across production zones in the border areas. As the next section makes clear, it is also a consequence of a new style of governance across drug-producing territories and continuous adaptation to law enforcement disruption and chemical control measures.

Chemical adaptations

One of the most obvious structural changes to the meth business in the Mekong is one that became entrenched nearly a decade ago. In response to external enforcement challenges around chemical shipments, Mekong production enterprises moved away from the use of their traditional meth pre-cursors of ephedrine and pseudoephedrine (PE) and began using a myriad of chemical alternatives, many of which were unscheduled pre-precursor chemicals. Pre-precursors are chemicals that are seen as 'dual use' and can be used to produce a specific precursor needed to manufacture a synthetic end-product like methamphetamine.[22]

The regular acquisition of PE in volumes necessary to sustain large-scale production of meth tablets and a growing crystal market was increasingly challenged by closer supply chain surveillance in China. It was also constrained by improved regional law enforcement identification and seizure of ephedrine and PE powder en route to the production areas. The move by Thailand in 2012 to ban PE tablets completely, due to their links to the illicit meth industry, marked a turning point for synthesis efforts.

Producers adapted their meth 'recipes' accordingly, embracing a collection of pre-precursors that further improved production efficiencies. In fact, it was this chemical transition 'breakthrough' to pre-precursors a decade ago that played a very large part in the ability of the UWSA and other Mekong producers of meth to increase significantly the potency and volume of production once again.[23]

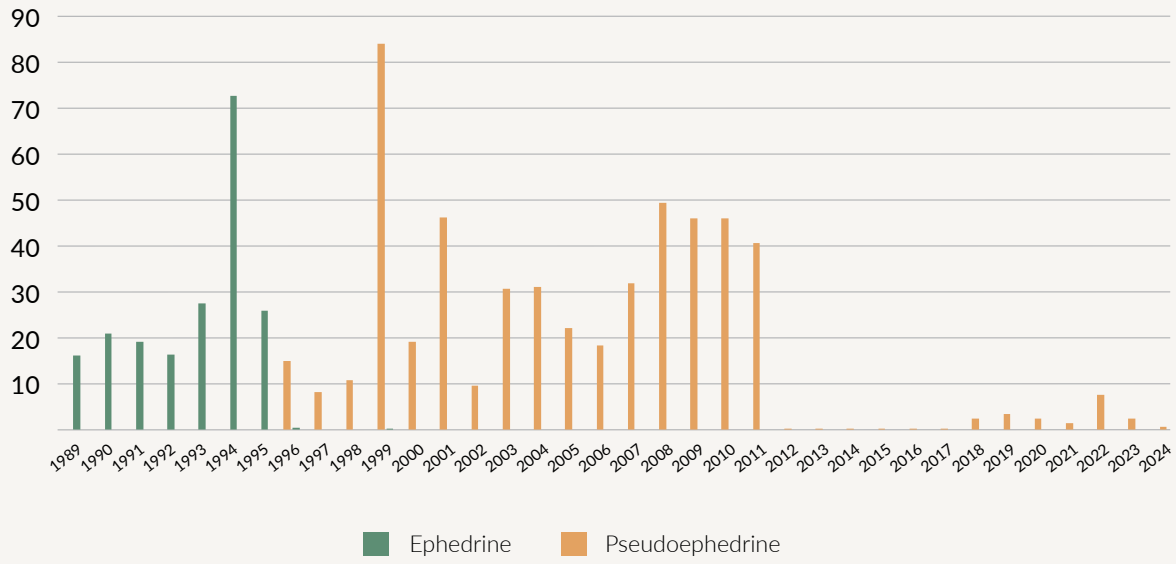


FIGURE 7 Reported exports of ephedrine and pseudoephedrine (in tonnes) to Thailand, 1989–2024.

NOTE: Ephedrine and pseudoephedrine were the original and most common precursors used since production of tablet and crystal methamphetamine first got underway in the Mekong. Myanmar reported zero imports of both substances throughout this reporting period.

SOURCE: UN Comtrade data, https://comtradeplus.un.org

This is where a second meth synthesis method, using phenylacetone – also known as phenyl-2-propanone (P2P) – came in. Using the P2P synthesis method enabled the use of precursors that differed from many of those employed in the traditional PE method. Chemical precursors like P2P, methylamine, phenylacetic acid and propionyl chloride came into use. This enabled a larger production ratio of the more desirable d-methamphetamine isomer as output than is possible through the PE method, along with an increased potency and overall higher volumes of production.

Production of meth has therefore changed significantly in the past decade to a model today that embraces a series of synthesis options, depending on what precursors are available and where regional suppliers are being disrupted. In turn, these adaptive methods of synthesis exposed 'the inherent structural challenges of controlling the supply of synthetic drugs … and the limitations on attempting to schedule and interdict precursors as a mechanism to stop the illicit supply'.[24]

The UWSA quietly appeared to shift its structural dependencies away from PE to a wider pool of readily available and harder-to-control chemical precursors. This came as China – alongside various security and law enforcement bodies of the Western powers – were pointing fingers and pursuing arguments in the UN Commission on Narcotic Drugs (CND) and other diplomatic forums around what precursors to schedule next.[25]

The mastery achieved by producers over specific synthesis pathways underpins the industrial-scale efficiency and adaptability of the Mekong meth trade. A fuller examination of the emergence of P2P and methylamine as precursors is provided in the appendix to this report.

Market segmentation and services

The proliferation of methods deployed by a diverse range of actors means that there is no single production synthesis deployed across the entire production environment at any one time. It is a highly adaptive environment, with a multitude of entrepreneurial actors making meth and other substances in various ways. Much of this is a consequence of a final paradigm shift in the marketplace, one that is being driven by a new generation of leaders who embrace an alternative approach to the traditional Mekong meth business model.

Components of a simple *yaba* pill press operation located on the Myanmar–Thailand border in Shan State, August 2024. *Photos supplied*

As generational change seeped into the narco-empire of the UWSA and a growing number of other armed groups in the late 2010s when newer, entrepreneurial-minded commanders began their ascent, structural aspects of the methamphetamine trade began to shift. A proliferation of underground Chinese banking services and their embrace of the advent of cryptocurrency and satellite-based communications emerged as a staple feature of illicit financial transactions across much of the Mekong borderlands region. In addition, many ascending UWSA commanders began to move away from direct involvement in the production and transport of meth, instead becoming meth production 'landlords', security guarantors and distribution brokers for the product.

Photographs taken in the Wa territorial capital of Pang Hsang show the delivery of Starlink internet receivers. Following Chinese and Thai law enforcement operations targeting scam compounds, with internet transmitters shut down by both governments, interviewees report that the use of Starlink devices has increased across ethnic armed group territories to enable internet access and online financial transactions. *Photos supplied*

This managerial transition from direct control to process oversight has now matured, accelerated by challenges and opportunities generated by the COVID-19 pandemic. Many UWSA commanders realized during the pandemic that there was a great deal more money and less risk involved in simply allowing external criminal groups to produce meth on their territory and tax that production and distribution, than there was in running clandestine meth production laboratories themselves. The adoption of this 'landlord' model represents the pinnacle of the Mekong meth industry's adaptation to date, creating a resilient and highly profitable system.

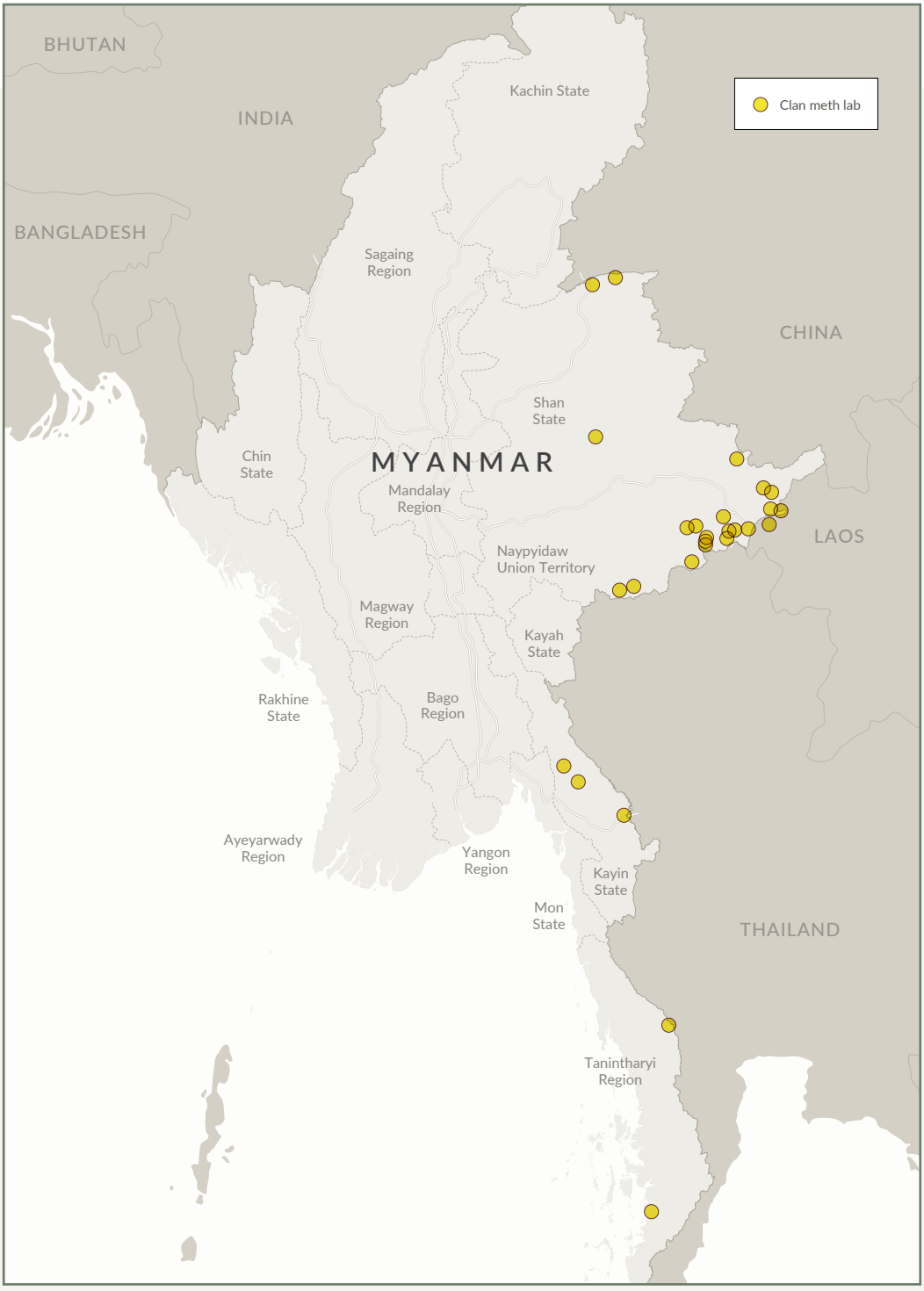


FIGURE 8 Location of currently operating clandestine methamphetamine labs in Myanmar.

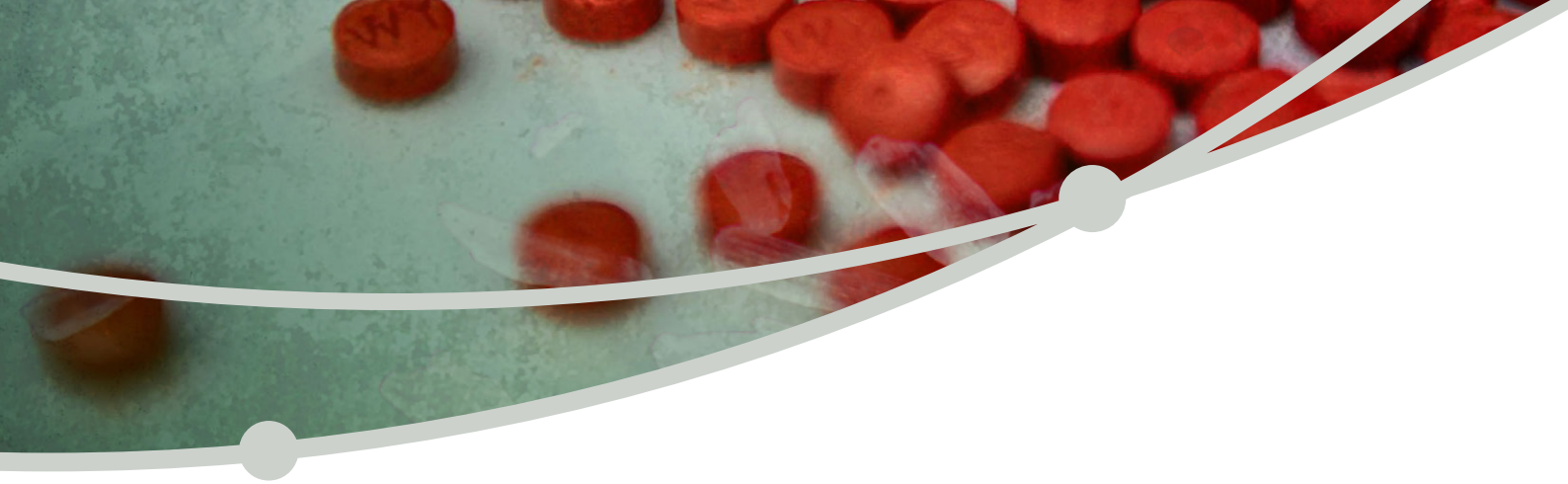
SOURCE: Data verified by fieldwork operatives

However, this mature business model is now being stress tested by two powerful and convergent factors. The eruption of conflict under Operation 1027 (see below) is radically reshaping territorial integrity and disrupting established logistical corridors, creating both new vulnerabilities and unforeseen opportunities for armed actors and their illicit business enterprises. Simultaneously, the intense, regionally-driven policing crackdown on border-based cyber-fraud compounds is drawing unprecedented law enforcement scrutiny to the very enclaves that have long served as sanctuaries for meth production, forcing the criminal entrepreneurs and their state-like hosts to navigate a landscape of significant risk and uncertainty.

Operation 1027: Clashes interrupt meth trade

Significant conflict flared in the north of Shan State from October 2023, generating major challenges for the production and distribution of meth (and heroin). This conflict centred on the Three Brotherhood Alliance launching a military campaign known as Operation 1027.[26] The fighting halted and re-directed trade flows southward away from the border with China in the north of the state.

The conflict has affected the urban supply chain nodes of Laukkai, Lashio, Mandalay and Muse. Some post-production activities such as tabletting, which has generally largely been carried out on the Myanmar side of its southern land border with Laos and Thailand, began to bleed over into neighbouring districts of these two countries. Synthesis activities expanded in the border areas of northern Laos and also became more evident in Cambodia.[27]



A GLOBAL COMMODITY: TRANSNATIONAL EXPANSION OF MEKONG METH

The narrative that Myanmar's February 2021 coup triggered a trend-busting surge in methamphetamine production from the region is not supported by the available evidence. Instead, the evidence points to a long-term and ongoing increase in production that began many years before the coup and endures to this day.

International analysis of regional meth production has for many years been constrained by challenges in gaining geographical access, corrupt or complicit embedded territorial actors, and armed conflict. These factors have perpetuated mischaracterizations of production models and capacities that have generated massive underestimates of regional meth production.[28]

The Mekong meth economy continues to expand the depth and breadth of its influence, beyond the region and into the wider global meth economy. Mekong meth is a major contributor to a global illicit commodity that feeds burgeoning demand for synthetic drugs.[29] It is one of three major points of origin; the other two major production hubs are Afghanistan/Pakistan/Iran and Mexico.[30]

The extent of global demand is such that these zones function less as direct competitors and more as parallel, industrial-scale platforms. The structural reality is that the pathways forged by Mekong-based meth syndicates are merely new arteries feeding a vast, interconnected circulatory system, one that our current analytical frameworks – which have tended to focus on discrete regions and outdated trafficking models – are failing to comprehend holistically.

A main driver of this globalization is the inherent nature of the commodity itself. Methamphetamine is cheap to produce, chemically flexible and lacks significant product differentiation regardless of its point of origin. A high-purity crystalline product synthesized in Shan State is functionally identical to one produced in the Mexican state of Michoacán or Afghanistan's Farah province, allowing it to be seamlessly accepted by distant stimulant markets with minimal friction.

This fungibility removes barriers to entry. It encourages organized criminal groups to treat methamphetamine as a universal product, the value of which is increasingly being determined by purity and availability rather than by brand or origin point, perfectly engineering it for rapid, opportunistic expansion into any market with a latent demand for stimulants.

Source	Mean wholesale production point price (US$/kilogram)
The Af-Pak region – Afghanistan (Farah)	350
Mexico (Michoacán)	600
The Mekong region – Myanmar (Shan State)	425

FIGURE 9 Comparison of mean at source price of a kilogram of crystal methamphetamine in global production centres, 2024.

NOTE: The Mekong region price was identified through field research interviews in Shan State, Myanmar.
SOURCE: Personal communication; Falko Ernst, quoted in Thomas Graham, Fentanyl may enter the US from Mexico, but the drug of choice there is different, *The Guardian*, 8 December 2024, https://www.theguardian.com/world/2024/dec/08/fentanyl-methamphetamine-mexico-border

This expansion is facilitated by the extraordinary efficiencies of the licit global transport and logistics industry. The same containerized shipping routes, air freight networks and express courier services that oil today's global economy are expertly exploited by trafficking networks to move product reliably and at scale. The industrial output of the Mekong production centres requires an equally industrial-scale distribution network, one that leverages existing infrastructure to achieve speed and reach. Legitimate pathways are subtly co-opted, making detection a profound challenge for enforcement agencies accustomed to more conventional trafficking methods.

The embedded resilience perfected within the Mekong meth trade through overt state complicity and elite patronage is a structural feature increasingly replicated on a global scale. The successful long-range transit of these illicit consignments of commodities is not merely a logistical achievement but is contingent upon a transnational network of corrupt and complicit actors. These include port

Malaysian police stand guard in a warehouse containing 33.2 tonnes of crystal methamphetamine in storage drums seized from two containers originating in Iran and destined for Australia, January 2025. *Photo: Royal Malaysia Police*

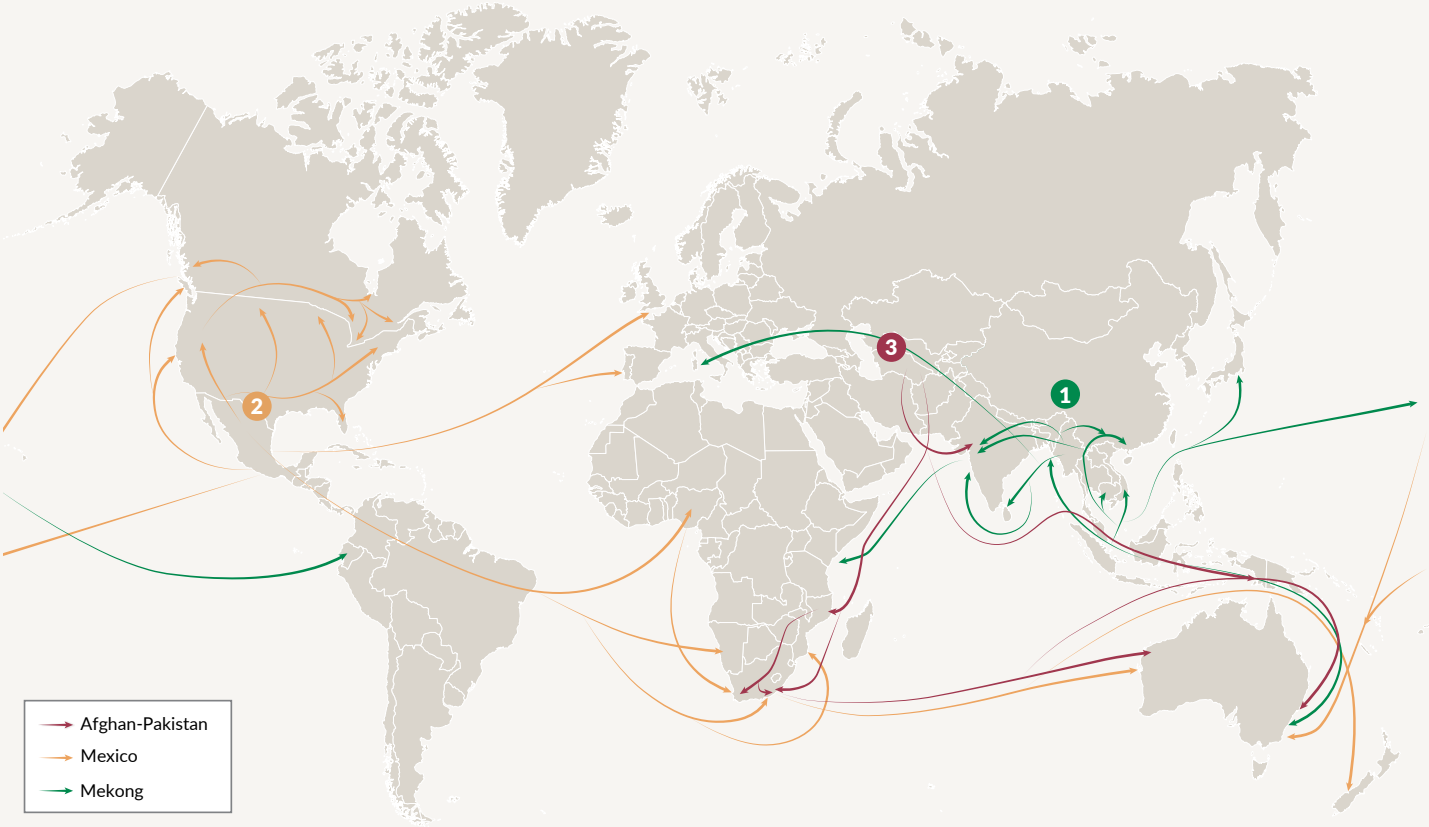


FIGURE 10 Global distribution patterns of major supply chain routes of the 'big three' methamphetamine production points: 1. The Mekong; 2. Mexico; 3. The Af-Pak region, comprising production in Afghanistan, Pakistan and Iran.

officials, customs agents and security personnel who facilitate passage and ensure impunity. This architecture of corruption is the essential, enabling condition for the global meth trade, providing the institutional insulation required for the supply chain to function with the reliability of a legitimate multinational enterprise. It is a major driver of the Mekong meth industry's adaptability.

Globally, methamphetamine is becoming a premier 'portfolio drug' for various transnational organized crime groups, and it is rapidly coming to dominate global drug markets.[31] Its ease of production, logistical simplicity and high profit margins make it an attractive and low-risk addition to any criminal enterprise.

The tragedy is that we are failing to recognize the scale of this infiltration because in many jurisdictions, we are simply not looking for it, blinded by outdated assumptions about drug flows and market dynamics. The result is a quiet pandemic of supply, where the structural realities of a globalized synthetic drug trade have decisively outpaced the analytical and operational capacity of the international community to respond.

Market penetration: case studies beyond South East Asia

The prevailing narrative that confines the Mekong methamphetamine crisis to a South East Asian problem is not only outdated, but dangerously naive. In fact, the attributes that appear to have defined the industry's economic evolution – its industrial-scale production efficiencies, sophisticated chemical adaptability and resilient 'landlord' business models – have given its supply chains a distinct comparative advantage on the international stage.

This section moves beyond the regional focus to examine concrete case studies of market penetration and adaptation in countries far from the Mekong. The global expansion of this meth supply is not a future potential but a current reality, one that has been largely underestimated in mainstream security and policy discourse.

Selected marketplaces	Estimated wholesale price of crystal methamphetamine (US$/kilogram)
Cambodia	7 000
Malaysia[32]	6 962
Hong Kong	17 604
Australia	40 000
Mexico City, Mexico	670
Yangon, Myanmar	1 900
Korea	100 000
Bangkok, Thailand	7 000
New Zealand	81 000
South Africa	10 000

FIGURE 11 Estimated wholesale prices for crystal methamphetamine in a subset of market destinations, 2024.

NOTE: The prices are a rough mean and have been derived from a combination of UN data, law enforcement interviews, national reports and other public reporting.

The 'western route' through South Asia and beyond

Naturally, this supply chain route begins in Shan State. It connects meth producers in northern Shan State with Bengali traffickers who move methamphetamine across the Rakhine state frontier and into Bangladesh. Meanwhile, secondary routing has grown to accompany flows of heroin into the north-east Indian border states of Mizoram and Manipur. Both of these routes transit through Mandalay, where the transfer of drugs from Shan State suppliers to exporters occurs.

This westward routing has been largely ignored for years and was thought to be insignificant in both frequency and flow. This peripheralization of the subcontinent as a destination market for Myanmar meth could stem from geographic coverage biases, given that flows of methamphetamine tablets have been known to move from the Wa hills in Shan State to north-eastern India and Bangladesh since production of these tablets began in the 1990s.[33] Mekong-focused observers have largely overlooked this trade dynamic, perhaps in part due to research efforts generally arbitrarily separating analysis of South Asia and South East Asia.

An Indian Coast Guard vessel seized 5.5 tonnes of methamphetamine originating from Myanmar from a fishing vessel in the Andaman Sea in November 2024. *Photo: Screengrab from WION on YouTube*

Supply chains for methamphetamine tablets manufactured in Myanmar extended westward through Bangladesh to Italy in the years before the 2021 coup.[34] *Yaba* tablets – which are produced in the Mekong – have long been available in the US,[35] and according to several interviewees remain available today in Asian diaspora communities in the US, Canada and several EU countries.[36] Additionally, reports over the past four years indicate that methamphetamine tablets from Myanmar remain available among Asian[37] communities who live in several African countries.[38]

One source provided an account of a December 2024 comingled shipment of 1 tonne of heroin and an unknown quantity of methamphetamine being shipped from Ye port in Myanmar to an importer in Ecuador (see the photos below). Previously thought to be uncommon, comingled maritime shipments have become frequent across the Indian Ocean region, particularly in the shape of dhow-based loads of Afghan heroin and meth from the Makran coast of Iran and Pakistan travelling to points along the Swahili coast of Africa.[39]

Pre-departure photos document the components of an alleged shipment of 1 tonne of Myanmar heroin and an unknown volume of crystal methamphetamine (disguised as green tea) that made up a comingled load shipped by sea from Ye in Myanmar to Ecuador in December 2024. *Photos supplied*

Australia and New Zealand

The Australia and New Zealand illicit drug marketplaces have for many years been primary target markets for Mekong meth traffickers. The supply of methamphetamine to Australia and New Zealand by Mexican cartels has increased significantly during the post-COVID period and become a competitor to the more traditional Mekong meth supply. Business linkages between these cartels and local criminal syndicates have increased as well. The relative remoteness of the two countries – and the impossibility of penetrating them through overland trafficking supply chains from nearby production points – fed into high retail meth prices in these markets. The increased supply risk generated by the Australian authorities' relative success in interdicting maritime and air-based flows of meth also contributed to higher retail prices, as traffickers increased wholesale prices to compensate for lost supply.

However, strong consumer demand for meth persisted, and a sizeable South East Asian diaspora provided a means of getting product into the country. As a result, Asian trafficking syndicates that were able to get their Mekong meth supplies into the country could reap significant profits compared to their more traditional Mekong sub-region marketplaces. According to the Australian Federal Police (AFP), seizures of South East Asian-produced methamphetamine in Australia have decreased notably since 2021, accounting for less than 15% of total methamphetamine seized in 2023.[40]

A June 2025 seizure by the Australian Federal Police of a Sydney-based clandestine methamphetamine lab linked to Latin American supply chains. *Photos: Australian Federal Police*

Meanwhile, the production and international distribution of methamphetamine made in North America – and in Mexico and Canada in particular – has become globally significant in recent years. According to interviews with Australian and New Zealand security officials, Mexican meth shipments increased so significantly that they have been taking up more border agency resources. In their view and experience, Mekong meth continues to flow to the Australia/New Zealand region in similar volumes as previously, but is not being seized as frequently as meth shipments originating from Mexico and Canada.

According to authorities in both countries, the recent increase in seizures of North American meth has resulted from greater intelligence sharing by North American authorities around identified flows at their end of the supply chain. Inter-agency operations have been increased and tasked accordingly, resulting in greater time and attention being taken up by border and law enforcement agency work

around North American flow interdiction efforts. A correlated reduction in attention, assets and time targeting Mekong-origin flows means these are less likely to be represented in the growing seizure volume statistics. An additional consideration here is the view expressed by one interviewee that traditional Mekong meth smuggling syndicates are better at concealing their Australia and New Zealand-bound shipments and supply chains than their less established supply chain rivals from North America and Afghanistan/Pakistan.[41]

Expansion to stimulant markets of the Middle East

With the implosion of the Syrian-based Captagon trade following a rebel offensive that toppled President Bashar al-Assad in December 2024, supply and distribution of these amphetamine-based tablets to key Middle Eastern consumer markets have been disrupted. At the moment, it appears uncertain whether these Syrian–Lebanese supply chains will recover, given that the new regime is courting international recognition and these networks were closely tied to Assad's patronage network.

This raises several possibilities in terms of a replacement or secondary supply. One possibility is that Captagon production points in the EU will largely replace Syrian–Lebanese networks.[42] Another alternative is that the *yaba* markets of the Mekong could fill the gap.[43] Myanmar meth already flows to India overland via the 'Seven Sisters' in India's north-east,[44] and overland through Bangladesh and into East Bengal. It is allegedly imported in much greater volume by sea departing from Myanmar's Andaman Sea coastline, sometimes via stops in the Maldives and/or Sri Lanka, to the destination ports of Gujarat and Mumbai.[45] These same ports dispatch vessels westward to the trading waters off the Makran Coast, as well as along the eastern and southern meth marketplaces of the Swahili coast countries and island states of Africa.[46] Incorporating Mekong meth shipments on these routes would seem both plausible and entirely in keeping with the historic mercantile tradition of these sea traders and their community marketplaces.

Expansion to Africa

Unconfirmed reports of Mekong meth arriving in Africa have persisted for more than two years. There is a precedent for Mekong-based narcotic supply chains feeding African consumers. The late 1990s and the initial period after the Taliban banned the cultivation of opium poppies in 2000 saw the emergence of a Mekong-based heroin supply chain via Thailand to Kenya and Tanzania.[47]

More recently, the forensic service in Mauritius confirmed in 2024 the seizure of a kilogram of heroin originating from Myanmar.[48] Yet the eastern and southern coastal countries of Africa are waning heroin consumer marketplaces today.[49] A transition by these consumers to synthetics in general – and to stimulants in particular – has seen the regional appetite for methamphetamine grow enormously.[50]

A strong continental meth production base exists in both East and Southern Africa, as well as in Nigerian networks in West Africa.[51] An Afghan-based methamphetamine supply chain emerged in 2019, piggy-backing shipments onto the embedded Swahili coast heroin trading network that plies the so-called 'southern route', and has connected East African consumer markets to the world for hundreds of years. Meanwhile, Mexican cartels have forged knowledge-sharing alliances with local criminal syndicates to co-locate Mexican meth production facilities in the region. These facilities serve both regional demand and extend the reach of cartels' meth supply points.[52]

Yet these varied supply chains still struggle to keep pace with rising consumer demand for meth in this rapidly developing part of the continent. There remains significant growth potential for meth producers driven by ongoing massive rural to urban migration, booming infrastructure development and a corresponding growth in low skill and menial employment. It is an urban development situation reminiscent of that in the Mekong region in the early 1990s when meth consumption – particularly in its *yaba* tablet form – began to take off.

The fact that consumption of drugs in tablet form is already a staple feature of the illicit drug marketplace in Kenya, Tanzania and South Africa is an additional factor that may contribute to the introduction and adoption of meth in tablet form.[53] If Mekong meth tablets have not yet arrived along the Swahili coast, then their arrival should be viewed as inevitable.

Europe and beyond

Reports of the intermittent presence of Mekong meth arise in a diverse geography of marketplaces globally. As mentioned earlier, Bangladeshi networks facilitated a small-scale yet regular Myanmar meth tablet supply chain between Dhaka and Italy.[54]

Some interviewees stated that *yaba* supply chains to Eastern Europe, the UK and North America already exist.[55] Like the Italian example, the supply reportedly discreetly targeted Asian diaspora communities in these destinations, potentially explaining why seizures of these flows fail to materialize in official records.

Outside the South East Asia region, it is likely that law enforcement agencies are not profiling for *yaba* or crystal meth imports from the Mekong. Perhaps they should. Just as Mexican, Canadian, Afghan and African meth can be found across the East Asia and Pacific region and considerably beyond, why not also Mekong meth?

In July 2025, Australian Border Force officers intercepted a shipment of fabric from Thailand at the Port of Brisbane. The consignment was found to be concealing 600 kilograms of methamphetamine. *Photo: Australian Border Force*

Mekong meth on the world stage: a new global drug threat

Reports of meth tablets flowing from the Mekong region to points around the globe sound fantastical to many, especially among a large cross-section of law enforcement and 'drug experts' interviewed as part of this research. These transnational flows are so enmeshed in diasporic supply channels and localized retail marketplaces that they are invisible to law enforcement. Their very invisibility – both in terms of absent seizure accounts and of individual experts' personal knowledge – was the reason held up by several expert informants as validation of the absence of such flows occurring at all. Yet there was an acceptance among a small sub-group of other interviewees that simply because we do not see this flow in our seizure metrics does not mean that it is absent.

The availability of cocaine in the EU has reached unprecedented levels, making this substance a significant regional threat.[56] Significant resources and political pressure have been provided to border forces, law enforcement, militaries and other national security agencies to identify and disrupt the flow of cocaine to the EU. Arguably, this hyper-focus on one substance – driven by an ever-present ambiance of political rhetoric – has contributed to a blinkering of sentinel surveillance in relation to growth in other potential substance threats, notably synthetic opioids like nitazenes and precursor chemicals used in the production of MDMA and methcathinone.

Blinkering is a challenge shared also by North American security forces. Alongside a saturated cocaine market, the political rhetoric around fentanyl and national security in North America has dominated news cycles. All the more so, when it has become enmeshed in a general national repositioning of security and trade interests by the US, Canada and Mexico as they reconsider their relationships with China (and with each other). The added focus in the US on reprioritizing Customs and Border Protection assets towards the rapid identification, capture and deportation of illegal migrants[57] has only exacerbated the strain on drug surveillance capacities that have been reoriented to fentanyl.[58]

In short, fentanyl (and its related market components) has become the national narcotics priority in Canada, Mexico and the US. All other substances have become only secondary or tertiary concerns. When asked if there was any Mekong meth being imported into the US, one US drug authority representative remarked, 'I couldn't tell you. We're not even looking for it.'[59]

A permissive threat environment

Year-on-year increases in global stimulant demand are met by an ever-widening geographic distribution of supply, creating a synthetic drug-driven criminal economy that now has a foothold in nearly every country in the world. The impact of this commodity and the criminal trade that surrounds it is worsening at an accelerated rate. In the four-year period from 2021 to 2024, the criminal market for synthetic drugs became more significant in 123 countries, while a further 46 nations experienced an impact that remained stable (albeit for many at a level of harm that was already adjudged to be either significant or severe).[60] This global penetration by synthetic drugs – and methamphetamine in particular – is exacerbated by the general absence of effective resilience-based measures to disrupt and deter it in most countries.

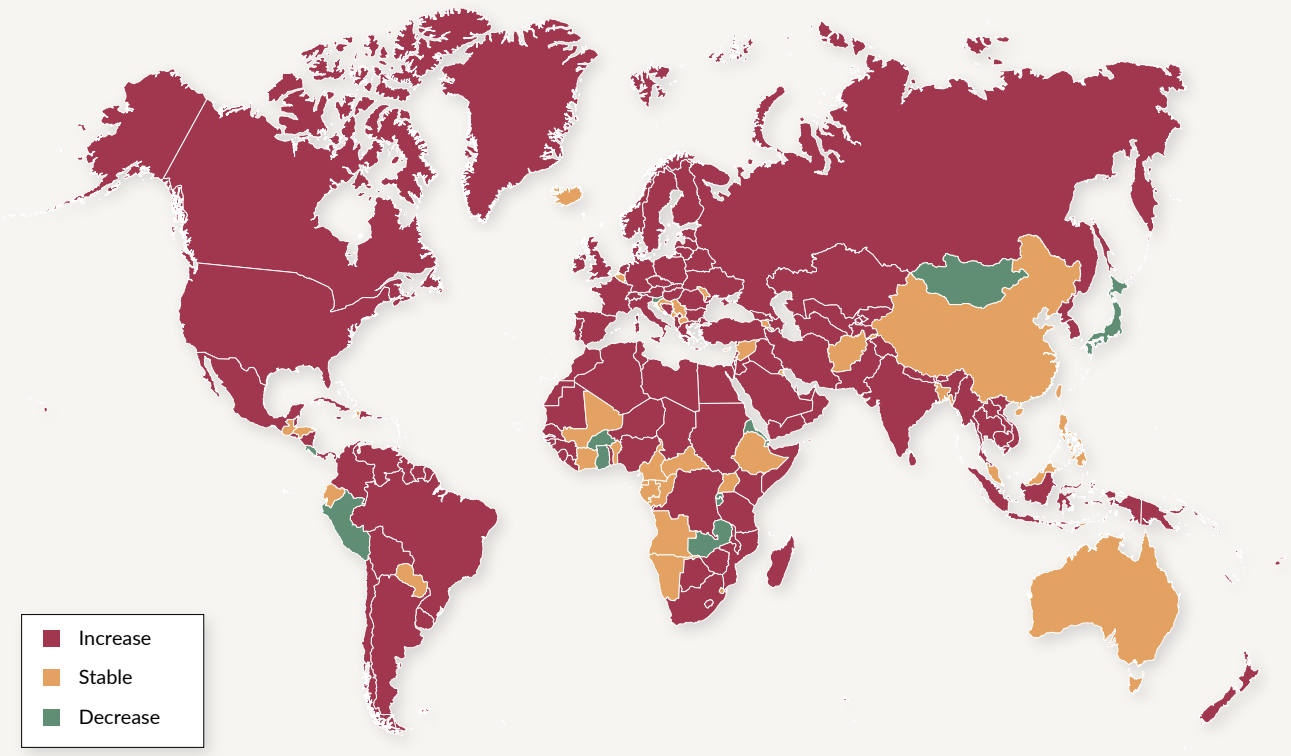


FIGURE 12 Changes in synthetic drug market severity, 2021–2025.
SOURCE: Global Organized Crime Index 2025

This rapid globalization is fuelled by a critical and often overlooked structural vulnerability: the exceptionally low resilience of most states to the penetration of these advanced criminal enterprises. National policy and enforcement frameworks, many of which were designed to disrupt geographically-fixed, plant-based drug trades, are proving inadequate against the speed, adaptability and chemical sophistication of modern meth syndicates. This mismatch creates a permissive environment where new markets can be rapidly seeded and scaled, overwhelming local public health and security institutions long before an effective response can be mobilized. The result is a global landscape of systemic weakness, ripe for exploitation.

At the core of this expansion lies the unique nature of methamphetamine itself, a commodity seemingly designed for globalization. Unlike cocaine from coca or heroin from opium poppies, its synthesis is not geographically determined, liberating production from reliance on agricultural cycles, climate or specific location. This operational freedom is compounded by the industry's mastery of chemical substitution, allowing producers to adapt their recipes to a wide array of precursors and pre-precursors. Because many of these input chemicals are dual use and not subject to stringent international controls, they can be easily procured anywhere, effectively nullifying traditional supply-side disruption strategies and making any industrializing nation a potential production base.

This inherent production flexibility provides the perfect foundation for ambitious criminal enterprises to achieve worldwide reach by exploiting the pathways of legitimate commerce. For a highly efficient and well-capitalized production powerhouse like the one developed gradually in the Mekong region, this environment offers boundless opportunity. It provides the structural architecture through which regionally produced methamphetamine can be injected seamlessly into transnational supply chains, transforming a regional crisis into a clear and present global threat.

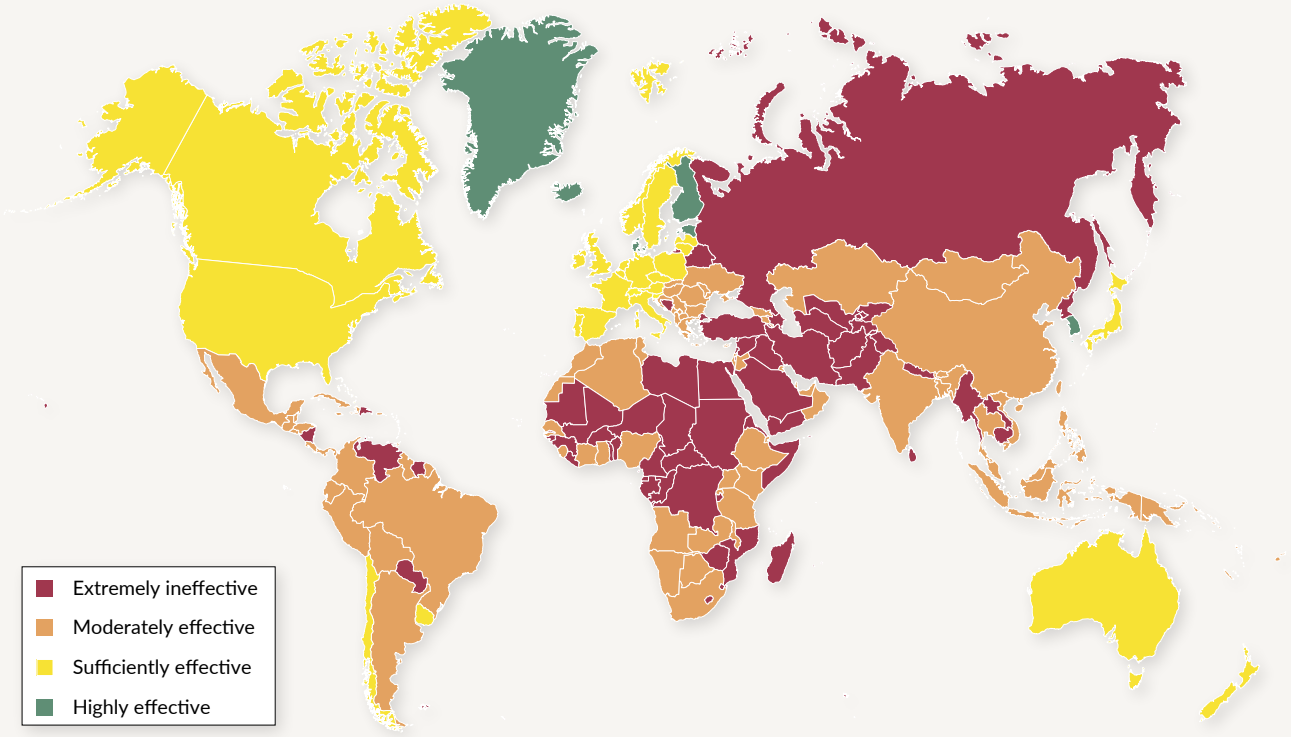


FIGURE 13 State resilience to criminal markets, including synthetic drugs, and the capacity of states to respond to and mitigate the harms created by these markets.

SOURCE: Global Organized Crime Index 2025

This is accompanied by a rapid decline in development assistance and security and intelligence help from traditional sources. Funds for UN programming have been cut significantly.[61] Meanwhile, the US has proposed cutting the budget of the Drug Enforcement Administration,[62] having already dissolved the overseas presence and work of the US Agency for International Development (USAID).[63] It has also sought to dismantle the US Institute for Peace (USIP).[64] These moves resulted in the closure of many small, indigenous non-governmental organizations in the Mekong whose work had previously received funding from the US government. Meanwhile, space has opened up for other global players to pursue their own geopolitical goals.

China's rising influence over illicit markets

The dominant narratives that have skewed our understanding of the Mekong meth trade often treat the geopolitical landscape as a static backdrop rather than a primary structural driver of the illicit economy. In particular, China's role is frequently misunderstood or misrepresented through the speculative lens of its participation in multilateral forums such as the Mekong Memorandum of Understanding on Drug Control.

This superficial view obscures the reality: for years, the region has been undergoing (and continues to undergo) a fundamental realignment of its security architecture, one that directly enables the global expansion of its illicit enterprises. This shift is starkly illustrated by the rapid withdrawal of USAID, USIP and other Western geopolitical assets in early 2025, a departure that created an immediate

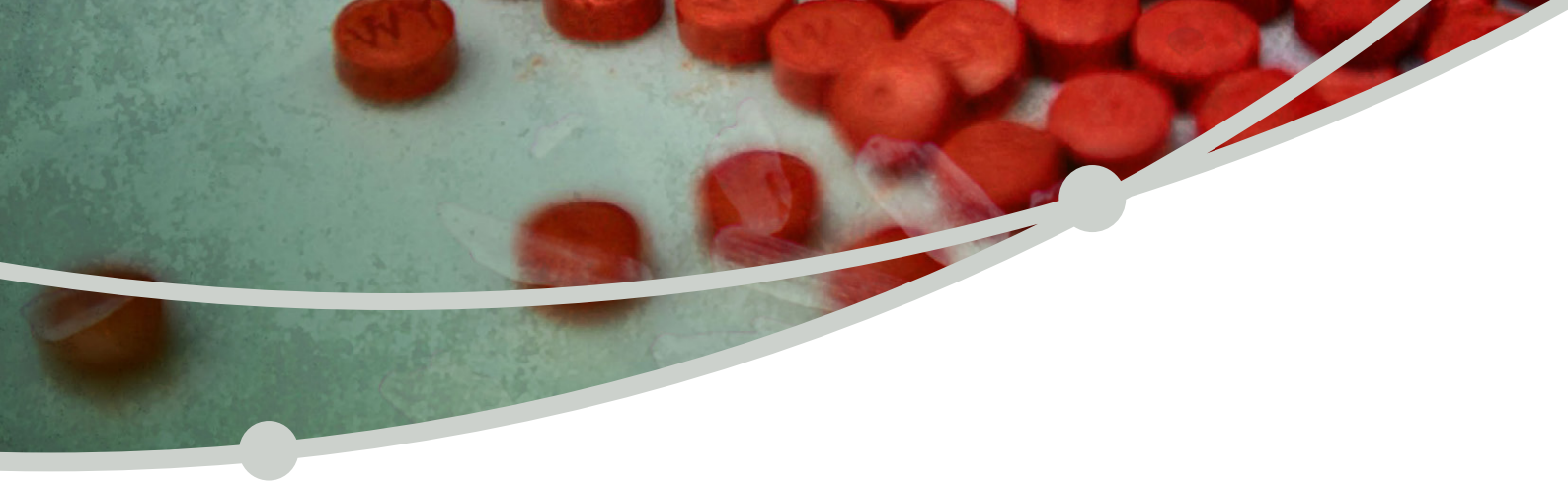
vacuum in development and security assistance, and one that is rapidly being filled by the China International Development Cooperation Agency (CIDCA).

Where Western assistance has historically been used as a vector to build counternarcotics capacity and intelligence networks, CIDCA's soft power initiatives are aligned with Beijing's distinct national security priorities.[65] The impending cessation of US-led funding and the closure of key surveillance nodes represents more than a loss of resources; it marks a structural collapse of a specific form of international influence. China's strategic tolerance for organized crime groups, as long as their illicit activities do not destabilize its own domestic market, provides a powerful permissive environment for expansion. This new dynamic is one of the most significant, yet overlooked, threats driving the globalization of the Mekong meth trade.

A US Congressional finding that Beijing actively encourages the export of precursor chemicals to foreign markets moves this assessment beyond conjecture.[66] It suggests a structural reality where these criminal enterprises are viewed not as an inherent threat, but as business entities and potential strategic assets whose outward-facing activities are, at best, tolerated.[67] This geopolitical reality serves as a powerful accelerant, effectively underwriting the transnational ambitions of the very meth syndicates this report has identified.

The geopolitics around illicit drugs has changed significantly in recent years, but particularly in the year since Donald Trump returned to the White House. At the annual CND meeting in March 2024, the US – at that stage still governed by the administration of President Joe Biden – tabled a resolution that used the phrase 'harm reduction'. After much acrimonious debate, particularly surrounding Russian efforts to derail this initiative, the US was successful in persuading a coalition of states to endorse the resolution. This should have been a significant achievement, because it was the first time that this phrase had been adopted at such a high multilateral level.[68] A year later, however, the US delegation aligned itself with Russia in driving opposition to all six resolutions tabled at the 2025 CND meeting. This opposition was grounded in a refusal to accept language around gender or reference to development initiatives like the sustainable development goals. In the end, the US found itself alone with Russia and Argentina on the losing side of the vote.[69]

This was a remarkable volte-face at the multinational level by a leading global player in the illicit drug space. The decision was accompanied by the elimination of programmes and programming entities at the local level, resulting in a reduction of territorial presence. This has potentially significant implications for regional and global insecurity, as these vacated spaces are likely to be filled by entities less inclined to disrupt their illicit activities.



CONCLUSION: OVERLOOKED THREATS AND THE NEED FOR AN EVIDENCE-BASED RESPONSE

Speculative causal links drawn between Myanmar's 2021 coup and a supposed trend-busting production surge are not supported by evidence. Instead, the evidence points to a much longer-term and ongoing expansion of illicit production in the region. It is likely that current narratives have consistently underestimated this production for years.

This research also confirms that supply chains originating in the region now extend outward to global marketplace destinations, a development that potentially turns Mekong-produced methamphetamine into a global illicit commodity. This potential globalization of the supply chain represents a significant and underestimated threat that extends far beyond the immediate region.

Sustained long-term growth in output results from adaptive advantages inherent in the Mekong production model. Industrial-scale efficiencies, the financial resilience of the COVID-inspired 'landlord' business model and partnership architecture, and the unparalleled ability to adapt synthesis processes to changes in the availability and control of chemical precursor components have created an enterprise perfectly engineered for the exploitation of transnational export market opportunities.

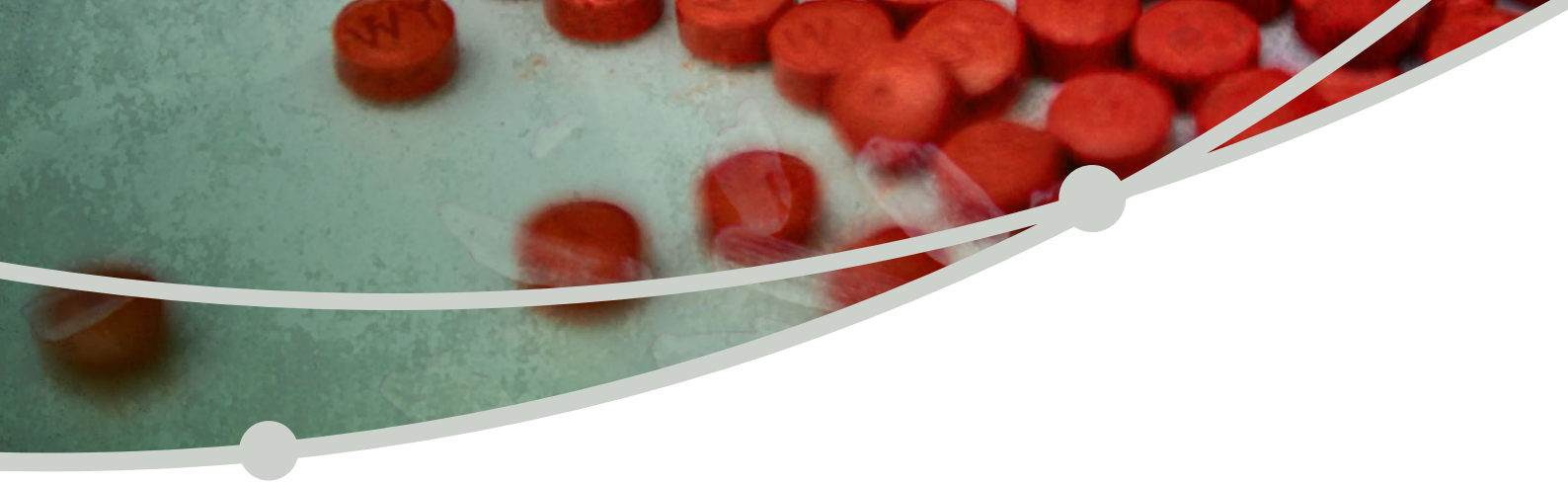
The structural reality, therefore, is that regional meth market dominance has become the engine to power a formidable global meth supply chain expansion. This is being facilitated by co-opting legitimate global logistics, and is protected by transnational patronage networks, rents and political complicity.

The cumulative weight of these findings has serious implications that extend beyond mere academic correction of speculative discourse. Rather, the core assumptions underpinning current international and regional counternarcotics strategies against Mekong methamphetamine are fundamentally mis-aligned with the nature of the threat.

Interventions focused on the traditional perception of this trade being a simplified, localized threat have consistently failed because the industrial economy they seek to disrupt is far more complex, resilient and ambitious. The evidence renders interventions based on conventional precursor control, regionally contained enforcement and seizure-based metrics largely obsolete.

Recognizing that we are confronting the emergence of an adaptive and structurally embedded global enterprise, not simply a reiterative regional crisis, is the essential predicate for any effective response. This necessitates a strategic pivot away from a singular focus on the production heartland of Shan State and its border regions and towards the transnational criminal networks and globalized supply chains that enable its global reach.

Effective interventions must prioritize inter-regional and multi-jurisdictional action against the abuse of pre-precursor chemical supply chains, the online and underground banking systems that launder profits, and the logistical routes and complicit institutions that enable Mekong meth to be carried to new demand centres worldwide.



APPENDIX: PHENYLACETONE AND METHYLAMINE

Phenylacetone

Phenylacetone (P2P) is a critical and popular precursor in the illicit synthesis of methamphetamine. This is due to its chemical versatility, efficiency and historical prominence in large-scale production settings. Unlike PE-based methods, which are hampered by the imposition of strict global controls, P2P can be synthesized from less regulated precursors like benzyl cyanide or phenylacetic acid, allowing for producers to circumvent law enforcement efforts. Additionally, P2P-derived methamphetamine is often viewed as more potent and easier to purify than other forms. This perception contributes to ensuring consistent demand among producers in illicit marketplaces. Despite increasing regulations, P2P remains a cornerstone of meth production where industrial-scale operations dominate, such as in the Mekong region.

The trade in P2P itself is significantly restricted, to the point where even though it is the most popular means of synthesis for methamphetamine globally, most illicit chemists today will synthesize their own P2P. While there are several ways of doing this, one of the most common makes use of acetic anhydride and acetone,[70] both of which are dual use and can thus be sourced legitimately. It is therefore worth examining the availability of both acetic anhydride and acetone in Myanmar.

Given the correlated illicit use of acetic anhydride in the processing of heroin from opium gum, it is no surprise that for the 10-year period from 2014 to 2024 there were only two shipments registered in the UN Comtrade database for a total volume of 27 kilograms (originating in Singapore).[71] For decades, acetic anhydride has been known to be a core chemical necessary in both Afghanistan and Myanmar for the production of heroin. Its trade has been internationally scheduled since the inauguration of the UN Convention Against Illicit Traffic in Narcotic Drugs and Psychotropic Substances (1988). This means that the importation of acetic anhydride can occur only under strict controls and monitoring regimens. Thus, the direct legal import of such a core precursor to a country that is well known both for its illicit heroin industry and its wider drug production would be a considerable challenge.

However, there are alternative ways of acquiring such controlled chemicals. If we look at the reported licit flow of acetic anhydride to neighbouring Thailand we get a different result.

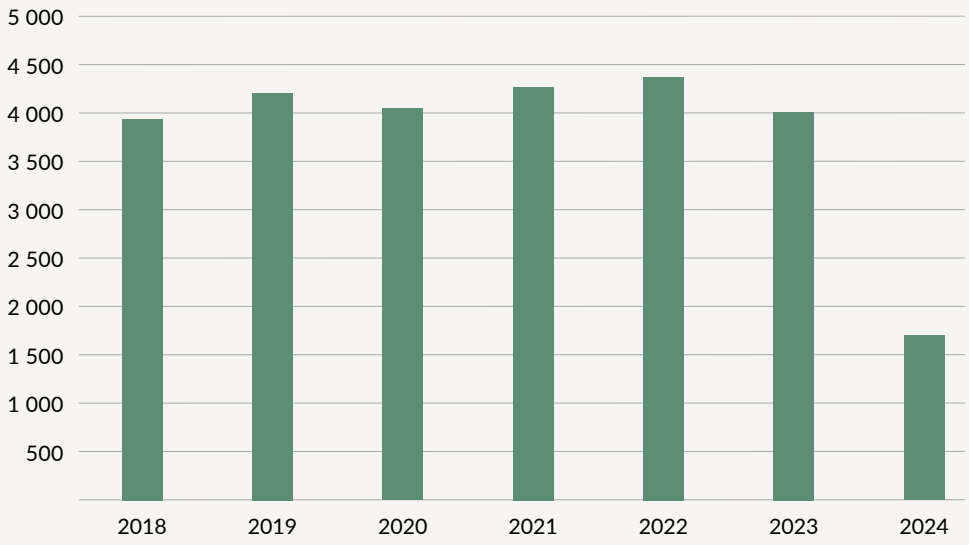


FIGURE 14 Annual volume (tonnes) of acetic anhydride exported to Thailand, as reported by global states in the UN Comtrade database, 2018–2024.

SOURCE: UN Comtrade data, https://comtradeplus.un.org

For the period 2018 to 2024, Thailand reportedly imported a total volume of 26 701 tonnes. As an acetylating agent, acetic anhydride has numerous licit industrial uses, including in the synthesis of pharmaceuticals like aspirin or in the modification of starches in the food industry. It is also a remarkably efficient chemical in the synthesis of P2P. Only 1.8 litres of acetic anhydride are needed to synthesize 1 litre of P2P.[72] Conversely, the route to synthesis of P2P using acetone, another common chemical in the licit industrial sector, would require an input volume of 9 kilograms of acetone to produce 1 kilogram of P2P.[73] Nevertheless, in 2024, a total of 126 tonnes of acetone was reportedly exported to Myanmar from three international supplier nations: India, Thailand and an undesignated Asian state.[74]

Thai police test a 90-tonne shipment of toluene originating from South Korea destined for Myanmar, and seized at Laem Chabang, Thailand, July 2024. Toluene is a common dual-use solvent used in the purification process for methamphetamine. *Photo: Yingyos Akmanachai via the Public Relations Department of the Government of Thailand on Facebook*

Nearly two-thirds of the total volume of Thailand's acetic anhydride imports originated in Singapore (17 285 tonnes) through the review period, while Japan provided an additional third (8 204 tonnes). For acetone shipments to Myanmar, 'other Asia' was identified as providing about 41% of the total volume (347 tonnes) with India (157 tonnes) and Vietnam (154 tonnes) contributing the majority of the remaining amount. That regional nations were the majority supply origins for these licit dual-use precursor shipments – and that China did not figure among the named suppliers – may be a surprise to some observers.[75] Yet it points to the increasing diversity of chemical suppliers available on the international market today, with many of these being ASEAN trade partner nations. Thus, the purchase and acquisition of precursors and pre-precursors, particularly those that are not under stringent international export controls, are rather easily arranged.

Methylamine

The precursor chemical methylamine appears to play a particularly crucial role in current synthesis methods. As a primary chemical building block, it is integral to several of the most efficient methods of producing high-purity crystalline methamphetamine, the industry's signature export-grade product.

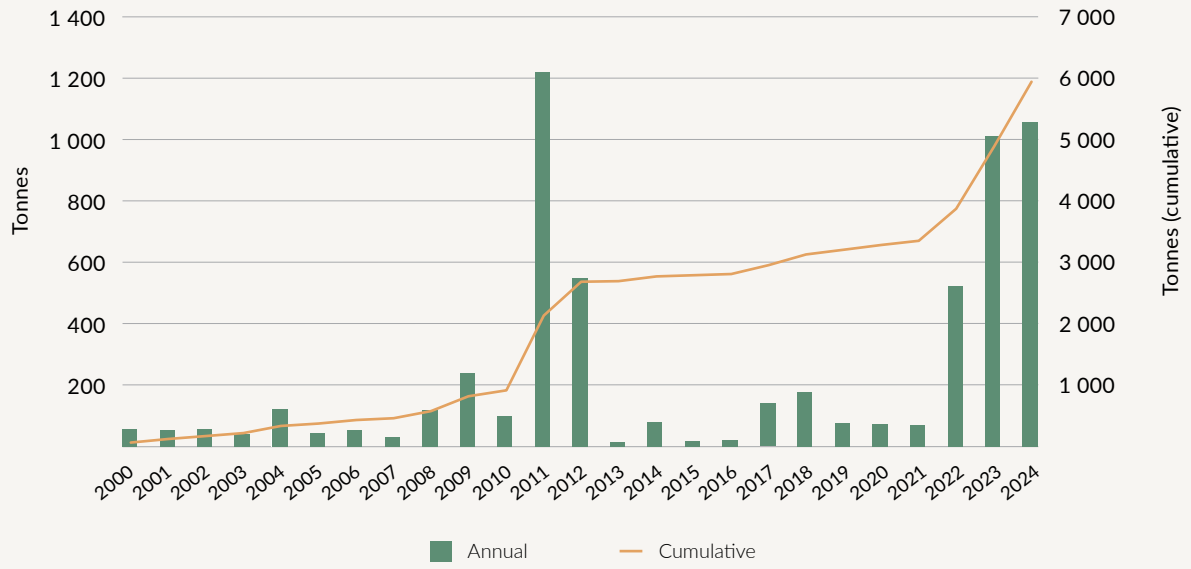
However, the strategic significance of methylamine extends far beyond its direct use. It serves as a prime example of the chemical sophistication that renders traditional precursor control regimes increasingly obsolete. The region's syndicates have demonstrated a formidable capacity not only to source methylamine through diversion from legitimate industries where it is a common dual-use chemical (including in the production of insecticides) but also to produce it in situ from a range of unrestricted pre-precursor chemicals. This operational flexibility fundamentally undermines international efforts focused on interdicting a static list of precursors, showcasing an adaptive production model that consistently outpaces regulatory and enforcement frameworks.

A significant volume of licitly traded methylamine is regularly exported to both Myanmar and Thailand. Trade in methylamine was evident from the early 2000s onwards, but it appears to have expanded significantly since 2010, along with a domestic trade rapidly emerging from 2014 in Myanmar. Over the period 2021–2024, a total of 4 683 tonnes of methylamine was collectively imported by Myanmar and Thailand.[76] In 2024 alone, the combined total was 1 622 tonnes.[77]

If we work on the basis of a hypothetical 50% diversion rate for licit methylamine shipments, then with a ratio of 1.4 kilograms of methylamine being required to contribute to the synthesis of 1 kilogram of methamphetamine, we would find that in 2024 a total potential volume of 1 159 tonnes of Mekong meth could be derived from the diverted precursor product.[78]

Methylamine shipments imported directly to Myanmar originated almost entirely from China (4 407 tonnes; 91.4% of total volume) across the reporting period (2021–2024). In 2024, China accounted for 441 tonnes (78% of the total volume), while Thailand accounted for the remaining 123 tonnes (22% of the total volume). In 2024, Thailand received 1 058 tonnes of methylamine, with 71% (748 tonnes) originating from China and a further 28% (297 tonnes) arriving from India.[79]

THAILAND



MYANMAR

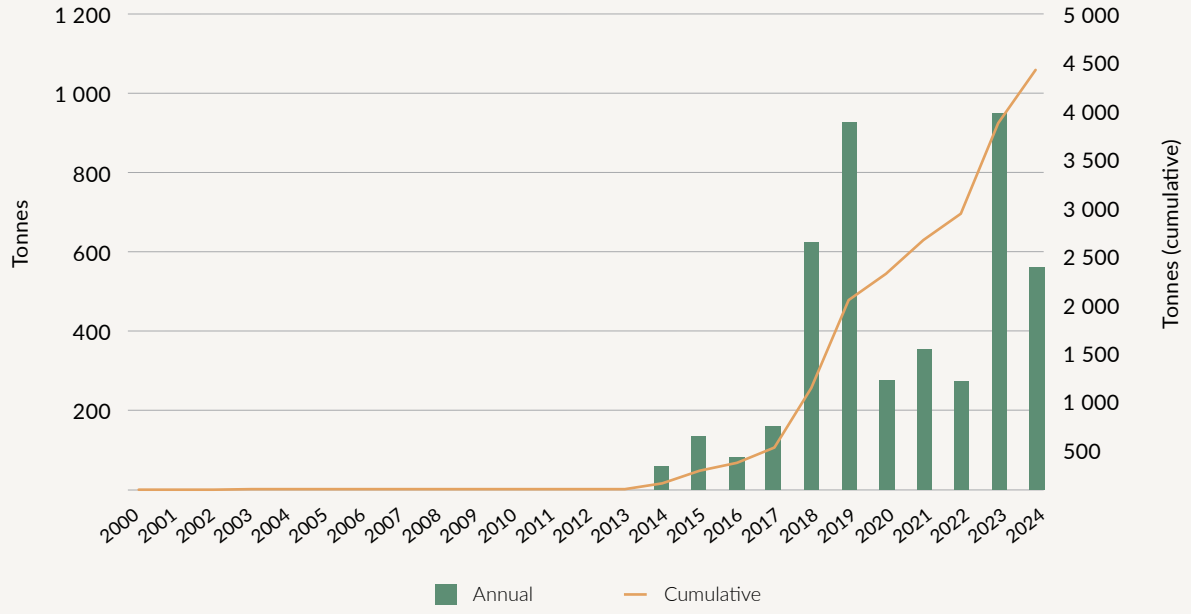
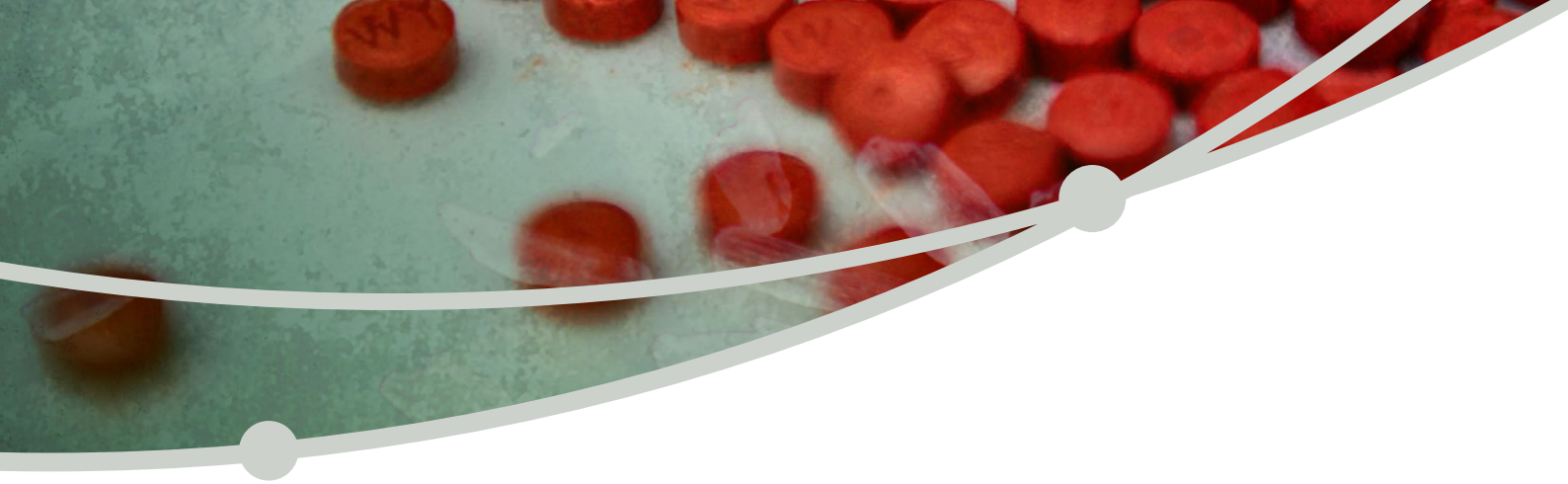


FIGURE 15 Annual reported import volumes of methylamine in Thailand and Myanmar, 2000–2024.

SOURCE: UN Comtrade data, https://comtradeplus.un.org



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2 Vijitra Duangdee, Meth 'super labs' said to thrive in Myanmar coup chaos, spilling drugs across Mekong, Voice of America, 29 September 2021, https://www.voanews.com/a/meth-super-labs-said-to-thrive-in-myanmar-coup-chaos-spilling-drugs-across-mekong/6219494.html.

3 There have been numerous media stories published in the years since the first exposition of this argument by the UNODC, following the publication of its Mekong synthetics report in May 2022. This report, an annual regional publication, is released roughly each May. Media reports following the release of each of these reports have invariably conveyed the production surge hypothesis as fact.

4 This 'principle' is based on an assumption that law enforcement seizes around 10% of all illicit drug flows. Sometimes the variable is lower or higher, but the principle implied remains the same: seizure volumes extrapolated by a factor of 10 will provide a rough indication of production volume. Although this 10% principle has no empirical (or logical) grounding, it finds its way into law enforcement discourse from time to time.

5 Peter Reuter, Seizure of drugs, *Encyclopedia of Drugs and Alcohol*, 3, 1995, pp 1022–1023.

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9 Longitudinal data is collected from the same population or place over an extended period of time, whereas cross-sectional data is collected from a number of different populations/places at a single point in time. From the perspective of retail market price monitoring, longitudinal data collection provides a better structured representation of market price dynamics and influencing characteristics over time, within a specific place, than cross-sectional collecting, which is prone to misrepresenting data in the absence of contextual knowledge of marketplace dynamics that differ from place to place and through time.

10 CCDAC annual reports, 2015–2024; data harvested from web-scraping of social media posts across Facebook accounts, postings by ethnic armed groups, statements on government websites and data from webchat forums.

11 Several interviewees noted this as a change in the risk environment. One provided an explicit example of a crystal meth synthesis operation that had been operating in a border area that had to be quickly relocated to an interior location closer to Nam Hkam. Another interviewee said that trade was moving away from the Chinese border near Muse and shifting south through the Mekong River maritime route as well as the overland route to Thailand through Tachilek.

12 The Three Brotherhood Alliance was a military coalition that consisted of three ethnic armed groups: the Arakan Army, the Myanmar National Democratic Alliance Army and the Ta'ang National Liberation Army. The Alliance undertook offensives against the Myanmar army in various parts of the country, but particularly in locations across northern Shan State. It achieved a surprising degree of success, including the capture and occupation of Laukkai and the Kokang Self-Administration Zone along the Myanmar-China border in Shan State. Myanmar's 'shadow government', the National Unity Government, and its armed wing, the People's

Democratic Force, were loosely aligned with the Alliance. For a general overview of the Three Brotherhood Alliance and Operation 1027, see Yun Sun, Operation 1027: Changing the tides of the Myanmar civil war?, Brookings Institute, 16 January 2024, https://www.brookings.edu/articles/operation-1027-changing-the-tides-of-the-myanmar-civil-war/.

13 'COVID never slowed the [Mekong] drug business down, it's really, really resilient … while borders closed to us [Mekong meth traffickers] were freely crossing them.' Jeremy Douglas, UNODC Regional Representative for Southeast Asia and the Pacific, as quoted in Mazoe Ford and Supattra Vimonsuknopparat, Asia's infamous Golden Triangle and the soldiers tracking down the drug smugglers who rule its narcotics trade, ABC News, 11 December 2021, https://www.abc.net.au/news/2021-12-12/golden-triangle-drug-smugglers-who-rule-narcotics-trade/100677834.

14 For example, see Bertil Lintner, New regime, same old drug myths in Myanmar, *The Irrawaddy*, 7 September 2021, https://www.irrawaddy.com/opinion/guest-column/new-regime-same-old-drug-myths-in-myanmar.html; Bertil Lintner, US spy memoir perpetuates myths about Myanmar military's 'anti-drug' efforts, *The Irrawaddy*, 15 September 2023, https://www.irrawaddy.com/culture/books/us-spy-memoir-perpetuates-myths-about-myanmar-militarys-anti-drug-efforts.html; Bertil Lintner and Michael Black, *Merchants of Madness: The Methamphetamine Explosion in the Golden Triangle*, Chiang Mai: Silkworm Books, 2009; Ko-lin Chin, *The Golden Triangle: Inside Southeast Asia's Drug Trade*, Ithaca: Cornell University Press, 2010.

15 Ko-lin Chin, *The Golden Triangle: Inside Southeast Asia's Drug Trade*, Ithaca: Cornell University Press, 2010.

16 Patrick Winn, *Narcotopia: In Search of the Asian Drug Cartel that Survived the CIA*, New York: Public Affairs, 2024.

17 These chemicals are identified in CCDAC annual reports for the period 2020–2024.

18 Jason Eligh, Global synthetic drug markets: The present and future, GI-TOC, March 2024, https://globalinitiative.net/analysis/global-synthetic-drug-market-the-present-and-future/.

19 A clandestine laboratory, otherwise known as a clan lab, can range in size and sophistication from a small dirt-hole-based set-up in the jungle for one-off small-scale production, to a modern industrial facility that can produce multiple substances at high volumes for long periods of time.

20 UNODC, UNODC-SMART: Emergence of 'happy water' in Southeast Asia, May 2022, https://www.unodc.org/LSS/Announcement/Details/0f57ddbe-01dd-481c-af78-0bc494c84a53.

21 UNODC, Synthetic drugs in East and Southeast Asia: Latest developments and challenges, 2025, p 58, https://www.unodc.org/roseap/uploads/documents/Publications/2025/Synthetic_Drugs_in_East_and_Southeast_Asia_2025.pdf.

22 So-called dual-use chemicals are those that have a valid, licit use in industrial production processes (e.g. in the production of lubricants, colourants or plastics) but can also be used in the production of illicit drugs. These chemicals cannot be banned because of their requirement for licit industrial purposes.

23 Patrick Winn called it a 'breakthrough' in his recent book, as he explained how UWSA meth production surged in the wake of this chemical transition from a dependence upon PE to the use of more easily available pre-precursors that could provide an easier route to the acquisition of meth precursors (while also providing a better ratio of return in terms of production potential when compared to PE alone). See Patrick Winn, *Narcotopia: In Search of the Asian Drug Cartel that Survived the CIA*, New York: Public Affairs, 2024, p 309.

24 Vanda Felbab-Brown, China and synthetic drugs control: Fentanyl, methamphetamines, and precursors, Brookings Institute, March 2022, p 31, https://www.brookings.edu/articles/china-and-synthetic-drugs-control-fentanyl-methamphetamines-and-precursors/.

25 Patrick Winn, *Narcotopia: In Search of the Asian Drug Cartel that Survived the CIA*, New York: Public Affairs, 2024.

26 Operation 1027 was a military offensive of the Three Brotherhood Alliance that began in October 2023. It targeted strategic military locations of the junta government, including those related to the army, the Myanmar Police Force, and BGF militias. The operation saw significantly increased fighting across the country's conflict zones, particularly in the western border region with India and Bangladesh, dominated by the Arakan Army, and the northern border regions of Shan and Kachin states. The Alliance forces captured several bases and geographic regions of strategic importance along the Myanmar–China border during this operation, inflicting significant losses on the junta forces, but also causing increased security concern among Chinese government officials.

27 These developments were communicated by local informants interviewed in Shan State by research team members. They also correspond with some developments reported in regional analysis by the UNODC and included in its 2025 report. See: UNODC, Synthetic drugs in East and Southeast Asia: Latest developments and challenges, 2025, https://www.unodc.org/roseap/uploads/documents/Publications/2025/Synthetic_Drugs_in_East_and_Southeast_Asia_2025.pdf, pp 7–10.

28 In 2011, the UNODC held an internal conference call in Thailand in advance of a media launch of a new report surveying opium poppy production in Myanmar. The purpose of this conference was to discuss the political ramifications of providing an annual production estimate for methamphetamine tablet production in the event that such an estimate was requested at the launch. With the author present, the challenge discussed was whether or not the UN provided a number that was in excess of 1 billion tablets.

Given what we know today, this speculative threshold was a gross underestimate, a point that some local observers had stated at the time. This internal debate at the UNODC exemplifies the struggle that the international community has had in getting to grips with the massive unknown of Mekong meth production, a situation that continues almost 15 years later with speculation still dominating many narratives.

29 The GI-TOC's latest Global Organized Crime Index has noted that Asia's synthetic drug trade has grown more than any other criminal market across the region since 2021 and that the wider trade in synthetic drugs (like methamphetamine) is rapidly coming to dominate global drug markets. See Global Organized Crime Index: Crime at a crossroads, GI-TOC, November 2025, https://ocindex.net.

30 It is acknowledged that there are many other production centres for methamphetamine globally. However, other production locations – for example, in Eastern Europe, West Africa and Australia – are far smaller in terms of annual potential production volume and feed localized demand centres rather than plugging into global trafficking channels. 'Back-of-the-envelope' calculations provided to GI-TOC informants for production in the Mekong, Afghanistan/Pakistan and Mexico all placed annual production of crystal methamphetamine in each of these three centres at a volume well above 1 000 tonnes. Keeping in mind that Mekong meth is also produced in tablet form, we gain some perspective on meth market reach.

31 The findings of the latest Global Organized Crime Index confirm this synthetic drug's dominance; see Global Organized Crime Index: Crime at a crossroads, GI-TOC, November 2025, https://ocindex.com.

32 This is the 2023 price as reported by the UNODC, Synthetic drugs in East and Southeast Asia: Latest developments and challenges, 2025, p 82, https://www.unodc.org/roseap/uploads/documents/Publications/2025/Synthetic_Drugs_in_East_and_Southeast_Asia_2025.pdf.

33 Bertil Lintner, *The Wa of Myanmar and China's Quest for Global Dominance*, Chiang Mai: Silkworm Books, 2021, pp 154–155.

34 Lorenzo Chiaro, The drug of madness, yaba, in the grocery store, *La Milano*, 26 May 2020.

35 National Drug Intelligence Centre, Yaba fast facts: questions and answers, US Department of Justice, 2003, https://www.justice.gov/archive/ndic/pubs5/5048/index.htm.

36 Allegations relate specifically to *yaba* tablets and are based on multiple interviewee responses acquired between August and October 2024, and February to May 2025.

37 Frequently, interviewees described these Africa-based 'Asian' communities more specifically as 'Chinese' communities.

38 These allegations arise from multiple interviews between 2021 and 2024. They were carried out as part of unrelated drug market inventory assessment fieldwork in Kenya, Nigeria and South Africa. Despite these allegations from geographically diverse areas, GI-TOC researchers have been unable to confirm through either visual or chemical means the physical presence of *yaba* tablets in any of these drug markets. Naturally, the absence of such physical confirmation does not necessarily mean an absence of their presence.

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42 European Union Drugs Agency, Technical report: Captagon trafficking and the role of Europe, September 2023, https://www.euda.europa.eu/publications/technical-reports/captagon-trafficking-and-role-europe_en.

43 *Yaba* supply chains to the Middle East, particularly through Bangladeshi networks, have been common in recent years. See *Daily Sun*, 39 000 yaba pills seized from Saudi-bound cargo flight from HSIA, 16 October 2020, https://www.daily-sun.com/printversion/details/512203/39000-yaba-pills-seized-from-Saudiboundcargo-flight-at-HSIA; *Dhaka Tribune*, Man held with 8 000 yaba pills at Dhaka airport, 9 November 2021, https://www.dhakatribune.com/bangladesh/dhaka/316434/man-held-with-8-000-yaba-pills-at-dhaka-airport; BDNews24, UAE-bound passenger detained with 5 000 yaba pills at Chattogram airport, 1 June 2019, https://bdnews24.com/bangladesh/uae-bound-passenger-detained-with-5000-yaba-pills-at-chattogram-airport.

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67 That the Chinese government failed to act upon the Mekong border-based scam centre operations until these were seen to be targeting Chinese consumers is but one example of this laissez-faire positioning in respect to the illicit marketplace and its many actors. The same situation held with respect to the export of precursor chemicals to Myanmar and beyond, with one Chinese official telling the paper's author that 'it is not illegal for a Chinese company to export several tonnes of caffeine powder across the border to a recipient in [Shan State]. Caffeine powder is not controlled. It is a legitimate business transaction. Even if this powder is being used for illicit purposes, that is the internal business of the other country [Myanmar] to address itself. It is not the business of China.'
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70 The purpose of this appendix is not to provide details on how precursor synthesis may be achieved in specific cases. Discussion here is concerned with specific chemical compounds. Explaining whether or not additional chemicals may be required to complete the process is not a concern of this section.
71 The UN Comtrade database is a comprehensive and publicly available online resource for global trade statistics. Maintained by the UN Statistics Division, it provides import and export data for 200 countries that cover approximately 99% of the world's commodity trade; see https://comtradeplus.un.org.
72 Potential conversion ratios provided as unofficial numbers through background discussion with a forensic chemist involved in illicit drug market chemistry.
73 Acetone enolate method conversion ratio provided as an unofficial number through background discussion with a forensic chemist involved in illicit drug market chemistry.
74 Figure derived from UN Comtrade data for acetone exports to Myanmar in 2024 using HSI code 29141100. The undesignated Asian nation, referenced in the database by the label 'Other Asia, nes' is a term often used to describe a

nation for which there is potential for the UN to encounter blowback from China in naming it more directly. Taiwan, which China insists be recognized as Chinese Taipei, is one such nation.

75 Naturally, there is some unknown portion of these precursor chemicals that make their way into the illicit production stream and that are not accounted for in the UN Comtrade database as a result.

76 Disaggregated, these totals are 2 528 tonnes to Thailand and 2 155 tonnes to Myanmar. Data from UN Comtrade, https://comtradeplus.un.org.

77 Disaggregated, these totals are 1 058 tonnes to Thailand and 564 tonnes to Myanmar. Data from UN Comtrade, https://comtradeplus.un.org.

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GLOBAL INITIATIVE
AGAINST TRANSNATIONAL ORGANIZED CRIME

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The Global Initiative Against Transnational Organized Crime is a global network with over 700 Network Experts around the world. The Global Initiative provides a platform to promote greater debate and innovative approaches as the building blocks to an inclusive global strategy against organized crime.

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The Mekong Network to Counter Transnational Crimes (MNET-CTC) is funded by the Australian Government through the Mekong-Australia Partnership and implemented by the Global Initiative Against Transnational Organized Crime.

MEKONG NETWORK TO COUNTER TRANSNATIONAL CRIME
MNET -CTC