



**GLOBAL  
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AGAINST TRANSNATIONAL  
ORGANIZED CRIME

# HEROIN TRAFFICKING ALONG THE NORTHERN AND SOUTHERN ROUTES

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## EXECUTIVE SUMMARY

**T**his paper investigates the heroin supply chains that originate in Afghanistan and flow north and south, examining how they have been affected since the Taliban came to power in Afghanistan in 2021, and the major shifts that have since occurred in geopolitics. The aim is to trace the ripple effects of the Taliban ban on poppy cultivation and to identify points of intervention and policy leverage in key countries along both routes. Starting with a detailed assessment of the mechanics of heroin trafficking in Afghanistan, the paper traces displacement in production, the adaptation of routes, and how these factors have affected the European and UK markets in terms of supply and quality.

In 2017, the total amount of opium produced globally was estimated at 10 500 tonnes, 9 000 tonnes (86%) of which came from Afghanistan.<sup>1</sup> The supply from Afghanistan has now dropped to an estimated 296 tonnes,<sup>2</sup> a huge 97% reduction in opiate output from the country. In 2018, 9.9 tonnes of heroin were seized in European Union countries, Türkiye and Norway;<sup>3</sup> in 2025, that number had reduced to 5.4 tonnes.<sup>4</sup> Although seizures are a notoriously unreliable indicator of drug smuggling,<sup>5</sup> this 45% reduction illuminates the downstream impact over time.

Routes into Europe and the UK have changed; shifting enforcement dynamics, geopolitical upheavals and changes in trafficking tactics have elevated the importance of alternative pathways, particularly the Caucasus routes. The types of drug seized along the northern and southern routes now reflect the global rise in synthetics – global methamphetamine seizures have increased from just under 400 tonnes in 2021 to near 500 tonnes in 2023, while heroin seizures have reduced by 50% over the same period.

The demand for heroin continues to be supplied by stockpiles, adulterated heroin and new cultivation, but there is a general global shift away from heroin. The research indicates that stockpiles and availability from other sources have allowed a resilient flow to maintain worldwide in 2025, despite the compound effects of diminished poppy cultivation in Afghanistan since the Taliban ban, climate-change-induced water shortages, seasonal droughts and crop failures.<sup>6</sup>

It seems that the heroin ecosystem is changing for two main reasons: first, internal to Afghanistan, the supply chain is under serious strain; and second, externally, it has a serious rival in the shape of synthetic drugs. But the picture is mixed. Understanding the changing nature of heroin trafficking networks as well as mapping the structure, scale and strategic implications of the change are vital for shaping policy responses and operational interventions.



A farmer harvests opium from a poppy field in Afghanistan's Badakhshan province. Badakhshan is now responsible for about 40% of opium production in Afghanistan and Pakistan. © Omer Abrar/AFP via Getty Images

## Methodology

This research was carried out over six months in 2025 and early 2026, employing a qualitative research methodology to examine opium and heroin production and trafficking dynamics in and from Afghanistan. It draws on a considerable body of research conducted by the Global Initiative Against Transnational Organized Crime (GI-TOC) over the past decade looking into illicit opiate trafficking along the northern and southern routes.<sup>7</sup> Data was collected through semi-structured interviews with stakeholders involved in the drug economy, conducted across multiple provinces and countries along the routes. For example, in Afghanistan, 39 interviews were carried out across six provinces.<sup>8</sup> Interviews in the field were guided by a semi-structured questionnaire, which allowed interviewers to ask follow-up questions, probe emerging themes and adapt questions based on respondents' experiences. Regional consultations were held with expert groups, and a southern route trafficking expert panel was convened in Cape Town in February 2026.

This range of respondents provided multiple perspectives on cultivation, trafficking, enforcement and community-level impacts. To enhance the reliability and credibility of the findings, data was systematically triangulated across multiple sources. Information provided by one respondent group was cross-checked with accounts from other respondents, including local officials, counter-narcotics law enforcement, elders, family members, and people familiar with the activities or locations. Where possible, the same events, practices or trends were verified through interviews conducted in different locations and with respondents holding different roles within the drug economy. This process helped identify consistent patterns, clarify discrepancies and reduce the risk of single-source bias.

Security constraints in some countries limited access to certain areas. The sensitivity of the topic also led to reluctance among some respondents to share information openly. Despite these challenges,

cross-verification of information from multiple respondent categories and locations strengthened the overall reliability of the findings.

Monitoring of Afghanistan's drug markets has been curtailed by the Taliban de facto authorities' suspicion of, and restrictions on, third party external NGOs and media. The UN monitoring system has been cut to the bone by this, restrictions on women working for the UN and US funding cuts – it has lost much of its ability to assess conditions in the country. Satellite monitoring and local research is struggling to fill the gap. Research is also limited by the lack of access to detailed seizure data from national authorities, the inability to gain accurate data on shipping container smuggling, and the inability of researchers to properly penetrate Iran's networks due to the volatile situation.

## Key findings

- Exit smuggling routes from Afghanistan are thriving, sustained by an illicit ecosystem of traffickers, couriers and brokers.
- The volume of opiate smuggling from Afghanistan may have decreased, but the supply chain remains well-stocked and has diversified to other substances, notably methamphetamine.
- Badakhshan now produces about 40% of opium from the Afghanistan/Pakistan region; Helmand about 20%; and Balochistan (Pakistan) about 25%. Facilities in south-west Afghanistan act as refinement centres; from there, both unrefined opium and refined product move to border crossings and into an external smuggling system.
- Taliban de facto authorities are connected to both the cross-border exit smuggling operations and to the internal network of routes and actors, either directly or indirectly.
- The northern route through Central Asian countries persists for heroin, but the volumes have reduced. Heroin trafficking through the region is now a secondary concern to the markets for Afghan-origin methamphetamine and synthetic cathinones (alpha-PVP and methadone) among a burgeoning youth population.
- The Caucasus route has become more established as traffickers circumvent the Russia-Ukraine war, and multiple smuggling sub-routes have been established, including from northern Iran into Azerbaijan and onward to Georgia.
- The southern route has metamorphosed into myriad connected routes, methods and domains, with the options limited only by traffickers' imagination and resources. The dhow route to East Africa as far as Mozambique, trans-shipment to fast boats and small dinghies, offshore drop-offs and containerization are all characteristics of heroin trafficking along this route.
- Along both the northern and southern routes and their offshoots, research has observed poly-drug shipments, with heroin rarely being trafficked alone – amphetamine-type stimulants (ATS), new psychoactive substances (NPS) and cocaine are usually found together in shipments.
- Afghanistan has emerged as a major production centre for synthetic drugs, mainly methamphetamine, which is feeding a growing internal user community as well as countries along the northern and southern routes. There is sufficient excess supply to be pushed into European and UK markets.
- There is a conundrum in the European and UK domestic markets, where heroin is still entering but seizure rates do not correspond to usage rates.
- Drug buyers are experiencing reduced purity and an increased mixing of heroin with synthetic opioids, while testing efficacy has also reduced.

## Recommendations

- Re-establish drug monitoring mechanisms and systems in Central and South Asia, with specific focus on Afghanistan and the initial stages of exit-smuggling – the border regions and communities along the Amu Darya and Panj rivers to the north and the Durand Line to the south.
- Maintain a focus on and establish policy interventions in Tajikistan and Uzbekistan to the north; Azerbaijan and Georgia to the west; Pakistan, Türkiye and Iran to the immediate south; Kenya, Tanzania and Mozambique in the east; and Madagascar, Mauritius and South Africa to the far south.
- Focus efforts on (re)establishing effective testing mechanisms in northern and southern route countries, both front-line immediate and back-office laboratory capacities, to provide the essential data within a context of poly-drug trafficking and increased synthetic drug trafficking from Afghanistan.
- Establish mechanisms to monitor and track sea container shipping at major and minor ports along the northern and southern routes to understand and interdict what remains of high-volume shipping.
- Improve border control mechanisms to target ingested-drug trafficking from airports and ports of interest along the northern and southern routes.
- Improve testing and monitoring capacities within heroin-user communities and the chemsex sub-groups, with a view to identifying synthetic nitazenes in the supply to the former and identifying warning signs of increased methamphetamine use in the latter.



## INTRODUCTION: A RESILIENT MARKET

**H**eroin markets appear to be a mess of contradictions. In 2023, the global heroin market had the smallest rise of all drug markets since 2021, compared to cannabis, cocaine and synthetic drugs, and the smallest rise of all criminal markets – only 0.1 points since 2021.<sup>9</sup> Two years later, the Global Organized Crime Index recorded an even more constrained heroin market relative to other illicit drugs, with cocaine and synthetics in the ascendancy and heroin and cannabis markets contracting. The heroin market decreased from 4.08 in 2023 to 3.77 in 2025 (a drop of 0.31 points), making it now the least pervasive of the 13 markets covered by the Index.<sup>10</sup>

Supply is constricted not just by factors along the supply routes but chiefly by the ban imposed on poppy cultivation and the production, use and transportation of other drugs by the Afghan Taliban's Emir, Haibatullah Akhunzada, on 3 April 2022.<sup>11</sup> Since the ban, the United Nations Office on Drugs and Crime (UNODC) has tracked a 95% reduction in opium poppy cultivation, from 233 000 hectares in 2022 to a mere 10 800 hectares in 2023. Opium cultivation has become concentrated in other sites,<sup>12</sup> raising the relative importance of north-eastern Afghanistan and Pakistan, compared to south-western Afghanistan, where the Taliban's anti-drug efforts have been most strongly felt. Although it is difficult to obtain accurate data from Pakistan, judging by eradication data in 2023<sup>13</sup> and Alcis satellite analysis,<sup>14</sup> cultivation is thriving in the Pakistani region of Balochistan. The global impacts on downstream destination countries have yet to be fully felt, but the immediate impact on rural economies in Afghanistan's production areas has been profound.<sup>15</sup>

Despite this, heroin remains the most commonly used illicit opioid in Europe.<sup>16</sup> Heroin also retains its significance in the global drug economy, especially across Asia, where it remains widely available.<sup>17</sup> In 2023, the UNODC reported that 61 million people worldwide used opioids.<sup>18</sup> Heroin's health-related effects continue to be felt in Europe and the UK; heroin and morphine caused over a quarter of the 5 129 drug-related deaths recorded in the UK in 2024, up from the previous year.<sup>19</sup> Although heroin-user communities in European destinations can still access the drug, research indicates that less heroin is entering the UK compared to five years ago. What is arriving is also less pure and sometimes consists of a mixture of nitazenes (highly potent synthetic opioids) and contains no heroin at all.<sup>20</sup>

This situation gives rise to a number of important questions:

- How is it that despite a 95% decrease in poppy cultivation,<sup>21</sup> the opiate routes out of Afghanistan remain 'stocked and thriving',<sup>22</sup> fuelling smuggling across the Amu Darya to the north and out of Bahramcha and Spin Boldak to the south?
- How is it that a resilient provincial network and system of production, refinement and trafficking of opium and heroin persist inside Afghanistan?

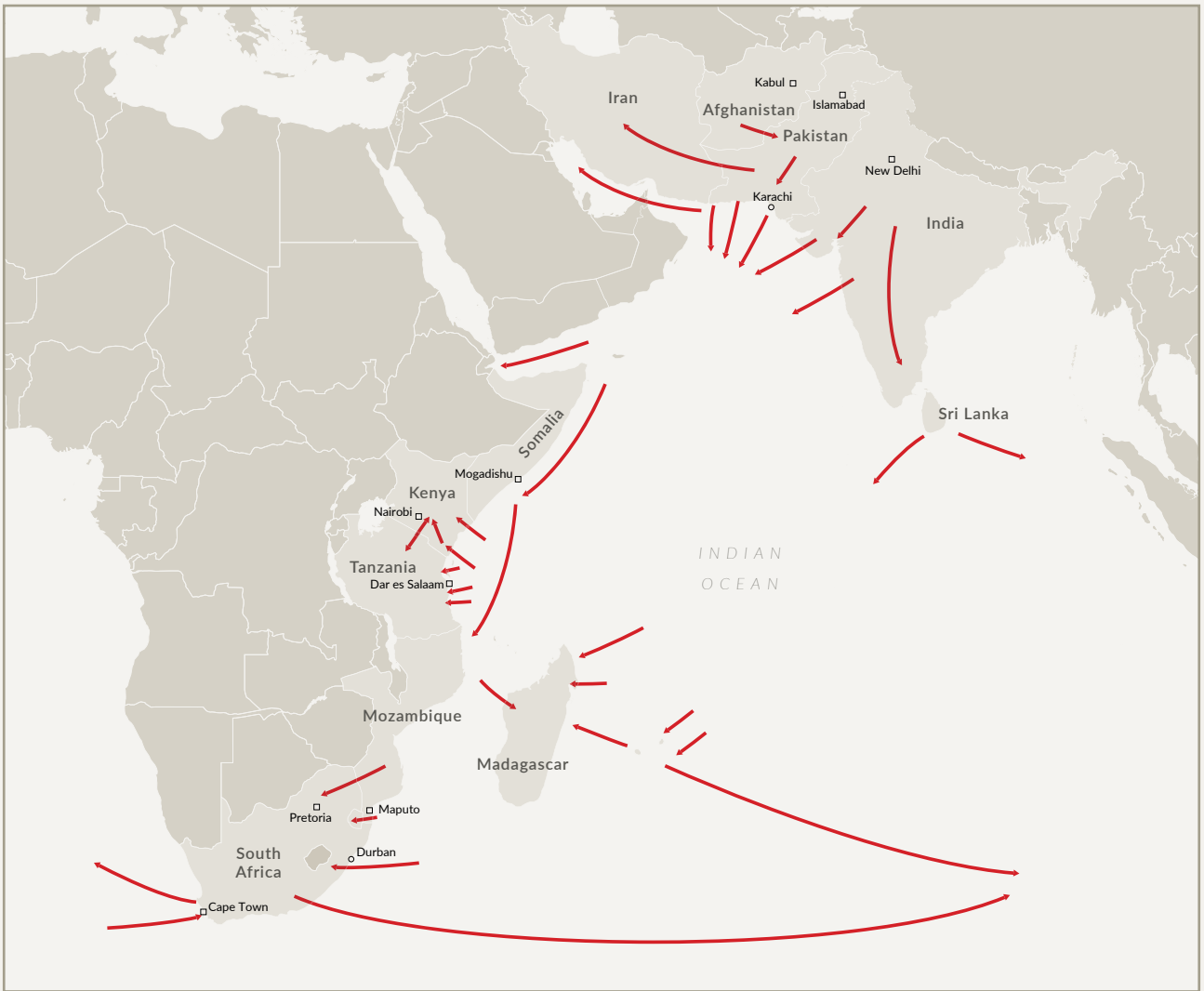
- How are opium and heroin transported across borders and onto transnational routes, bypassing or enriching state representatives along the way? How do they reach intermediary points at ports or trans-shipment centres, from where they are moved onward by sea, air or land?
- Which countries are of interest to policymakers in Europe and the UK? This is not necessarily the countries they already know about and are monitoring closely, but rather the areas where changes or novel adaptations in trafficking methods or mechanisms suggest potential intervention options that could be more successful, especially where local authorities have requested support.
- How has heroin trafficking been supplanted by the rise of synthetic drug trafficking, with methamphetamine in particular piggybacking on, overtaking, and in some cases entirely supplanting heroin in shipments? Is the dominant theory that most shipments now carry proportionally more synthetic drugs than opioids correct? If so, is Afghanistan emerging as a major producer of high-purity, low-cost, organic-origin methamphetamine? Does this production threaten Europe and the UK?
- Focusing on heroin from Afghanistan, how has the stability of the supply and the purity of the bags sold in the UK and Europe changed? How are the profiles of heroin users changing due to changing methods of heroin use and intentional or unintentional poly-substance use?

Country	2021	2023	2025	Change
Afghanistan	9.50	9.50	9.00	↓
Armenia	4.00	4.50	4.00	↓
Azerbaijan	6.00	6.50	6.50	→
Georgia	3.50	4.00	4.00	→
India	6.50	7.00	7.00	→
Iran	9.00	9.00	8.50	↓
Kazakhstan	6.50	6.50	6.00	↓
Kenya	7.50	7.50	8.00	↑
Kyrgyzstan	7.00	7.50	7.00	↓
Madagascar	7.00	7.00	7.00	→
Maldives	6.00	6.50	6.50	→
Mauritius	8.00	8.00	8.00	→
Mozambique	7.50	8.00	8.00	→
Pakistan	8.50	8.50	8.50	→
Seychelles	7.50	8.00	8.00	→
South Africa	7.50	7.50	8.00	→
Sri Lanka	6.00	6.50	6.00	↓
Tajikistan	8.50	8.50	8.50	→
Tanzania	7.50	8.00	8.00	→
Türkiye	8.00	8.50	8.00	↓
Turkmenistan	6.50	6.50	6.50	→
Uzbekistan	6.50	6.50	6.00	↓

**FIGURE 1** The severity of heroin markets in countries along the northern and southern routes.

NOTE: Scores are out of 10, where 10 indicates the highest level of criminality.

SOURCE: GI-TOC, Global Organized Crime Index 2025, <https://ocindex.net>



**FIGURE 2** Major heroin trafficking flows on the southern route.



**FIGURE 3** Major heroin trafficking flows on the northern route.



## AFGHANISTAN: THE ORIGIN OF THE NORTHERN AND SOUTHERN ROUTES

**A**fghanistan's involvement in the export of opium began over a century ago, and despite geopolitical shifts, the country has continued to dominate the global heroin market.

Six years ago, Afghanistan was the largest producer of opium in the world, with markets for refined heroin in Asia and Europe, trafficked through Pakistan, Central Asia and Iran. In 2020, 80% of the world's opiate supply came from Afghanistan,<sup>23</sup> and in 2022, the country produced 6 200 tonnes of opium, resulting in 350–580 tonnes of export quality heroin (delivering 50%–70% purity).<sup>24</sup> This powerhouse was centred in south-western Afghanistan, fed by favourable soil and climate, and watered by the Helmand River and its green zone network of canals, streams and *karez*s (underground channels), managed by powerful and knowledgeable *mirabs* (village water managers). Farmers, traffickers and insurgents existed in a close relationship to ensure income generated from the trade funded the insurgency, keeping farmers in profit while the insurgents protected the ecosystem.

Poppy was the country's most valuable cash crop, requiring little water and able to withstand adverse agricultural conditions. Its labour-intensive cultivation gave employment to thousands of seasonal workers. It offered tenant farmers an option to access land while also enabling them to work as day labourers. Profits were reinvested into wells and solar-powered pumps and supported secondary and tertiary sectors (agricultural supplies, food and fuel, schools and markets).<sup>25</sup> In 2021, the illicit opiate economy in Afghanistan was estimated at between US\$1.8 billion and US\$2.7 billion, with opiate exports exceeding legitimate business exports by value.<sup>26</sup>

After seizing power, the Taliban's Emir issued a decree banning poppy cultivation and the 'usage, transportation, manufacture, trade, export, and import of all types of narcotics'.<sup>27</sup> A 10-month reprieve allowed stockpiles to be established, and a 12-month price hike in opium prices made up, to an extent, for lost revenue.<sup>28</sup>

Researchers on the ground in Afghanistan have found that, by late 2025, Afghan drug traffickers had adapted to the Taliban de facto authorities' restrictions on poppy cultivation. The trade continues without significant obstacles, meaning that the downstream effects of the announced cultivation drop may not be felt for some years, if at all. The view in Afghanistan is that traffickers are able to supply the demand signals from the markets, with quantities available to meet the need and adequate pricing to



**FIGURE 4** A brief history of Afghanistan's involvement in the heroin and opium trades.



Bags of opium ready to be sold in Kandahar, Afghanistan. Kandahar is both a production region and a transit hub for Afghan opium being moved south for processing.

© Murteza Khaliqi/Anadolu Agency via Getty Images

make the effort worthwhile.<sup>29</sup> The market seems to have stabilized after the pendulum swings of the ban, the price hikes and significant reductions in cultivation.

This is a vital finding, raising questions about the degree to which the changes in the heroin ecosystem are a result of the Taliban’s bans or a product of changing demand. Despite the massive decrease in south-western cultivation in Afghanistan, demand is being met by western Pakistan, Badakhshan and eastern Iran. While traffickers face no shortage of raw opium to meet the demand from downstream markets, the demand signal has also changed.<sup>30</sup> The lack of a shortage is also due to opium stocks retained by well-established traffickers and those with links to the Taliban de facto authorities as a store of value and a hedge against market disruptions.<sup>31</sup>

## The opium economy in Afghanistan

In 2025, Afghanistan’s opium economy remained shaped by a handful of dominant regions. Helmand continued to play a major role, though significant activity persisted in Badakhshan and across the border in Pakistan. The approximate share of total production is shown in Figure 5 below. Field researchers have reported a bumper crop in Balochistan and Badakhshan in 2026, with implications for increased supply along both northern and southern routes.

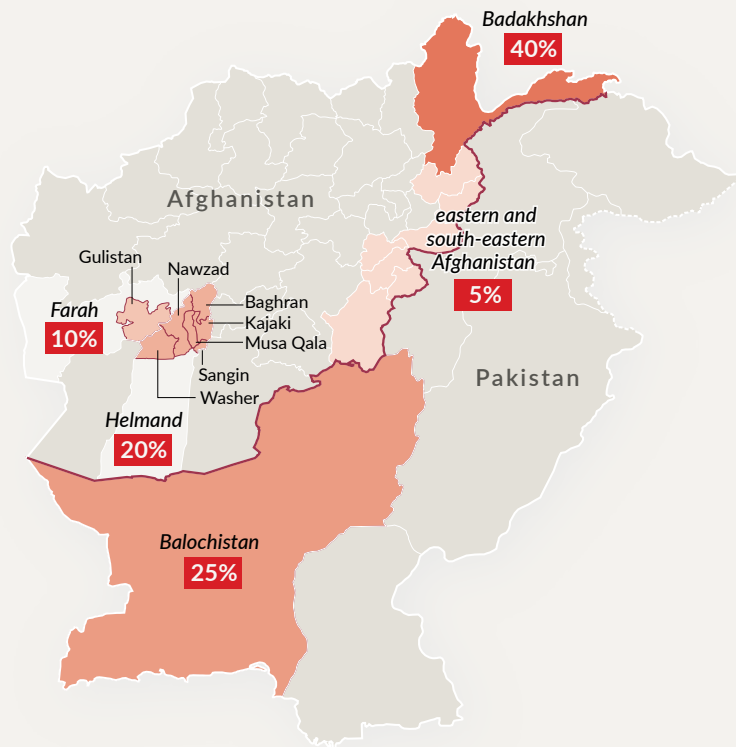


FIGURE 5 Breakdown of opium production in Afghanistan and Pakistan in 2025.

## Counter-narcotics enforcement

### South-eastern Afghanistan

Researchers found opium and heroin trading had moved to discreet locations with no reduction in activity levels. In Sangin, the Sherafat bazaar is a long-famous opium trading centre, with shops dedicated to opium and heroin. Obvious trading is suspended, but deal-making and physical exchange have shifted to private premises surrounding the bazaar.<sup>32</sup> Likewise, some heroin refinement facilities in the south-west (e.g. Bakwa) were destroyed by Taliban forces, directed by Taliban ministers – but other refinement facilities in the immediate vicinity were left standing, protected by their owners' links to prominent and powerful traffickers.<sup>33</sup> This seemingly duplicitous approach to disrupting the opium and heroin trade is common in present-day Afghanistan. With many Taliban leaders connected to and profiting from the trade, enforcement of the ban is performative in places and carefully calculated in others. Drug traffickers are powerful and well-funded, capable of causing significant problems to the Taliban leadership if they were to shift allegiance or start funding an opposition movement.<sup>34</sup>

### Badakhshan

The southern Pashto Taliban are seen as an occupying force by the majority of Badakhshi, and poppy eradication is a source of violent tension. The former provincial governor,

Qari Ayoub, who was replaced in November 2025, imposed control of the network of ethnicities and tribal loyalties in the province by ensuring key positions were staffed to maintain a balance of power. When it came to poppy eradication, dissent often spilled over into violence. In June 2025, unrest over eradication operations prompted interventions by the Taliban's army chief of staff, Fasihuddin Fitrat, who is himself a Badakhshi Talib.<sup>35</sup> When negotiating failed, the Taliban's response was brutal; by July, at least 15 protesters had been killed in the Khash district. The pattern was similar to that seen in 2024, when at least two people were killed and many others wounded in the Daryam and Argo districts.<sup>36</sup>

### Tajikistan

Tajikistani counter-narcotics officers expressed frustration that the Taliban have failed to shut down the movement of opiates from north-eastern Afghanistan into Tajikistan and on to Central Asia, Russia and Europe.<sup>37</sup> Trafficking is dangerous along the Tajikistani border with Afghanistan. The 1 357-kilometre border is mountainous and extremely difficult to monitor and defend, leading border guards on both sides – if they are not being bribed to look the other way – to resort quickly to lethal enforcement methods. On 30 January 2026, three Afghan drug traffickers were killed in the Khatlon province, just across the river border from the smugglers' preferred crossing points. In total, 19 people have been killed crossing the river since November 2025.<sup>38</sup> ■

## Trafficking networks and Taliban connections

The partnerships and networks that enable trafficking of opium and heroin in Afghanistan are complex and intertwined, relying on protection from the de facto authorities, couriers, agents and brokers. It is useful to describe these in some detail, using case studies from researchers.

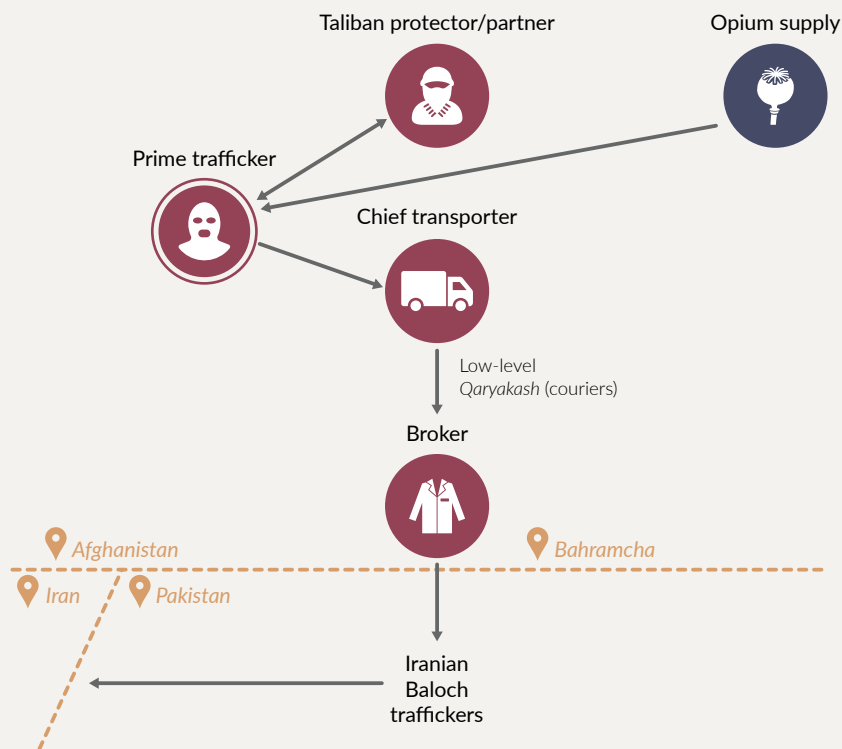
One well-established trafficker from north-western Afghanistan, referred to here as A1, partners with a local chief of police, referred to here as A2, a Taliban from the same Ishaqzai tribe. A2 is actively involved in A1's operation, transporting opium and heroin and receiving a third of the profit. A1's procurement network extends into regions surrounding Herat and northern Afghanistan, Badakhshan and Takhar. A1 has purchased several Land Cruisers for his chief courier, A3, who moves the drugs to

Bahramcha in the south, where they are handed over to the broker, A4, who is also an Ishaqzai. A4 arranges the receipt, storage and handing over of consignments to the next stage in the trafficking network, across the border to an Iranian Baloch, A5, who then transports the product from Bahramcha through Pakistan to the deserts of Sistan Balochistan in Iran.<sup>39</sup>

Another renowned drug trafficker in north-western Afghanistan, B1, receives protection directly from a senior local Taliban official, B2. B1, an Achakzai, is a regular donor to B2's madrassah. He procures opium from the northern provinces and transports it to Helmand and on through Iran to Europe through an agent, B3, from the Mohammadzai tribe. His broker in Bahramcha, B4, also uses A5 for onward transport through Iran.

These are typical connective systems that define the ecosystem of opium and heroin trafficking through and from Afghanistan. Tribe, history and family all play a part, along with patronage and direct bribery or corruption. Involvement in and benefiting from international drug trafficking is thoroughly normalized among the Taliban leadership.<sup>40</sup> Some traffickers are connected to the very top of the regime. For example, one particularly prominent trafficker, based in Sangin, Helmand, is connected by tribe and shared history to high-level officials at cabinet and district level. The infamous Haji Bashir Noorzai, released from a US prison in 2022,<sup>41</sup> is alleged to have immediately re-established his networks and is now a prime trafficker in Afghanistan. Protection of his network is said to derive from high-level officials.<sup>42</sup>

These cases point to the degree to which traffickers benefit from protection by the regime. Without this licence to operate, trafficking would be starved.



**FIGURE 6** Drug trafficking mechanisms in Afghanistan.

## Opium cultivation and routes from Badakhshan

Poppy cultivation in Badakhshan began in the era of King Zahir Shah, who reigned in Afghanistan from 1933 to 1973. According to local legend, Zahir Shah granted permission to some districts to grow poppy because other crops produced poor yields and the available agricultural land was limited.<sup>43</sup> The main poppy-growing districts are Argo, Khash, Jurm, Darayem and Shahr-e-Bazarg, clustered around the provincial capital of Faizabad. The mountainous, isolated terrain of Badakhshan and the naturally independent Badakhshis, predominantly ethnic Tajiks, make for a difficult-to-govern province for the southern Pashto Taliban.

Smuggling from Badakhshan to Helmand started with highly opportunistic Helmandi networks who were willing to move any profitable goods. Around 2014, they primarily trafficked weapons rather than drugs, as intense fighting in the south sharply increased demand for arms; opium smuggling from north to south existed only on a small scale. To facilitate weapon trafficking, a major corridor was established through central Afghanistan, particularly through Bamyan and Daikundi, creating a strategic link between northern and southern regions. Within about two years, Helmandi traffickers had begun to repurpose this same corridor for opium transport, using the logistics, routes and contacts already developed for weapon smuggling. As weapon trafficking later declined due to reduced demand, drug trafficking became the primary function of this route.<sup>44</sup>

When the Taliban returned to power in 2021, smugglers shifted away from using the old central Afghanistan corridor to the main highway running from Badakhshan to Kabul and then onward to Helmand. This shift was driven by improved security, greater convenience and reduced restrictions. The highway provided better infrastructure, faster travel and lower transport costs compared to the difficult mountain routes through Bamyan and Daikundi.<sup>45</sup>



**FIGURE 7** The province of Badakhshan now produces 40% of Afghanistan's opium.

NOTE: Badakhshan shares a 1 357-kilometre border with Tajikistan to the north. Keshem, a small town in Badakhshan, sits astride the Pul-e-Begum River and is the main hub for licit and illicit trade out of the province.



The road connecting Faizabad to Keshem, the main hub for licit and illicit trade out of Badakhshan. *Photo supplied*

The Taliban concentrated their enforcement operations in the southern provinces, areas long under Taliban influence and control, targeting cultivation rather than trade. As a result, while cultivation sharply declined in the south, east and west, Badakhshan's continued production gained new prominence, becoming by default one of Afghanistan's main sources of opium. By 2025, Badakhshan accounted for about 40% of Afghanistan's total opium production. The amount of land given over to opium production in the province increased by 371% from 2023 to 2024 – the province has also witnessed inward migration of skilled poppy farmers from the south.<sup>46</sup>

Helmand-based drug smugglers played a major role in sustaining and expanding the local heroin trade in the north. They brought money, networks and purchasing opportunities into Badakhshan, encouraging farmers to continue cultivating poppy despite the restrictions. Now most traffickers transporting drugs from Badakhshan to other parts of Afghanistan come from the southern provinces. Approximately 90% are from Helmand, while the remaining 10% are from Kandahar, Farah, Nimroz and other provinces.<sup>47</sup> Helmandi smugglers pay higher prices and in cash, making them the preferred buyers for local traders, and they maintain strong ties with the Taliban, reducing the risk of interception and increasing predictability.

Drug deals between Helmandi traffickers and Badakhshi growing networks take three forms. Some Helmandi smugglers are based in the south and buy opium and heroin directly from Badakhshi harvesters, local smugglers or agents. Other Helmandi smugglers live in Badakhshan and act as local buyers on behalf of partners based in Helmand. A third method involves Helmandi smugglers travelling to Badakhshan for a few days, buying opium and heroin there directly, and handing the shipment over to a *qaryakash* (courier) before leaving again.<sup>48</sup>

Digital communication, especially through WhatsApp, now plays a growing role in negotiating prices and arranging transactions. These remote deals reduce the need for travel while still allowing dealers to maintain direct control over large drug purchases. It is notable that senior traffickers have switched to using Starlink internet to facilitate their trafficking operations, having been tipped off about the internet blackout at the end of September 2025.<sup>49</sup>



**FIGURE 8** Trafficking routes from Badakhshan to south-eastern Afghanistan before and after the Taliban seized power in 2021.

### ***Factories, processing and packaging***

Badakhshan lacks drug-processing laboratories because of the difficulty of obtaining chemical precursors required for heroin production. These chemicals are mostly imported from Iran and Pakistan, but Badakhshan's distance from both borders makes transportation there difficult. The route passes through multiple checkpoints, where Taliban monitoring and informal payments increase both risk and cost. As a result, precursor chemicals are scarce in Badakhshan and expensive, limiting processing capacity. There is also a lack of skilled workers familiar with heroin production. When the Taliban returned to power in 2021, many local producers feared punishment and distanced themselves from factory operations. Most existing laboratories were closed, either by their owners or pressure from the Taliban.

Over time, Helmand-based smugglers have begun moving small quantities of precursor chemicals from the south to Badakhshan. This limited supply, along with some technical support from southern networks, has led to the quiet reopening of a few laboratories, though production is small-scale and irregular. Despite these developments, heroin processing in Badakhshan remains limited. The shortage of chemicals, lack of skilled workers, high transport costs and fear of Taliban enforcement mean that most drugs continue to be produced and traded in raw opium form in Badakhshan. Compared with southern Afghanistan, Badakhshan's opium is naturally dry and compact, making it easier to store and transport.<sup>50</sup>

### Trafficking dynamics from Badakhshan to the north

Traffickers rely on *qaryakash* to move their product. During the Republic, most of the *qaryakash* were Tajiks and Uzbeks because most of the security forces at checkpoints were also Tajik and Uzbek. Being of the same ethnic group and speaking the same language made communication easier and reduced suspicion from security forces. Since the Taliban took over in 2021, Pashtun *qaryakash* have become dominant, because most security forces at the checkpoints and most smugglers are now Pashtun. *Qaryakash* can be long-standing professionals or locals who take up this work simply because it is the only available source of income that pays well, despite the obvious risk of imprisonment. Some *qaryakash* also act as smugglers, transporting and selling their own opium and heroin in addition to carrying goods for others. This dual role allows them to earn higher profits but also exposes them to greater risks.<sup>51</sup> Vehicles are either owned by the *qaryakash* or by the smuggler; if the vehicle belongs to the smuggler, the *qaryakash* receives roughly half the payment for the trip, and if the *qaryakash* owns the vehicle, he charges separately for both the transport service and vehicle use. Payment rates vary depending on risk, distance and load size.<sup>52</sup>

Once a *qaryakash* has been selected for transport, his first responsibility is *jaisazai*, or concealment. He decides how and where to hide the opium or heroin in the vehicle to minimize the chance of detection. Opium or processed heroin can be hidden in fuel or water trucks and in fruit and vegetable cargoes. Methods of concealment are rapidly adapted to account for search mechanisms.<sup>53</sup>

Once the drugs have been concealed, the *qaryakash* begins the journey from Badakhshan towards the border districts in Takhar and Kunduz.<sup>54</sup> The route and timing depend on the transporter's experience, familiarity with the area and existing contacts. The movement is in two phases: from Badakhshan to the border districts through road corridors, then transport from the border districts to the Afghan side of the Amu Darya, where the handover takes place between Afghan and Tajikistani counterparts.<sup>55</sup>

Most smugglers negotiate in advance with selected police or army checkpoints along the way. Once these arrangements have been made, they typically take the risk of passing through the remaining checkpoints without coordination or payment.<sup>56</sup>

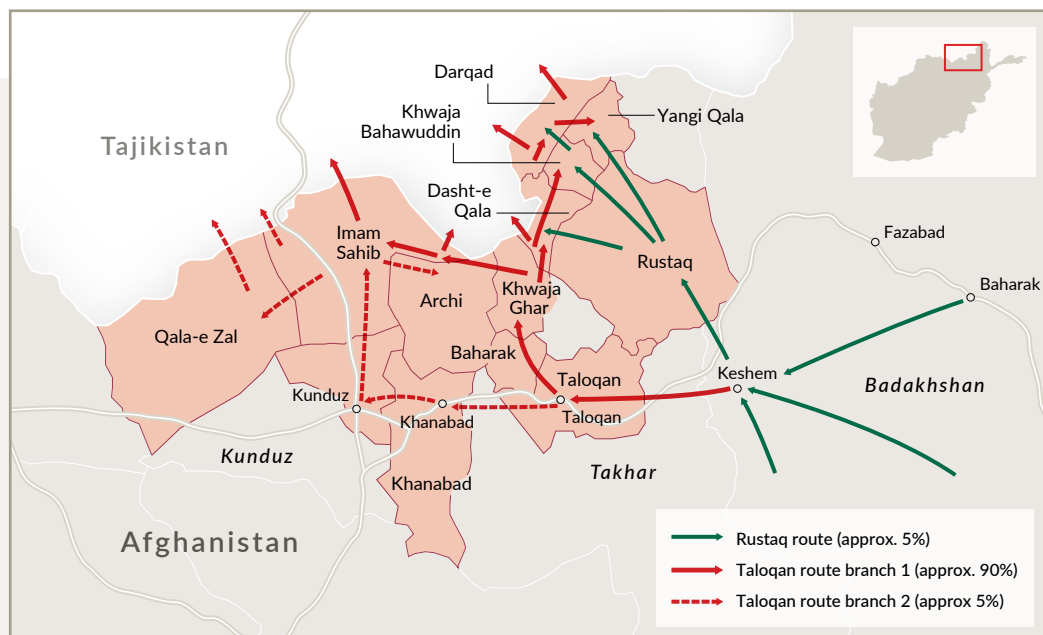


FIGURE 9 Heroin smuggling routes from Badakhshan to the north.

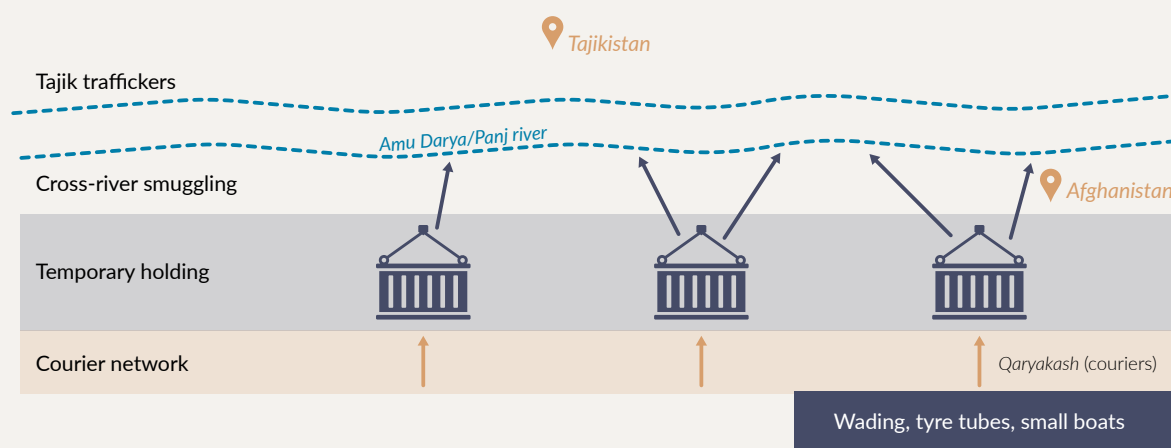
Some traffickers travel without any prior negotiation or payment, relying instead on chance and faith. As one respondent involved in cross-province smuggling from Takhar province explained: ‘Almost 30% of us don’t pay anything at the checkpoints; we just pass through with *Tawakkul ‘ala Allah* – trusting God to protect us.’<sup>57</sup>

Once the opium and heroin have arrived in Takhar or Kunduz provinces, the process moves into two main parts: temporary holding and then smuggling across the border to Tajikistan. Facilitators, typically locals from villages near the crossing points, enable these parts of the process. They are armed and usually operate in small groups led by a main facilitator, often a local strongman, tribal elder, the son of an elder or an *arbab* (village head), who hires the remaining men to assist him. The lead facilitator’s primary responsibility is to receive the opium or heroin on the Afghan side from the *qaryakash*, the smuggler, or from the place where it has been hidden. The drugs are then either kept with him or placed in one of the smuggler’s trusted houses in villages near the border.

Once the main smuggler has provided instructions, the facilitator arranges the transfer of the drugs to the riverbank and oversees their crossing. Depending on the situation, he and his men may cross on foot, use small boats, or rely on inflatable tubes to deliver the shipment across the Amu Darya or Panj rivers. The method depends on river conditions, security risks and ease of movement. Facilitators usually charge between US\$70 and US\$150 per kilogram of heroin for their services.

Smugglers cannot move the drugs into Tajikistan immediately upon arrival in the border provinces due to several challenges. These include security risks when passing through checkpoints on the way to the Amu Darya, the need to ensure that the Tajikistani side of the river is clear and ready for the pickup, and coordination with Tajikistani smugglers, who must arrive on time to collect the shipment.

Taliban checkpoints and patrols are a major operational challenge during transfer along the river. Smugglers often attempt to bribe Taliban personnel, use intermediaries with local connections, or find alternative routes and times to avoid these patrols. When bribes or arrangements fail, shipments risk confiscation and the *qaryakash* or facilitator may be detained. For these reasons, smugglers keep the drugs for short periods in temporary holding facilities such as houses, warehouses or remote compounds until conditions are favourable for crossing.<sup>58</sup>



**FIGURE 10** Smuggling mechanisms across the border into Tajikistan.

### ***Cross-river smuggling methods***

Dasht-e-Qala, Yangi Qala and Darqad are the main crossing points used for smuggling into Tajikistan. Smuggling in this area takes place using three main methods: on-foot handovers, inflatable tractor tubes and boats, and boat crossings at main trade crossing sites such as Ai Khanum. Direct on-foot exchanges occur when the river level is low enough and dense forest cover on both the Afghan and Tajikistani sides provides cover. Afghan and Tajikistani smugglers meet at prearranged points along the river to hand over the drugs in exchange for cash, or in some cases deliver the drugs first and receive payment later through trusted intermediaries. Inflatable rubber tractor or vehicle tubes provide a cheap, easy-to-use alternative and are capable of carrying hundreds of kilograms of opium and heroin. During seasons when the water level is high, smugglers rely heavily on these tubes. Although it lacks a bridge, Ai Khanum also functions as an official crossing point where people regularly use boats to export and import legal goods. Smugglers exploit this trade by concealing opium and heroin within shipments, often coordinating with Taliban and Tajikistani border officials. Bribes are usually paid in advance to authorities on both sides to ensure safe passage.<sup>59</sup>

Local smugglers generally have no direct knowledge of their Tajikistani counterparts. The cross-border connections are managed by prime traffickers with relationships built through trusted intermediaries or long-standing personal networks with their counterparts in Tajikistan, Russia or other Central Asian countries. Once an agreement has been reached, the Afghan smuggler assumes full responsibility for managing the logistics of the operation, including transportation and moving the product across the Amu Darya.

Transactions between Afghan and Tajikistani smugglers occur mainly in cash, although barter is also common. In the barter system, Afghan smugglers supply opium and heroin in exchange for goods from the Tajikistani side, most often horses, hunting guns and general merchandise. The *hawala* network is also used in some cases to transfer funds and settle accounts, but its role in this trade remains relatively limited.

### ***Routes from Badakhshan to the south***

Badakhshan exports 80% of its opiates to the south.<sup>60</sup> Smugglers use the main highway network, as it is faster and, to a large extent, safer for transporting large quantities of opium and heroin from Badakhshan to the southern processing hubs. The primary route runs from Badakhshan through Kabul and Kandahar (Maiwand district) and then splits towards Helmand, Nimroz and Farah through different corridors.

The first stage, from Badakhshan to Kabul, is considered the most dangerous. According to smugglers, about 90% of all confiscation happens before reaching Kabul. Most confiscations occur in the provinces of Badakhshan and Takhar, especially around the Pul-i-Begum police checkpoint in the Kesham district, which is described as the last and strictest checkpoint in the Badakhshan province.<sup>61</sup>

After entering Kabul, opium and heroin transport continues along the main highway between Kabul and Kandahar, which leads directly to the Maiwand district in Kandahar. Smugglers use this paved, high-traffic highway because it is efficient and because the police checkpoints along it are generally not focused on drugs. Only about 10% of confiscation occurs on the Kabul–Maiwand route, and even those rare cases happen only when authorities receive specific intelligence.<sup>62</sup>

When the opium and heroin reach the Maiwand district, the route divides into three main directions, depending on the intended destination. The first and most frequently used route runs from Maiwand to Gereshk, then continues into northern Helmand – Sangin, Musa Qala, Nawzad, Kajaki and surrounding districts. Northern Helmand is the primary hub for opium and heroin in the province, both in terms of business volume and processing capacity.

A small amount continues along the second route, an unpaved road into the Ghorak district, Kandahar province. Approximately 1%–2% of Badakhshan’s opium and heroin follows this route for processing in Ghorak’s factories.

The third route from Maiwand heads towards Nimroz and Farah provinces along Highway 1. Based on smugglers’ assessments during interviews, approximately 70% of Badakhshan-origin opium and heroin is transported westward toward Nimroz and Farah.<sup>63</sup> These provinces function as major exit and border trafficking regions, serving as important gateways for smuggling into Iran and to other international markets. Delaram, in Nimroz, is a major hub where opiates are sold, stored and further processed. Bakwah, in Farah, directly borders Delaram and is the point where materials from Helmand and locally produced opium and heroin from Farah come together. This junction is where most western-bound flows consolidate before moving outward. From these two districts, the combined flow branches towards multiple exit routes into Iran.<sup>64</sup>



**FIGURE 11** Opium and heroin smuggling routes from and to south-western Afghanistan.

Large volumes of drugs – mainly opium – are moved by smugglers, or *jaisazai*, using both large trucks and smaller vehicles to transport shipments across the border. The secondary method is courier-based smuggling. Individuals with legal passports swallow 0.5–1 kilograms of opium and cross through the official checkpoints, taking advantage of regular passenger flows. Smugglers also arrange deals with Taliban officials on the Afghan side and, more often, with Iranian border guards. Once payment has

been secured, off-road crossings continue with limited interference. Another method involves border slings. Local groups have built large sling devices along the Afghan side of the border that launch packets of opium and heroin directly into Iranian territory (see the image).

Trafficking occurs in large- and small-scale operations. The barrier to entry into the market is incredibly low, with one researcher observing an individual borrowing cash to buy 2 kilograms of opium in the open market at Sangin. He brought *chainak* ('teapot'), a semi-processed form of opium produced through basic heat treatment and highly prized in Iran. The trafficker then hired a *qaryaqash* to transport the drug south to Bahramcha, where it was sold by a broker to Iranian Baloch traffickers. Within 48 hours, word had come back that the consignment had arrived safely in Iran and the small investor was paid his profit.<sup>65</sup>



Catapults with a range of 500 metres are used to launch packages of opium and heroin from Afghanistan into Iran. Some 50 of these are in operation in Farah, moving 500 kilograms each night. *Photo supplied*



## THE NORTHERN ROUTE

**A**s in the south, there is evidence of a changing situation along the northern route. Heroin trafficking through Central Asia expanded sharply in the early 2000s, with an estimated 160 tonnes of heroin produced in northern Afghanistan moving through the region during this period.<sup>66</sup> Data from 2021 suggests the rate of expansion continued, with 875.7 tonnes collectively recorded in seizures in the five Central Asian countries. The role of the region was to act as a transit hub for Russian consumption markets – with Russia itself widely characterized as one of the largest drug markets globally – and supplying a small domestic market.<sup>67</sup> Historical patterns of mobility, trade and governance inherited from the Soviet period intersected with post-Soviet economic transitions, creating environments in which illicit economies took root and persisted.<sup>68</sup>

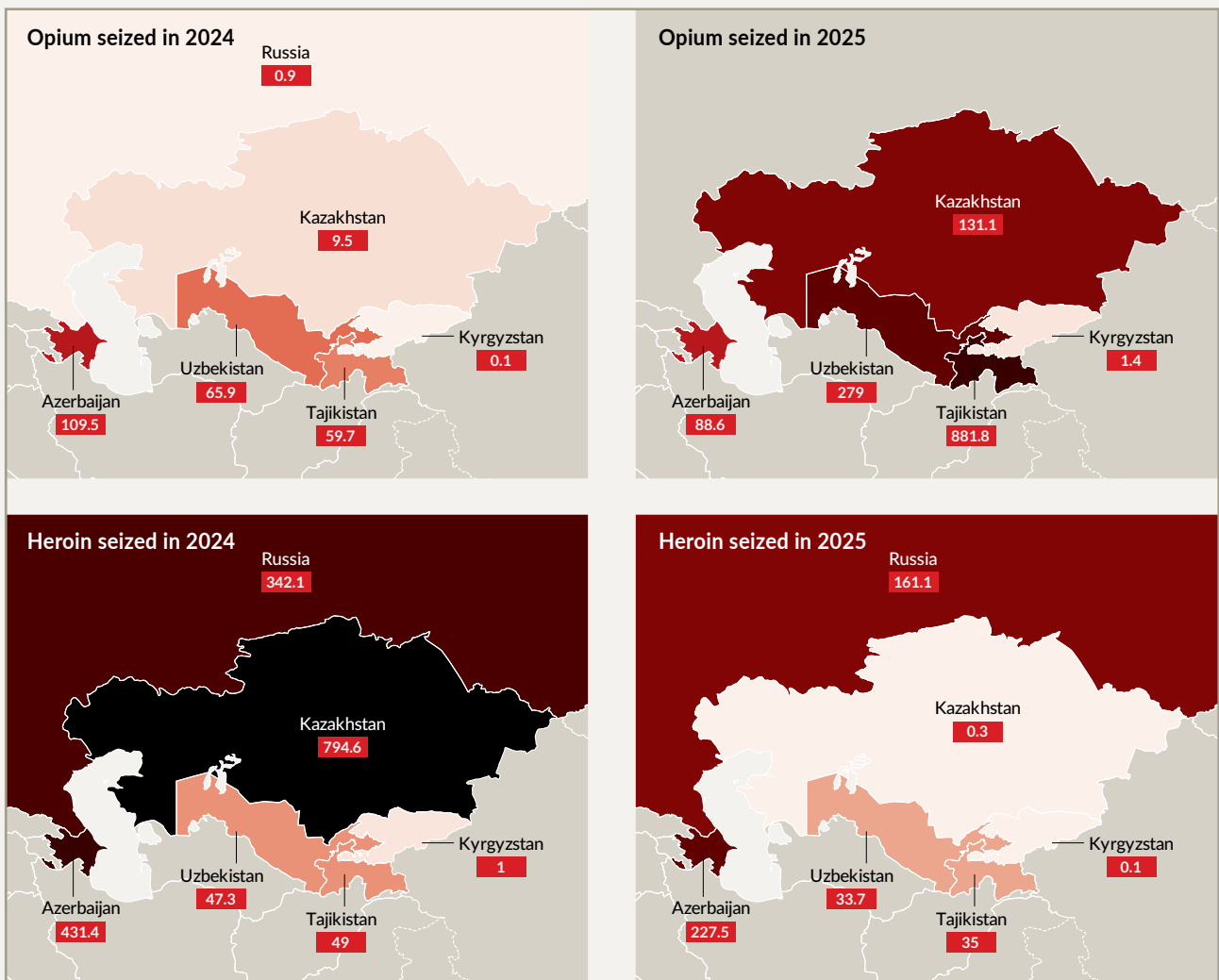
The northern route has now changed and become more opaque, politically insulated and resilient, reflecting a transition from visible trafficking to managed and concealed flows. While UNODC reporting and official seizure statistics suggest that heroin trafficking volumes along the northern route have reduced, GI-TOC interviews with regional experts indicate that this contraction reflects restricted information access as well as genuine disruption.<sup>69</sup> Heroin intelligence is tightly held, major seizures are selectively disclosed, and trafficking networks operate under conditions of secrecy that are themselves protective, limiting both domestic transparency and international visibility. In this environment, the absence of data should be read as a signal of control. Data published by the Central Asian Regional Information and Coordination Centre for Combating Illicit Trafficking of Narcotic Drugs, Psychotropic Substances and their Precursors (CARICC),<sup>70</sup> a regional monitoring platform, supports the thesis that opium and heroin trafficking along the northern route are continuing.

What is indisputable is the significant rebalancing of criminal and enforcement attention towards synthetic drugs. CARICC found a 15.2% increase in seizures of psychotropic substances in member states in 2024.<sup>71</sup> From 2023 to 2025, 90% of press releases regarding drugs in Central Asia were referring to synthetic drugs, particularly mephedrone and alpha-PVP, two potent synthetic stimulants.<sup>72</sup> Some law enforcement officials contend that the region has become a self-sufficient economy for NPS, with production facilities disrupted in Kazakhstan, Uzbekistan and Kyrgyzstan.<sup>73</sup> The Russian-initiated war in Ukraine contributed significantly to the displacement of a substantial number of Russian citizens into the region, particularly young people with relative financial means, further impacting the trafficking picture.<sup>74</sup>

This pivot has reshaped enforcement priorities, donor programming and intelligence collection, with national authorities, US-supported initiatives and international partners increasingly focused on

precursor monitoring and domestic synthetic markets. As a result, heroin – now primarily a transit commodity rather than a consumer drug in much of Central Asia – has moved further out of sight, benefiting from strategic neglect rather than direct protection.

The persistence of the northern route is inseparable from the structural entanglement of organized crime and the state across Central Asia. Organized crime is rarely acknowledged as a standalone phenomenon, as trafficking, protection, enforcement and intelligence are mediated through the same elite power structures. Cooperation mechanisms such as controlled deliveries (in which authorities knowingly allow a drug consignment to pass through so that they can monitor its path), joint investigations or information sharing occur only on a transactional basis, typically when political or institutional leverage can be extracted in return. Drug destruction statistics are widely mistrusted, with credible suspicions that a proportion of seized product is recycled back into the market, reinforcing the perception that enforcement outcomes are managed rather than absolute. In this context, the northern route functions less as an illicit corridor contested by the state and more as a regulated flow operating within tolerated or negotiated boundaries.<sup>75</sup>



**FIGURE 12** Heroin and opium seizures in CARICC member state countries, in kilograms, 2024 and 2025.

NOTE: The Central Asian Regional Information and Coordination Centre (CARICC) is the regional body responsible for combating illicit trafficking of narcotic drugs, psychotropic substances and their precursors.

SOURCE: CARICC, <https://www.caricc.org/ru/publications/infographics>

A central factor underpinning the resilience of heroin trafficking through Central Asia has been the expansion of legitimate trade and economic integration across the region. Policies designed to stimulate regional commerce – including visa-free travel within the Commonwealth of Independent States and later the Central Asian Economic Union – have significantly increased the cross-border movement of people and goods. These measures reduced transaction costs and border frictions for licit trade, but simultaneously expanded the opportunity structure for drug traffickers. Heroin trafficking through Central Asia has proven resilient in large part because it is embedded within dense, high-volume trade corridors that provide effective logistical cover. Long-established cargo routes – particularly those transporting fruit and vegetables from Tajikistan and other Central Asian states to Siberia and the Russian heartland – have repeatedly been exploited to conceal drugs. Rail, road and air transport systems designed for bulk agricultural trade allow traffickers to move drugs in ways that are difficult to detect without disrupting legitimate commerce. The sheer scale of these flows continues to overwhelm inspection capacity, making concealment within licit cargo one of the most sustainable trafficking methods in the region.<sup>76</sup>

Institutionally, the northern route persists in part because regional cooperation mechanisms are insufficiently resourced. CARICC remains active but functions largely through open-source intelligence and legacy reporting, with its original donor base eroded and meaningful intelligence sharing minimal. The Border Management Programme in Central Asia (BOMCA) and the Central Asia Drug Action Programme (CADAP), both initiatives of the European Union, provide technical and demand-side engagement but are project-driven and politically constrained, offering limited leverage over elite-controlled trafficking systems. Information exchange remains overwhelmingly bilateral, transactional and opaque, while intelligence itself is treated as a commodity that can be withheld, traded or monetized. Although Europol, EMPACT Drugs and national liaison officers are seeking deeper engagement, a structural gap remains between European multilateral policing models and Central Asian governance realities, limiting the effectiveness of conventional cooperation frameworks.<sup>77</sup>

Taken together, these dynamics suggest that the northern route has not weakened but has instead become quieter, more controlled and more resilient. Heroin trafficking through Central Asia now operates beneath the surface of official statistics, donor priorities and public narratives, shielded by secrecy, political management and the diversion of attention towards synthetics. Any serious assessment of route resilience must therefore move beyond seizure data and reported volumes towards an analysis of the political economy, elite incentives, institutional performativity and cross-route adaptation. The northern route should be understood not as a declining pathway but as a stabilized trafficking system whose resilience lies precisely in its invisibility.<sup>78</sup>

## Trafficking corridors

The classic northern route originates in Afghanistan's north-eastern provinces of Badakhshan, Takhar and Kunduz. Heroin and opium are moved across the Amu Darya River into Tajikistan, from where flows diverge through Kyrgyzstan and Uzbekistan, converge in Kazakhstan, and move northwards into Russia. Both road and rail corridors move bulk consignments, while high mountain trails and river crossings sustain smaller flows. The Tajik-Kyrgyz clashes of 2022 forced significant rerouting into Uzbekistan, elevating Kaplanbek and Zhibek-Zholy as key nodes. A supplementary Caspian corridor, linking Turkmenistan to Azerbaijan, supports consignments destined for the Caucasus and the Balkans. Throughout the route, traffickers exploit concealment techniques ranging from embedding heroin in construction materials or food staples, to placing drugs in sealed rail containers or within legitimate logistics shipments. The increasing use of freelance drivers and licensed firms distributes the risk and reduces visibility.



**FIGURE 13** Heroin trafficking along the immediate northern route.



The Amu Darya River seen at the border between Afghanistan and Uzbekistan. Afghan-origin heroin and opium are moved across the river into Tajikistan. © Vyacheslav Oseledko/AFP via Getty Images

The route's main chokepoints are concentrated around Tajikistan's Panj region, Uzbekistan's Kaplanbek and Zhibek-Zholy border crossings, and Kazakhstan's Konysbayev and Kaplanbek points.<sup>79</sup> However, the institutional weaknesses that have long undermined regional enforcement – limited forensic capacity, fragmented data-sharing, weak early-warning systems and entrenched corruption – continue to constrain collective responses and limit the translation of seizures into strategic disruption.

## Tajikistan

Tajikistan remains the most important entry point for Afghan heroin into Central Asia. The logistics behind this are deeply structural. With its long, mountainous and sparsely governed border along the Panj River, Tajikistan is the front-line state in northbound heroin flows.<sup>80</sup> During the 1992–1997 civil war, both opposition factions and government-aligned elites relied heavily on trafficking revenues

to finance military operations.<sup>81</sup> After the war, competition flared between former commanders, particularly in Gorno-Badakhshan and Khorog, where attempts by the state to assert a monopoly on force periodically resulted in violent confrontations with local strongmen.<sup>82</sup>

Over the past decade, open violence has declined not because trafficking has ceased but because criminal and political actors have reached stable, trust-based arrangements that reduce the need for coercion.<sup>83</sup> Corruption is still pervasive: border guards, police and senior officials have been repeatedly documented facilitating trafficking or receiving payments for protection.<sup>84</sup> This has created a political economy in which drug revenues underpin elite networks and stabilize local patronage systems. Violence has gradually declined as networks stabilized and trust-based arrangements replaced open conflict, but trafficking remains deeply woven into the country's governance structures. CADAP's national analysis recorded a 129% rise in heroin seizures from 2017 to 2021, and more than 3 096 kilograms seized in 2024, indicating that Tajikistan continues to absorb a significant proportion of Afghan opiates passing northwards. Methamphetamine seizures in Tajikistan have also risen sharply since 2021, increasing by 75% per quarter. The year 2024 saw a 59% increase, with 110 kilograms of methamphetamine seized.<sup>85</sup> Tajikistan thus embodies a dual reality: it is simultaneously the most important interdiction actor on the northern route and the most structurally integrated into drug trafficking flows.

## Uzbekistan

Uzbekistan occupies a unique position on the northern route. Historically, Tashkent pursued a highly securitized and repressive approach to organized crime, limiting the influence of major trafficking groups and constraining the power of so-called 'thieves-in-law', the elite crime bosses of the post-Soviet underworld. This approach reduced visible violence but did not eliminate corruption or trafficking. Smaller networks, often dependent on state protection and complicit officials at border posts, continued to move drugs northwards.

Since 2023, Uzbekistan has shifted from a purely transit state to an increasingly important processing and distribution node. Domestic synthetic drug laboratories dismantled in 2024/25, as well as corruption cases involving border and customs officials, illustrate this change.<sup>86</sup> The 2022 Tajikistan–Kyrgyzstan border clashes pushed much of the traffic deeper into Uzbekistan, increasing the importance of the Kaplanbek and Zhibek-Zholy crossings as chokepoints for onward movement into Kazakhstan. These crossings are now some of the most heavily used points along the route.

Uzbekistan's strong security posture constrains large-scale criminal groups, yet its bureaucracy – characterized by persistent corruption – provides the necessary flexibility for trafficking networks to operate. As a result, Uzbekistan is both a gateway and a staging area for heroin and methamphetamine moving north.

Following the disruptions caused by the COVID-19 pandemic and increased pressure on laboratories in Kazakhstan and Tajikistan, synthetic drug production began relocating into Uzbekistan. Officially, no drug laboratories were recorded until 2020. By 2024, however, five local labs had been dismantled, and in just the first quarter of 2025, six more were identified, indicating an accelerating trend.<sup>87</sup> Some operations involve full synthesis; others perform secondary processing, repackaging or adulteration of raw materials imported legally as industrial precursors. Law enforcement experts describe these imports arriving as 'biologically active additives, washing powders, food additives', taking advantage of legal loopholes, precursor regulation gaps and the absence of large-scale scanners at border checkpoints.

Uzbekistan requires urgent investment in forensic capacity and cross-border data-sharing to detect these patterns. Multiple interviewees noted that Uzbekistan receives synthetic drugs not only from Afghanistan but also from Kyrgyzstan and Kazakhstan, and that border districts such as Surkhandarya and Samarkand serve as critical entry zones for both psychotropic substances and natural narcotics. Meanwhile, domestic consumption of methamphetamine remains modest relative to mephedrone and alpha-PVP, yet an increase in availability is widely anticipated as Afghan production scales up.



The Zhibek-Zholy checkpoint on the border between Uzbekistan and Kazakhstan is now one of the busiest crossings for heroin trafficking along the northern route. *Photo: Republic of Kazakhstan*

## Kyrgyzstan

Kyrgyzstan acts as a bridge, reservoir and alternative pathway for illicit economies whenever border pressures shift. Its trafficking environment has long been shaped by political instability and the penetration of organized crime into the state apparatus, most prominently during the presidency of Kurmanbek Bakiev (2005–2010), when criminal networks wielded significant influence inside political institutions. Violence has historically surged during political upheavals – especially in 2010 – and receded as new patronage networks have restabilized. Several clandestine methamphetamine labs have been dismantled in Kyrgyzstan, often located in rural areas where state presence is thin.<sup>88</sup> Kyrgyzstan has seen a broad increase in synthetic drugs traded through Telegram-based courier networks, further blurring the line between domestic use and transit dynamics. Seizures – including 174.8 kilograms of heroin in Bishkek in 2025 and 16 tonnes of hashish in 2024 – demonstrate both classical and diversified drug movements. Local experts interviewed describe a market in transition, with synthetic drugs gaining prominence and heroin increasingly embedded within mixed consignments.<sup>89</sup>

Over time, only groups with state protection have survived, particularly mafia-style networks associated with the thieves-in-law. Both high-ranking and low-ranking police officers have been involved: the former facilitating large shipments, the latter engaging in local distribution.<sup>90</sup> This fusion between

political elites and organized crime has made Kyrgyzstan's borders porous to trafficking – even as the country presents a less direct route to Russian markets than Tajikistan.

Operationally, traffickers exploit crossings such as Korday, where enforcement pressure fluctuates regularly. Kyrgyzstan often acts as a buffer or pressure-release valve, absorbing flows temporarily before they move towards Uzbekistan or Kazakhstan. Though not the central artery of the northern route, Kyrgyzstan's permissive environment and political-criminal entanglements ensure its continued relevance.

## Turkmenistan

Turkmenistan remains the most opaque but strategically significant link in the northern route network. Its authoritarian governance structure, severe restrictions on civil society and the media, and lack of external monitoring limit reliable information. Nonetheless, its long border with Afghanistan and access to Caspian maritime routes make it a key corridor for heroin and potentially methamphetamine shipments destined for the Caucasus, Russia and Europe. Secondary data in an unreleased methamphetamine study confirmed the presence of ephedra plant species in Turkmenistan – particularly *Ephedra equisetina* and *Ephedra distachya* – though no direct interviews were possible due to access restrictions.<sup>91</sup> Analysts believe that trafficking through Turkmenistan is both tolerated and tightly controlled by the state: the absence of reported violence is likely to reflect consolidated political-criminal arrangements rather than the absence of activity.<sup>92</sup> Given its geography, Turkmenistan remains an essential, if poorly understood, component of the northern system.

## Kazakhstan

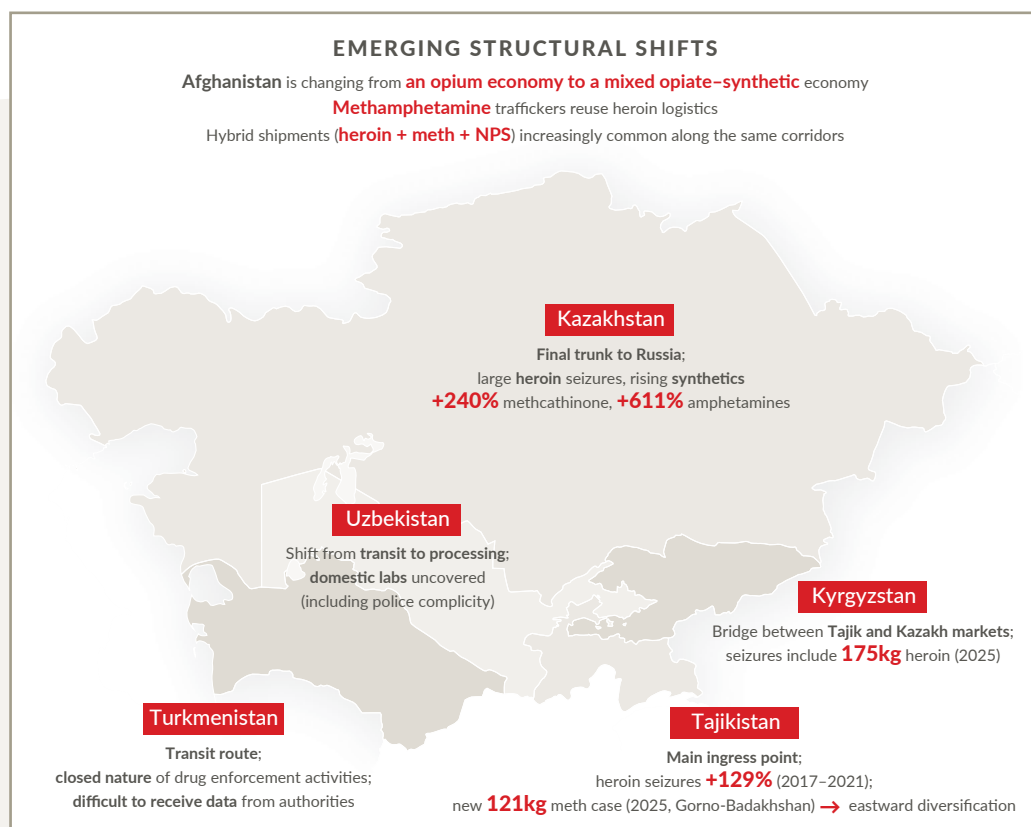
Kazakhstan represents the primary trunk line for shipments moving into Russia. While Tajikistan and Uzbekistan function as entry and consolidation zones, Kazakhstan handles the highest volume of onward movement. Kazakhstan's criminal market differs markedly from its southern neighbours. Drug trafficking is less dominant in its illicit economy. The notorious Four Brothers group of the 1990s focused less on drugs than on oil theft and racketeering.<sup>93</sup> Violence between criminal groups has been episodic, usually tied to political power struggles rather than competition over heroin routes. The January 2022 unrest, during which authorities accused criminal groups of exploiting political chaos, illustrates these dynamics.<sup>94</sup>

Kazakhstan's importance as a transit corridor has grown, with a sharp rise in methcathinone (+240%) and amphetamine (+611%) seizures, reflecting the region-wide shift towards synthetic stimulants.<sup>95</sup> A 2025 methamphetamine study by CADAP revealed that industrial-scale NPS laboratories have been dismantled near major transport hubs, and domestic production is now sufficient to supply Kazakhstan's entire internal market. The seizure of 775 kilograms of heroin at Konysbayev border crossing in 2024 also indicates that traffickers continue to rely heavily on Kazakh infrastructure while simultaneously diversifying commodity types. Importantly, Kazakhstan is the regional leader in integrating public health and law enforcement data, an area highlighted repeatedly in CADAP's Early Warning Systems report.<sup>96</sup> Yet, even here, significant forensic gaps persist. Laboratories require more advanced GC-MS (gas chromatography-mass spectrometry) and HPLC (high-performance liquid chromatography) equipment to monitor an increasingly complex market where heroin, methamphetamine, mephedrone and alpha-PVP circulate simultaneously.<sup>97</sup> These forensic insufficiencies hamper efforts to link seizures to specific production sites or trafficking networks. Without these capabilities, states struggle to convert tactical interdictions into strategic disruption of supply chains.

From 2023 onward, seizures increasingly contained mixed consignments of heroin, methamphetamine and hashish. Afghan methamphetamine – produced using locally harvested ephedra or imported precursors – has become a consistent feature of these shipments. Such hybrid loads complicate forensic analysis: heroin, methamphetamine and hashish may originate from different production zones or networks, hindering attribution. They also broaden each consignment’s end-market reach, linking Central Asian logistics chains not only to traditional Russian heroin consumers but also to emerging synthetic drug markets across Eurasia.

The durability of trafficking routes through Kazakhstan is also explained by structural limits on border enforcement rather than pervasive corruption alone. The Russia–Kazakhstan border is among the longest continuous land borders in the world, and the daily movement of thousands of trucks carrying bulk goods creates an inspection environment in which comprehensive control is practically impossible. Law enforcement officials themselves emphasize that the volume and complexity of trade flows – not institutional complicity – constitute the primary vulnerability exploited by traffickers. This constraint has allowed drug flows to persist even amid enforcement efforts, reinforcing the resilience of trafficking routes over time.

Crucially, heroin trafficking through Kazakhstan is not primarily organized by domestic groups but coordinated by transnational actors operating at distance. Türkiye-based Kurdish organized crime groups play a dominant role at the tonnage level, managing logistics, concealment, front businesses and cross-border coordination across Central Asia, the Caucasus and the European Union. Tajikistani nationals, meanwhile, remain disproportionately involved in organizing mid-level wholesale flows of opiates moving north from Afghanistan through Tajikistan, Kyrgyzstan and Uzbekistan into Kazakhstan. This division of labour reinforces Kazakhstan’s role as a managed transit space rather than a site of origin or command, with control exercised upstream and downstream rather than locally.<sup>98</sup>



**FIGURE 14** Changes in drug trafficking dynamics of Central Asian countries on the northern route.



## THE SOUTHERN ROUTE

**T**he southern route has re-emerged as the most dynamic and resilient pathway for the movement of Afghan heroin into global markets. Its importance has grown as geopolitical shifts, enforcement pressure on northern corridors, and the disruption of Black Sea logistics have driven traffickers to diversify away from traditional routes. Today, the southern route forms a flexible trafficking architecture that links the major poppy-producing provinces of southern Afghanistan to maritime gateways in Pakistan and Iran, and from there to Europe, the Middle East, and East and southern Africa.

Afghanistan remains the world's principal source of illicit opiates. Despite reductions in recorded cultivation following the Taliban's enforcement of poppy bans, vast pre-ban stockpiles, ongoing processing and continued production in specific provinces ensure that there is ample supply for export. The southern route's attraction lies in its logistical reach: southern Afghanistan connects efficiently to Pakistan's Balochistan province and the Makran coast, and westward into Iran's borderlands, where traffickers exploit dense commercial activity and long-established cross-border ties. From seaports such as Gwadar, Chabahar and Bandar Abbas, heroin can be dispatched through three major maritime arcs: westward through the Suez Canal towards Europe; through Gulf ports and redistribution hubs in the United Arab Emirates; and southward down the Indian Ocean to East African ports that act as both consumption markets and springboards to Europe. This combination of geographic access, commercial throughput and concealment opportunity makes the southern route a strategic backbone of global heroin movement.

The southern route is not a single pathway but a lattice of interconnected corridors. One major land corridor begins in Helmand, Nimroz, Kandahar and neighbouring provinces, where opium is refined and packaged before moving across the Afghanistan–Pakistan border through hubs such as Spin Boldak and Chaman. From there, shipments pass through Balochistan's established logistical networks – Quetta is a key consolidation point – before reaching the Makran coast. The coast's porous geography and its long history of smuggling make it particularly attractive for dispatching heroin from Gwadar or adjacent coastal sites onto dhows, small fishing vessels or commercially containerized shipments.

A second western overland corridor funnels heroin from Nimroz and Herat across the Iranian border at crossings such as Zaranj–Milak. Once inside Iran, consignments can move south to Bandar Abbas or Chabahar, or be rerouted northward through the Caucasus. Crucially, Iran functions as a consolidation and integration zone: traffickers embed heroin in licit logistics chains, exploit commercial trucking routes and use layered shipment strategies that mix Afghan-origin heroin with Iranian domestic product or other commodities. Formal trade corridors, diaspora networks and established cross-border family ties further facilitate these flows.



A Taliban security officer stands guard near the zero point border crossing between Afghanistan and Pakistan in the town of Spin Boldak. Spin Boldak is a main transit hub for refined opium being transported overland into Pakistan. © Sanaullah Seiam/AFP via Getty Images

Once heroin reaches the major ports of Pakistan, Iran or the Gulf, the trade branches into a maritime system characterized by three key strategies: concealment within standard commercial containers; movement by dhows and small vessels to mid-sea rendezvous points; and multi-leg journeys that deliberately obfuscate origin through trans-shipment at intermediate ports in the Gulf, East Africa or West Africa. Recent seizures of heroin hidden in bulk goods such as salt, soap or marble tiles demonstrate the sophistication and scale of container concealment. Rotterdam and neighbouring Dutch ports have emerged as critical European endpoints in this chain.

The East Africa/Swahili Coast branch is increasingly prominent. Large consignments now move from Makran or Gulf ports down the Indian Ocean to Mombasa (Kenya), Dar es Salaam (Tanzania) and onward to secondary coastal hubs. These consignments frequently mix heroin and methamphetamine, reflecting traffickers' preference for diversified commodities that increase profitability and mitigate enforcement risk. Weak port controls, complex regional maritime trade and extensive overland transport networks make East Africa an effective stealth transit zone into European and southern African markets.

Across the southern route, concealment strategies are diverse but consistently layered. Containerized maritime shipping is now the dominant vector for large loads, benefiting from the immense scale of global container traffic and the challenges of systematic inspection. Traffickers commonly use false documentation, corrupt customs brokers and mis-declared goods to embed heroin in legitimate imports and exports. Dhows and small coastal craft are crucial for flexible, low-profile movement, especially for rendezvous operations beyond jurisdictional boundaries.

Air couriering is also well documented: smaller high-value parcels are moved by courier transiting African or Gulf airports into Europe, carried on-person or concealed within luggage. Meanwhile, the

co-movement of heroin with methamphetamine and other commodities reflects a broader diversification trend that strengthens the resilience of trafficking networks.

Higher up in the chain, organized criminal groups coordinate international logistics, container concealment and port-side corruption. These networks often maintain relationships with freight forwarders, warehouse operators and shipping agents, and operate alongside external specialists – chemists, financiers, document forgers – who bring additional capabilities. The networks are not siloed: facilitators involved in heroin trafficking frequently service other illicit markets, including methamphetamine, arms, minerals and human smuggling. This convergence deepens resilience: disruption in one commodity can be offset by pivoting to another, and shared logistics reduce marginal costs across trades.

Understanding the southern route requires distinguishing between weak enforcement capacity, opportunistic corruption and systemic complicity. Evidence from the region suggests that these dynamics exist on a spectrum. Widespread petty corruption at checkpoints, border crossings, and ports lowers the operational costs of smuggling and reflects long-standing institutional fragility. In some areas, local officials engage in more structured forms of rent-seeking or protection arrangements, allowing traffickers to move goods in exchange for predictable payments or temporary non-enforcement. Fieldwork has documented cases where officials have selectively intervened in the market or made short-term accommodations based on local political considerations.<sup>99</sup>

At higher levels, the question of organized political involvement remains sensitive. While some trafficking patterns imply coordination that would be difficult without senior-level awareness, definitive public evidence of high-level complicity is limited. Robust intelligence, financial tracing and targeted investigations are required to establish firm chains of accountability. Meanwhile, the Taliban's opium bans have altered trafficking geography: farmers have shifted cultivation towards concealed plots or across borders, and traffickers have adapted by stockpiling opiates and intensifying processing. The ban has therefore displaced rather than eliminated production pressures.

The southern route is durable because it is diversified, networked and embedded within legitimate global trade. Effective disruption demands integrated regional cooperation: targeted port intelligence, financial investigations, disruption of facilitators, calibrated strikes on processing capacity, and politically informed development initiatives. Above all, interventions must respond to granular local dynamics – tribal logistics networks in Balochistan, processing clusters in Helmand and Nimroz, and the trans-shipment role of key Indian Ocean ports – to have any prospect of changing the system rather than simply displacing it.

## Pakistan

Pakistan has become a major producer of opium, with 1 800 hectares under poppy cultivation in 2023.<sup>100</sup> It is also one of the main transit routes for opioids trafficked from Afghanistan to the rest of the world.<sup>101</sup> An estimated 40% of Afghan opioids are trafficked through Pakistan.<sup>102</sup> Major trafficking routes run through the conflict-ridden provinces of Balochistan and Khyber Pakhtunkhwa, utilizing informal crossings and protected supply chains. Pakistan serves as a critical passage for heroin headed to other parts of south-western Asia and further afield, including East and southern Africa.

The ban imposed by the Afghan Taliban in 2022 resulted in a 95% decline in poppy cultivation in Afghanistan, affecting the dynamics of heroin trafficking in Pakistan.<sup>103</sup> The increase in poppy cultivation in the bordering areas of Pakistan remains a growing threat. Satellite imagery revealed

a dramatic rise in opium poppy cultivation in Balochistan in 2025, particularly in Duki and Gulistan, Killa Abdullah.<sup>104</sup> Fields exceeding 1 hectare are increasingly common, with individual farms stretching over 5 hectares – a scale rarely seen even during Afghanistan's most prolific poppy production years.

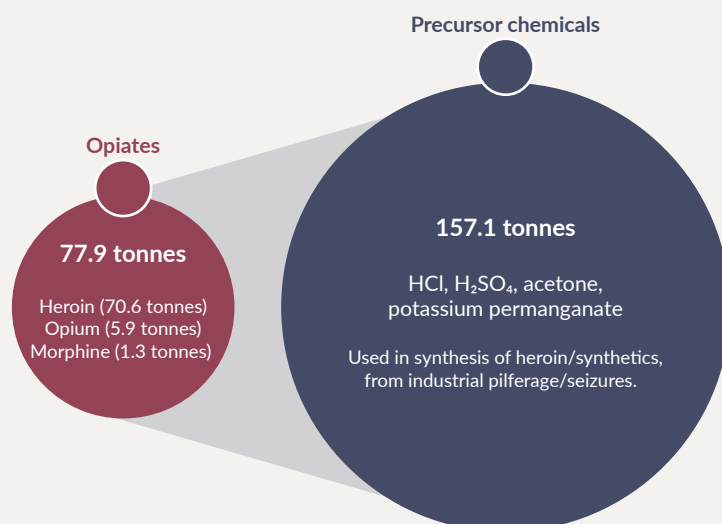
This expansion has been driven by Afghan farmers moving into the area, many of whom work as tenant farmers or under sharecropping arrangements.<sup>105</sup> These Afghan migrants usually use illegal crossings between Bahramcha district in Helmand and Nushki district in Balochistan.<sup>106</sup> Smugglers charge Rs. 30 000–35 000 (US\$110–US\$125) per person to drive migrants over the border.<sup>107</sup> The repurposing of arid land through solar-powered irrigation has also contributed to the expansion, suggesting that the area under poppy cultivation in Pakistan may span tens of thousands of hectares.<sup>108</sup> Afghan migrant farmers further report government officers taking annual bribes of between Rs. 200 000 (US\$700) and Rs. 500 000 (US\$1 800) before the harvest.<sup>109</sup>

Pakistan officially denies the extensive poppy cultivation in Balochistan. In 2024, Pakistan's Anti-Narcotics Force (ANF) stated that Pakistan has been a poppy-free country since 2001. Yet, in the same year, the ANF seized 70.6 tonnes of heroin across Pakistan. The ANF report also contradicts the US Department of State report on narcotics in Pakistan for 2024, which noted that 1 800 hectares in Pakistan were under poppy cultivation. Any country with more than 1 000 hectares of land under poppy cultivation is termed a major opium-producing country.

The growth in poppy cultivation in Pakistan stabilizes supply and offsets Afghan production declines, which reinforces assessments that the ban's impact on downstream European markets is likely to be overstated.<sup>110</sup>



**FIGURE 15** Heroin trafficking routes through and from Pakistan.



**FIGURE 16** Drug categories by total seizure volume, 2024.

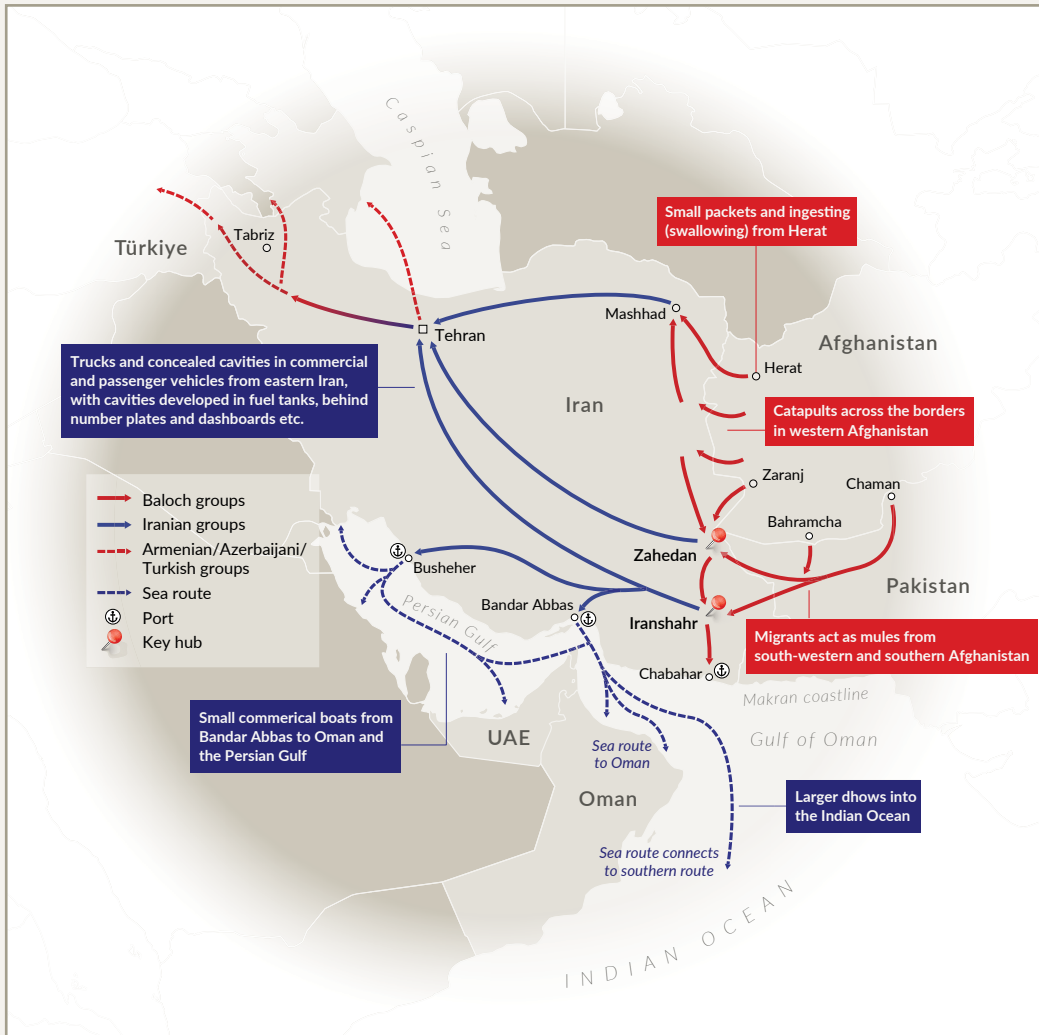
SOURCE: Pakistan Anti-Narcotics Force

Operationally, Pakistan contains several critical internal corridors. Afghan-origin opiates enter through border crossings such as Chaman and Torkham, consolidating in hubs including Quetta and Peshawar. From there, shipments follow two principal trajectories: westward towards the Makran coast for maritime export through Gwadar and Pasni, or southward along the N-25 corridor to Karachi. These coastal and port-based nodes enable large-scale maritime shipment to the Arabian Peninsula, south-eastern Africa, East Asia and onward to other global destinations.<sup>111</sup> In parallel, air travel and courier networks operating through Pakistani airports and traffickers facilitate smaller but frequent heroin shipments using body-packing, luggage tampering and parcel systems.<sup>112</sup> These air-based routes complement maritime trafficking and allow rapid, low-volume distribution to downstream hubs, reinforcing Pakistan's role as both a consolidation and export platform rather than a simple transit state.

Pakistan's drug economy is deeply entangled with insecurity and political violence, particularly in Balochistan. Trafficking revenues are repeatedly linked to militant and terrorist financing, which enables the environment in which cultivation and smuggling persist.<sup>113</sup> Although enforcement actions and seizures occur, they are insufficient to disrupt systemic flows. Overall, Pakistan remains a structural backbone of westbound trafficking, combining production, logistics and export capacity in ways that significantly reinforce the resilience of the southern route and the overall Afghan opiate trafficking network.

## Iran

Iran still occupies a central position in the global drug trade as the primary land bridge connecting the Afghan and Pakistani drug supply to Türkiye and the Caucasus, ultimately leading to Europe. Despite heavy border militarization and formal enforcement by some elements of the Iranian state, trafficking through Iran remains highly resilient due to systemic corruption, political accommodation and traffickers' ability to withstand enforcement measures on transport networks.<sup>114</sup>



**FIGURE 17** Opiate trafficking routes through Iran connect production centres in Afghanistan and Pakistan to Europe and elsewhere using land and sea routes.

NOTE: Different groups predominate at different stages, with Baloch groups spanning the source countries' borders, followed by Iranian, then Azerbaijani, Armenian and Turkish groups.

Field researchers in the region reported on the current situation of opium and heroin trafficking in February 2026. Their interviews revealed that the days of multiple vehicle convoys driving through the deserts from western and south-western Afghanistan all the way to Tehran are long gone. These heavily armed, brazen trafficking methods of 30 years ago required significant military resources and political cover in ungoverned spaces. Today, Iranian state authorities exercise tighter control over trafficking routes and methods, with smugglers choosing between avoiding detection or co-opting officials and thus losing a percentage of their profits.<sup>115</sup>

Smaller operators now move consignments of opium and heroin into south-eastern and eastern Iran, to the main hubs of Mashad, Iranshahr and Zahedan. This first stage is controlled by Baloch networks and usually involves small, 1-kilogram packets of drugs being delivered to safe houses by migrants or couriers contracted by the traffickers. From these hubs, the next stage is controlled by Iranian groups, whom interviewees suggested were state-affiliated, although this could not be confirmed. The packets of heroin or opium are concealed in commercial or private vehicles, behind dashboards and number

plates, and in hidden cavities in the chassis and fuel tanks. The routes branch to the southern ports of Chabahar, Bandar Abbas or Bushehr for onward movement by small boat or dhow to the Persian Gulf coastal ports and into the Indian Ocean. The land branch flows to the north-west, where Armenian and Azerbaijani groups take over for the cross-border legs into the Nakhchivan enclave or Türkiye, or the Caspian Sea route to Baku's coastline.

The trafficking infrastructure in Iran is multi-purpose, beyond just opiate trafficking. The same corridors used for drugs are also utilized for human smuggling, with shared logistics that extend into Türkiye and Europe used to smuggle migrants.<sup>116</sup> Methods such as concealed freight and the embedding of drugs within legitimate trade have been documented, indicating high levels of trafficking organization. Despite sanctions and economic pressure, Iran's strategic geography and entrenched trafficking networks ensure its continued centrality in the southern route maritime trade and the secondary Caucasus trade.

Iran represents the indispensable connective tissue between production zones and Europe-facing routes. Its role is not diminishing but adapting, anchoring both the Caucasus and Balkan extensions of the broader northern and southern trafficking systems.

## East Africa

East Africa has become one of the most strategically important sections of the southern route (see Figure 2), a developing hub that links upstream flows from Afghanistan, Pakistan and Iran to the global market. The region has shifted from being solely a transit belt, as countries in the region now repackage, store, redistribute and even consume incoming drugs. This adaptability is mainly due to the weak maritime governance and well-entrenched African criminal networks that connect upstream flows to African and European markets.<sup>117</sup>

Operationally, the East African coast offers traffickers flexibility and concealment. Drugs arrive in dhows and containerized shipping from the Makran coast through Iranian and Pakistani ports, with offshore drop-offs and GPS-marked coordinates used for concealment. Speed-boats retrieve consignments for inland distribution or onward export.<sup>118</sup> Countries such as Kenya, Tanzania, Mozambique and the Seychelles form a continuous coastal belt where maritime surveillance capacity is limited and enforcement fragmented.<sup>119</sup> Ports such as Mombasa, Lamu, Dar es Salaam, Zanzibar and Kilifi have repeatedly been identified as repackaging and consolidation hubs, where consignments are broken down or re-exported to other markets.<sup>120</sup>

While the maritime trafficking network is extensive, it works in parallel with the growing air trafficking network. Courier networks using body-packing, luggage tampering and parcel systems move heroin, methamphetamine and increasingly cocaine onward to markets in Europe, the UK and the Asia-Pacific region.<sup>121</sup> These operations often rely on corrupt airport personnel and exploit the high volume of legitimate passenger traffic moving between these highly populated regions. Kenya and Uganda have become crucial air hubs, with West African syndicates operating alongside East African organized criminal groups.<sup>122</sup>

A growing trend in East Africa is commodity diversification. Heroin quality and availability are declining relative to ATS, methamphetamine and cannabis.<sup>123</sup> Large methamphetamine shipments through East Africa, destined for Europe and Asia-Pacific, demonstrate how the region is now embedded in synthetic as well as opiate markets. According to UNODC reports, East Africa is no longer merely a transit zone, but an emerging consumer market in its own right.

## Madagascar and Mauritius

Madagascar demonstrates this increase in strategic importance the best, as the country has developed far beyond a mere transport hub. The country faces weak enforcement, corruption and minimal maritime patrol capacity, which have enabled Nigerian, Tanzanian and Malagasy networks to transform the island into a storage, redistribution and consumer market for heroin, methamphetamine and cocaine.<sup>124</sup> New coastal corridors along the north-east (Antananarivo and Toamasina) and northern part of the country (Sava region and Nosy Be) and on the western coast have emerged to bypass security at major ports, while offshore drop-offs and informal air freight systems continue to expand.<sup>125</sup> Malagasy law enforcement officials confirm that the country is key to the southern route and increasingly a consumer market.<sup>126</sup>

The regional picture of drug trafficking has tilted decisively towards air routes. Weekly interdiction activity at Sir Seewoosagur Ramgoolam International Airport has made the site a main focus for law enforcement. Among the recent cases observed here were significant consignments of cannabis and cannabis resin entering from Thailand through Dubai, and from France on commercial flights. One case involved a mule carrying 4 kilograms of amphetamine routed from Tamil Nadu through Malaysia. Malagasy officials suspect that white heroin from Thailand is appearing in Madagascar through airport-mule trafficking, intended both for the domestic market and for onward shipping.<sup>127</sup> Markets may be adjusting to a drop in supply from the Makran coast and seeking alternative supplies.<sup>128</sup>

Sea-borne threats persist in the background: dhow traffic and other vessels are using offshore features between Mauritius and Seychelles as waypoints before skirting towards Madagascar and trans-shipping onward. Drop-offs and GPS-bundling methods ensure greater mobility and spread the risks (mainly for drugs departing Madagascar for Mauritius). Limited Mauritian patrol capacity and the sheer size and danger of local waters mean that very few sea cases are intercepted inside Mauritius's exclusive economic zone. The working assessment is therefore twofold: maritime flows continue but are rarely caught without international support; and airports now produce the bulk of interdictions. Notably, there has been a reduction in heroin flows using the maritime routes around the region; officials reported a drop in supply in the heroin market in November 2025 (without providing figures), which they attributed to upstream supply contraction and the dangers of shipping through rough seas.<sup>129</sup>



Regular interdiction activity at Sir Seewoosagur Ramgoolam International Airport indicates that Mauritius has become a main hub for heroin trafficking using mules, serving both domestic and transit markets. © Laura Morosoli/AFP via Getty Images

Mauritius reports near-weekly airport operations, with detections spanning mules and luggage-borne consignments. Mules who swallow pellets are more commonly African nationals; most other couriers carry the drugs in their luggage rather than in or on their person. Madagascar reports drugs entering the country predominantly as swallowed pellets; smuggling out of the country using air routes mainly takes place in craft goods (baskets), in luggage (in a double bottom, the handles or the frame) and inside laptops.<sup>130</sup>



**FIGURE 18** Heroin trafficking routes through Madagascar.

Freight and courier channels are increasingly exploited: authorities are holding a 26-kilogram consignment of heroin pending a controlled delivery, and similar cases are in progress.<sup>131</sup> Postal flows are an additional concern: synthetic cannabinoids (commonly known as ‘spice’) are embedded into A4 sheets and shipped from the UK through Réunion; the same product has turned up in UK prisons and local pricing is high – one treated sheet can sell for roughly £2 000, before being cut into strips for retail.<sup>132</sup> On the maritime side, law enforcement actors believe that dhows and other craft move

between the Nazareth Bank area (between Mauritius and Seychelles) and the Malagasy coast, with Madagascar functioning as a principal staging and storage point. Where sea drops occur, they are typically handled by rapid boats in rough water, as they are difficult to monitor or stop in the absence of persistent patrol hours and inter-operable tasking.<sup>133</sup>

The biggest external threats are Afghanistan as the upstream source for opioids and synthetics and, closer to home, Madagascar as the regional ‘go-down’ – a place where consignments are warehoused, broken down and relaunched.<sup>134</sup> Networks linked to Nigeria and Tanzania operate out of Madagascar alongside Mauritian and other actors, taking advantage of corruption and the current political turmoil there. Réunion is a specialized risk on the cannabis side: runs of 100–200 kilograms by fast boat are reported, exploiting short hops and the difficulty of ensuring 24/7 sea coverage. Courier profiles on the air corridor are mixed: in June 2025, a group of British nationals were arrested at Sir Seewoosagur Ramgoolam airport in Mauritius with a total of 161 kilograms of cannabis in their luggage; the group tried to use a six-year-old boy, the son of one of the suspects, as a cover.<sup>135</sup> The types of drugs seized tend to vary: for example, the Mauritius Revenue Authority reported 12.5 kilograms of synthetic drugs and 23.48 kilograms of heroin seized in 2025.<sup>136</sup> This reflects a modular ecosystem where recruitment is opportunistic and logistics are stitched together from multiple jurisdictions.

Drug type	2022	2023	2024
Cannabis	26 938.31	14 421.93	12 351.28
Cocaine	0.10	1.62	123.49
Heroin	5.69	23.18	0.39
Methamphetamine	1.60	4.29	3.66

**FIGURE 19** Drug seizures in Madagascar, in kilograms, 2022–2024.

SOURCE: Madagascan law enforcement data, 2025

Mauritius has moved to harden both airport and maritime approaches. At the airport, joint customs–police teams run targeted 100% checks on high-risk flights (Malagasy routes are currently flagged), coordinate intelligence screening and pursue controlled deliveries immediately after a seizure. Legally, the Dangerous Drugs Act empowers a police superintendent to authorize ‘allow-to-pass’ operations or substitution with a placebo.

Trafficking networks have adapted by demanding live verification by WhatsApp video when the drugs are passing through border controls. Mauritian teams now restage seized consignments under controlled conditions so that the suspects can ‘see’ the goods before making incriminating moves, which strengthens the evidentiary chain for court. At sea, the National Coast Guard has established a maritime intelligence and security unit, and an inter-agency intelligence coordinating committee now meets to align tasking – a hands-on commissioner of police has centralized coordination across services. Radar coverage upgrades are planned, reportedly with Japanese support, to reduce blind spots along the littoral.

Airport cases reported in 2025 show a clear swing towards trafficking of ATS and cannabis/resin, with heroin less visible and, where present, of lower purity by the time it reaches street level. The postal stream of high-margin ‘spice’ sheets is expanding, with some consignments routed through Réunion and others mailed directly from the UK.

Mauritius operates a forensic science laboratory (FSL) that is a regional reference point: the Seychelles relies on it for drug exhibits, and the scientists there work to international standards. Front-line officers use presumptive test kits for preliminary screening, but evidentiary confirmation must come from the laboratory. The pinch point is throughput. The lab limits daily exhibit processing to what is safe and compliant – typically very low single-digit numbers – which creates backlogs. Madagascar has presumptive test kits that are evidentially sufficient for the current judiciary but are likely to be challenged by lawyers in the future; and one TruNarc device – a handheld narcotics analyzer – that is only available when criminal investigation colleagues are not out on missions. There is no laboratory testing facility and no digital database for reference purposes.<sup>137</sup>

Three trajectories emerge. First, air corridors will remain the main pressure point for interdiction – by volume of cases, investigative leverage (controlled deliveries) and evidentiary quality (WhatsApp verification tactics that strengthen prosecution files). As long as weekly operations continue and joint customs–police profiling is tight, Mauritius can keep squeezing the air vector. Second, the maritime threat is latent rather than headline-grabbing: it will only become ‘visible’ to Mauritius when international partners push dhow cases into the exclusive economic zone or when radar and patrol capacity expand. Until then, Madagascar’s role as a warehouse and trampoline will continue to shape regional flows with little direct interdiction within Mauritian waters. Third, the composition of the drug market is changing: ATS are becoming more prevalent, while heroin flows appear suppressed or the drug diluted when present. High-potency Thai cannabis and postal-stream ‘spice’ now anchor a diversified market. The economics of ‘paper’ are especially corrosive: tiny physical volumes with outsized retail value favour postal vectors and prison infiltration, demand minimal storage and are more difficult to deter without specialized screening and intelligence.

Mauritius and Madagascar are doing many of the right things to combat drug flows, but the system will be stress-tested by the seam between rising air/parcel volumes and finite forensic and investigative bandwidth, and along a coastline that is too long and too rough for continuous coverage.

## South Africa

In South Africa, fragmented national enforcement efforts have allowed traffickers to exploit inadequate policing, porous borders and unregulated maritime spaces in the region.<sup>138</sup>

On the operational side, maritime and port control are among the weakest links in the enforcement chain. Research indicates the need for intelligence-led container screening at high-volume ports in East and southern Africa, such as Durban (South Africa), Mombasa, Dar es Salaam, Beira (Mozambique) and Port Louis (Mauritius). These ports handle high volumes of container freight: in November 2025, throughput was estimated to be ~365 000 TEUs at Durban’s port; ~175 000 TEUs at Mombasa; ~60 000–70 000 TEUs at Dar es Salaam; ~30 000–40 000 TEUs at Beira; and ~30 000–40 000 TEUs at Port Louis.<sup>139</sup> Officials note that most containers are not physically searched (less than 5%), with only slightly more scanned where equipment exists, driven by intelligence and risk-profiling.<sup>140</sup> The adoption of digital manifests, seal-tracking systems and AI-based risk scoring could significantly enhance interdiction efficiency. Reviving the East African Port Security Project as a permanent joint task force,<sup>141</sup> combining customs, coastguard and naval intelligence capacities, would serve as a significant starting point. Mapping and monitoring dhow operations, targeting financiers and refuelling points along the Makran and East African coasts, and closing data gaps in maritime surveillance are also critical steps.<sup>142</sup>

Air trafficking through South African airports is a major vulnerability. Officials described increasingly sophisticated courier methods and widespread corruption at airport facilities. A remedy may be found in the introduction of modern passenger-profiling systems, interview training and document analysis skills at major hubs in Cape Town, Durban and Johannesburg, as well as better screening of passengers boarding South Africa-bound planes in Addis Ababa (Ethiopia), Nairobi (Kenya) and Mauritius. An AI-driven system to identify anomalies in flight data was seen by law enforcement officials as a promising tool for detecting suspicious travel patterns. Reinforcing cooperation among airport police, customs and intelligence agencies is essential, as is restoring vetted, multi-agency airport units that can operate independently of compromised local structures.

Financial flows were identified as a critical enabler of the trafficking economy. Experts identified gold-company remittance systems and property-based money laundering in Mauritius and South Africa as areas for further investigation. Expanded cooperation with financial intelligence units could help trace payments made through legitimate bank cards or cryptocurrency. Asset-freezes and sanction mechanisms are needed against complicit officials and private-sector intermediaries. Improving transparency and accountability in financial transactions was also seen as a central measure to disrupt the revenue streams that sustain organized crime and corruption.

South Africa's new Border Management Authority offers the potential to address trafficking on land routes from Mozambique into South Africa. This area is currently regarded as an 'enforcement vacuum', making investment in training, integrity vetting and cross-border liaison units essential. South Africa, Mozambique, Zimbabwe, Kenya and Tanzania require joint patrols, mobile inspection teams and real-time information exchanges. Traffickers also exploit secondary crossings and farm roads, which demands better surveillance and stronger oversight of game reserves and private security forces that control sections of frontier terrain.<sup>143</sup>

Methamphetamine production and consumption have expanded dramatically in South Africa, and the convergence between this market and the heroin trade now poses new risks. Establishing regional drug-market observatories would allow systematic monitoring of prices, purity and consumption trends. Enhanced forensic and toxicology capacities are also needed to detect emerging substances, including highly potent synthetic opioids such as nitazenes and fentanyl analogues. At the same time, harm-reduction and community-based health services should be scaled up. Expanding opioid substitution therapy, needle-exchange programmes and outreach to younger or non-traditional drug-user groups are vital to mitigating the social damage of entrenched domestic drug markets.<sup>144</sup>

Mapping the intersection of African, Asian and European organized crime groups is an immediate analytical need. Priority research areas include the role of Black Axe, a violent Nigerian confraternity with global links, and Tanzanian, Pakistani and Mexican networks; the use of digital marketplaces and cryptocurrencies; and the growing economy of passport and identity theft linked to trafficking and irregular migration. Better data collection on enforcement disparities within Afghanistan, methamphetamine production in Iran and Pakistan, and container-shipping vulnerabilities would also inform more targeted interventions.<sup>145</sup>

## India

India occupies a dual position in the regional drug economy, functioning as both a major end market for opiates and a transit hub along the southern route linking south-western Asia (Afghanistan and Iran) with South Asia and Africa. The southern route across the Indian Ocean has long supplied opiates produced in south-western Asia to large consumer markets, with South Asia identified as hosting some of the world's highest numbers of consumers.<sup>146</sup> Owing to its large population, India is one of the world's biggest opiate markets by number of individual drug users, with an estimated 2.1% of the population consuming opium, heroin or pharmaceutical opioids. This prevalence may have increased significantly over the past two decades, considering the overlap with an increase in heroin seizures.

Additionally, maritime trafficking into India has intensified: in 2019, Indian authorities reported a 157% increase in heroin shipments trafficked by sea from south-western Asia, and the same year, 40% of the heroin seized in India was traced to that region.<sup>147</sup> These findings indicate that heroin trafficking into India along Indian Ocean southern route pathways remains significant, positioning India primarily as a large absorption market rather than a principal transit corridor to Europe.



## CONNECTIONS TO EUROPE: THE CAUCASUS AND BALKANS

**T**he Caucasus to Balkans corridor functions as a secondary but strategically significant extension of the northern route, linking Central Asian and Iranian segments of the drug flow to European markets. While Russia remains the primary end market for the northern route, this secondary route provides traffickers with resilience to shifting dynamics that allow access to EU demand through a combination of land, maritime and mixed commercial logistics.

Structurally, the corridor draws supply from two overlapping upstream systems. First, a portion of Afghan-origin heroin and methamphetamine moving north through Central Asia can divert westward over the Caspian Sea into the South Caucasus. Second, and increasingly more important since 2022, Iranian-linked flows connect directly into the Caucasus, bypassing heavily securitized segments of the Iran–Türkiye border, through Azerbaijan.<sup>148</sup> Azerbaijan's border with Iran, access to the Caspian Sea and connection to Türkiye through the Nakhchivan exclave – an autonomous republic of Azerbaijan – allow traffickers to route consignments towards Georgia and onward into the Black Sea, or directly into Türkiye for entry into the Balkan route.<sup>149</sup> This flexibility has made Azerbaijan a key gateway rather than a simple transit state.

Governance dynamics along this corridor mirror the northern route's 'low-violence, high-corruption' model.<sup>150</sup> Declining heroin seizures in Türkiye and parts of the Balkans do not indicate route collapse but rather concealment within legitimate trade and adaptive logistics allowing shipments to go unhindered. Traffickers exploit commercial freight, containerized shipping and passenger traffic, embedding drugs within licit flows that are difficult to disrupt through routine customs controls alone. Azerbaijani seizure data demonstrates diversification, with heroin, methamphetamine, methadone pills and other psychotropics appearing together, indicating that the corridor is increasingly multi-commodity rather than heroin specific.<sup>151</sup>

Geopolitical disruption has further reshaped the corridor's role. The Russia–Ukraine war has altered Black Sea dynamics and increased uncertainty along northern maritime routes. This has led to small realignments of the Balkans' three main branches – southern, central and northern – which remain active conduits into EU markets, increasingly carrying methamphetamine alongside declining heroin volumes.<sup>152</sup> Moreover, owing to tightened security and enforcement along the Türkiye–Iran land border,

traffickers have partially shifted towards maritime options. Container shipping of diverse drugs from Turkish Mediterranean ports into Italy, Croatia and Slovenia is seen as a growing low-risk and an easier bulk transport method.

Overall, the Caucasus to Balkans corridor should be understood as a pressure-release mechanism within the broader northern system. It does not replace Central Asia–Russia flows, but it ensures continuity, diversification and access to Europe when geopolitical shocks, enforcement surges or market shifts disrupt primary pathways. That said, the northern route as a whole remains fully functional and active in both its main route to and beyond Russia, and its secondary route through the Caucasus into the Balkans.<sup>153</sup>



Azerbaijan's border with Iran makes it an important gateway for heroin being moved into the Balkans, allowing traffickers to bypass heavily securitized segments of the Iran–Türkiye border. © Stringer/ AFP via Getty Images

## Azerbaijan

Azerbaijan occupies a pivotal position in the regional heroin economy. Far from being a marginal transit point, it has become an integral part of the supply chain that feeds European consumer markets. Three structural features explain its prominence: Azerbaijan shares an extensive border with Iran, a front-line state for Afghan heroin leaving south-western Asia; it commands access to the Caspian Sea, which has become an increasingly important vector for maritime transfers; and the Nakhchivan exclave – a small but strategically significant territory bordering Türkiye – provides traffickers with a direct gateway to the Balkan route, while sidestepping heavily policed Iranian–Turkish crossings.



**FIGURE 20** Azerbaijan has become an integral part of the heroin supply chain feeding European consumer markets.

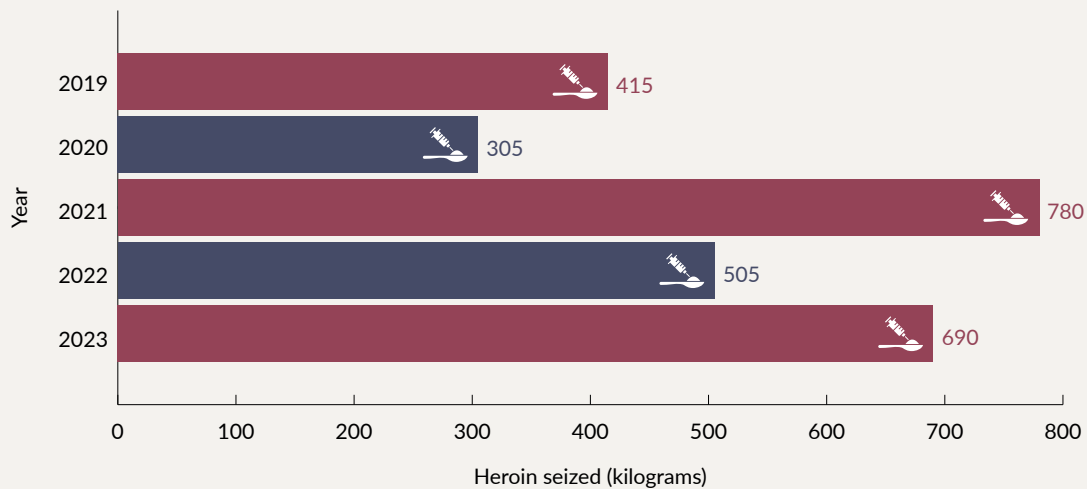
Traffickers exploit these advantages by embedding heroin in legitimate freight, employing forged documents and relying on trusted logistics networks. Enforcement authorities, in turn, publicize significant seizures and hold destruction ceremonies to demonstrate state resolve. Yet the persistence and adaptability of trafficking networks undermine any sense that seizures alone are reducing flows. The scale of intercepted consignments suggests a parallel reality: Azerbaijan is not only intercepting heroin, but also hosting sustained trafficking activity that continues to adapt under pressure. The evidence underscores the need for more than routine interdiction. Targeted, intelligence-led cooperation with neighbours, investment in maritime and counter-drone surveillance, improved container control regimes and systematic financial investigations into logistics operators and facilitators are required to shift the balance against traffickers.

The Türkiye–Azerbaijan connection is most visible in Nakhchivan, which shares just 17 kilometres of border with Türkiye. For traffickers, this short stretch represents a high-value bypass: it allows consignments to cross from Azerbaijan directly into Türkiye and then blend into Balkan-route supply chains that service European demand. A defining example occurred in April 2023 at Julfa – a city in Nakhchivan on the border with Iran – when customs officials intercepted two trucks carrying a combined 500 kilograms of heroin.<sup>154</sup> Turkish nationals drove both vehicles, and the drugs were concealed in cargo declared as building materials destined for Poland. This single case encapsulates the operational logic of the corridor: heroin is hidden in apparently legitimate freight, transported by trusted drivers and pushed seamlessly into European logistics networks.

Nakhchivan is not the only vector, however. Some consignments transit mainland Azerbaijan before moving north into Georgia and on to Black Sea ports, broadening the country’s function from a hand-over point to an active staging area. This diversification complicates enforcement but also increases the leverage of well-targeted operations. Interdicting a consignment in Nakhchivan or northern Azerbaijan can disrupt not only the shipment itself but the wider network servicing European markets. For this reason, enforcement needs to go beyond traditional customs checks. Joint investigations with Turkish authorities, real-time exchange of freight data, and scrutiny of logistics companies and shell entities are critical to undermining the corridor’s resilience.

If Nakhchivan represents a tactical bypass, the Iran–Azerbaijan corridor is the strategic artery feeding heroin into Azerbaijani territory. Afghan heroin typically moves across Iran and then enters Azerbaijan through land crossings, Caspian maritime transfers, or increasingly using drones that drop packages across the frontier. The re-establishment of Azerbaijani control over previously unmonitored border areas after 2020 forced traffickers to adapt their methods. Enforcement reports document seizures from drones, fast boats on the Caspian Sea and concealed freight at checkpoints.<sup>155</sup> Drones are also used to transport cannabis, methadone and methamphetamine from Iran to Azerbaijan.<sup>156</sup> As a result, Azerbaijani authorities report that over 2.6 tonnes of drugs were seized in 2024, including heroin, cannabis, methadone pills, methamphetamine and other psychotropic substances.<sup>157</sup> The border service said that over 2.6 tonnes of drugs were seized in 2024.

Azerbaijani officials have consistently linked these flows to Iranian criminal networks and to elements within Iran’s state structures, alleging Iranian gangs are smuggling cannabis, methadone pills, methamphetamine, heroin and other psychotropic substances across their borders. Several incidents have escalated into firefights between smugglers and border guards, underlining both the profitability of the trade and the risks faced by enforcement units.<sup>158</sup> Although contested in the public record, Azerbaijani allegations shape enforcement priorities and diplomatic messaging. Once inside Azerbaijan, the drugs are redistributed northward through Georgia to Black Sea ports or westward into Nakhchivan for eventual transfer to Türkiye.



**FIGURE 21** Heroin seizures in Azerbaijan, 2019–2023.

SOURCES: US Department of State Bureau of International Narcotics and Law Enforcement Affairs; Azerbaijan State Customs Committee; State Border Service of Azerbaijan; Trend News Agency; AzerNews

Despite repeated seizures, the corridor shows little sign of collapse. Its persistence reflects both demand in Europe and the adaptability of trafficking groups. Countering it requires moving beyond tactical interdictions to a broader operational strategy: aerial surveillance and counter-drone investment, maritime patrols on the Caspian Sea, and financial investigations that track profits and expose facilitators rather than focusing exclusively on low-level couriers.

## Türkiye

Türkiye has long been a key hub in heroin trafficking networks due to its strategic position. Historically, the same corridors that enabled legitimate Eurasian trade to flourish have been exploited by criminal organizations for illicit purposes. Today, trafficking trends in Türkiye continue to change rapidly, with drugs entering and exiting through land borders as well as using maritime and air routes.

Türkiye sits at the heart of one of the world's most important drug highways. Its geography makes it far more than a transit point: straddling Asia and Europe, the country lies directly across the routes that carry Afghan heroin towards the markets of Western and Central Europe. The state is not a passive actor in this trade; it has had to build some of the region's most extensive counter-narcotics capacities, balancing domestic security concerns, cross-border law enforcement cooperation, and the public health costs of addiction. The steady flow of illicit goods across its territory shapes Türkiye's internal policies and its diplomacy alike, making the fight against drug trafficking not just a matter of crime control but a strategic national priority.<sup>159</sup>

Opium reserves may have helped buffer the effect on the European market and keep the Balkan route active.<sup>160</sup> Rising clashes between Iran and Israel, compounded by the 7 October 2023 Hamas attack, have triggered heavier military deployments along borders throughout the Middle East. Even though Türkiye is not geographically tied to this conflict zone, its armed forces remain on alert, contributing to a climate of heightened vigilance. For traffickers, this has narrowed opportunities, disrupted traditional channels and forced a recalibration of operations.<sup>161</sup> However, if production remains at low levels,

the reduction of stockpiles will tighten supply, driving up prices and potentially accelerating a shift towards synthetic opioids and stimulants.<sup>162</sup> In addition to the ban on opium poppy cultivation in Afghanistan, the war on Ukraine has also affected trafficking through Central Asia and the Caucasus and on the Black Sea to Europe.<sup>163</sup>

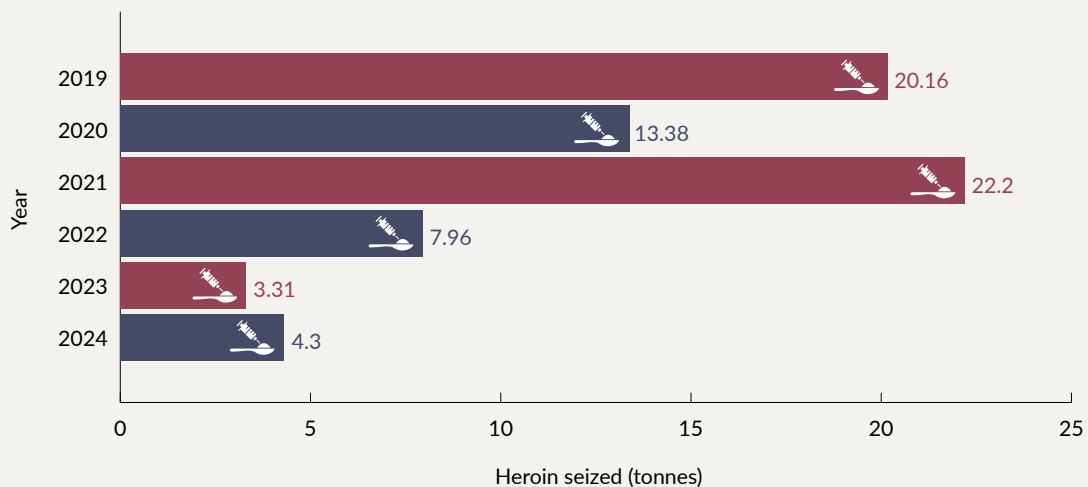
According to the data provided by the Turkish National Police Counter Narcotics Department in its 2025 report, heroin seizures remain very low compared with pre-2022 levels. In 2023, Turkish authorities seized 3.31 tonnes of heroin, with a slightly increase in 2024 to 4.3 tonnes.<sup>164</sup> However, according to the report, 'the increase in 2024 is primarily attributed to a 19% expansion in poppy cultivation areas in Afghanistan in 2024, despite remaining at relatively low levels compared to previous years'.<sup>165</sup>

The heroin seized in Türkiye primarily enters through the country's border with Iran. However, in 2024, a significant quantity of heroin also entered through the Iraqi border, including a case in which 850 kilograms of heroin were found smuggled in trucks.<sup>166</sup>

Analyzing trafficking trends and routes based on price data alone is increasingly problematic, particularly in the case of heroin, as product quality has become significantly compromised. Multiple sources suggest that, since 2022, the quality of heroin circulating in Türkiye and along the Balkan routes has deteriorated substantially, with marked declines in purity levels. As a result, price fluctuations are largely driven by variations in purity rather than by supply dynamics or route-specific factors.

Consequently, comparative analyses based solely on wholesale heroin prices do not provide a reliable basis for assessing broader market trends. However, in October 2025, a kilogram of heroin was reportedly sold for €17 000–€17 500 in Türkiye, whereas two years ago it was priced between €1 000 and €1 500.<sup>167</sup>

In 2025, the wholesale price of heroin in North Macedonia and Albania – part of the Balkans route – was €22 000–€25 000 per kilogram. Compared to 2024, when heroin in Albania was sold at €16 000–€18 000 per kilogram, the 2025 price marks a sharp increase of 35%–40%.<sup>168</sup>



**FIGURE 22** Seizures of heroin in Türkiye, 2019–2024.

SOURCES: European Union Drugs Agency and Turkish National Police Counter Narcotics Department

Location	Market level	Reference year	Price
Türkiye	Wholesale	2023	€1 000–€1 500 per kilogram
Türkiye	Wholesale	2025 (October)	€17 000–€17 500 per kilogram
Albania	Wholesale	2024	€16 000–€18 000 per kilogram
Albania	Wholesale	2025	€22 000–€25 000 per kilogram
North Macedonia	Wholesale	c. 2020	€18 000–€19 000 per kilogram
North Macedonia	Wholesale	2025	~€25 000 per kilogram
North Macedonia	Retail (street)	c. 2020	~€20 per gram
North Macedonia	Retail (street)	2025	€35–€45 per gram

**FIGURE 23** Heroin pricing in Türkiye, Albania and North Macedonia.

SOURCES: GI-TOC field research, including interviews with law enforcement and criminal market actors, Türkiye, Albania and North Macedonia, September to December 2025

In North Macedonia, the rise has been more gradual: wholesale prices have climbed from around €18 000–€19 000 per kilogram five years ago to today's €25 000, while the street price has more than doubled from €20 per gram to the current €35–€45.

Despite the fall of production in Afghanistan, Turkish authorities highlight that the Balkan route is still active.<sup>169</sup> However, they emphasize that heroin destined for the EU increasingly relies on maritime container routes, which enable larger quantities to be smuggled.<sup>170</sup> Trafficking groups are more commonly routing heroin through Turkish ports on the Mediterranean. Consignments are shipped by ferries and cargo vessels to ports in Croatia, Italy and Slovenia, with other European ports directly linked to Türkiye also likely to be targeted.<sup>171</sup> A notable case occurred in October 2021, when Croatian authorities intercepted 220 kilograms of heroin in the port of Ploče, hidden within a cargo of lead ingots on a vessel arriving from Türkiye.<sup>172</sup>

According to the European Union Drugs Agency (EUDA), several factors appear to have driven this maritime shift. Traffickers perceive it as lower risk compared to the Balkan route and more cost-effective, particularly for moving bulk shipments. The use of commercial transport networks – often intramodal systems that combine land and sea elements, such as trucks loaded onto ferries bound for EU ports – further facilitates the concealment of larger quantities in single consignments. Compared with the older method of moving smaller loads hidden in vehicles overland, maritime containerization enables traffickers to scale up. However, this shift also adds layers of complexity for authorities seeking to monitor and disrupt heroin flows into Europe.<sup>173</sup>

An increasing number of Balkan countries are seeing trafficking not only of heroin but also of methamphetamine along the classic Balkan route. Methamphetamine trafficking is rising particularly along the Afghanistan–Iran–Türkiye segment, indicating a diversification of flows now that levels of heroin on this route have reduced.

## Drug consumption in Türkiye

In 2025, Turkish authorities reported an increase in synthetic opioid derivatives and pharmaceutical analogues in the country due to a reduced heroin supply. They have observed an increase in synthetic pharmaceuticals containing pregabalin, which are frequently preferred by opioid-dependent individuals to relieve withdrawal symptoms.

Most important, however, is the internal increase in methamphetamine use. An investigative journalist told the GI-TOC that the local use of meth has 'quietly turned into a nationwide crisis'.<sup>174</sup> According to this source, the

government does not publish reliable data, but specialists – including doctors, rehabilitation experts and social workers – estimate that at least 5 million people in Türkiye are now dependent on methamphetamine.

The price of meth in the street-level market in Türkiye is also very cheap. A gram of methamphetamine sells for about 400 Turkish lira (roughly US\$10). By contrast, cocaine costs about 3 500 lira per gram (US\$90), and 25 grams of cannabis about 1 500 lira (US\$30).<sup>175</sup>

### Methamphetamine in Türkiye

Turkish authorities reported a sharp increase in methamphetamine seizures during 2024, reaching a record 33.8 tonnes, from 22 tonnes in 2023. In 2024, methamphetamine was the second most seized drug in Türkiye, after cannabis.<sup>176</sup> Sources indicate that the country produces methamphetamine domestically, but also obtains it from various regions, most importantly and primarily from the Iran border, including in liquid form.<sup>177</sup> Türkiye is both a destination market and a transit country for methamphetamine, and there is also active production in the country. Turkish authorities have reported seizing organic precursors – ephedra plants, along with ephedrine – and red phosphorus used in methamphetamine production.<sup>178</sup> Some investigators report there is no longer a requirement to import methamphetamine – it is simple to produce with two or three precursors that are easy to purchase online, and production sites have sprung-up in basements, garages and apartments.<sup>179</sup> Still, the largest proportion of methamphetamine in Turkey is Afghan-origin, imported through the land border from Iran and, in smaller scale, from Iraq.<sup>180</sup> Transporting liquid methamphetamine, often converted into crystal form using various chemicals, is a method commonly used by traffickers around the world, including in Türkiye, to evade law enforcement controls.



**FIGURE 24** Notable areas of methamphetamine seizures in Türkiye.

SOURCE: Adapted from the Turkish Drug Report 2025

## Luxury car smuggling and the heroin trade

The Iran–Türkiye land corridor remains the main over-land route for Afghan heroin bound for Europe, funnelled through three strategic gates: Gürbulak–Bazargan (Ağrı), Kapıköy–Razi (Van) and Esendere–Sero (Hakkari). Heavy flows of legal freight and passengers through these crossings allow traffickers to hide consignments inside legitimate cargo, using professional logistics, relay drivers and advanced concealment techniques. Once past the gates, shipments move quickly across Türkiye towards onward routes into the EU.<sup>181</sup>

On the Iranian side, the real vulnerability is economic. Years of sanctions and import restrictions have created scarcity and inflated prices for foreign-made cars. A luxury car that costs around €60 000 in Türkiye can be worth €100 000–€200 000 once inside Iran. This turns vehicles into a form of high-value currency: easy to transfer, more difficult to trace than cash, and highly attractive for corrupt exchanges. Criminal networks exploit this asymmetry by moving cars through official gates under apparently legitimate paperwork, then relinquishing them before or after a drug consignment crosses. In many cases those cars function explicitly as payment to corrupt border authorities, who allow heroin and other illicit shipments to pass through in exchange. In a compromised environment, what should be impoundment or fines instead becomes a quiet transfer of value to insiders.<sup>182</sup>

The system's grey zones add further cover. Foreign 'tourists' may legally drive their vehicles into Iran with international number plates, but they are required to install temporary Iran-issued plates at the border or, in some cases, leave the vehicle behind and use local transport. This creates an administrative mechanism through which valuable cars can cross legally, only to shift ownership later under the appearance of routine enforcement. Some reports suggest that on the Iranian side, elements of Qashqai communities – a

Turkic indigenous group – have been involved in facilitating these arrangements, but these accounts should be treated as investigatory leads, not blanket conclusions.<sup>183</sup>

Over the past year, the picture has shifted. Iranian and Turkish military and security deployments at the border have increased, making on-the-ground corruption harder to run and raising the operational cost for networks that rely on cars as in-kind payment. That security presence appears to have contributed to a measurable decline in land-based drug smuggling through these gates, even as traffickers adapt by changing routes or methods.<sup>184</sup>

The cars-as-payment method is effective because it consolidates value, reduces the risks of direct cash payments and allows plausible deniability. Cars genuinely do get seized and the paperwork is genuinely complex. Without close oversight of custody chains, auctions and vehicle records, it becomes almost impossible to separate clean enforcement from corrupt transfer.

For interdiction, drug seizures alone are not enough. Authorities need to track luxury vehicle movements in and out of border provinces, reconcile temporary import records, monitor how impounded cars are disposed of, and enforce staff rotation and lifestyle audits at customs yards. On the Turkish side, closer bilateral data-sharing on temporary imports and exits would increase the cost of using cars as covert compensation.

In short, heroin flows along this corridor because geography makes it efficient and legal trade provides concealment. The car scheme persists because sanctions make vehicles disproportionately valuable in Iran, and administrative rules make their transfer launderable. At Gürbulak–Bazargan, Kapıköy–Razi, and Esendere–Sero, luxury vehicles have become bargaining chips that turn border control from a barrier into a service. ■



## HEROIN MARKETS IN EUROPE

**H**eroin remains available across most of Europe, but subtle shifts suggest that the market is entering a period of transition. Despite the Taliban's 2022 opium ban and fears of an impending shortage, the European heroin supply chain has so far proven remarkably resilient. With the exception of Kyiv, where Russia's invasion has severed traditional trafficking corridors, heroin continues to circulate widely at stable retail and wholesale prices. This continued availability indicates that long-established stockpiles, ongoing cultivation in parts of Afghanistan, and adaptive trafficking networks have prevented a sudden disruption.<sup>185</sup>

Nonetheless, there are early signs of disrupted supply. Several European cities, including Antwerp, Barcelona and Milan, report a perceived decline in heroin purity, suggesting that scarcity may be emerging at the production or trafficking level.<sup>186</sup> Forensic testing and official monitoring confirm a gradual decrease in purity across much of Europe: in 2021, retail heroin contained only 16%–24% active substance on average, the remainder made up of adulterants such as caffeine and paracetamol.<sup>187</sup> Yet prices remain largely stable, implying that dilution, not cost, has become the first signal of tightening supply. The market has thus entered a phase where purity is the variable of adjustment, cushioning consumers from immediate price shocks while hinting at deeper supply-side pressures.<sup>188</sup>

Patterns of consumption are also changing. Field research shows an increasing prevalence of poly-drug use, where heroin or its substitute methadone is consumed alongside powder cocaine, crack cocaine or other stimulants. This blending of depressants and stimulants, evident from syringe analysis across multiple cities, may reflect both user adaptation to lower heroin potency and the easy availability of stimulants in urban markets. It also points to the growing complexity and volatility of European drug scenes, where traditional opioid use intersects with stimulant-driven economies.

In terms of pricing, the wholesale market across Europe shows wide variation, ranging from €20 000 to €40 000 per kilogram of heroin. The highest retail prices are reported in London and Hamburg, while lower prices prevail in Istanbul and Bucharest, probably reflecting proximity to trafficking routes and differences in local enforcement intensity. Despite concerns over the Taliban ban, continued seizures in Afghanistan's neighbouring countries and along the Balkan route confirm that the main supply arteries into Europe are intact.<sup>189</sup>

Regional variations are notable. Kyiv represents a unique case: the closure of sections of the northern route heading into Ukraine from Russia, as a result of the war, has effectively halted heroin imports into Ukraine. Deprived of supply, long-term heroin users have shifted towards synthetic

cathinones – cheap, domestically produced stimulants with unpredictable potency and high risk. This substitution pattern mirrors earlier crises, such as the rise of fentanyl in Estonia following the Taliban's 2000 opium ban, and underscores the danger that prolonged heroin scarcity could push Europe into a synthetic opioid crisis.<sup>190</sup>

The structure of the trade is also changing. While Turkish organized crime groups remain dominant in several markets – including Germany, Antwerp and Milan – the overall landscape appears more fragmented and diversified than in the past. A wider array of actors, including domestic European networks and groups from North Africa, the Middle East and the Western Balkans, now participate at both wholesale and retail levels. Episodes of violence involving Turkish groups may reflect competition within an increasingly crowded marketplace rather than outright contraction.

Europe's heroin market is undergoing slow, measurable change. Purity is falling, actors are diversifying and users are adapting through poly-drug consumption. The heroin pipeline from Afghanistan continues to function, buffered by stockpiles and entrenched logistics, yet the system's apparent stability may mask a fragile equilibrium. If supply tightens further and synthetics continue to encroach, Europe could soon face the same destabilizing shifts that have transformed drug markets in North America.



## IMPLICATIONS

**T**he findings in this paper point to a heroin market that is no longer defined primarily by volume, but by instability, opacity and substitution. The collapse of opium production in Afghanistan has not translated into a clean contraction of supply at street level. Instead, it has produced a more complex risk environment in which heroin continues to reach Europe and the UK, but in smaller quantities, with lower and less predictable purity, and increasingly embedded within poly-drug supply chains dominated by synthetics. This has significant implications for public health, border control, intelligence collection and international policy engagement.

First, the persistence of exit smuggling routes from Afghanistan, despite a 95%–97% reduction in cultivation and output, demonstrates that European states can no longer rely on production-side indicators as a proxy for downstream market impacts. Stockpiles, residual production, displacement to new cultivation areas, and diversification into methamphetamine have combined to sustain resilient flows along both northern and southern routes. This means that the apparent contraction of the global heroin market does not equate to reduced harm. Heroin remains widely available, but in altered forms, increasingly mixed with synthetic opioids. This directly contributes to the conundrum identified in European markets, where seizure rates do not align with levels of use or harm, and where drug-related deaths linked to heroin and morphine continue to rise.

Second, the growing dominance of poly-drug shipments fundamentally alters users' exposure to risk. Along both routes, heroin is now rarely trafficked alone, instead moving alongside ATS, NPS and cocaine. Afghanistan's emergence as a major producer of methamphetamine, with sufficient excess capacity for traffickers to push supply aggressively into European and UK markets, raises the prospect that the opioid problem will increasingly intersect with stimulant and synthetic drug harms. This blurs traditional distinctions between heroin markets, user sub-groups and stimulant users, increasing the likelihood of unintentional poly-substance use and complicating both treatment responses and harm reduction messaging.

Third, changes in trafficking geography have direct implications for enforcement and international engagement priorities. The reduced but persistent northern route, the growing importance of the Caucasus, and the fragmentation of the southern route into maritime, air and containerized pathways expand the number of points at which Europe and UK-bound drugs can enter global logistics systems. The rise of the Caucasus route, including movements from northern Iran through Azerbaijan and Georgia, reflects traffickers' capacity to adapt rapidly to geopolitical disruption, in this case the Russia–Ukraine war. This underscores the need to look beyond familiar transit countries and to engage more

deeply with states that have become newly salient nodes in Afghan-origin supply chains, particularly where local authorities are seeking external support. The implications of conflict in Iran are difficult to discern at this early stage, but one scenario sees the risk of immediate dislocation of supply chains followed by a rapid doubling-down by a new regime on illicit sources of revenue generation.

Fourth, the transformation of the southern route has important implications for interventions. The use of dhows to East Africa, trans-shipment to fast boats and dinghies, offshore drop-offs, containerization, and the splitting of loads for ingestion by air couriers creates a highly distributed risk profile. No single interdiction point can meaningfully disrupt supply. This reinforces the importance of intelligence-led targeting at ports and airports linked to northern and southern routes, particularly in relation to ingested-drug trafficking and container shipping. It also highlights the continued strategic value of naval operations in the Indian Ocean, not only for volume interdiction but for understanding how high-volume trafficking adapts and fragments.

Fifth, the degradation of monitoring systems across Afghanistan and along both routes has direct consequences for policymaking. Taliban restrictions on NGOs and the UN, combined with donor funding cuts and political upheaval in transit states, have sharply reduced the availability of reliable data. This has created blind spots precisely as trafficking networks are diversifying and accelerating their move towards synthetics. This weakens early-warning capacity and increases the risk of being reactive rather than preventive. The need to re-establish testing and monitoring, both in route countries and domestically, speaks directly to this gap. Without improved front-line and laboratory testing overseas and at home, states lack the evidential base needed to align enforcement, treatment and public health responses with the realities of changing supply.

Finally, the findings point to a strategic implication for drug policy: heroin cannot be treated as a declining legacy market. While its relative share of the global drug economy is shrinking, its interaction with synthetic opioids and methamphetamine makes it more dangerous, not less. The market is characterized by reduced predictability, greater toxicity and weaker attribution between supply-side shocks and domestic outcomes. Addressing this requires sustained engagement with upstream countries of interest, sharper focus on poly-drug dynamics, and renewed investment in testing and monitoring systems that can detect change early. In this environment, the challenge for states is not simply to interdict what remains of Afghan heroin flows, but to manage the wider systemic risks created by their transformation.



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