

GLOBAL INITIATIVE
AGAINST TRANSNATIONAL ORGANIZED CRIME

THE MEKONG METH BUSINESS

MYANMAR-LINKED SUPPLY CHAINS AND RISKS FOR NEW ZEALAND AND AUSTRALIA

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GLOSSARY AND ABBREVIATIONS

Collagen drinks	Illicit drink mixtures marketed or disguised as beauty or wellness products, often resembling collagen supplements. In drug market reporting, the term is used for flavoured powders or drinks that may contain MDMA, ketamine, methamphetamine, caffeine or other psychoactive substances, consumed in nightlife or party settings.
Etomidate	Used medically as an intravenous general anaesthetic but also misused as a psychoactive substance as it has sedative, dissociative or intoxication-like effects, similar to ketamine. Etomidate is often detected in liquids formulated for vaping.
'Happy water'	Sold in liquid or powder form and consumed dissolved in water, alcohol or other drinks. These products do not have a fixed composition: reported mixtures include MDMA, ketamine, methamphetamine, nimetazepam, caffeine, benzodiazepines or other psychoactive substances in varying combinations and concentrations.
Ketamine	An essential medicine used for anaesthesia and pain relief that is also misused as a psychoactive substance. It is sold in multiple formats, including powder ('K-Diamond' refers to a premium-grade product) and ketamine vapes.
K-pods	Also referred to as Pod-K, they are illicit vape pods or vape liquids containing psychoactive substances. The 'K' label can be misleading: in the Mekong and wider South East Asian context, the term is often associated with etomidate-laced vapes, although vape products containing ketamine or other synthetic drugs have also been identified.
Kratom	The common name of both the tropical tree *Mitragyna speciosa* and the drug made from its leaves. In small doses the drug provides stimulant effects; in large doses it is sedative. Kratom preparations are used in folk medicine and as opium substitutes. Kratom has been legalized in Thailand, but its legal status is unclear in Cambodia and Vietnam, where authorities have advised against its use, transportation and distribution. It remains illegal in Laos.
KTV	Karaoke television venue
Methamphetamine	A synthetic substance and a member of the phenethylamine family, which includes a range of substances that can be stimulants, entactogens or hallucinogens. It is commonly available in tablet form – locally called *yaba* or WY – and in crystal format, referred to as 'ice'.
MNDAA	Myanmar National Democratic Alliance Army
NDAA	National Democratic Alliance Army
OMCG	Outlaw motorcycle gang
SSA South	Restoration Council of Shan State/Shan State Army–South
SSPP/SSA North	Shan State Progress Party/Shan State Army–North
THB	Thai baht
TNLA	Ta'ang National Liberation Army
UWSA	United Wa State Army



EXECUTIVE SUMMARY

Myanmar's methamphetamine economy sits at the centre of one of the most significant illicit synthetic drug markets in the world.[1] Production linked to Shan State and adjoining areas has supplied markets across South East Asia for decades, while also feeding consumer markets globally through maritime, air and overland routes.

Since Myanmar's 2021 coup, a dominant narrative has linked rising regional seizures, falling prices and ongoing insecurity to a sharp increase in methamphetamine production.[2] Although the coup and ongoing conflict have undoubtedly influenced the regional drug economy, this interpretation risks oversimplifying a market that has developed over many decades and has expanded through innovations in chemical supply chains, territorial control, protection, logistics networks and market demand.[3]

Myanmar-origin methamphetamine is the analytical anchor of the report, particularly its Mekong supply chains and market dynamics. But the research also considers production elsewhere in the region as well as new or emerging substances, in Cambodia, Laos, Thailand and Vietnam. The report does not attempt to provide an exhaustive account of the Mekong methamphetamine economy or the scale of production, trafficking and consumption. Rather, it analyzes the trafficking flows and the actors involved to understand the implications for downstream markets, such as New Zealand and Australia.

Much of the available information on the Mekong methamphetamine economy is partial and contested, coming from national statistics, seizure figures, official government announcements and periodic media reporting. This report looks beyond those numbers to provide a qualitative snapshot: first-hand accounts of how methamphetamine is produced, moved, brokered, concealed, sold and consumed.

This report finds that over the past two decades, the role of the Mekong region in the broader global methamphetamine market has grown in scale and complexity.[4] Cambodia, Laos, Thailand and Vietnam may not be where most of the methamphetamine stemming from the Mekong is produced, but they are where it is moved and stored, and from where it is exported. The region functions as a layered business environment in which production, storage, transport, protection, brokerage, concealment, payment and retail distribution are often handled by different actors operating with plausible deniability.[5] Methamphetamine moves through formal and informal economies, using roads, river routes, border crossings, ports, airports, warehouses and courier networks, enabled by digital communications.

The Mekong region is not homogeneous, nor is it solely a transit corridor: countries, provinces and hubs occupy distinct roles in production, transit and consumption. Cambodia, Laos, Thailand and Vietnam have all become profitable consumer markets, production sites for other synthetic drugs (particularly ketamine) and new psychoactive substances, redistribution hubs, and jurisdictions through which wider drug economies are filtered, adapted and concealed. Methamphetamine tablets (known locally as *yaba*), crystal methamphetamine ('ice') and an increasing mix of synthetic drugs circulate differently across these countries, depending on local consumption patterns, enforcement pressure, transport infrastructure and proximity to production or repackaging areas.

Profits are distributed along the criminal supply chain, and a long list of actors provide services to the criminal industry. Armed actors and associated business structures benefit through direct investment, taxation and protection fees; drivers and couriers charge based on distance and risk; and police, border and customs officials, and transport facilitators extract income by allowing movement, providing advance warning of law enforcement operations, reducing scrutiny or supplying access to particular routes.

The regional drug economy is being reshaped by broader forms of criminal convergence. The same border areas and enabling conditions that support drug trafficking also facilitate cyber scam operations, money laundering, corruption, human trafficking and other criminal activities. The same actors do not necessarily control all these markets, nor is every scam compound or special economic zone directly linked to methamphetamine trafficking. However, the same wider infrastructure enables criminal economies to flourish: permissive jurisdictions, weak oversight, informal financial channels, transport networks and commercial intermediaries.

The Mekong methamphetamine market is a global illicit business that generates, moves and repackages synthetic drugs through adaptable supply chains. Changes in precursors, production mix, routing, concealment and supply chain organization all have an impact on the global methamphetamine market, including two of the principal destination markets for Mekong methamphetamines: New Zealand and Australia. North America may be the largest source of methamphetamine reaching New Zealand and Australia, but the size, proximity and adaptability of the Mekong methamphetamine market mean that it should not be treated as a secondary concern.[6] The Mekong methamphetamine market remains a serious strategic risk, particularly given the region's complex maritime, parcel and transit connections to downstream markets.

This report shows that effective responses require a clearer understanding of the hubs, services, routes, actors and market dynamics that allow methamphetamine to remain one of the Mekong's most resilient illicit economies. Understanding these systems is essential not only for governments in the region but also for downstream markets such as New Zealand and Australia, because developments upstream can have significant consequences for supply, availability and criminal activity.

Methodology

This report is based on six months of primary research and near real-time media monitoring aimed at improving the understanding of methamphetamine trafficking through the Mekong region, with particular attention to relevance for New Zealand and Australia.

The methodology combined three main components: first, a literature review, including national and regional drug reports, government statements, reporting of drug-related offences and United Nations

Office on Drugs and Crime publications; second, structured media monitoring across Cambodia, Laos, Thailand and Vietnam, conducted from July 2025 to the end of May 2026; third, semi-structured interviews and consultations, conducted in the target countries.

The media monitoring captured 628 usable drug-related cases from Cambodia, Laos, Thailand and Vietnam, of which 440 (approximately 70%) explicitly mentioned methamphetamine. The monitoring captured drug-related reporting, such as seizures, arrests, court cases, laboratory discoveries, precursor incidents, enforcement statements and public reporting on trafficking routes, concealment methods, prices and purity. Relevant incidents were recorded, translated and analyzed, allowing for comparison between countries and over time.

Forty-four interviews and consultations were conducted across the target countries with national law enforcement and foreign liaison officials, customs officials, researchers, harm reduction practitioners, journalists, civil society representatives, people involved in the criminal economy, and people with knowledge of border areas, criminal economies and local market dynamics.

Official reporting was compared with incident-level media data; media-monitoring entries were assessed against interview findings; and user-level or harm reduction perspectives were used to interpret changes in availability, price, purity and consumption. When several sources pointed in the same direction, the report treats the pattern with greater confidence. When evidence could not be clearly substantiated, this is flagged in the report.

Data limitations

The remote location of methamphetamine production sites, the political sensitivity of drug policies and the limited availability of comparable data from different countries makes gathering data particularly challenging in the region. The data limitations identified here shape the analysis and are themselves a finding: they indicate where future monitoring and field-based research could most usefully strengthen the evidence base and support enforcement and harm reduction strategies.

Seizure data provides evidence of enforcement activity and can help identify routes, substances, concealment methods and operational priorities. However, it is not a reliable indicator of production volume, trafficking intensity or market size. An increase in seizures may reflect higher levels of production and trafficking, but it may also reflect improved enforcement, changes in targeting, increased international cooperation or greater political attention.[7] Similarly, a decline in seizures does not necessarily indicate a contraction in supply or trafficking. It may reflect improved concealment, route displacement, corruption, reduced enforcement or media reporting capacity, or changing law enforcement priorities.

This limitation is particularly relevant to Myanmar-linked methamphetamine flows. Since the 2021 coup, public discourse has often linked rising regional seizures and falling prices to a sudden increase in production. However, methamphetamine production and trafficking in the Mekong have been developing for longer than the post-coup period, not least since the industrialization push by producers that began in the 2010s.[8]

A second limitation concerns official and public reporting. Some official data is aggregated; some is released irregularly; and some reflects institutional priorities rather than the underlying structure of the market. In politically sensitive environments, official reporting may understate, overstate or omit activity in contested areas, border zones or locations associated with powerful political, military or

commercial interests. United Nations Office on Drugs and Crime and other regional reporting relies on government-provided data, which means the reporting may reproduce these limitations. Nevertheless, such reporting remains a valuable resource for identifying regional patterns and situating country-level findings within a Mekong-wide picture.

Media monitoring can help address some of these gaps by capturing more immediate incident-level reporting, but the reporting is uneven across the region. Of the 440 usable drug-related records in the regional media-monitoring data set that explicitly mentioned methamphetamine, Thailand accounted for 331, Vietnam for 66, Laos for 36 and Cambodia for seven. However, these figures should not be read as a measure of market size in these countries; reporting may be shaped by censorship, law enforcement publicity strategies, civic space, journalistic capacity and the availability of local sources. The monitoring results provide a useful baseline for understanding where drug flows become visible and what kinds of routes, methods and substances appear most often.

A third limitation concerns price, purity and drug composition data. Reliable monitoring of these indicators requires standardized sample collection, testing procedures, geographic coverage and longitudinal data collection. However, such systems are limited or, in some countries, completely absent. Discussions on price and purity in this report are based on interviews with harm reduction practitioners, people who use drugs and law enforcement. Claims about changes in purity, quality, adulteration or price should therefore be considered cautiously.

In many contexts, people who use drugs face significant legal risk, social stigma and exposure to the penal system. A fourth limitation therefore relates to these factors, which restrict participation in research and affect the openness of responses. These constraints are significant because user-level information is often one of the earliest indicators of shifts in availability, composition or harm.

In many cases, the data shows that drugs are moving through particular routes or hubs, but their ultimate destination cannot be established. This is especially relevant when assessing downstream risks for New Zealand and Australia. The absence of direct information linking a specific incident in the Mekong to those markets should not be read as evidence of no connection; equally, possible relevance should not be overstated as proof of a direct flow.

Although the report is subject to these data limitations, they do not undermine its core findings. The analysis is grounded in the triangulation of media monitoring, interviews, official data and secondary sources, allowing the report to identify consistent patterns even where data points are fragmented.

Key findings

- The Mekong drug economy is undergoing important changes: a more diversified product mix is moving into a market once dominated by methamphetamine. Other synthetic substances appear inherently linked to Mekong methamphetamine, and developments in one commodity signal adaptation across the wider criminal economy.
- Methamphetamine production and trafficking are not conducted by a single criminal network. They are part of a layered and decentralized business environment in which a range of actors offer their services and often only know their immediate counterparts.
- Methamphetamine trafficking is tightly linked to legitimate business structures: the same logistic networks that transport fruits and vegetables, the same warehouses that store locally produced goods and the same precursors needed in agriculture and mining also play an important role in the drug market.

- Corruption is fundamental for the running of the methamphetamine economy. It is structural and deeply embedded in the functioning of the market. However, its existence varies: available data suggests that officials working at or close to border areas may be particularly compromised.
- Across the Mekong, methamphetamine is trafficked by foot, boat, and private and commercial vehicles. When leaving the region, maritime routes are crucial for bulk shipments, but smaller consignments are frequently transported by air as parcels or carried on flights. Exit points are spread across Thailand, Cambodia, Laos, Myanmar and Vietnam.
- Methamphetamine trafficking draws on the same enablers as the industrial-scale cyber scam industry: protection providers, corrupt officials, border brokers, logistics routes, informal finance and money movement systems, front businesses, and permissive special economic zones. Growing knowledge of scam centres and the transnational nature of organized crime in the Mekong is therefore enabling better understand the systems that sustain the regional drug economy.
- Profit from methamphetamine is distributed along the entire criminal supply chain, from production to transportation and, finally, in the destination markets.
- Better cooperation with people who use drugs and harm reduction professionals is needed to gain early information on changes in purity, potency and prices, which can help authorities track the emergence of new substances. Implementation of wastewater analyses across all Mekong countries could enable more comprehensive monitoring of the local drug markets before products reach downstream destinations.
- The size and adaptability of the Mekong methamphetamine market make it a primary concern for downstream destinations. New Zealand and Australia are lucrative destination markets because of their comparative proximity, strong consumer demand and high retail prices, which have long made them attractive markets for traffickers capable of managing long-range supply chains. Mekong methamphetamine is a serious strategic risk for New Zealand and Australia, particularly given the region's complex maritime, parcel and transit connections to downstream markets.
- To combat the Mekong methamphetamine market, it is vital to target the facilitators that sustain the trade. Seizures may take product off the market, but the operations have been set up to withstand these intermittent losses. Focusing instead on the drivers and enablers of the broader criminal economy could help reduce drug trafficking networks and cyber scam operations.



METH FLOWS: ROUTES, HUBS AND DISPLACEMENT

According to the GI-TOC's Global Organized Crime Index, synthetic drugs are, broadly, a major illicit market across the Mekong.[9] Large methamphetamine seizures are consistent with a substantial market, although the quantities intercepted also reflect law enforcement priorities and capacity and cannot establish market size on their own (see Figure 1). The product mix produced and available is diversifying fast: synthetics now commonly include not only methamphetamines (both in tablet and crystal form) but also ketamine, MDMA, ecstasy, 'happy water', collagen drinks and etomidate. In addition, the regional drug economy is shaped by the widespread availability and use of heroin, cocaine, cannabis and kratom.[10] Seizures of precursors and other chemical substances are also commonly reported in the media.

The GI-TOC media-monitoring data set shows that, despite having different origins and target markets, various types of drugs are often seized together, suggesting that drug trafficking in the Mekong is not a self-contained market. The business of methamphetamine appears to sit within a broader synthetic drug and polydrug economy, in which routes, brokers, concealment methods and logistics services may be used for multiple substances.

The methamphetamine market and trafficking routes are built around a complex system of overlapping corridors: flows do not depend on a single route, hub or exit point. This complexity is a core source of resilience. Enforcement pressure may disrupt specific consignments or temporarily close a route, but this often simply displaces trafficking onto another corridor.

Methamphetamine trafficking is best understood as a business system with visible nodes for storage, concealment and transshipment. Seizures show where the nodes have become visible, and interviews reveal how the system continues to function when one node is pressured. Flexible concealment methods, expendable couriers, complicit or unknowing logistics providers, and maritime and air exit options allow this system to quickly adapt.

The system also relies on plausible deniability: little information is shared about who owns the drugs at which point, which route the drugs will take, who controls each stage of movement, and whether the intended destination is a local market, a regional redistribution point or a high-value market such as New Zealand or Australia. This uncertainty is produced by the compartmentalized structure of the trade and forms part of the operating logic that allows the methamphetamine economy to remain resilient.

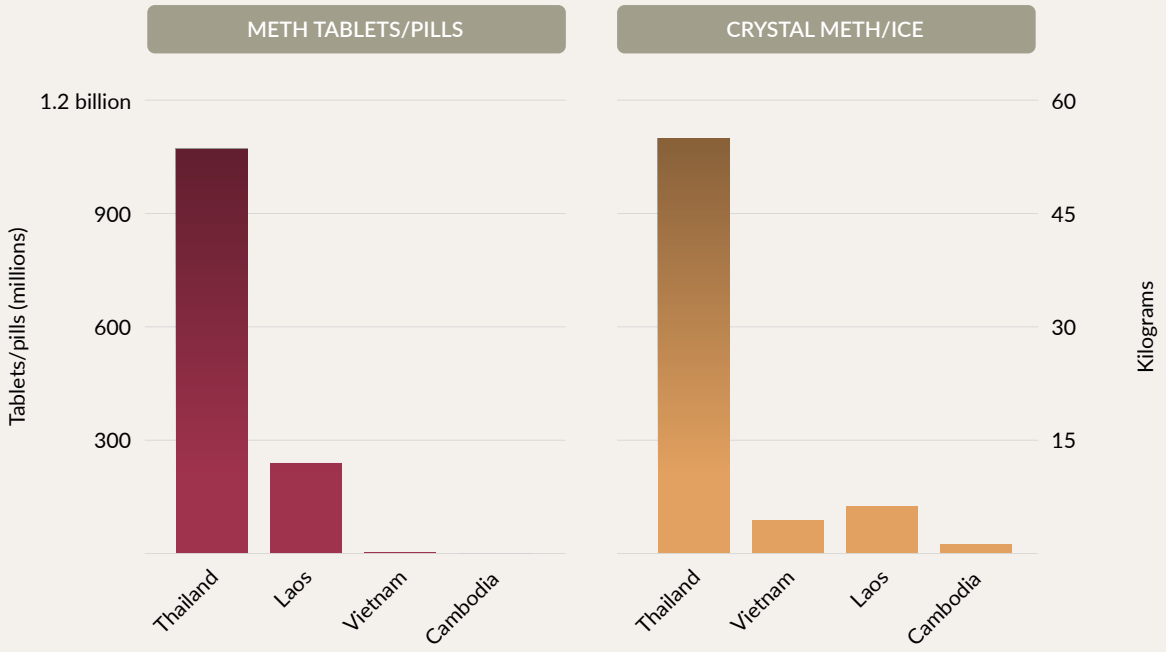


FIGURE 1 National seizure statistics for Cambodia, Laos, Thailand and Vietnam, 2025.

SOURCES: Thailand Office of the Narcotics Control Board; UNODC; Lao provincial police authorities; Vietnam Ministry of Public Security

Purity, potency and price

A shift is taking place across the Mekong as ketamine vapes, disguised party drugs and pharmaceutical anaesthetics are moving into a market once dominated by methamphetamines. According to wastewater analysis in Vietnam, ketamine has become the most widely detected drug in Hanoi.[11] The study found a significant decline of methamphetamine in samples between 2018 and 2023; detection of ketamine increased significantly during the same period and overtook methamphetamine by the end of 2022.[12]

Users in Laos describe easy access to ketamine, kratom, crystal methamphetamine and emerging substances, such as K-pods and collagen drinks, which are primarily accessed through nightlife venues, karaoke television venues (KTVs), party rooms, casinos, workplaces and social networks involving both Lao and foreign nationals.[13] In Thailand, the Ministry of Public Health reclassified etomidate as a Category 2 controlled substance under Thailand's Narcotics Code in July 2025 after authorities raised the alarm of etomidate being added to vaping products, causing serious harm to users and sometimes leading to death.[14]

This does not mean that methamphetamines are no longer relevant in the Mekong; in fact, they remain extremely widely consumed and seized. The product mix available across the region is, however, diversifying, and several developments are not yet well documented in official reporting. Wastewater analysis, routine testing of street-level substances, and other laboratory results are limited.[15]

People who use drugs and harm reduction actors are often the first to see market changes. Accounts from these groups suggest that the retail market is extremely dynamic; one harm reduction organization operating regionally suggested that in some places their clients might observe a shift in potency on a weekly basis.[16] Similarly, a harm reduction organization in Cambodia – where methamphetamines appear to be the mostly widely consumed illicit drug, together with ketamine[17] – described rapidly shifting potency of methamphetamine tablets in late 2025, increasing reports of inconsistent drug effects, growing polydrug use and more frequent reports of overdose or overdose-like incidents among users.[18]

In addition to purity and potency, drug prices are considered relatively good indicators of changes within the market. However, short-term changes in consumer markets are often first reflected in purity changes, with prices moving more slowly.[19] In Cambodia, some users reported that drugs had become more expensive (US$4 being the minimum single purchase value, although purchases of US$5, US$10 or even US$20 are reportedly more common[20]), or that the quantity received for the same price had declined, or that the quality had deteriorated.[21] Some users described weaker effects, bad odours or suspected chemical adulteration. This runs counter to the common Mekong narrative that methamphetamine prices are cheap and low across the board. However, other users reported little change, which points to uneven market experience rather than a single national trend. In Laos, user experience varied: some described relatively stable prices for K-pods (US$30–50 per unit), ketamine (US$25–35 per package) and collagen drinks (US$45 per purchase); others warned about counterfeit products and varying quality and availability, depending on location and supplier.[22]

The lack of chemical analysis and standardized regional collection protocols or procedures for drug price data and composition (particularly at user level) has led to a massive gap in understanding of the Mekong drug economy. Weak capacity to test drugs on the market has meant that changes in potency, adulterants, counterfeit products and emerging substances are poorly understood. Harm reduction actors have long advocated for early-warning systems, community-level monitoring and non-punitive health responses to encourage people who use drugs to seek medical care and support monitoring efforts, but these remain largely absent across the region.[23]

Observations by people who use drugs and harm reduction organizations cannot substitute for laboratory testing, but they can provide important early-warning indicators and a step towards closing the knowledge gap. Wastewater analysis, as was conducted in Vietnam, would also show changes in consumption patterns that seizure data may not capture. ■

Exit from Myanmar: Entry into Laos and Thailand

Monitoring data identifies three major exit corridors from Myanmar: the north and north-western corridor from Myanmar to Chiang Rai, Chiang Mai and Mae Hong Son in Thailand; the western Thailand–Myanmar corridor from Karen State through Myawaddy–Mae Sot; and the Myanmar–Laos corridor (see Figure 2).[24] Beyond movement eastwards towards Thailand, Laos, Cambodia and Vietnam, Myanmar-produced methamphetamine is also moving to China and westwards to India and Bangladesh.

The north and north-western corridor is associated with large-volume consignments, armed encounters, and mountainous and riverine border crossings. Law enforcement officials interviewed in the north of Thailand described methamphetamine tablets, crystal methamphetamine and ketamine moving from United Wa State Army (UWSA)-controlled territory into Thailand through Chiang Rai, Chiang Mai and Mae Hong Son. When Thai enforcement pressure increases along the Myanmar border, routes shift and the Laos corridor absorbs part of the pressure.[25]

The size and frequency of seizures on the north and north-western corridor underline its central role in trafficking from Myanmar to Thailand. For example, one July 2025 case in Mae Fa Luang District in Chiang Rai province involved a firefight between Thai military forces and a caravan of armed drug smugglers near the Myanmar border, after which authorities reported the seizure of 6 million methamphetamine tablets and 64 kilograms of crystal methamphetamine.[26] In November 2025, 7.2 million methamphetamine tablets were seized following a confrontation with traffickers in the Mae Sai District of Chiang Rai province.[27] December 2025 saw the seizure of approximately 2.8 million methamphetamine tablets following a police pursuit and shootout in the Mae Fah Luang District in Chiang Rai province.[28] These cases only represent a percentage of total trafficking – in Thailand, media



FIGURE 2 Methamphetamine flows through the Mekong region.

reporting between January and May 2026 recorded seizures of approximately 328.8 million methamphetamine tablets and 15.6 tonnes of crystal methamphetamine, alongside substantial quantities of ketamine, heroin, cannabis, cocaine, etomidate and precursor substances – but they demonstrate the scale of loads moving across the north and north-western border and the role of armed escorts and remote terrain in protecting these consignments.

The Pha Muang Task Force, a Royal Thai Army border-security force whose duties include drug interdiction along Thailand's northern border, reported that it had conducted 59 drug interdiction operations; arrested 68 suspects; seized more than 36.3 million methamphetamine tablets, 745 kilograms of crystal methamphetamine, 1.2 kilograms of heroin and 1.5 kilograms of opium; and been involved in eight clashes with trafficking groups between 1 October and 8 November 2025 – a little more than a month. This again underscores both the frequency of trafficking activity and the intensity of enforcement efforts on the north and north-western corridor.[29]

Interviewees also described a pivot westward as enforcement had tightened on these traditional routes. Although less robust than the other entry corridors, traffickers have been increasingly testing crossings along the Mae Sot–Myawaddy corridor and the more porous stretches of the western border, like the Three Pagoda Pass linking the town of Nong Lu in the north of Kanchanaburi Province, Thailand, to the town of Payathonzu in the south of Karen State, Myanmar.[30]

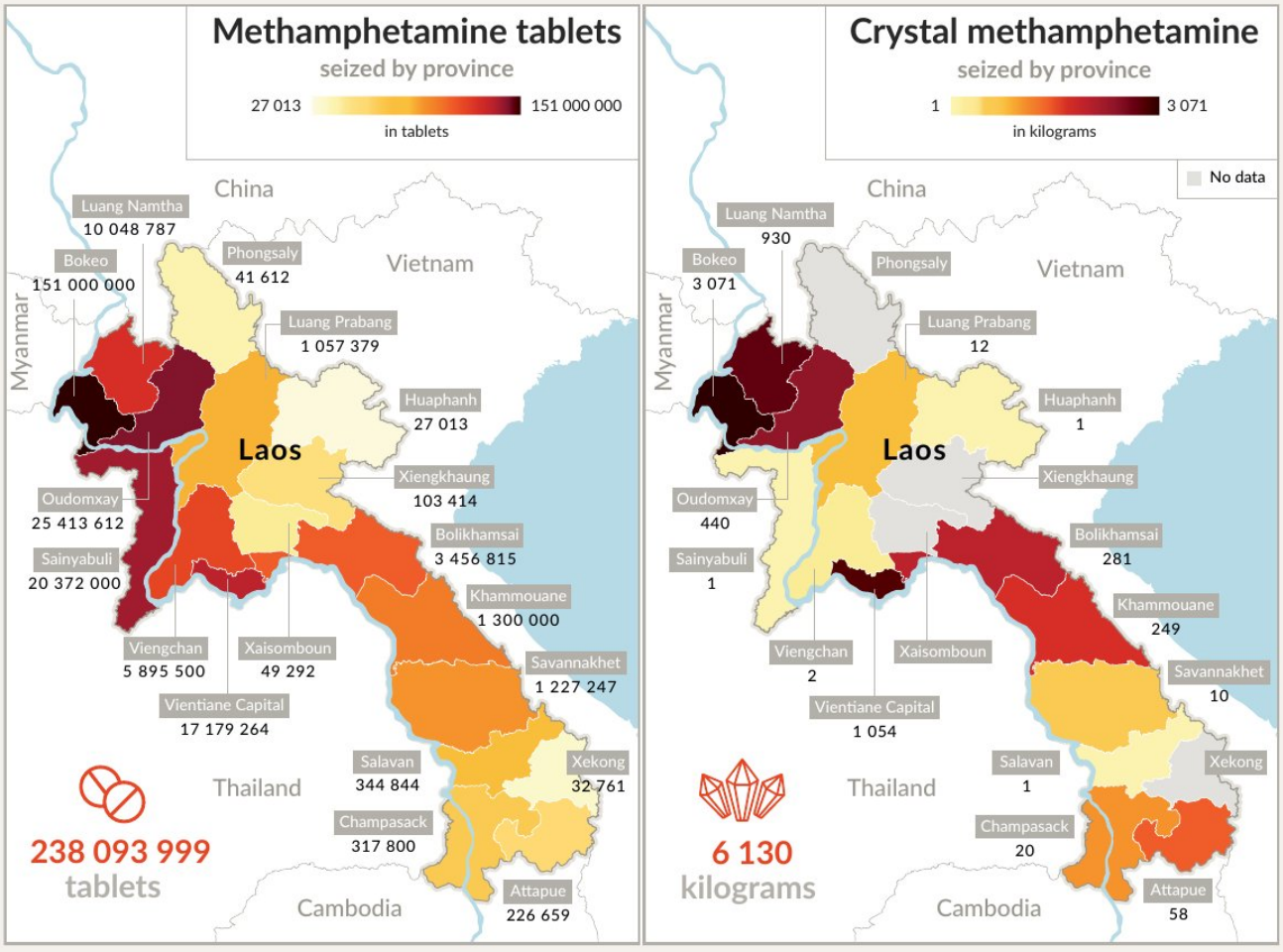


FIGURE 3 Methamphetamine seizures in Laos, by province, 2025.

Media monitoring and interviews also identified another exit system from Myanmar – the Laos corridor – from where drugs are transported onward to Cambodia, Thailand and Vietnam. This route operates both as a diversion from more heavily monitored Myanmar–Thailand crossings and as a major trafficking corridor in its own right. Nationwide media monitoring from Laos recorded more than 73 million methamphetamine tablets and more than 2.1 tonnes of crystal methamphetamine seized between July 2025 and May 2026.[31] Lao law enforcement data for 2024–2025 points to even larger figures: more than 235 million methamphetamine tablets, over 6 tonnes of crystal methamphetamine, approximately 3.4 tonnes of heroin and more than 5.6 tonnes of ketamine were seized across all provinces (see Figure 3).[32]

Movement, concealment and distribution

Once across the border, methamphetamine moves along a flexible set of corridors, staging areas and onward distribution nodes. In Thailand, flows disperse along two main axes: westward and southward, with central provinces around Bangkok's periphery functioning as storage and handover areas before onward movement to domestic, southern and maritime routes. The monitoring data set also provides insights into methamphetamine moving east and south through Laos into Cambodia and Vietnam, across the Mekong River, Laos–Vietnam borderlands and Cambodia–Vietnam border corridors.

Thailand and Laos show the clearest evidence of large-volume trafficking and links to Myanmar-produced methamphetamine. Cambodia's role is more thinly evidenced in public reporting, but the country also functions as a transit, storage and possible processing hub. Vietnam's borders with Laos and Cambodia are important entry points for trafficked drugs and sites of interception by authorities. The country also serves as an urban synthetic drug market and potential redistribution hub, including as a point of exit towards external markets.

Cambodia

Cambodia is a hub for domestic consumption and for transit to regional and international markets. The main entry route identified by Cambodian sources runs from the Golden Triangle through Laos and into Cambodia, particularly through Stung Treng, before onward movement to Phnom Penh, Sihanoukville or international routes.[33] Cases reported in January and March 2026 point to onward synthetic drug trafficking from Cambodia into southern Vietnam through Tây Ninh. In the January case, Vietnamese authorities seized methamphetamine and ketamine reportedly being transported from Bavet, Cambodia, to Ho Chi Minh City for a fee of 5 million VND (equivalent to approximately US$192). The March investigation identified a larger network moving drugs from Cambodia through Tây Ninh for distribution and onward movement to Ho Chi Minh City, Tra Vinh, Dak Lak and other areas.[34]

Cambodia's official reporting also points to a change in seizures and in how authorities describe the country's role in regional drug flows. Government reports recorded 27 884 drug-related arrests in 2025, with around 5.9 tonnes of drugs seized.[35] Although total drug seizures declined compared with 2024, seizures of chemical precursors increased sharply, reaching more than 42 tonnes.[36] This increase is notable because official reporting indicates that precursor seizures rose from only 354 kilograms in 2024, while overall drug seizures declined by around 60 per cent over the same period.[37] The largest case in Cambodia in 2026 involved approximately 200 kilograms of drugs and related materials seized in a hotel in Sihanoukville, including 1.86 kilograms of heroin, 1.42 kilograms of cocaine, 4.52 kilograms of ketamine, 16.49 kilograms of methamphetamine, 63.65 kilograms of MDMA, 57.82 kilograms of precursor chemicals and 90 kilograms of chemical compounds, as well as manufacturing equipment



Cambodian authorities prepare to burn confiscated drugs in Phnom Penh, 2023. *Photo supplied*

and processing and packaging materials.[38] The contents of the seizure could potentially suggest a shift in Cambodia's role from transit to drug production hub, and the mix of substances and equipment points to a possible role in storage, processing and packaging in the wider synthetic drug supply chain.

Alongside these production-related activities, Cambodia retains a role in onward trafficking. In October 2025, the secretary-general of the National Authority for Combating Drugs stated that approximately 95% to 97% of drugs circulating through Cambodia were not intended for domestic consumption but were primarily mixed chemicals transported to third countries.[39] Although the scale of the export appears surprising, considering the widespread local consumption,[40] the statement confirms Cambodia's role as transit, storage and precursor-handling hub within the Mekong methamphetamine market.

Cambodian authorities have encountered cases involving trafficking to New Zealand and Australia using courier and postal services, air passengers, and maritime routes.[41] Concealment methods have included baby nappies, dolls, towels, confectionary, tea products and postal packages. Authorities have noted that synthetic drugs, especially methamphetamine, have become more prominent than heroin in trafficking flows linked to these markets.[42]

Laos

Laos functions as a transit country connecting routes towards Cambodia, Thailand, and Vietnam. According to GI-TOC media-monitoring records, drugs move from Myanmar-linked production areas into northern Laos, with onward routes running south through the country, across the Mekong River into Thailand, and across land borders into Cambodia and Vietnam.

There are key trafficking routes and transshipment points across Laos. In the north, Bokeo and the Golden Triangle area are central. Official reporting identifies Bokeo as the province with the highest

number of arrests and seizures in Laos, with the Golden Triangle Special Economic Zone accounting for a large share of reported activity within the province. In October 2025, Bokeo police intercepted a 22-wheel truck carrying approximately 19 million methamphetamine tablets and 1 648 kilograms of crystal methamphetamine from Bokeo towards Luang Namtha.[43] Official reporting has also highlighted Bokeo's role as a consolidation and onward distribution point.[44] Bokeo also links directly with Boten, a central hub for drug use.

Further south in Laos, crossings along the Mekong River around Vientiane–Nong Khai, Bolikhamxay–Bueng Kan, Khammouane–Nakhon Phanom and Savannakhet–Mukdahan appear to play a key role. These crossings rely on both formal border infrastructure and informal river movement. A village head in a town in Chiang Rai province described small flat-bottomed boats crossing the Mekong before dawn, often using village fishermen as carriers and exploiting the jurisdictional limits of Thai enforcement at the river boundary.[45] In several cases, methamphetamine tablets have been moved by small boat across the Mekong and transferred to vehicles on the Thai side. For example, in March 2026 approximately 246 kilograms of crystal methamphetamine was seized at a target house in Sivilay Village, Paksan District, Bolikhamxay province. The drugs had reportedly been moved from a border area in Bokeo province near the Laos–Myanmar border and were intended for onward movement to Thailand via the Mekong River towards Bueng Kan province.[46]

Interviewees repeatedly emphasized that traffickers avoid predictable routes where checkpoints are dense. On the Laos side, this means avoiding some stretches of Route 13 and relying instead on secondary roads, mountainous corridors and river crossings. In Thailand, it means shifting between northern crossings, the Mekong corridor, central staging points and southern exit routes, depending on enforcement pressure.[47]

Like Thailand, Laos serves as a transit hub for methamphetamine going to Cambodia, China,[48] Vietnam and beyond. Although Cambodia shares a longer land border with Thailand than with Laos, the Laos route is reportedly the main trafficking corridor into Cambodia as it is a more permissive environment. As a result, the Thailand–Cambodia border conflict, which erupted in 2025, reportedly had little to no impact on trafficking routes.[49]

Thailand

Once methamphetamine enters Thailand, it appears to move through a series of staging and redistribution nodes rather than taking a single linear route to Bangkok. Ayutthaya is the most consistently identified inland transshipment hub.[50] A Thai military intelligence officer in Mae Sai identified Ayutthaya as the principal consolidation and storage point after northern entry, with Pathum Thani and Samut Prakan functioning as secondary waiting and staging locations, and Chon Buri and Ranong as eastern collection points and onward distribution areas.[51] Bangkok-based anti-narcotics officers similarly stated that product no longer sits inside Bangkok itself; instead, storage has shifted to surrounding provinces, especially Ayutthaya, Chon Buri and Samut Prakan.[52]

Ayutthaya's role appears structural: it sits between Bangkok and the north, is large enough to absorb activity without attracting attention, and provides easy access to the expressway network in multiple directions. Towns on the outskirts of Bangkok are also used to help evade police detection, preferably villages that are quiet and remote and thus easily overlooked as staging areas. Thailand's Office of the Narcotics Control Board has found drugs in both rented residential properties and commercial storage facilities in such villages, sometimes alongside weapons.[53]

The operational logic across Thailand appears to be speed. Bangkok-based officers described drugs as being treated like a 'bomb': no one wants to hold them for long, and safe houses are used as short-term, rotating holding points to reduce exposure.[54] This may explain why the Bangkok periphery matters more than Bangkok itself in the trafficking chain, despite Bangkok being a larger market, coordination environment and logistical hub.[55] The GI-TOC's media monitoring also points to central Thailand as a recurring seizure location.[56] A January 2026 case seized 4.8 million methamphetamine tablets linked to a network operating in and around Lopburi;[57] other cases described drugs from the Savannakhet region of Laos being staged in Ang Thong, Thailand, before distribution elsewhere in the country and beyond.

A Thai military intelligence officer described Omkoi and Mae Sariang as staging points for product moving from further north, with Mae Sot itself functioning more as a consumption city than a major distribution hub.[58] The southern route moving from Shan State in Myanmar through Lampang and smaller villages in Thailand to Ayutthaya, then onward towards Ranong, Chumphon and Surat Thani is particularly relevant for maritime export.[59] Tachilek was also identified as a primary source point for drugs moving through this corridor, with shipments divided among couriers using buses, vans and public transport; the loss of one courier therefore does not compromise the full consignment.[60]

Transport methods vary according to the quantity, route and risk. Along the border, drugs are often moved by couriers on foot, in small boats (including long-tail boats), in backpacks and by armed escorts. Movement often takes place through mountain and forest trails, and the product may be left at dead drops for later collection.[61] Multiple crossing locations are activated at the same time so if one is intercepted, the others proceed. Some traffickers also take advantage of the lunar calendar, scheduling crossings during the six-day dark-moon window, when natural light is at its lowest.[62]



A displaced person uses an informal crossing to bring goods from Thailand to Myanmar. These paths are also commonly used to move drugs in the other direction. *Photo supplied*

Once inside Thailand, drugs are loaded into private vehicles, vegetable trucks, oil tankers, modified vans, cargo trucks and parcel delivery systems. A Thai military intelligence officer in Mae Sai described waterproof backpacks being carried by couriers, vehicle convoys and scout teams operating ahead of carriers and armed support units trailing behind. Once the drugs reach vehicles, they are concealed among agricultural produce such as avocado, ginger, corn and oranges, or in larger cargo vehicles capable of carrying hundreds of thousands or even millions of tablets.[63] Bangkok-based officers described the use of pilot cars, modified vans with hidden ceiling compartments, night-time water routes, public transport and luggage.[64] Additional examples included concealment in household appliances and modified commercial vehicles, washing machines and six-wheeled box trucks.[65] These methods are designed to not attract attention, allowing large loads to move through ordinary commercial traffic. Nevertheless, one interviewee noted that avocados and ginger had been so commonly used that both commodities now roused suspicion at checkpoints.[66]

Postal and express parcel services provide a channel for distributing smaller drug consignments. Shipments are falsely declared as ordinary goods such as food products, dietary supplements, household items and toys or may be more elaborately concealed: drugs laminated onto paper, soaked into clothing or hidden inside consumer packaging.[67] Despite increasing countermeasures – senders are now required to present ID and be photographed, and mobile units conduct spot checks of parcel contents – it appears that Thailand does not have the scanning capacity to screen the volume of parcels moving through its domestic courier networks. Interviewees described how scanners can be bypassed, for example by using wrapping materials that obstruct the machine's ability to perceive the product.[68] Small, regional Thai delivery companies are reportedly the most frequently exploited because they have less oversight and less technology than major international operators.[69] Postal and express parcel channels have also become part of longer distance trafficking and downstream flows because they allow smaller consignments to move through commercial systems without requiring the same logistical infrastructure as bulk maritime shipments.

Vietnam

Vietnam is the furthest of Mekong region countries from Myanmar, and its position within the Myanmar-linked methamphetamine system is the least clear. Law enforcement from the Thailand–Laos border has identified Laos-side consolidation points, including Vientiane and Oudomxay, from which product reportedly moves towards Vietnam and Cambodia or across the Mekong River into Thailand.[70] The same source described a Vietnam-linked onward route towards Malaysia and Indonesia by sea. That route also appears to be used to transport precursors in the opposite direction (i.e. through Vietnam via Laos towards UWSA-controlled territory).[71] When interview material is analyzed alongside media-monitoring, Vietnam appears to play three overlapping but unevenly evidenced roles in the Mekong methamphetamine market: a border-interdiction space for drugs entering from Laos; an urban synthetic drug consumption market centred on Ho Chi Minh City and other major cities; and a potential redistribution hub connected to both Laos-facing and Cambodia-facing routes. These roles are more visible where consignments are intercepted and cases publicized. The resulting picture reflects enforcement and reporting priorities as well as trafficking activity, leaving unresolved how much moves undetected, how much is produced within the country, and what share supplies domestic markets rather than onward export.

Vietnam's western and north-central borderlands are recurring locations for drug interceptions involving flows entering from Laos. Several major seizures have been reported in central and north-central provinces linked to Laos-facing corridors, including Quảng Trị, Hà Tĩnh and Nghệ An, a long-standing drug trafficking hotspot. A July 2025 case in Hà Tĩnh involved the transport from Laos into Vietnam of 38 kilograms of methamphetamine, 3 kilograms of ketamine, 9 000 synthetic drug pills and 1 kg of heroin.[72] A July 2025 case in Nghệ An involved 60 kilograms of heroin and 37 kilograms of crystal methamphetamine;[73] another case involving two Lao nationals arrested with 17 kilograms of crystal methamphetamine and 6 000 synthetic drug pills near the Laos–Vietnam border.[74] In October 2025, Quảng Trị authorities reported the interception of approximately half a tonne of drugs, described as mainly methamphetamine, linked to two Lao nationals.[75] In November 2025, Vietnam's counter-narcotics police department reported the disruption of a Golden Triangle-linked trafficking ring and route into Vietnam involving 777 kilograms of synthetic drugs.[76]

The southern regions appear to be more closely connected to methamphetamines stemming from Cambodia. Ho Chi Minh City, Tây Ninh, Đồng Nai, Đà Nẵng and Huế appear repeatedly in the data set as locations of enforcement action or network disruption. Several cases point to Cambodia–Vietnam movement, including a January 2026 seizure in Tây Ninh involving 2.8 kilograms of ketamine and methamphetamine,[77] and a March 2026 case in which nearly 59.5 kilograms of drugs, including almost 20 kilograms of ketamine and more than 32 kilograms of methamphetamine were reportedly moved from the Cambodia border into Tây Ninh.[78]

Urban cases show Vietnam as a significant synthetic drug consumption and redistribution hub. Ho Chi Minh City cases included a 17-kilogram seizure involving ketamine, MDMA and methamphetamine,[79] as well as arrests linked to party-drug use and distribution. Huế also appears as a notable node, with one March 2026 case indicating that since mid-2024 a new drug supply route from Laos to Huế had been identified and monitored, which led to 28.8 kilograms of methamphetamine, ketamine, nimetazepam and MDMA being seized.[80]

Moving onward: Exit from the Mekong

Maritime export appears to be the dominant method for bulk shipments out of the Mekong; air passenger, courier and postal channels are more relevant for smaller shipments. Crystal methamphetamine, rather than *yaba*, appears to be the most relevant export commodity for higher-value markets, not least because it carries greater value in smaller volumes. The vessels involved are not always container ships but often include small commercial vessels and fishing boats, large enough to move several tons but not large enough to require the infrastructure of a major cargo operation.

Major methamphetamine exit points can be found across most Mekong countries (see Figure 2). For example, seizures of predominately methamphetamine tablets and crystal methamphetamine in Thailand's southern provinces such as Chumphon, Nakhon Si Thammarat, Yala, Surat Thani and Ranong point to a southward flow towards Malaysia and maritime exit points. A case from September 2025 involved a joint maritime operation off the Kawthaung–Ranong coast that uncovered an at-sea packaging operation involving approximately 1 tonne of methamphetamine reportedly originating in Myanmar.[81] Some of the shipment had already been moved to southern Thailand, and the remaining product was intended to move through Phuket towards Indonesia and beyond.[82] According to Thai intelligence, Laem Chabang and the Chon Buri port are also used to export bulk consignments of methamphetamine, with smaller shipping agencies playing a facilitation role.[83]

Yangon and Phnom Penh have been identified as locations where methamphetamine is stored and consolidated before export.[84] In Yangon, traffickers appear to be using industrial estate and warehouse environments to store large volumes of product before maritime export, disguising storage as legitimate commercial activity.[85] The situation seems to be similar in Phnom Penh: drugs are first smuggled there across the Laos–Cambodia border through Stung Treng province before being sent by sea to Oceania.[86] This challenges traditional understanding, which considers Thailand as the exit point for Myanmar-origin methamphetamine and suggests that higher-grade product may also be routed overland to Yangon for maritime export, while other consignments move through Thailand, Laos and Cambodia.

Vietnam's role as an exit hub for Myanmar methamphetamines is unclear. Unlike for Cambodia and Thailand, the 2025–2026 data did not produce clear cases linking Vietnam-based seizures to specific overseas destination markets. Although a March 2025 case was clearly linked to Taiwan, which was assumed to be the final destination market.[87] Interview material also suggests that some Laos-linked flows may continue south towards Vietnam, with onward maritime connections to Malaysia and Indonesia, but this was not clearly reflected in Vietnam-based seizure cases over the last 12 months.[88] For the purposes of this report, Vietnam is best understood as an important regional node in the synthetic drug market, but one with limited data on its onward export function.

In practice, methamphetamine originating from or linked to the Myanmar production zone may move through Cambodia, Laos, Thailand or Vietnam, and in some cases through other regional hubs and stop-overs, such as Malaysia, Papua New Guinea or the Philippines, before reaching destination markets such as New Zealand and Australia. Some interviewees noted that consignments are often broken up, redirected or consolidated at different points along the route, making linear source-to-destination pathways difficult to identify.[89]

The lack of data shows that downstream trafficking cannot be understood only through maritime border enforcement. By the time shipments become visible at ports, in fishing vessels or in warehouse environments, they may already have passed through several earlier stages of consolidation, repackaging and ownership transfer.

The monitoring also shows that the Mekong's role as an exit hub extends beyond methamphetamine. Airport and passenger-smuggling cases, particularly in Thailand, involved cannabis, heroin, cocaine and synthetic products concealed in luggage, food packaging and clothing or on or within a person's body, flowing downstream towards New Zealand and Australia but also to East Asian markets and west towards Europe. These flows may not be structurally identical to methamphetamine trafficking, but they demonstrate the breadth of the region's outbound trafficking infrastructure, the diversity of actors involved in outward trafficking, and the range of departure points used to move drugs to downstream markets. Although seizures of North American methamphetamine, particularly from Mexican-linked supply chains, dominate statistics New Zealand and Australia,[90] Malaysia, Thailand and other South East Asian countries have long been important nodes for Myanmar-origin product reaching New Zealand and Australia.[91]

Convergence with cyber scams and other criminal markets

Methamphetamine trafficking and other criminal markets across the Mekong converge at several points. These nuanced convergences highlight key pressure points of the criminal underworld in the Mekong.

Drug trafficking, cyber scams, human trafficking and smuggling, arms trafficking, wildlife trafficking, and money laundering appear to rely on the same enabling conditions: protection providers, corrupt officials, border brokers, logistics routes, informal finance and money movement systems, front businesses, and permissive special economic zones. Almost all the people interviewed in Thailand reported that industrial-scale labs in Myanmar were to some degree linked to the scam centre infrastructure, sharing protection, logistics and networks. As one interviewee stated: 'A route that moves people can also move drugs or weapons. A corrupt checkpoint can protect different types of illicit commodities. A casino, KTV, hotel, gold shop or logistics company can provide cover, storage, money laundering opportunities or access to networks that serve more than one criminal economy.'[92]

In several border areas – particularly Tachilek and the wider Shan State–northern Thailand border zone, the Golden Triangle Special Economic Zone in Bokeo, and the Mae Sot–Myawaddy corridor – state authority is fragmented, protection is monetized and multiple illicit markets appear to rely on overlapping facilitation structures.[93] For example, the UWSA, the Democratic Karen Buddhist Army, the Karen Border Guard Force and various Shan State militias are reportedly providing simultaneous security for scam infrastructure and narcotics logistics in overlapping zones.[94] In Mae Sot, one hotel is allegedly owned by a police officer and used both to stage drugs and to hold people bound for scam compounds across the border in Myanmar.[95] Although this information could not be independently verified, this illustrates how officials or armed actors who control security and access can collect payments for protecting or facilitating both drug trafficking and scam operations.[96] The protection network becomes the connecting tissue between otherwise distinct criminal markets.



Workers from a scam compound in Myawaddy cross the river from Myanmar to Thailand after Myanmar's military raided one of the country's largest scam centres, October 2025. *© Sarot Meksophawannakul/Thai News Pix/AFP via Getty Images*

There have also been accounts of co-location of scam centres and drug production, including Kokang[97] and Shwe Kokko in Myanmar – both notorious hot spots for cyber scam operations. In Shwe Koko, direct involvement by the Democratic Karen Buddhist Army has been reported in the production, storage, taxation and brokering of methamphetamine.[98]

The convergence with other criminal markets complicates financial analysis because drug profits may not remain within the market. They are often reinvested into land, gold, casinos, entertainment venues, logistics companies, mining activity, scam operations or other commercial fronts.[99]

Conversely, profits from scams, gambling or other illicit markets help finance drug logistics, protection payments and corruption.

Targeting methamphetamine flows only at the point of seizure is insufficient. Identifying and disrupting the criminal services that enable illicit markets should be another key focus. These services include private sector facilitators, logistics coordination, chemical procurement, corrupt protection, special economic zone governance gaps, and the transport systems linking border areas to ports, airports and downstream markets. ■

Precursors and production: The infrastructure behind the supply

Methamphetamine supply in the Mekong is sustained by more than trafficking routes. Large-scale synthetic drug production depends on access to chemicals, equipment, protection and security, technical expertise, storage and staging sites, front companies, and commercial cover. These elements are often less visible than seizures of the finished product, but they are central to the functioning of the market.

The production of methamphetamine is geographically diffuse. It occurs in parts of Myanmar where access is limited. Available data suggests that Shan State remains the primary production area as this is where sophisticated, industrial-level labs have been discovered.[100] Recent reporting identified large production sites, which point to the industrial scale of these operations, between Hsipaw and Mongyai and in areas south-west of Mongyai. There, authorities claim to have seized record amounts of drugs, chemical precursors and drug-manufacturing equipment, such as tablet press machines, packaging equipment, and heavy machinery with the capacity to routinely produce more than 27 tonnes of crystal methamphetamine or more than 810 million methamphetamine tablets.[101] According to Myanmar authorities, examinations and analysis of the sites estimated that two dismantled labs may have been responsible for producing up to a third of all crystal methamphetamine seized in the country in 2025.[102] These results should be treated cautiously, given the political and conflict-sensitive context in which they were released.



A meth lab seizure in Shan State, Myanmar, January 2026. © *Joe Stenson/AFP via Getty Images*

Before production can take place, equipment, technical knowledge and chemical precursors need to be brought to Shan State. Precursor supply chains originate in several countries: in addition to China and India,[103] Thailand appears to be an important supplier, with chemicals and equipment reportedly moving through Thailand under legal or semi-legal commercial cover. Production methods have moved away from the use of ephedrine and pseudoephedrine to include pre-precursors such phenylacetone, methylamine, phenylacetic acid and propionyl chloride, which can be used to produce the necessary precursor itself. These chemicals are used in mining, construction and other industries, and large quantities are being diverted towards Myanmar-linked drug production areas. One mid-level Mae Sai military intelligence officer reported that Chinese companies operating in Thailand order precursors in bulk under legitimate industrial cover, then divert a portion across the border: 'Ten barrels ordered, five go into the mining operation and five go into the lab.'[104]

Disruption of border trade by conflict and regulatory tightening on the Chinese side has reportedly made it harder for exporters to send chemicals directly to Laos or Myanmar, but there have been reports of chemical companies being set up in special economic zones such as Mongla.[105] These developments have increasingly pushed the route through Thailand. Laem Chabang, Chon Buri, Kanchanaburi, Three Pagoda Pass, Chiang Saen, Mae Sai and the Mae Sot–Myawaddy corridor are all key points on this route.[106] At the Mae Sot border, one bridge seems to carry the precursors and another carries the finished product.[107]

Thailand is a good example of how synthetic drug production can shift towards new or less regulated substances. As some substances become more closely monitored or harder to obtain, suppliers move towards products that are easier to source, or less consistently regulated. Thailand operates a 33-category chemical classification system, which is more stringent than normal industry regulation; however, capacity to test precursors is low, and traffickers often relabel controlled substances as ordinary industrial products.[108] In addition, precursors of less-known drugs, such as etomidate, are poorly monitored: between January and May 2026, just 28 kilograms of etomidate and approximately 12 tonnes of etomidate precursors were seized and one etomidate lab was dismantled.[109]

Laos is central to the consumption, movement and storage of finished drugs, and its proximity to production areas makes it relevant to the wider production economy, including the movement of precursors. Reporting, however, is limited; no data is available on the quantities or types of precursors identified. Precursors are also commonly seized in Cambodia. There, official reporting recorded more than 42 tonnes of chemical precursors seized in 2025, compared to only 350 kilograms in 2024.[110] According to national authorities, Cambodia is not considered a major production hub. However, industrial-scale ketamine labs have been discovered in the country.[111] The discovery of industrial-scale ketamine laboratories demonstrates that Cambodia's role includes domestic production, alongside the importation, storage, consolidation and onward movement of chemicals. The increase in precursor seizures does not, on its own, establish whether those chemicals were intended for domestic use or onward trafficking. According to the Secretary-General of Cambodia's National Authority for

Combating Drugs, precursor chemicals originate primarily from supplier countries outside the Mekong, including China and India, before moving through a combination of legitimate commercial channels, diversion mechanisms and illicit trafficking routes.[112]

In Vietnam, now-dismantled production sites had reportedly been set up for the production of ketamine rather than methamphetamines.[113] For example, in March 2025, Vietnamese authorities dismantled an industrial-scale ketamine production facility in Nha Trang, Khánh Hòa province, seizing 1.4 tonnes of high purity ketamine and nearly 80 tonnes of chemicals.[114] The facility reportedly used business cover, two remote premises, industrial equipment, foreign technical and financial involvement, and local facilitation. This pattern is not limited to Vietnam; interviewees also reported ketamine production in Cambodia, Laos and Myanmar, with Myanmar-based sites described as producing methamphetamine, in some cases alongside ketamine and other synthetic drugs.[115] The spread of large-scale production sites outside traditional production hubs is a particularly worrisome trend given that labs can be easily refitted to produce other synthetic drugs, as long as the precursors and technical knowledge are available. Just as the labs in Myanmar are now reportedly producing ketamine, labs elsewhere in the region may also diversify production.[116]

The precursor and production picture therefore shows a regional enabling system rather than a single production location. Methamphetamine production remains most strongly associated with Myanmar, but the infrastructure that sustains synthetic drug markets extends across the Mekong. Chemicals are ordered through legitimate companies, equipment can be moved and reassembled across borders, warehouses can be disguised as industrial premises, and new synthetic substances emerge before regulators and enforcement agencies fully understand the threats.



ACTORS: LAYERED NETWORKS AND SHARED CRIMINAL INFRASTRUCTURE

No single organization controls methamphetamine flows through the Mekong. Instead, the business appears to be controlled by layered and compartmentalized networks who provide different services at different points in the supply chain. Production, territorial access, protection, brokerage, transport, storage, concealment, payment and export logistics appear to be handled by separate groups and individuals, many of whom know only their immediate role and counterparts. As with drug cartels elsewhere in the world, these operational tiers make it difficult to identify key nodes in the market, which makes the markets harder to disrupt. It also complicates tracking who ultimately reaps the benefits.

This is not to say that the market is not controlled by key figures. Powerful armed groups, business and political elites, brokers, and criminal networks play important roles. But the data suggests that a focus on individual 'kingpins' overlooks the dispersed coordination and division of labour that sustain these networks. A single arrest may remove a courier, a driver, a coordinator or even a local boss, but it rarely exposes the full supply chain.

Interviewees described a system designed precisely to prevent that from happening. As a village head from a town in the Chiang Rai province explained: 'The division of labour is quite detailed – this is to prevent getting through to the source. A lot of the couriers do not know who gave the order or where it came from.'[117] In practice this means that couriers know only the next handover point; drivers know only pickup and delivery locations; local brokers manage one segment of movement; and coordinators can disappear once a consignment is intercepted.[118]

Production and movement in Myanmar

Five broad groupings of actors are involved in the methamphetamine market on the Myanmar side. The first is a collection of 'neutral' ethnic armed groups. The UWSA is the dominant player, but the National Democratic Alliance Army (NDAA) and the Shan State Progress Party/Shan State Army – North (SSPP/SSA North) also have notable roles. These groups have long-standing bilateral ceasefire

agreements with the Myanmar Army and cooperate broadly with the military in economic terms while maintaining high levels of political autonomy. They also generally enjoy close relations with China; UWSA and NDAA territories both use Chinese currency and maintain a high level of integration with the Chinese economy.

Interviewees indicate that the UWSA has largely shifted away from direct production towards providing territorial access and production sites to small external groups that undertake production themselves. A payment-share is made to the UWSA for the use of the land, the protection provided and, in many cases, the brokerage of distribution from the production site to cross-border storage and on to a transfer location in Thailand.[119] With this shift, smaller groups such as the NDAA and the SSA North have also reportedly seen a migration of production into their areas and have pivoted towards a similar model.[120]

This first grouping of actors has also undergone key changes over recent years. The SSPP/SSA North, the Ta'ang National Liberation Army (TNLA) and the Myanmar National Democratic Alliance Army (MNDAA) had previously closely worked with the UWSA, but these groups have reportedly significantly expanded their territories since October 2023, and their collaboration changed from September 2025 when the UWSA, under pressure from China, declared the end of its alliance with the groups.[121] When this report was drafted, in July 2026, only the UWSA and the NDAA were still understood to be closely cooperating together, with some degree of cooperation still taking place with the SSPP because it maintains a more stable ceasefire with the military than do the TNLA and the MNDAA.

The role of the TNLA and MNDAA in 2026 is less clear. These groups' involvement in the methamphetamine trade can be traced to the mid-2010s,[122] but there is much less evidence of involvement in production. The MNDAA has, however, only started to control sizeable territory in northern Shan since January 2024. The MNDAA has also been very public in advancing anti-scam and anti-drug initiatives and was involved in seizing and demobilizing drug production operations under the Myanmar military's Border Guard Force in Kokang in 2024.

A second grouping involves two 'neutral' armed groups that are signatories to the 2015 National Ceasefire Accord and have maintained ceasefire status with the Myanmar military since the 2021 military coup. The first group is the Shan State Army–South (SSA South), which is an adversary of the UWSA, the NDAA and the SSA North; the second is the Democratic Karen Benevolent Army, which is deeply involved in a range of illicit markets and controls territory in Myanmar's south-east along the Myanmar–Thailand border. This is said to function largely separately from the UWSA–NDAA production.[123]

The third is the Arakan Army, which is actively fighting the Myanmar military and now controls most of the territory in coastal Rakhine State along the border with Bangladesh. The group also maintains close ties with the UWSA and a presence in northern Myanmar near the border with China. Experts have reported the Arakan Army be an important force in the methamphetamine trade, but few details of the group's involvement are known, and the AA has publicly refuted claims of its involvement.[124]

The fourth is a collection of largely unaffiliated criminal groups, opportunist in make-up and entrepreneurial in action.[125] The presence of Chinese-speaking collectives remains common; however, interview accounts suggest that the composition of these intermediate illicit actors is increasingly diverse.

The fifth is the Myanmar military and its affiliated armed group proxies, which are a commanding force throughout the methamphetamine market. There is little evidence that implicates the Myanmar military directly in the production or transport of methamphetamine, but these activities are undertaken by affiliated groups. More strongly evident in the research was how the Myanmar military benefits directly from the methamphetamine trade through the actions of its border guard forces and other affiliated militia groups.

Rather than 'the producer' being one single actor, available information suggests that different actors finance production, provide protection and transport the finished drugs.[126] Actors have a wide spectrum of involvement. For example, interviewees reported that SSPP/SSA North hosts producers and that the SSA South controls the border areas and is involved in trafficking from Shan-side areas towards the Thai border, while also owning its own production and supply chains.[127]

The UWSA's holding company has diversified into legitimate business infrastructure, which indicates that territorial control and permissive protection may matter more than direct ownership of production. This distinction is important because even if direct production is outsourced or distributed across multiple groups, the actors who control territory, routes and protection arrangements remain central to the market.

Compartmentalization as protection

Compartmentalization is one of the defining features of methamphetamine supply chains in the Mekong. The evidence suggests that networks are structured to ensure that most actors know only their immediate task, contact and handover point. This is not simply a by-product of informal trafficking. It is protection by design. By separating production, transport, storage, brokerage, protection and onward distribution, the network limits the damage caused by any single arrest, seizure or betrayal.[128] The uncertainty is also commercially useful as it protects high-value actors from exposure, enables routes to shift quickly under enforcement pressure and allows several groups to profit from the same shipment without forming a single unified organization.[129]

At the border level, compartmentalization takes the form of separate teams handling successive stages of a shipment, with limited knowledge of the wider operation. Village chiefs, local officials, armed escorts, small boat operators, drivers, warehouse managers and logistics brokers each facilitate a particular stage of movement. Some may be directly complicit, while others may provide services without full knowledge of the shipment. Couriers may know what they are carrying, but not who owns the consignment or where it will ultimately go. Drivers may know only a pickup and drop-off point. Some actors carry no phones, while others use basic phones or code systems; they may make contact with intermediaries rather than directly with higher-level figures. In some cases, shipments are divided across multiple couriers travelling separately by bus, van or public transport, so that the arrest of one individual does not compromise the rest of the load.[130] This model also protects senior organizers by making lower-level actors replaceable.

Couriers, drivers, delivery agents and retail distributors are often the people most visible to law enforcement, yet they are rarely positioned to expose the structure above them. Some are paid relatively small amounts compared with the value of the drugs they move; others are recruited through debt, addiction, family ties, economic hardship or community relationships. On the Myanmar side, couriers are recruited primarily from among the families of armed groups, which restricts recruitment to a trusted circle and makes couriers easier to trace and subject to retaliation if they betray the

organizers. The system appears to build in the possibility of loss: a courier may be arrested or even killed,[131] a run may fail or a vehicle may be confiscated. These situations are likely to be treated as an operating cost rather than a strategic disruption.[132]

Media monitoring and interviews identified Cambodian, Chinese, Lao, Malaysian, Myanmar, Nigerian, Taiwanese, Thai and Vietnamese networks, among others, at different points in the drug supply chain.[133] Local networks often run the operations within their country and/or at key entry and exit points but also cooperate with foreign criminal networks that act as investors, brokers, technical specialists, couriers, retail distributors, chemical suppliers or destination market intermediaries, who in turn depend on local protection, transport and facilitation. There appears to be a certain inter-dependence: foreign actors require local facilitators, and local actors require foreign capital, market access or technical knowledge.[134]

Thai actors, for example, are indispensable to the functioning of drug supply chains inside Thailand. They appear as drivers, couriers, logistics facilitators, warehouse contacts, local distributors, corrupt officials, small shipping intermediaries and other service providers.[135] Thai nationals are frequently the visible layer in domestic transport, particularly once drugs have crossed the border and move through central and southern Thailand.[136] They play a crucial role in enabling operational access: they understand roads, checkpoints and parcel systems and have access to local officials, vehicle rental, safe houses and the commercial routines that allow illicit goods to blend into ordinary movement.[137]

Lao and Myanmar actors are especially important in border movement. In the Laos corridor, Lao couriers, boat operators, village-level facilitators and officials appear in accounts of Mekong crossings and onward movement into Thailand.[138] In Myanmar-linked corridors, conscription, which was put in place in 2024, has made people from Myanmar more vulnerable to becoming drug couriers.[139] Different ethnic groups, including Shan, Wa and Hmong, provide access to border routes and contacts, labour, trust and territorial familiarity.[140] These relationships are often older than the current methamphetamine economy. They draw on kinship, community ties, armed group authority and long-standing cross-border movement.[141] This makes them difficult for law enforcement to penetrate and difficult for external observers to map. The relationships may also explain the relatively low levels of violence in the Myanmar-linked methamphetamine market when compared to other drug economies around the world.[142]

Chinese-speaking actors appear to play a prominent role in the broader criminal economy: in chemical precursor procurement, synthetic drug production, casinos, KTVs, scam compounds, front companies and special economic zones.[143] Interviews also link Chinese capital and business activity to commercial networks in border towns in which drugs, scam operations, entertainment venues and informal finance overlap,[144] suggesting again that Chinese-speaking networks involved in cyber scam operations and drug trafficking are able to exploit the same permissive environments, commercial cover and protection systems for both activities.

Other foreign groups are more commonly associated with specific commodities or routes. Malay-speaking actors are visible in crystal methamphetamine movements towards southern Thailand and onward transit. Nigerian and other African networks appear more prominently in cocaine and heroin distribution, particularly in Bangkok nightlife and tourist markets. Taiwanese group involvement appears in some international drug trafficking cases involving substances such as ketamine, including cases where Thailand functions as a hiding place, coordination point or export base. Vietnamese nationals have appeared in some cannabis and synthetic drug production or processing cases, including operations using nominee-company structures.[145]

There is little information on the networks controlling the receipt and distribution of Myanmar-linked methamphetamine in New Zealand and Australia, but interviews suggest they are controlled by a range of actors, particularly outlaw motorcycle gangs (OMCGs) in Australia. This is consistent with the Global Organized Crime Index 2025, which for New Zealand describes the synthetic drug trade as dominated by OMCGs, Asian syndicates and deported Australian gang members coordinating large-scale imports from China, Mexico and South East Asia.[146] For Australia, the Index identifies OMCGs, alongside Vietnamese networks and Afghan criminal rings, among the groups controlling methamphetamine importation and distribution and notes that Australian OMCGs are involved in transnational operations in South East Asia linked to narcotics, chemical precursors and illicit firearms.[147] OMCGs are consistently described as highly adaptive, using different routes, transit countries and transport methods depending on enforcement pressure, logistics and market opportunities. Although many of these groups are primarily the receiving network, Australian OMCG members have also reportedly established a stronger presence in the Mekong region by marrying into local families, establishing residence and using the region as a base for negotiation and money laundering.[148]

Who profits?

The scale of methamphetamine moving through the Mekong suggests that the illicit proceeds generated are massive. Although acknowledging the limitations of seizure data to extrapolate profit, all data points indicate that billions of US dollars are circulating across production, transport, protection, storage, brokerage and export services. The question therefore is not whether profits are being generated, but how they are distributed and laundered across a fragmented supply chain and where they are invested. Those who benefit the most may be those least visible in seizures: the actors who provide protection, finance, logistics, laundering or market access without appearing at the point of interdiction.[149]

Data suggests that profits are captured at several points. At the production and territorial control level, armed actors and associated business structures appear to benefit through direct investment, taxation, protection fees, negotiated cuts of output and payment in kind. These are all services that can be monetized.[150] It also suggests that the illicit actors benefiting most from the wider trafficking supply chain may not be those who physically produce or move the drugs. This has been confirmed by experts on the Myanmar drug economy: 'If you are ever in the room with the kilos [referring to kilograms of methamphetamines], you are not a major player.'[151]

At the transport level, the amounts paid to drivers and couriers are small relative to the value of the commodity they move. Payments reportedly range from a few thousand Thai baht (THB) for border crossings (THB5 000–15 000 (US$150–450) on the Thai and Laos side and THB4 000–5 000 (US$125–150) on the Myanmar side) to larger sums for higher-risk international courier work (reaching sums around THB130 000 (US$4 000) onward to East Asia).[152] These payments can be substantial for economically vulnerable people but are minor costs for the criminal operation.

A similar pattern appears in corruption payments and facilitation costs. Local officials, police, border actors, village heads, pier operators, logistics intermediaries and transport facilitators all extract income from the methamphetamine market by allowing movement, providing advance warning of law enforcement operations, reducing scrutiny or supplying access to particular routes. These payments may be relatively small compared with destination market values, but they are critical services that keep the system running.[153]

In Thailand, one police informant explained that some police are traffickers themselves: 'I have personally experienced Thai anti-drug police working with the traffickers.[154] Getting bribes to look the other way, or consistent money to alert them of possible seizures.'[155] Another person who reportedly engages as a drug courier and human smuggler at the Mae Sot–Myawaddy border reported that he is often stopped by police and pays THB100 000 (US$3 000) per stop on a normal day, more for larger loads. He reportedly carries cash, given to him from the smuggling agencies, specifically for this purpose.[156] Although no similar testimonies were shared by interviewees in the other Mekong countries, the situation there is likely to be similar, given that structural corruption is documented to be pervasive in all countries.[157]

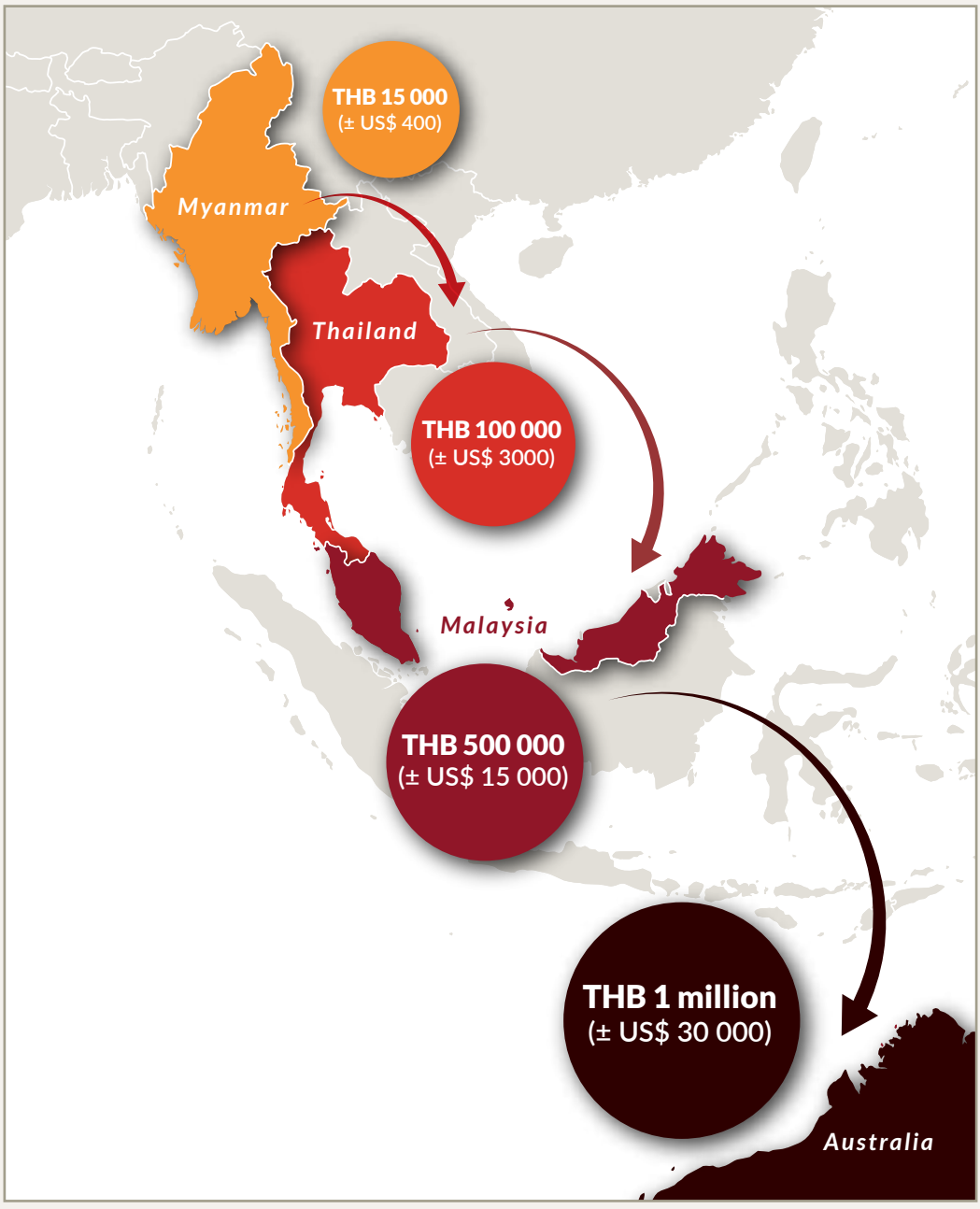


FIGURE 4 Comparative wholesale prices of Myanmar methamphetamine per kilogram along the supply chain.

The largest profit margins may be generated downstream because the price of crystal methamphetamine rises sharply once it moves from production and transit zones towards higher-value destination markets. The same commercial logic also applies to methamphetamine tablets, although the scale of margin expansion is far larger for crystal methamphetamine. One estimate placed the value of crystal methamphetamine at approximately THB15 000 (US$400) at the production site in Myanmar, which then rises to THB100 000 (US$3000) per kilogram in Thailand, approximately THB500 000 (US$15 000) in Malaysia and around THB1 million (US$ 30 000) in Australia (see Figure 4).[158] Case-level data from Thailand also demonstrates price increases for *yaba* within domestic distribution chains, including one case in which methamphetamine tablets were reportedly purchased at around THB8 (US$0.24) per pill wholesale and sold for up to THB50 (US$1.50) per pill in Bangkok.[159] Even if such figures vary by case and market conditions, they illustrate the core commercial logic: once the product reaches high-value markets, the profit margin can absorb seizures, courier losses, bribes, storage costs and repeated route changes.

These large profit margins also help explain why methamphetamine flows are resilient. The loss of individual shipments does not necessarily undermine the business model if enough consignments get through and downstream prices remain high. It also underlines why crystal methamphetamine is particularly attractive for export. Compared with methamphetamine tablets, it carries higher value in smaller volume, making it better suited to long-distance trafficking through maritime, air, parcel and courier channels.[160]

Tracing these profits is difficult because the financial system supporting the trade appears to be as layered as the logistics system itself. Even when financial investigations are conducted, they are unlikely to link back to the people that enable and protect production, trafficking and distribution. Cash payments are common at the lower levels, especially for couriers, drivers and local facilitators. Chinese yuan, Thai baht and other local currencies all appear in border-level transactions. Bank transfers may be used for some courier payments, but these generally expose the lower end of the network rather than the organizers.[161] At higher levels, the use of cryptocurrency, informal value-transfer systems (in Myanmar called *hundis*) and commodity-based laundering are commonly used to reduce the visibility of profit flows.[162] These mechanisms are particularly relevant for transfers in and out of Myanmar, not least because Myanmar tightly controls foreign exchange and has been designated a high-risk jurisdiction by the Financial Action Task Force, making transactions to and from the country subject to additional international scrutiny.[163]

Illicit proceeds appear to be laundered at and into the border economies around Tachilek, Bokeo and the Golden Triangle, which include casinos, KTVs, hotels, land holdings, gold shops and Chinese-linked commercial activity.[164] Gold appears particularly relevant as a potential store of value and a cross-border laundering mechanism, allowing illicit capital to be converted into a commodity that can move outside formal banking systems.[165] Entertainment venues, casinos and special economic zones may also provide opportunities to absorb cash, disguise ownership and connect drug profits with other criminal income streams.



IMPLICATIONS FOR NEW ZEALAND AND AUSTRALIA

Methamphetamine stemming from the Mekong makes up a significant proportion of the methamphetamine available in New Zealand and Australia, but the Mekong is not the only supplier. Recent years have seen increasing seizures of Mexico-produced methamphetamine, with Mexican cartels trafficking the drugs to Australia via Pacific island countries. According to Australian law enforcement, seizures of South East Asian-produced methamphetamine in have decreased notably in the country since 2021.[166]

Although the reduced seizures are noteworthy, this does not necessarily mean that Mekong meth supply has decreased in the country. New Zealand security officials have explained that Mekong methamphetamine continues to flow into New Zealand in similar volumes as before but is not being seized as frequently as shipments originating from Mexico. According to New Zealand authorities, the increase in North American methamphetamine seizure volumes may be a result of increased intelligence-sharing by North American authorities as well as interagency operations in response to this intelligence. Another reason for reduced seizure of Mekong-origin methamphetamine may be that traditional Mekong smuggling networks are better able to conceal their New Zealand-bound shipments and supply chains than their newer rivals.[167]

It may also be the result of the service-based criminal economy in the Mekong. The more compartmentalized and service based the market becomes, the harder it is to trace specific consignments back to a single controlling actor. No single cartel or kingpin controls the marketplace dynamics, but armed actors and groups affiliated with the Myanmar military provide protection and access in Myanmar, while brokers and coordinators connect supply to transport, and drivers and couriers move consignments while knowing little about the wider chain.

The conditions under which production in Myanmar take place inhibit a clear understanding of the total production capacity and output volume of methamphetamines. However, taking a broader look at the Mekong region – the channels through which it all moves – can provide an alternative perspective and help fill some of the known unknowns. For New Zealand and Australia, the Mekong is critical because, irrespective of where methamphetamines are produced, they are trafficked through routes spread across the entire region. Although it is unclear to what extent production happens in other countries beyond Myanmar, the region as a whole continues to generate, move and repackage high-value synthetic drugs through increasingly adaptable supply chains.

It is clear that we are confronting an adaptive and structurally embedded global enterprise, not simply another criminal market in the Mekong. The structural reality is that the regional methamphetamine market has become an engine to power global meth supply chains, facilitated by co-opted legitimate global logistics and protected by patronage networks and political complicity.

Mekong-produced methamphetamines are a global illicit business. Supply chains originate in the region but extend outward to global marketplace destinations making the methamphetamine business a significant and underestimated threat that extends far beyond the immediate region.[168] Recognizing this global reach is particularly important for New Zealand and Australia, two of the principal destination markets of Mekong methamphetamines.



RECOMMENDATIONS

Methamphetamine moving through the Mekong is an inherently regional business. While the production is centred in Myanmar, the illicit market and its high profitability rest on sophisticated and flexible multilayered regional supply chains and networks. The supply chains and the protection they receive are adaptive, allowing groups to quickly exploit new opportunities by adjusting the precursors used, expanding the product mix and testing new supply routes.

The methamphetamine business is embedded in the Mekong criminal economy: the same enablers that facilitate industrial-scale cyber scam operations also enable the regional drug economy. This underlines the urgent need for a more nuanced understanding of the supporting infrastructure, criminal actors and beneficiaries. The response to both the methamphetamine market and cyber scam operations would benefit from more regionally coordinated action that holistically approaches the underlying drivers and enablers of organized crime in the Mekong. Recommendations to disrupt the Mekong methamphetamine business are as follows:

- **Leverage the international political will to respond to cyber scam operations to enhance action against methamphetamine trafficking.** Achieving meaningful change requires substantial political will and resources. At present, the international community is more focused on the response to cyber scam operations. However, both criminal markets thrive thanks to the same enabling infrastructure. This provides an opportunity for the local and international communities working on drug trafficking to team up with those working on cyber scams and share experience, expertise and resources and break down siloes. It also provides an opportunity for national and international drug agencies to request targeted help and resources from their international partners and support agencies working to disrupt cyber scams.
- **Expose the enabling networks of the illegal drug trade and impose sanctions.** Most enforcement efforts focus on seizing and tracing the drug itself. A shift to mapping the myriad service providers and the enabling infrastructure that connects production and destination markets may yield more promising results. More effort needs to be put into going after and prosecuting the logistics coordinators, corrupt facilitators, financial channels, chemical procurement systems, shipping intermediaries, storage points and protection networks, both in the Mekong and in destination markets. Private sector and civil society organizations can support the mapping of networks – not necessarily just people – to enable a better understanding of who finances, protects and profits most from the trade. Sanctions against those who are found to be enabling the business of methamphetamine should also be considered.

- **Elevate precursor and pre-precursor control as a high-level diplomatic priority, including with India and China.** The methamphetamine economy in the Mekong depends not only on trafficking routes for the finished product but also on the commercial, regulatory and logistical systems through which chemicals, pre-precursors and production equipment are sourced and diverted. Given the importance of China- and India-linked chemical supply chains, governments of downstream destination markets should place greater emphasis on political dialogue and practical cooperation with these countries to identify suspicious chemical orders, disrupt diversion networks and strengthen controls over dual-use materials. Chemical interdiction should be treated as a strategic diplomatic and economic concern.
- **Reconsider training and capacity-building for law enforcement in the Mekong.** Corruption among law enforcement is a strategic enabler of the illegal methamphetamine trade across the Mekong, but its presence is not homogeneous. For example, cooperation with national law enforcement leadership may function without apparent interference from corruption, even where corruption among officers at border posts undermines enforcement. Engagement and training of Mekong law enforcement by international donors needs not only to keep these local realities in mind but to actively challenge the normalization of corruption and build peer accountability structures.
- **Push for more private sector responsibility and accountability.** Logistics, mining and financial services are clear enablers of the criminal market. As such, the private sector also has a crucial role in the response. For example, enhanced cooperation between port and airport authorities, shipping companies and law enforcement would not only help track what is leaving the Mekong ports but also better control what is coming in and identify where pre-precursors are moving next. More work needs to be done to bring the private sector into the response to reduce the risk of criminal infiltration into professional entities.
- **Improve data reporting by making user-level and harm reduction data part of drug market intelligence.** There are significant gaps in the understanding of the Mekong methamphetamine economy, either because data is not available and accessible at all or because it is not comparable across countries. Improving the pipeline of data for law enforcement and prosecution will be critical to painting a more comprehensive picture of how the business of methamphetamine works. One way of doing this could be to collect independent user-level and harm reduction data and include it in official drug reports. Users are often the first to see shifts in potency and prices and including this information, even if qualitative, could provide early signals of shifts in the broader drug economy. Law enforcement should also increase reporting on potency and impurities in substances seizes as a means of public education about risks. This needs to go hand in hand with enhanced testing and laboratory capacities and should be coupled with challenging the punitive responses to drug use and the stigmatization of people who use drugs. If people who use drugs fear arrest, detention or stigma, they are less likely to seek help, report dangerous substances or participate in monitoring.
- **Continue monitoring the trajectory of the methamphetamine business.** The Mekong drug economy is undergoing rapid changes, and data is needed to better understand the nature of those changes. More research is required on the role of Vietnam as an exit hub and on production sites in Cambodia and Laos. More information is needed on where and which volumes of methamphetamine are stockpiled across the region, how the criminal groups are networked and where the money is laundered. The role of private sector businesses also requires more study.



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