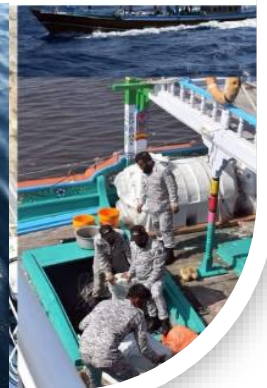




NARCOTICS SMUGGLING TREND ANALYSIS JMICC REPORT 2025



PREFACE

This report provides **comprehensive analysis of narcotics smuggling** in the region focusing Makran Coast, which has remained a key conduit for the transnational smuggling of heroin, hashish, and more recently, methamphetamine. Originating from Afghanistan, narcotics is smuggled through Makran Coast using skiffs for onward transportation to dhows destined to different destinations across continents.

Drawing upon **analysis of interdictions made by Pakistan Navy (PN), Pakistan Maritime Security Agency (PMSA), Combined Maritime Forces (CMF)**, as well as study of relevant reports from the United Nations Office on Drugs and Crime (UNODC), this document offers a comprehensive **overview of the drug trafficking landscape in maritime domain**. It examines smuggling **patterns, evolving trends including maritime smuggling routes etc.**

Emphasis is placed on the influence of environmental factors such as weather as well as the geopolitical implications of developments like the Taliban's ban on poppy cultivation in Afghanistan and its effects on narcotics smuggling.

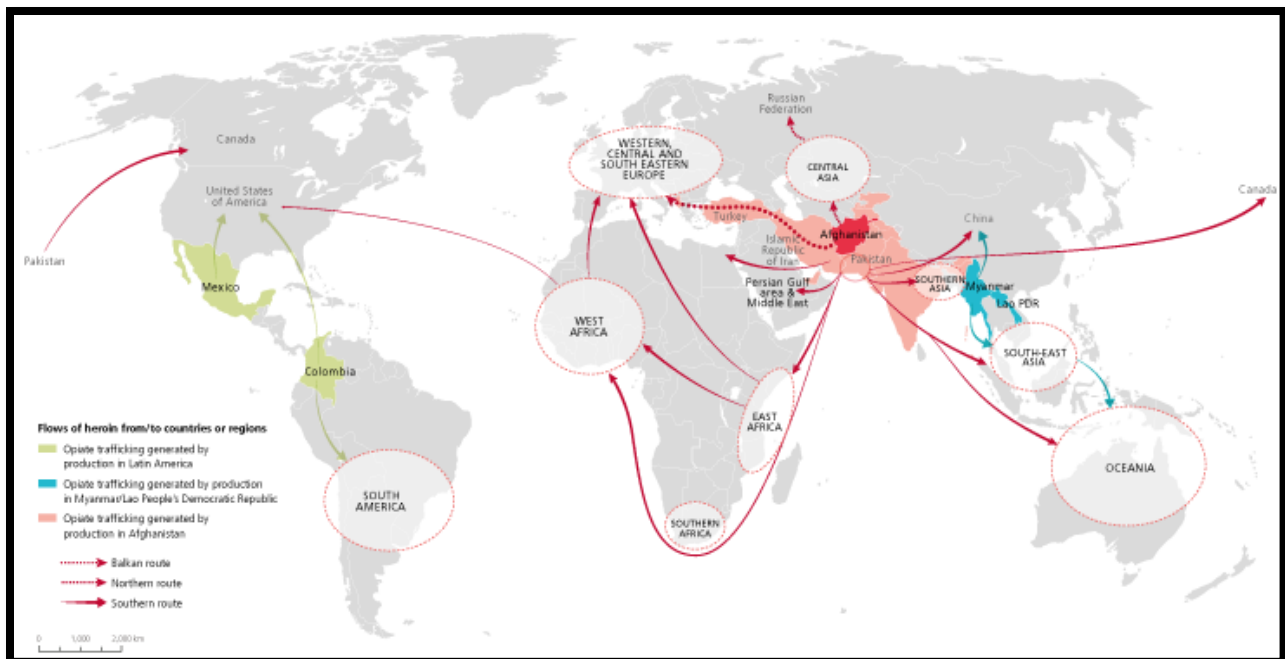
This analysis report is intended to provide an insight into the evolving dynamics of narcotics trafficking via the Makran Coast, thereby supporting Counter Narcotics Effort by LEAs.

NARCOTIC SMUGGLING TRENDS ANALYSIS

INTRODUCTION

1. Narcotics smuggling through maritime domain presents a persistent threat to maritime security, governance, and economic stability. The vast and often under-regulated expanse of the world oceans has been systematically exploited by **Transnational Criminal Networks (TCNs)** engaged in the trafficking of illicit narcotics. These networks leverage congested maritime domain and jurisdictional limitations to conduct long-range smuggling operations with relative impunity.

2. The global narcotics network through maritime domain is geographically spread and operationally diverse. From the **Caribbean and Eastern Pacific**, where **cocaine** dominates trafficking flows, to the **Indian Ocean Region (IOR)** and **Southeast Asia**, which are key transit zones for **heroin**, **hashish**, and **synthetic drugs such as methamphetamine**, narcotics smuggling through maritime domain has remained rather persistent in both scale and sophistication. Drug smuggling syndicates employ a range of tactics worldwide from the use of modified fishing vessels/ dhows to submerged vessels and containerized concealment techniques to avoid detection and interception. Undermentioned map show movement of illegal drugs flow around the globe.



Drug Flow Around the Globe (UNODC Report 2024)¹

¹ World Drug Report 2024 - Drug market patterns and trends. UN: Office on Drugs and Crime.

3. In the **Caribbean and Eastern Pacific**, South American cocaine is trafficked to North America using fast boats and semi-submersible vessels. The **West African and Gulf of Guinea regions** serve as key **transshipment** hubs for drugs from **Latin America destined for European markets**, taking advantage of porous coast line. **North Africa and the Mediterranean** act as major transit points for cannabis and heroin, with trafficking routes extending to Europe. The **Indian Ocean** has become an increasingly active corridor for narcotics trafficking, particularly heroin, hashish, and more recently, methamphetamine (Commonly known as Meth). Afghanistan has traditionally remained the primary source of these drugs. Overall, these regions are increasingly infested by organized drug syndicates supporting crimes, insurgencies, and terrorist organizations, destabilizing regional security matrix.

4. The **Makran Coast** has remained an emanating line for maritime narcotics trafficking. This region's location along the Arabian Sea with dense fishing provides opportunity for smugglers to undertake their nefarious activities while merging in legitimate fishing.

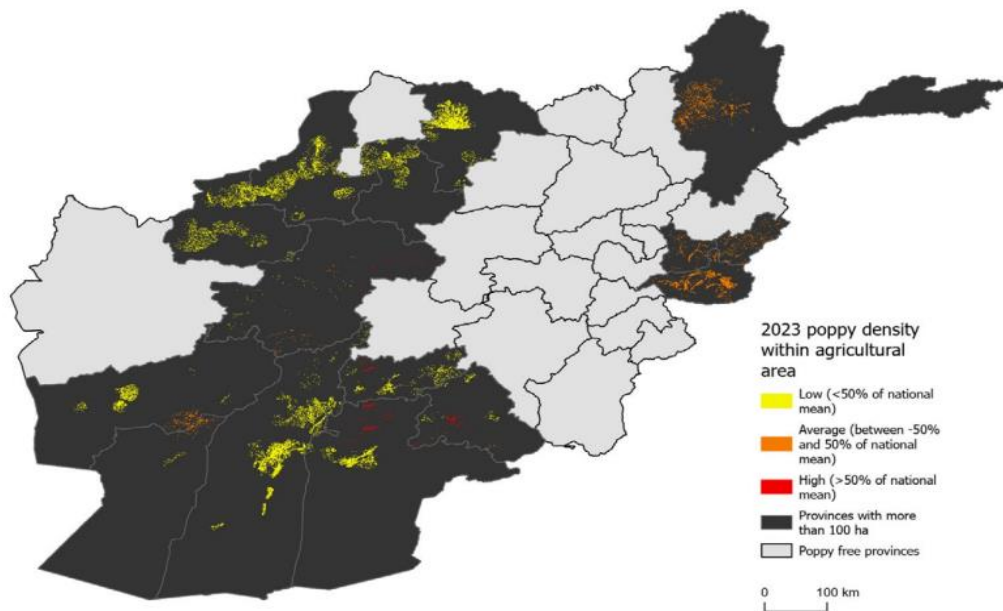
5. Historically, **heroin and cannabis resin (commonly known as hashish)** have been the **dominant narcotics trafficked** from the Makran Coast. However, since 2014, there has been a notable **surge in methamphetamine smuggling** from the region. This shift is mainly attributed to comparatively lower production costs and significantly higher profit margins associated with methamphetamine (Meth). Furthermore, the Taliban ban on poppy cultivation in Afghanistan has also resulted in shift towards Meth smuggling by cartels; these aspects are discussed further in later part of the report.

6. Narcotics is transported from Afghanistan through various land routes before reaching the Makran Coast. From there, smugglers use the traditional dhow vessels to move the contraband across maritime corridors toward global markets, often exploiting the region's remote coastline.

NARCOTICS PRODUCTION SOURCES

7. Afghanistan is the primary source of narcotics production in the region including heroin, hashish, and methamphetamine. The opium poppy fields in Helmand, Kandahar, and Nangarhar provinces supply **heroin**, while **cannabis** farms produce **hashish**. **Methamphetamine is often produced using ephedra shrub** extract, which grows naturally and also cultivated in Afghanistan's mountainous regions. Favorable climatic, agricultural and geopolitical conditions in Afghanistan have made it a major producer of these substances.

Density distribution of the 10,800 ha of opium cultivation across provinces in Afghanistan, 2023



Red areas indicate 'pockets' of opium poppy cultivation, with – in comparison to the remainder of the country – higher densities of opium poppy cultivation. In comparison to earlier years, density is very low. Grey provinces are estimated to have less than 100 ha of cultivation and are considered poppy-free. Opium poppy density is calculated by its preponderance within the area's agricultural land.

Opium Cultivation in Afghanistan (UNODC Report 2024)



Ephedras are hardy plants that tend to favour poor soils in dry environments.

Ephedra's Plant in Afghanistan Mountains

8. Narcotics smuggling network is highly organized, often leveraging traditional knowledge of terrain, local connections, and sophisticated evasion tactics. This segment of the network relies on experienced traffickers who specialize in moving contraband through remote and hostile terrain. The region's rugged coastline, characterized by hidden coves, isolated beaches, and reduced law enforcement presence, provides ideal conditions for smuggling. Once narcotics reaches the Makran Coast, traffickers rely on maritime transporters to move shipments across international waters.

NARCOTIC SMUGGLING ROUTES/ LOADING AREAS FROM MAKRAN COAST

9. Narcotics **smuggling dhows** are of similar design commonly used for **legitimate fishing along the Makran Coast** and certain areas of the Northern Indian Ocean. These dhows are called **Jellibut Dhows** in local language.



Jellibut Type Dhows Commonly Used for Narcotics Trafficking

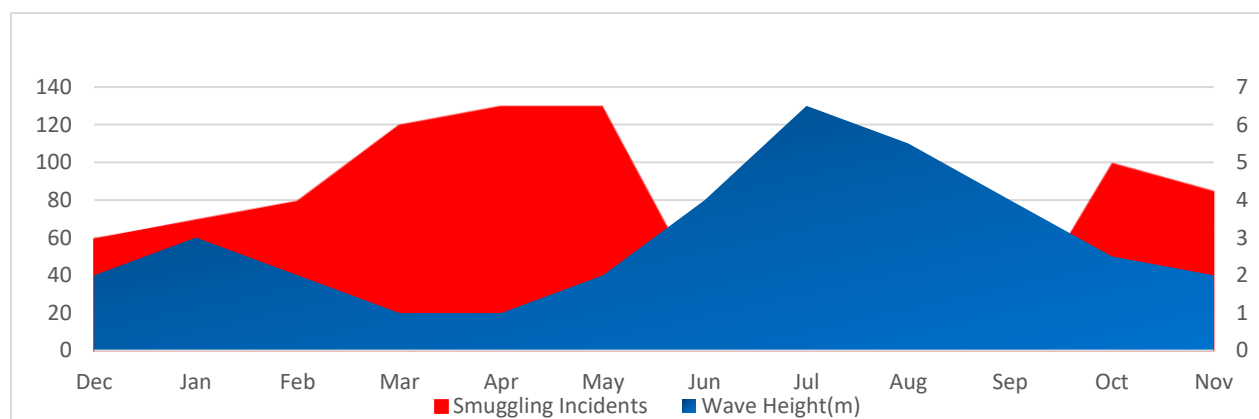
10. These dhows merge with the legitimate fishing and wait for opportune time to undertake loading through skiffs. Upon loading, narcotics is trafficked across the Indian Ocean through different smuggling routes. Analysis of historic narcotic trafficking patterns identifies three primary narcotic smuggling routes. The first leads towards, the second leads to East Africa, whereas, the third route transits south to East African destination and at times towards South East taking a wider approach along 59 degree Longitude. On arrival at their destinations, dhows typically conduct another at-sea transfer to smaller vessels that take the narcotics to shore.

11. The smuggling route to Yemen heads across the North Arabian Sea and terminates near **Nishtun Bay off Yemeni Coast**, however may lead further along Somali Coast. Once ashore, various methods are used for transportation within land. Heroin and methamphetamine are generally destined for East Africa. Typical transit time is approximately 14 days for a southbound leg with an SOA of 7kts and permissive sea conditions.

12. Heroin and methamphetamine are also smuggled along 59 degree longitude; this route is primarily intended to avoid naval units operating closer to Coast. Average transit time on this track, based on an SOA of 7kts is approximately 19 days.

EFFECTS OF WEATHER ON NARCOTICS TRAFFICKING

13. Weather is a significant factor affecting narcotics smuggling in the region. Accordingly, understanding of seasonal variations is vital for situational awareness and pattern of illicit activities. During SW monsoon, small boats activity in the region is significantly reduced due to high swells. During fall transition, from mid-September onwards, smuggling activities gradually increase. This entails that **narcotics trafficking inversely correlates to wave height**. Peak activity occurs when conditions are favorable throughout the AOO (wave height 0 - 3 feet; Oct - Apr), with some activity during the transition periods when conditions are marginal (3 - 5 feet swell height). Reduced smuggling activity is observed during the SW Monsoon period (June - August). Chart depicting seasonal variation in smuggling activities is as under:



Number of Seizures v/s average Wave Height in the Region

COUNTER NARCOTIC EFFORT BY PAKISTAN NAVY (PN) AND PAKISTAN MARITIME SECURITY AGENCY (PMSA) AND COMBINED MARITIME FORCES

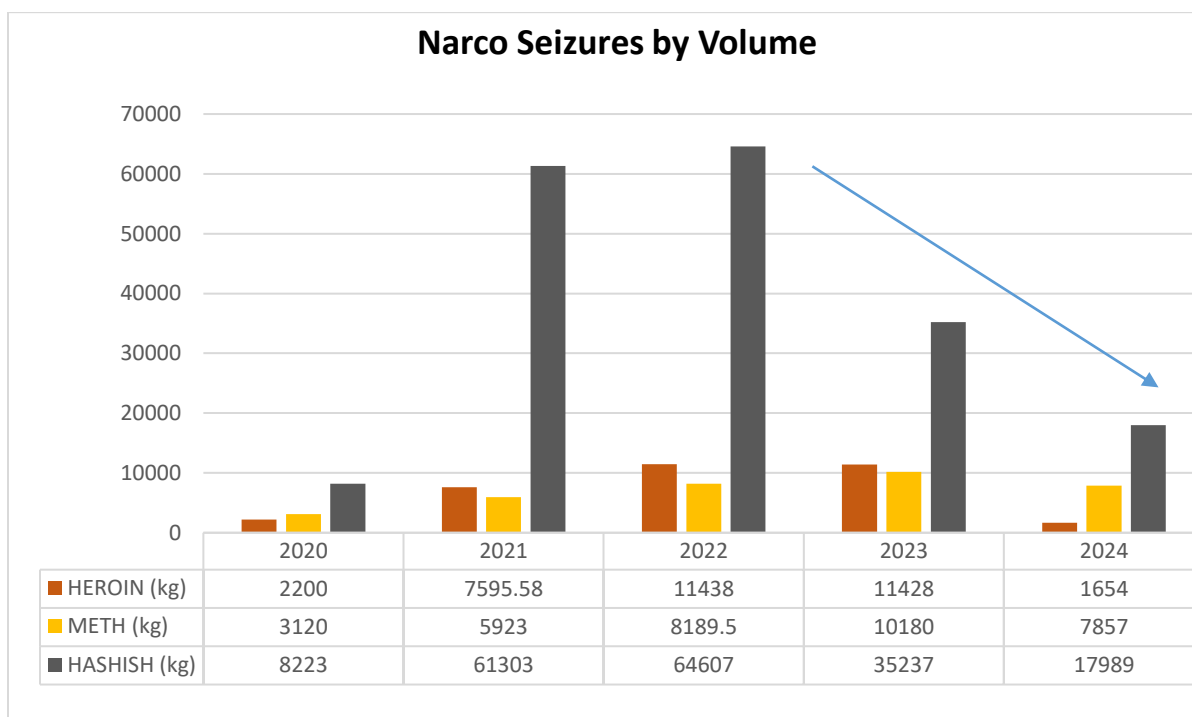
14. Pakistan Navy and Pakistan Maritime Security Agency have significantly enhanced counter narcotics efforts in recent years, undertaking numerous successful narcotics seizures, thereby considerably impacting narcotics smuggling networks and forcing smugglers to change their TTPs. Leveraging modern and agile surface platforms, PN and PMSA counter narcotics effort has remained impactful towards disruptions of illicit activity, however, continuity of effort is essential to illicit smuggling activity under check.

15. Combined Maritime Forces (CMF) at HQ US NAVCENT Bahrain has also played a significant role in combating narcotics trafficking across the Arabian Sea and wider Indian Ocean region. Units associated with HQ CMF/ CTF-150 conducts frequent

interdictions at sea, seizing large quantities of narcotics from dhows plying along known smuggling routes. Beside independent operations, PN is also effectively contributing towards CMF efforts through participation of ships and leading CTF 150. The collaboration has resulted in major seizures worth millions of dollars and significantly disrupting drug supply chains.

NARCOTICS SEIZURE BY VOLUME

16. a. The volume of narcotics seized during last 5 years is depicted as under:



Narcotics Seizures 2020-2024

- b. As seen above, there has been significant reduction in volume of narcotics seized since 2024, especially Hashish (possible reasons for the same are discussed in ensuing paragraphs). Methamphetamine (meth) trafficking is expanding, thus reshaping illicit drug markets. Heroin trafficking continued through 2022 and 2023, until in 2024 when seizures of meth surpassed heroin for the first time. Current trend of meth manufactured using the local Ephedra bush may continue due higher profit margins and availability of source material.

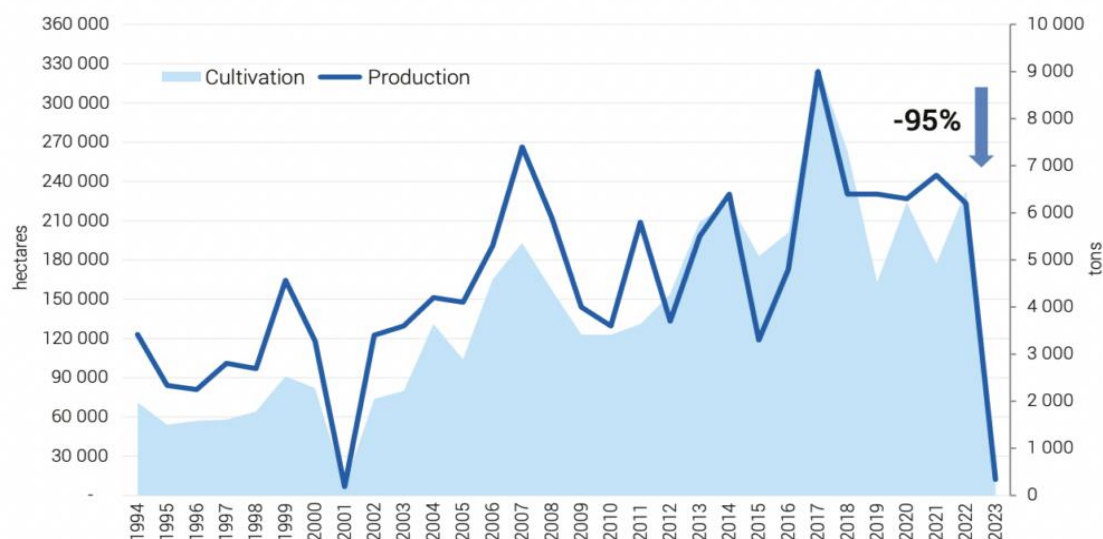
REDUCTION IN NUMBER OF NARCOTIC SEIZURES

17. The reduction in number and volume of seizures in the region has been analyzed; same may be attributed to:

a. As per report of UNODC report, in April 2022, a ban prohibiting Poppy cultivation and all types of narcotics was announced by Taliban. Area under opium poppy cultivation subsequently declined by 95%, indicating that farmers were mostly adhering to the ban. UNODC used high resolution satellite imagery and remote sensing techniques to identify areas that remain under cultivation. Remote sensing data and reports from the field indicated that opium poppy was moved to more remote and concealable locations, such as into yards and other confined areas.

b. Reduced number of narcotics seizures in 2024 is likely a reflection of the ban on narcotics beginning to have effect on supply of narcotics. A sustained reduction in opium production may lead to a replacement of Hash/ heroin or opium by other synthetic opioid substances such as fentanyl or methamphetamine.

Opium cultivation and production in Afghanistan, 1994-2023.



Opium production in Afghanistan (UNODC report 2024)

c. Another likely reason for apparent reduction in narcotics smuggling activity is successful narcotics interdictions made by PN/PMSA units followed by legal finish on dhows apprehended. Since 2022, PN/ PMSA units have conducted a large number of successful narcotics interdictions. These interdictions by PN/ PMSA units are followed by legal proceedings/ jail terms for personnel involved. This entails number of narcotics smuggling dhow/ crews were taken off the narcotics smuggling grid. The same is considered to have significantly impacted narcotics smuggling, especially within Pakistan's maritime zones.

- d. Enhanced presence of CMF assets in the area has added to deterrence leading to reduction in number of smuggling activity.

CONCLUSION

18. The maritime narcotics smuggling landscape, particularly along the Makran Coast, presents a complex and sustained challenge to maritime security and law enforcement. The persistent threat posed by transnational criminal networks, which exploit the vast maritime domain, underscores the need for enhanced maritime domain awareness and coordinated counter narcotics efforts.

19. The analysis reveals that the Makran Coast serves as a critical hub for the trafficking of various narcotics, including heroin, hashish, and increasingly, methamphetamine. The shift towards methamphetamine trafficking is particularly concerning due to its higher profit margins and the potential for increased production in Afghanistan.

20. Counter narcotics operations conducted by the Pakistan Navy, Pakistan Maritime Security Agency, and Combined Maritime Forces have resulted in disrupting these networks to some extent, as evidenced by a reduction in overall narcotics seizures and a notable decline in opium production following the Taliban's ban on poppy cultivation. However, the rise of synthetic drugs like methamphetamine poses new challenges that require ongoing vigilance and adaptive counter narcotics measures. As smugglers continue to evolve their TTPs, law enforcement agencies must remain agile, adaptive and responsive to these changes.