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Trends in Mexican Opioid Trafficking and Implications for U.S.-Mexico Security Cooperation

As a primary source of and transit country for illicit drugs destined for the United States, Mexico plays a key role in U.S. drug control policy. Included among the illicit drugs produced in Mexico are heroin, fentanyl, fentanyl analogues, and other opioids—substances that have contributed to the ongoing opioid epidemic in the United States. As policymakers search for solutions to the current opioid crisis, some may look abroad to the countries where illicit U.S.-bound opioids are produced and trafficked, including Mexico.

Global Context

Heroin is a highly addictive and internationally controlled narcotic processed from morphine and extracted from certain types of opium poppy plants. According to the United Nations Office on Drugs and Crime (UNODC), global opium poppy cultivation levels were higher in 2017 and 2018 than in any year since 2000. Less than 10% of global opium poppy cultivation took place in Mexico.

Although heroin from Southwest and Southeast Asia accounts for the vast majority of global production, Latin America has featured as the main source of U.S.-consumed heroin in recent decades. Until recently, Colombia and, to a much lesser extent, Guatemala supplied the bulk of the U.S. market. Since 2013, the majority of U.S.-seized heroin has originated in Mexico as Mexican transnational criminal organizations have taken over the U.S. market.

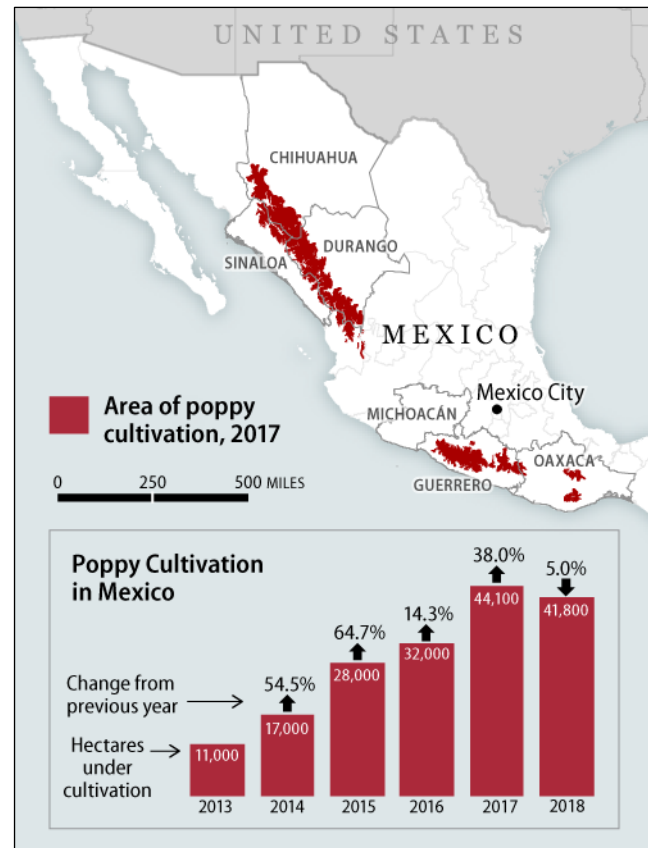
U.S. Estimates of Mexican Opium Poppy Cultivation and Heroin Production

According to the U.S. Office of National Drug Control Policy (ONDCP), 41,800 hectares of opium poppy were cultivated in Mexico in 2018—down 5% compared to 2017, but up 280% since 2013 (see **Figure 1**). Lower prices for farm gate opium in 2018 (due in part to a possible oversupply amid stable U.S. demand) appear to account for the decline in cultivation that year. Opium poppy cultivation historically has been concentrated in the hilly, western regions of the country in two primary zones: the southwestern states of Guerrero (and to a much lesser extent Oaxaca) and the tri-border or “golden triangle” region of Durango, Sinaloa, and Chihuahua.

Along with opium poppy cultivation, heroin production has also surged in Mexico since 2013. According to ONDCP, Mexico produced an estimated 106 metric tons of potential pure heroin in 2018, down 4.5% compared to 2017, but up 308% since 2013. In 2018, Mexican-sourced heroin accounted for 93% of the total weight of U.S.-seized heroin analyzed in the Drug Enforcement Administration’s (DEA’s) Heroin Signature Program. According to data collected by U.S. Customs and Border Protection, heroin

seizures along the Southwest border have also increased, doubling between 2010 and 2015, briefly declining in 2016, and then increasing again in 2017 and 2018 to the highest recorded total since 2012.

Figure 1. Poppy Cultivation in Mexico



Source: Graphic created by CRS using data from ONDCP (2019), State Department (2017), Esri (2014), and DeLorme (2014).

Eradication and Interdiction in Mexico

The Mexican military is involved in several aspects of domestic drug control. Since the 1930s, the army has conducted drug eradication activities. The military is also involved in detecting and interdicting illicit precursor chemicals, currency, and drugs; dismantling clandestine drug labs; and arresting drug kingpins. In 2017, the navy assumed control over Mexico’s ports (where most imports of precursor chemicals needed for the manufacture of illicit drugs arrive) from the country’s customs agency.

During 2019, the first year of Andrés Manuel López Obrador’s presidential term, eradication and interdiction efforts lagged. Mexico’s armed forces eradicated an estimated 11,791 hectares, down from 21,556 hectares in

2018. Similarly, the defense ministry reported a 70% decline in heroin seizures as compared to 2018 and the lowest number of drug labs destroyed (33) in six years. Partially in response to U.S. pressure, eradication and interdiction trends have begun to shift upward.

Fentanyl and Fentanyl Analogues

Fentanyl is a synthetic opioid significantly more potent than heroin and approved for medical use as a painkiller and anesthetic. Linked to the ongoing U.S. opioid epidemic, fentanyl and fentanyl-related substances (i.e., fentanyl analogues) have become more available throughout the United States since 2014.

China has become a major source of fentanyl and fentanyl analogues. Traffickers typically smuggle these substances into the United States through Mexico, Canada, and direct mail. In May 2019, the Chinese government implemented strict controls on all forms of fentanyl, including fentanyl analogues—a development that led to a decline in illicit U.S.-bound shipments from China and the emergence of Mexico as an important source of fentanyl-related substances. Since 2018, several clandestine labs capable of synthesizing fentanyl-related substances and pill-pressing operations that laced fentanyl into counterfeit pharmaceuticals have been dismantled in Mexico.

Mexico-based TCOs, particularly the Sinaloa Cartel and *Cártel de Jalisco Nueva Generación* (CJNG), are involved in the production and trafficking of fentanyl-related substances, according to DEA. Although the Mexican government regulates and limits the import of two fentanyl precursor chemicals (NPP and ANPP), TCOs reportedly rely on precursor (and pre-precursor) chemicals diverted from China and India to synthesize and produce large amounts of fentanyl-related substances with relatively low purity (often less than 10%). According to a January 2020 DEA report, *Fentanyl Flow to the United States*, more fentanyl-related substances (based on weight) are now trafficked across the Southwest border than sent directly to the United States from China.

Combating Opioids: What Role for U.S.-Mexican Security Cooperation?

U.S.-Mexican efforts to improve antidrug efforts in Mexico increased under the Mérida Initiative, a U.S.-Mexican partnership for which the U.S. Congress has provided \$3.1 billion since FY2008. Mérida Initiative funds support bilateral and trilateral (with Canada) efforts to increase cooperation to combat heroin and fentanyl production and trafficking. Recent efforts aim to

- improve Mexico's data on and targeting of opium poppy eradication efforts and data on opium cultivation and heroin yield through collaboration with UNODC;
- provide specialized training and personal protective equipment to Mexican personnel for interdicting drugs (such as fentanyl), pill pressing operations, and illicit drug labs;
- upgrade Mexico's national drug control system to better track the flow of chemical precursors;

- use intelligence to target which containers to inspect at Pacific ports;
- train all canines provided through the Mérida Initiative in fentanyl detection;
- engage bilaterally through a memorandum of cooperation to address specifically precursor chemicals and clandestine laboratories; and
- work with Canada through the North American Drug Dialogue (last held in December 2019) to develop common assessments of the opioid threat, regulate and classify fentanyl and its chemical precursors, improve container security, and share best practices.

Although the United States remains concerned that Mexico lacks a comprehensive drug control strategy, bilateral efforts have yielded some results. Since December 2018, U.S. training and equipment have helped Mexico's defense ministry seize 293,000 fentanyl pills. U.S.-trained canines detected 26 kilograms of fentanyl in the first six months of 2019. In August 2019, the U.S. and Mexican governments formed a drug policy group within a broader U.S.-Mexico High-Level Security Group.

Other Policy Issues

In addition to bolstering domestic efforts to address opioid demand, Congress has held hearings on Mexico's role in heroin production and trafficking, introduced several resolutions on the trafficking of illicit fentanyl from Mexico and China, and considered multiple bills to address the import of illicit opioids and analogues into the United States. As Congress reviews recent efforts and considers additional options, possible issues may include

- the U.S. role in or responsibility for addressing the social consequences of U.S. demand in foreign source and transit countries—including in Mexico;
- the extent to which competition among criminal groups vying to satisfy U.S. opioid demand has fueled record violence in Mexico;
- the extent to which fentanyl and fentanyl-related trafficking may be affecting Mexican opium poppy cultivation;
- whether tension in U.S.-Mexican relations over other issues affects prospects for future bilateral cooperation to address heroin production and trafficking; and,
- how President López Obrador has responded to U.S. pressure to increase his government's antidrug efforts.

For additional background, see CRS Report R45790, *The Opioid Epidemic: Supply Control and Criminal Justice Policy—Frequently Asked Questions*; and CRS In Focus IF10890, *Illicit Fentanyl, China's Role, and U.S. Foreign Policy Options*.

Liana W. Rosen, Specialist in International Crime and Narcotics

Clare Ribando Seelke, Specialist in Latin American Affairs

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