



**The Brookings Institution**

***The Killing Drugs* podcast**

**“The emerging fentanyl risk in South America”**

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*Episode Summary:*

In this episode, Vanda Felbab-Brown discusses the emerging smuggling and retail of illicit fentanyl in South America with guests Daniel Mejía and Sara García. They explore the sources and networks behind this threat, as well as the factors that mitigate or could amplify it. They also analyze South America’s preparedness to respond to fentanyl trafficking and use.

[music]

**FELBAB-BROWN:** I am Vanda Felbab-Brown, a senior fellow at the Brookings Institution. And this is *The Killing Drugs*. With more than 100,000 Americans dying of drug overdose each year, the fentanyl crisis in North America, already the most lethal epidemic ever in human history, remains one of the most significant challenges we face as a nation. In this podcast and its related project, I am collaborating with leading experts on this devastating public health and national security crisis to find policies that can save lives in the U.S. and around the world.

On today's episode, I am delving into the current state of fentanyl production, trafficking, and use in Latin America and potential solutions for addressing it. My guests are Doctor Daniel Mejia, an associate professor in the economics department at Universidad de Los Andes and former secretary of security of Bogota, the capital of Colombia, where he served between 2016 and 2018. And Sara Garcia, a researcher at Insight Crime, a think tank and media organization. Their project paper is titled "A First Overview of Fentanyl Markets Distribution and Consumption in South America."

Daniel and Sara, thank you very much for joining me today.

**GARCIA:** Thank you for having us.

**MEJÍA:** Thank you, Vanda. It's great to be here.

**FELBAB-BROWN:** Daniel, let's start with you. Just please give us a first cut take. What is the incidence of fentanyl trafficking and use in South America today?

[1:42]

**MEJÍA:** Well, Vanda, what we found with Sara is that the incidence of fentanyl use, production, and trafficking is very low compared to what we have seen in other countries, especially in North America. Currently there is no evidence of illegal fentanyl production in South America. In no country found we found evidence of labs or facilities producing illegal fentanyl. And most of the seizures that have occurred in South American countries of fentanyl or synthetic opioids have come from diversion from medical facilities.

We have to say that although the seizures of fentanyl diverted from medical facilities have increased, especially that's the case for Colombia and Chile, they are still very low. The numbers independently of how we analyze them in terms of rates or total numbers or depending on the size of the country, the figures for fentanyl seizures coming from diversion from medical facilities are still very low.

I have to say also that controls and regulations are relatively strong in medical facilities, in particular in the health system in general. And we also found that although one would initially think that there is an involvement of DTOs, of drug trafficking organizations, or organized criminal groups in fentanyl trafficking, we have no evidence of that in South America, despite some media outlets that have tried to say this.

I think we have two explanations for this, of the fact that we have not seen any involvement of organized criminal groups in fentanyl production or trafficking. Number one is that the demand for opioids in South America is extremely low. For opioids or synthetic opioids, it's very low. And it's not a profitable market to enter into compared to the opportunity cost.

And that's the second reason. The opportunity cost that these organized groups, organized criminal groups, their opportunity cost of getting involved in the production and trafficking of synthetic opioid is extremely large and is extremely large right now because the profits and the incidence of cocaine markets is thriving at the moment.

**FELBAB-BROWN:** We will absolutely talk about the drug trafficking groups, how they behave differently in North America versus Latin America, South America, at least for now. And what are the other illegal economies and the cocaine they are involved in. But, Daniel, just before I ask you about how robust is the data that we have, how much monitoring there is of fentanyl trafficking? And for that matter, you didn't mention anything about fentanyl use. Is there any fentanyl use in South America?

[4:22]

**MEJÍA:** It's extremely low. And let me start with this point. I would say that the available surveys that monitor drug use in the region are relatively strong. They are well-designed, relatively frequent. For instance, in Colombia, countries such as Chile, Argentina, we see these surveys coming out every 2 or 3 years at most. And I would say that we can trust information on these surveys on fentanyl use or synthetic opioids used in the region.

So, I would say that the reason for not having found a significant use of fentanyl is not because the surveys are not well designed or conducted. I think this information is real, and we can trust this information. The incidents of fentanyl use in the region is very low.

Given the fact that many South American countries have faced a significant drug production and drug trafficking in the region, the monitoring of these activities in the region is very good. And the information coming from intelligence agencies or the judicial system is also very good.

But let me point out to something that is very strong in Latin America. In Latin America in general and South America in particular, is the role of civil society organizations in monitoring drug use, their composition, and risk of what illegal substances are being traded in the streets in different cities in the region. And they have played a significant role.

I would like to mention one organization in Colombia, which is the organization led by Julian Quintero, which continuously monitors the substances that are being traded and what these substances contain. And in a long interview we had with Julian, he clearly stated that they haven't found significant traces of fentanyl in the drugs being consumed in the street, very scarce information on this. So, I would say that the information is really good, and we can trust that actually fentanyl use in South America is low or very low at the moment.

**FELBAB-BROWN:** Well, that is very interesting, Daniel, what you said, because this is certainly in striking contrast to another country in Latin America, Mexico, about which we speak in a separate episode where the outgoing government of President Andrés Manuel López Obrador has simply on his own denied that there is any fentanyl use and where there's been no systematic official government monitoring. Yet autopsies conducted on bodies in various parts of the country, particularly north, found the presence of fentanyl in at least one third of the cadavers. So, much greater use than the government of Mexico knows about than it wants to know about.

And certainly, monitoring in other parts of the world like East Asia is probably nowhere at the level where it should be. So, very interesting to hear that the level of monitoring in South America, in the countries that you are looking at, Colombia, Brazil, Chile, and Argentina is robust.

So, Sara, let me turn to you. Daniel was starting to talk about the criminal groups behind drug trafficking and certainly behind drug trafficking in the United States. Those are the Sinaloa cartel and cartel Jalisco Nueva Generación that in North America—in Canada, the United States, and Mexico—are the principal vectors of fentanyl. He spoke about the small incidence of diversion of fentanyl from medical facilities, from the medical system to the street, to illicit use. Can you describe the theft? Can you describe this diversion? Who is involved? Sounds like it's not the large criminal groups. Who are the smugglers? Who are the perpetrators? And where does the diverted fentanyl go?

[8:06]

**GARCIA:** Sure. Thank you, Vanda. First, it is important to note that the authorities we spoke with in different countries did not identify an actual involvement of the organized crime groups, whether in the theft or in the smuggling of fentanyl. However, it is something that is still under investigation in the different countries.

What we have seen so far is that the networks behind these dynamics are small networks of people who are committing these thefts and diversions, mainly from the medical facilities or hospitals. For example, in Colombia we found that these networks use different strategies such as, for example, using health personnel inside hospitals for the theft, or using medical prescriptions for access to fentanyl, and even hospitals' fentanyl leftovers.

And in Chile it is similar. For example, in one of the seizures that we analyzed made by the Chilean authorities, for example, medical prescriptions were found in a facility. And they also found that there was this anesthesiologist that was authorizing access to fentanyl to the members of the criminal network. Also in Chile, the theft from hospitals and theft from laboratories that produce pharmaceutical fentanyl is a common dynamic. In Brazil, in the other way, we have small quantities of medical grade fentanyl that have been found in small cities throughout the country, which showed us that there are small networks that find windows of opportunity in fentanyl supply chain with low surveillance in order to commit those thefts.

Argentina, in the other hand, is an interesting case as Argentina has had deaths due to the recreational use of fentanyl analogs, specifically carfentanil, which was mixed

to cocaine and resulted in the death of 24 people who consumed it without being aware that the cocaine they were consuming had carfentanil.

And it show us two things. The first one is that there may be a link between micro trafficking networks in the mixing of fentanyl with other drugs. And also, the second important thing that it showed us is that there are networks start accessing controlled substances such as carfentanil through some means. Unfortunately, as Daniel said, there are many limitations to accessing information specifically in Argentina. So, it is something we continue to investigate.

However, it brings me to an important point to conclude. The countries that we studied, fentanyl has been seized in facilities where other drugs were present. For example, in Colombia, tusi, which is a common synthetic drug generally composed of ketamine and ecstasy, but also in facilities where there was a presence of cocaine, marijuana, among other types of drugs. And this tells us that these small networks that divert fentanyl for medical use might be directly related to micro trafficking networks that might be looking to mix fentanyl or medical use fentanyl to other drugs.

**FELBAB-BROWN:** Thank you for that. So, just to explain to our listeners, carfentanil about which you spoke is an analog of fentanyl, even more potent than regular fentanyl. And the micro networks that you speak about would be the networks that source it locally, like from local medical facilities, and distribute it in local retail markets—do not seek to transport the fentanyl over large markets. And this could be happening either because the dealers are trying to develop new use, habituate users to fentanyl? Or would there be other reasons, Sara, why they are mixing fentanyl into the other drugs?

[12:20]

**GARCIA:** Yeah, well, that's something we still continue to investigate. What we have found so far, there's not at the moment a market for fentanyl in the countries that we analyzed, but it is an alarming signal—the mixture of fentanyl with other drugs—because that's something we have seen in other countries that have faced a fentanyl crisis. For example, the United States, where they started to mix different types of drugs—cocaine, methamphetamine—with fentanyl, without the end consumers being aware of that mixture.

And that is a point that in those specific cases, for example, in the United States, contributed to the fentanyl that we are seeing today at the moment. So, definitely, it is an important thing to have in mind in the South American context.

**FELBAB-BROWN:** Let me stay just for a little bit more with you. Sara, you do a lot of investigative work. I mentioned earlier that the groups that are bringing fentanyl to the United States, that are producing it in Mexico, are the Sinaloa cartel and cartel Jalisco Nueva Generación, and that also they dominate the fentanyl market these days, certainly in North America. Those groups, as well as other criminal groups, operate in the four countries that you're looking at in your research in this paper: Brazil, Argentina, Colombia, and Chile. If they are not bringing fentanyl there, if we don't have cases of wholesale trafficking, what do these groups focus on? What are their economic activities in the region you explored?

[14:09]

**GARCIA:** Yeah. Thank you, Vanda, for this question. What we found in the four countries that we analyzed is that the main criminal groups in those four countries are mostly focused on the dynamics behind cocaine trafficking.

So, I will start with Colombia. In Colombia, the main criminal groups at the moment are three. We have the dissident groups of the former FARC guerrilla. We have the ELN. We have also the AGC, or the Gaitanist Self-Defense Forces of Colombia. And the main activities of these groups are mainly drug trafficking, mainly cocaine, but also substances such as marijuana, mostly in the case of FARC dissidents.

But something important to have in mind is that, for example, in Colombia these groups are also involved in other criminal economies, for example in illegal gold mining, which is currently in a very profitable illegal economy for the interests of these groups as the price of gold in the international markets is getting higher. And some of these groups have other important criminal economies, for example, in the AGC the case of the smuggling of migrants through the Darién Gap is an economy that has been growing in the last couple of years.

In Brazil, we have the PCC, or the First Capital Command, the Primeiro Comando da Capital. And we also have the Red Command, or Comando Vermelho, that are the main groups in the country. Both of these groups have consolidated themselves in drug trafficking in the region and have even play an important role in drug trafficking to countries, for example, to Africa and Europe, specifically, in the case of the PCC.

In Chile and Argentina, we have different dynamics as there are not criminal groups that are as big as the ones we have in Colombia or in Brazil. In the case of Chile, for example, there's a presence of mostly criminal actors from Peru or Bolivia, criminal networks that are dedicated to drug trafficking mainly. And it is also important to note that in Chile, we have a domestic consumption market that is important specifically for marijuana, which has attracted criminal networks from Paraguay and Colombia as well.

In Argentina, there's dynamic that it's pretty similar to Chile. We have several small groups that are mainly focused on drug trafficking from the country. Those are, for example, Los Monos in Rosario and the Castillo clan. But they are small groups compared to the larger criminal structures that we have in the region.

**FELBAB-BROWN:** Thank you very much for that overview, Sara. And just to explain the Colombian groups that you mentioned, the FARC dissident groups and the ELN are insurgent groups or emerged out of leftist guerrillas, leftist insurgent groups. And the Gaitanistas is a criminal group that emerged out of the rightest paramilitaries that in the 1990s and early 2000s were associated with the Colombian government and fighting against the leftists, [got loss] and themselves became deeply implicated in drug trafficking and many other illegal economies that you spoke about.

You know, Daniel, Sara brought up cocaine. And of course, in the minds of many of our listeners, cocaine is the drug that's associated with South America. Please tell us what is happening with coca cultivation and cocaine production in South America, especially at the time when in the United States there has been a significant decline

in cocaine use. And a lot of the cocaine that's consumed today in the U.S. is mixed with fentanyl. Fentanyl is the dominant drug. What's happening with production and trafficking in the Southern Cone?

[18:09]

**MEJÍA:** Thank you, Vanda. First of all, North America, especially the U.S., was the main consumer market for cocaine. This is still the case but has been significantly reduced in terms of the share of cocaine trafficking coming out of Colombia, Peru, Bolivia, nowadays Ecuador as well.

But coca cultivation and potential cocaine production according to the latest figures that we have from UNODC, from the United Nations Office of Drugs and Crime, show that we are reaching historical records. For instance, for coca cultivation, during the last ten years, coca cultivation has increased dramatically from about 120,000 hectares back in 2014, and now we are seeing figures above 300,000 hectares. So, that's more than double the coca cultivation that we had only ten years ago.

And in terms of cocaine production, which is more important as a source of funding for these criminal groups, the estimated figures by UNODC, by the United Nations, have also more than doubled, almost tripled from 800 metric tons in the region as a whole in 2014. We are now observing figures in the order of 2,300 metric tons. And about 75 to 80% of that is coming out of Colombia, as has been the case for the last 30 years.

As you mentioned, cocaine consumption in the U.S. has been decreasing over time. But there are other emerging markets for the cocaine that is being produced in Colombia, Peru, and Bolivia. And there is an increase in cocaine consumption in some European countries. In Australia, where the prices are also much higher given the cost of transporting the cocaine to all the way to Australia. And there is also an increasing market in what we call the Southern Cone, which not only includes Chile, Uruguay, and Argentina, but also the southern part of Brazil, where the two largest cities are located.

So, just to just to wrap up on this answer, and connect it to the previous answer and the conversation you just had with Sara, I would say that drug trafficking organizations in the region—and this is an important part of our chapter—do not have a comparative advantage in the production and trafficking of fentanyl relative to Mexican organizations, as you are studying in the chapter on Mexico. And this is because of location, geography, and because of the local market for fentanyl consumption, which as we discussed earlier, fentanyl use in the region and synthetic opioids use in the region is relatively low or very low.

We don't see a comparative advantage, in economic terms a comparative advantage, for drug trafficking organizations that operate in South America in fentanyl production and trafficking. And the opportunity cost of these organizations of getting involved and start to compete with Mexican organization is very high, because cocaine markets, as I said, are thriving, not because consumption in the historically main consumer market in North America has increased. It has decreased, actually. But there are other emerging markets that have become very important.

And these emerging markets in Europe have led to the to the rise of Brazilian DTOs, or Brazilian criminal groups, in the trafficking of cocaine towards the west coast of Africa and towards Europe.

**FELBAB-BROWN:** You spoke about the market in Europe. I would say that this was probably the most dynamic cocaine market emerging in the 1990s and really hitting its stride over the past several years. Of course, the various Latin American groups, including the Mexican Sinaloa cartel and cartel Jalisco Nueva Generación are trying to develop cocaine markets in the Asia-Pacific region, principally Australia and New Zealand, as you mentioned, Daniel. But to some extent, beyond that.

And I think it's very important to highlight what you also said, that Argentina and Brazil themselves have developed a very large cocaine use. I know it used to be that there was a major tension in U.S. foreign policy where countries in Latin America saw the U.S. as extremely overbearing, heavy handed, focused on stopping coca production, coca cultivation, cocaine trafficking, where the drugs were simply going up north in their view, and they were not causing harm related to youth in the region. Of course, they were causing significant harm related to violence. But these days that's no longer the case. There is now a substantial market for cocaine in Latin America, in the Southern Cone specifically.

So, Sara, with that, let me turn to you again to explore the possibility of fentanyl markets and fentanyl trafficking emerging there. I mean, we heard from Daniel that groups like the Primeiro Comando da Capital, the major Brazilian criminal group involved in drug trafficking of cocaine from Brazil through West Africa to Europe, doesn't have comparative advantage vis-à-vis the Mexican Sinaloa cartel, cartel Jalisco Nueva Generación. But what about the Mexicans setting up shop, setting up fentanyl production in the Southern Cone? Is that likely? What are the risks associated with that?

[23:25]

**GARCIA:** It is important to note and it's difficult to say that it is impossible to have synthetic opiate market in South America. It is different to affirm that. But what we have found so far is that there are factors that indicate that it may be more difficult to create that consumer market in South America than in other parts of the continent, for example, such as the United States and Canada.

And I will give you the main takeaways we had for this question we did ourselves during the investigation. And is first what we have found is that the consumer markets in South America are mostly focused on stimulant substances, for example, cocaine. But also, in the Southern Cone we have an important market for ecstasies and MDMA coming from different countries. And in contrast to that, also as Daniel was pointing out, the prevalence rates for the opioid use, both legal and illegal, are much lower in the region compared to, for example, the United States.

Considering the causes of the opioid crisis in North America, there is not a significant market for medical opioid prescriptions in the countries analyzed. And in fact, South America is a region with low availability of opioids for medical use.



Similarly, in the main drug trafficking networks in the region, they have a well-structured supply chain for the cocaine production and trafficking, which in many cases it goes back to decades. And as Daniel was pointing out, this is an advantage they already have, they already have a structured chain in addition to the fact that cocaine markets are increasing worldwide.

But I want to make clear that there are two big challenges in the region regarding this topic. On the one hand, it is important to identify where and why the diversion of medical fentanyl is occurring in these countries and for also for the authorities to take actions against these dynamics. And on the other hand, as I was mentioning before, the mixing of medical grade fentanyl with drugs as cocaine or tusi can create a demand for the drug. So, it is crucial for authorities to start identifying what is behind the diversion of medical grade fentanyl and the recreational consumption.

And I will add another point, and I think it is something it will be good to continue to investigate in different scenarios, and it is how the cocaine supply chain can overlap with the illicit fentanyl supply chain. That's something we still continue to have to investigate. But it is an interesting question to open the debate about the topic.

**FELBAB-BROWN:** And, of course, good data is crucial for effective design of policies. Your comments here, Sara, are a good transition to my last question to both of you, and you already started previewing some of it. What are in your view any policy recommendations? What can and what should South America—Brazil, Colombia, Argentina, Chile—do today to prevent the emergence of extensive markets in synthetic opioids? Be they in the fentanyl class or the nitazene class of opioids? Sara, anything else you want to add to what you just said?

[27:09]

**GARCIA:** Yeah, well, mainly monitoring and surveillance. That is a key point for authorities to have in mind. As we have mentioned, one of the main challenges we faced in this research was the difficulty of getting information on the dynamics associated with fentanyl, even in Colombia where there's a lot of information and there's a significant availability of data. Some of the data may vary from institution to institution.

In Brazil and Argentina, it was the opposite. The data available to request information were sometimes scarce. And to this extent, having a network of institutions that work together in the analysis of these dynamics is a key point and a crucial point for addressing these issues. The early warning systems have been an important strategy for detecting the presence of fentanyl, but also to analyze the dynamics associated with the phenomenon within the countries.

And I will conclude with the public health approach. In countries, for example in Mexico, there has been this talk of a possibility of banning fentanyl. And for us, fentanyl is a key substance for medical procedures, for surgeries, for pain treatment, also for the authorities and the experts we spoke during our investigation. And access to fentanyl in hospitals is key and should not be restricted. However, it is important to investigate and also penalize the diversion of these substances.

On the other hand, it's also important to train the professionals in the health care system on the reality of the use of fentanyl as a recreational substance in the country, because sometimes they are not aware that it is happening. And also to provide them with access, for example, to naloxone to treat patients with possible cases of opioid overdoses.

**FELBAB-BROWN:** Thank you. Absolutely, in the United States as well we have enormous fentanyl illicit market problem. But fentanyl is absolutely crucial whether for surgeries or the pain in terminal patients. Daniel, your last concluding thoughts on what steps South America should take to prevent the emergence of an illegal market in synthetic opioids.

[29:42]

**MEJÍA:** Thank you, Vanda. Let me add one from the point of view of monitoring and the second one from the point of view of the enforcement authorities. The first one is regarding the role of civil society organizations that monitor and do drug tests in the streets. I think this is very important. It has been crucial for other type of substances that consumers don't know what traffickers are mixing. So, it's crucial to strengthen these civil society organizations so that drug users rely on important and reliable information on what they are actually consuming.

Because the biggest risk that we identified in our chapter was the induction of a demand for fentanyl by mixing commonly consumed substances such as cocaine, ecstasy, MDMA, with fentanyl, and doing that inducing a demand that doesn't yet exist, as we spoke earlier. So, strengthening the role of these civil society organizations, their work in the streets, and the drug test that they do, and the information they provide to users is crucial.

Let me go to the second point that I wanted to highlight. And that's from the point of view of enforcement authorities. I think traditional strategies that have been used in the past to fight against illegal drug production and trafficking will not work in the case of fentanyl. For instance, eradication, there are no fentanyl crops or crops associated with the production of fentanyl, of course.

And large drug seizures, or the detection and destruction of large facilities to produce drugs. Fentanyl and synthetic opioids are very different in this respect. Very small facilities or very small quantities of fentanyl are enough to satisfy the demand of a small or medium sized town. So, the drug enforcement strategy would have to change in the case of fentanyl.

And something that has worked in in North America is focused deterrence. Basically, this is the announcement of a strategy where the authorities basically tell criminal organizations that if they get involved in illicit fentanyl production, distribution, or trafficking, they will be prioritized for prosecution by the criminal justice system. This is important not only to announce it, but in case it happens, actually comply with the announcement and actually make up very strong prioritization of the criminal justice system in case any criminal organization, big or small, gets involved in fentanyl production or trafficking. This is crucial and this is a topic that we are not actually discussing in in South America. And this has to be a topic that we start there discussing with enforcement authorities in the region.

**FELBAB-BROWN:** So, Sara and Daniel, thank you so much for joining us today on the show and for your great contributions to the paper.

[music]

**MEJÍA:** Thank you. And it was a pleasure.

**GARCIA:** Thank you.

**FELBAB-BROWN:** *The Killing Drugs* is a production of the Brookings Podcast Network. Many thanks to all my guests for sharing their time and expertise on this podcast and in this project.

Also, thanks to the team at Brookings who makes this podcast possible, including Kuwilileni Hauwanga, supervising producer; Fred Dews, producer; Gastón Reboledo, audio engineer; Daniel Morales, video editor; and Diana Paz Garcia, senior research assistant in the Strobe Talbott Center for Security, Strategy, and Technology; Natalie Britton, director of operations for the Talbott Center; and the promotions teams in the Office of Communications and the Foreign Policy program at Brookings. Katie Merris designed the compelling logo.

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I am Vanda Felbab-Brown. Thank you for listening.