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The supply of heroin to Europe

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Definition

Heroin is a crude preparation of diamorphine. It is a semi-synthetic opioid obtained by acetylation of morphine, which occurs as a natural product in opium: the dried latex of certain poppy species (e.g. *Papaver somniferum* L.).

Introduction

Heroin use remains a serious public health issue in Europe. Although there is no strong evidence to suggest an epidemic growth of heroin problems similar to that experienced in the 1990s, current data point to a stable but no longer diminishing trend. A series of recent record opium harvests in Afghanistan may contribute to explaining this situation.

Afghanistan: Europe's main supplier

Afghanistan has been Europe's main heroin supplier for more than 10 years. Following a sharp decrease in production in south-east Asia in recent years, more than 90 % of the estimated global production of opium (8 870 tonnes in 2007) comes from Afghanistan with about 7 700 tonnes estimated in 2008 (UNODC, 2008b), potentially allowing the manufacture of over 700 tonnes of heroin (Figure 1).

Heroin enters Europe primarily by two land routes: the long-standing 'Balkan route' through Turkey, where the largest amounts are trafficked; and, since the mid-1990s, the 'northern route', which leaves northern Afghanistan to Russia (Figure 2).

The Balkan route

A route linking Afghanistan to Iran then through Turkey represents the shortest distance to European consumer markets. From Turkey, the route then diverges into a southern branch through Greece and a northern branch through Bulgaria. Turkey and Turkish criminal organisations play a central role in the trafficking of heroin to Europe (Europol, 2005).

The 'northern route'

Some opioids leave Afghanistan through the central Asian states to the north, particularly Tajikistan, primarily bound for the Russian Federation. Much of this heroin is likely to be consumed en route in central Asian countries, but some of it eventually reaches European consumers. Different nationalities and organisations are involved in trafficking along the northern route.

European trafficking

An estimated 49 000 seizures made in Europe amounted to over 19 tonnes in 2006, and quantities seized have been generally on the increase in the last 10 years (Figure 3). Most of the heroin bound for the western and central European consumer markets is transported overland towards the Netherlands and, to a lesser degree, Belgium. Both countries play an important part in distribution of heroin across western EU countries, especially to the United Kingdom, probably the largest consumer market in Europe. The United Kingdom is the second-largest confiscator of heroin in Europe (after Turkey) (EMCDDA, 2008). Italy is also a major market and a transit point. Furthermore, smaller quantities of heroin are imported directly from south-west Asia via commercial flights. Inside Europe, the organisation of heroin supply becomes more diverse and complex as a multitude of organised crime groups and other actors are involved.

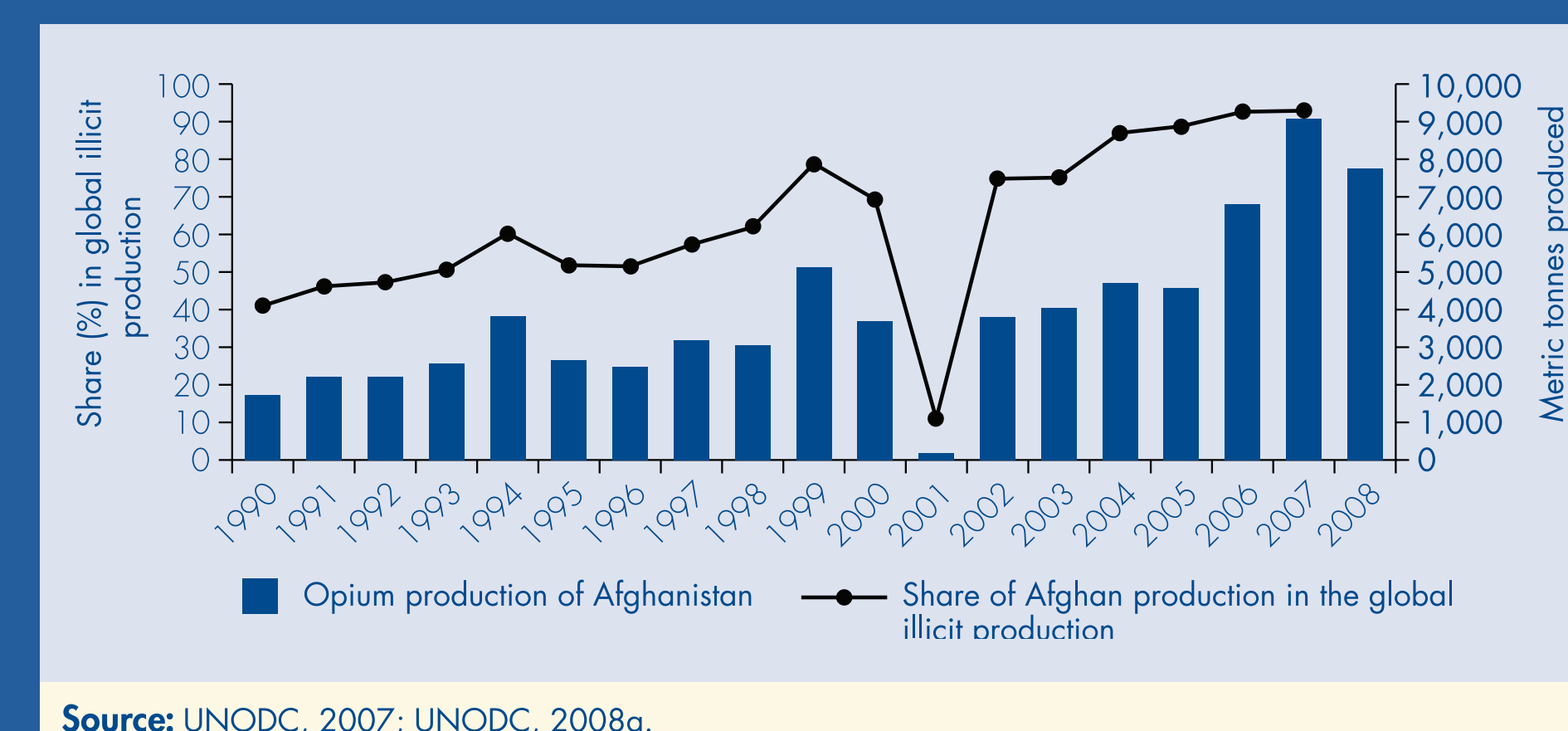
Conclusions

Although EMCDDA data collection is in place to report the prevalence of opioid use, robust indicators are lacking to conclude what consequences the increase of Afghan production might have in Europe. Answers are needed to questions of where opioids production is going; whether stockpiles exist; whether availability of heroin of Afghan origin is increasing in European consumer markets; whether the purity of heroin is being influenced; and whether consumer markets are emerging or expanding along trafficking routes and elsewhere. Information is also lacking on how much heroin these markets may be consuming, and on how this aggregated consumption may compare with the estimated output from Afghanistan.

References

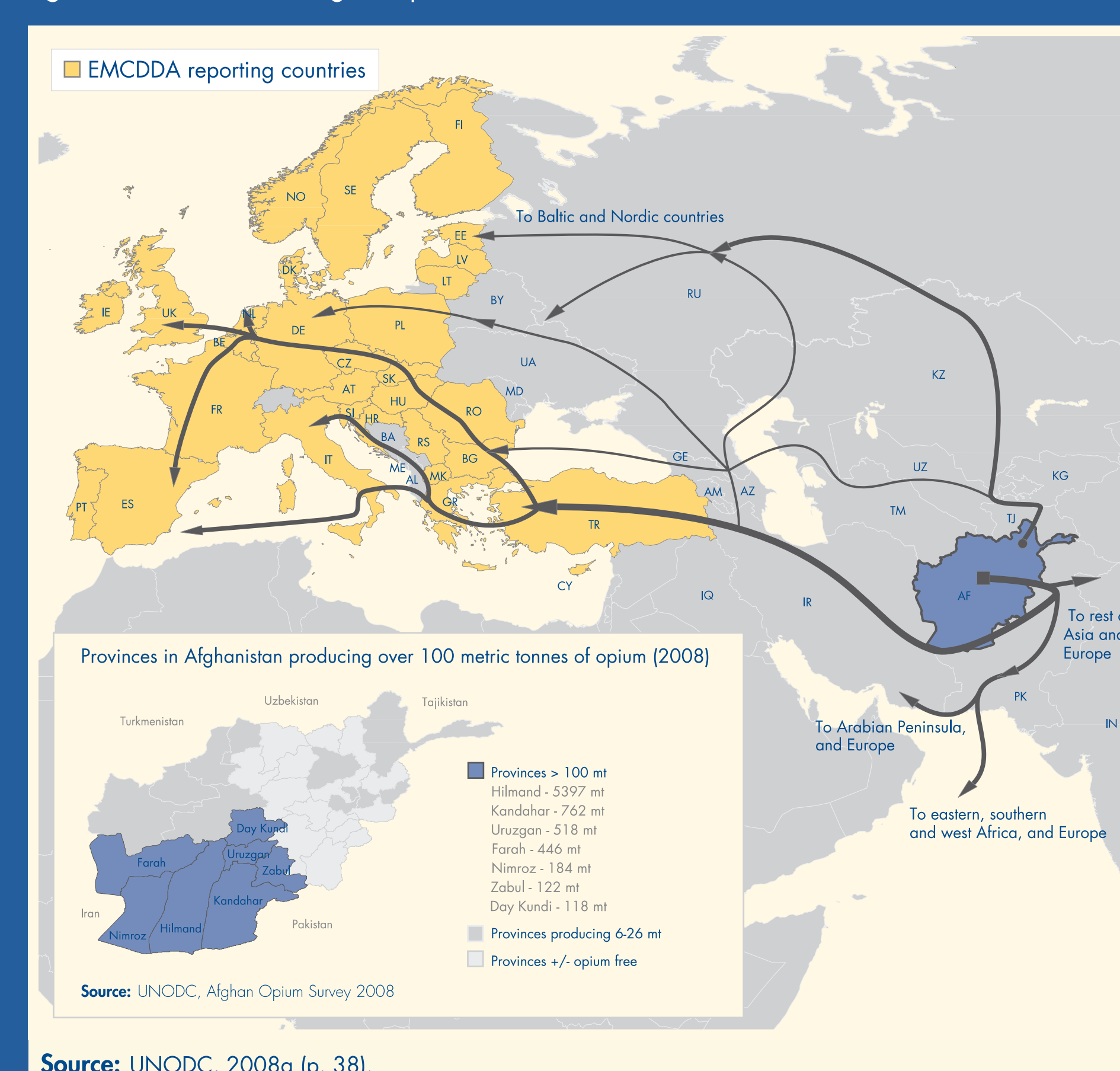
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Figure 1. Afghanistan — Estimated opium production and share in global detected illicit production, 1990–2007



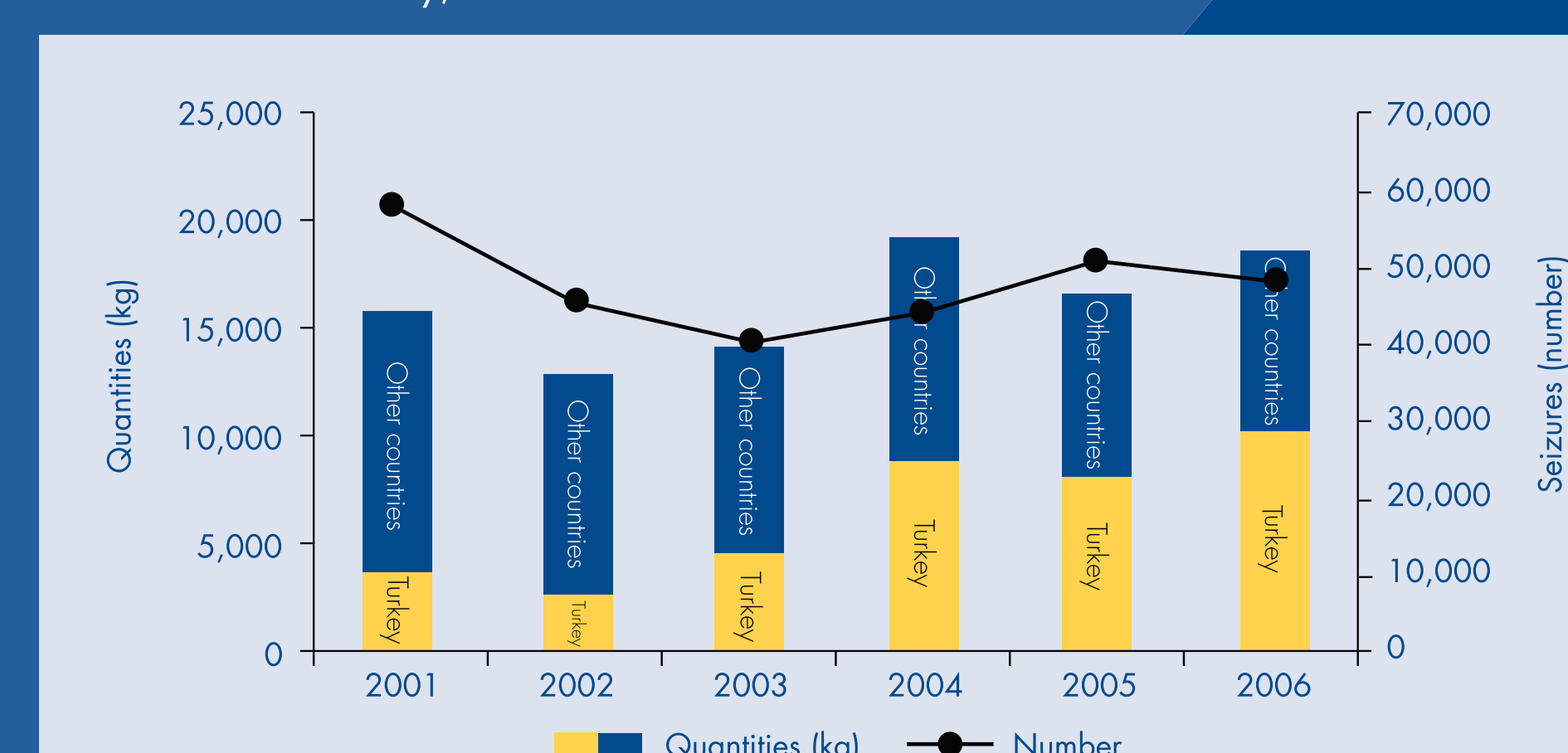
Source: UNODC, 2007; UNODC, 2008a.

Figure 2. Heroin entering Europe: the different routes



Source: UNODC, 2008a (p. 38).

Figure 3. Number of heroin seizures and quantities seized (kg) in the EU, Croatia, Turkey, and Norway, 2001–07



Notes: The total amount of heroin seized is based on data from all EMCDDA reporting countries (27 EU Member States, Croatia, Turkey and Norway), whereas 5 EU Member States (Italy, Cyprus, the Netherlands, Poland and Romania) were not included in the total number of heroin seizures due to unavailability of data. For countries included in the totals per year, missing data have been extrapolated from adjacent years.

Source: EMCDDA (2008).