



NEWS RELEASE from the EU drugs agency in Lisbon

26 JUNE: INTERNATIONAL DAY AGAINST DRUG ABUSE AND ILLICIT TRAFFICKING

Market share of herbal cannabis increasing as domestic production rises, says EU drugs agency

(26.6.2012, LISBON) 'The market share of cannabis herb is increasing across Europe at the expense of cannabis resin'. This is according to the first comprehensive analysis of *Cannabis production and markets in Europe*, released today by the **EU drugs agency (EMCDDA)** to mark **International day against drug abuse and illicit trafficking** (¹). The report describes a cannabis market in a 'continual state of evolution' and how Europe, a major cannabis consumer, is now an important producer of this, its most popular illicit drug. Also documented is the wide variety of products on sale and how the rise in herbal cannabis cultivation inside Europe's borders is increasingly associated with collateral damage such as violence and criminality.

Over 78 million Europeans (15–64 years) have tried cannabis, while around 9 million young Europeans (15–34 years) have used it in the last month. This represents a sizeable market and one that has greatly evolved. According to the report, in terms of size and sophistication, today's European cannabis market contrasts considerably to that of the 1960s, when importation was mainly the pursuit of 'amateurs and enthusiasts'. The report describes how profits to be made from the cannabis trade have rendered it a mainstream activity of criminal organisations and one often linked to trafficking in other illicit commodities (e.g. cocaine).

But that is not to say that all cannabis production is the work of organised criminals. Presented in the report are the many categories of cannabis grower found today and the motivations driving them (e.g. social, commercial).

'One of the most important developments impacting on the modern cannabis market is simply its increase in scale', says **EMCDDA Director Wolfgang Götz**. 'Wherever you live in Europe today, it is likely that not very far away cannabis is being bought or sold. Cannabis offences make up the majority of drug offences reported in the EU. And around 700 tonnes of cannabis herb and resin are seized in Europe annually. Meanwhile, virtually all EU countries now report being affected by the domestic cultivation of cannabis, a development bringing with it consequences in terms of public health and security. In this report, we bring together state-of-the-art evidence to offer an in-depth analysis of cannabis production and markets across Europe'.

The two main products manufactured from illicitly grown cannabis are herbal cannabis ('marijuana') and cannabis resin ('hashish'). But these may be broken down into numerous sub-types with varying compounds and effects. Looking at the complexity of today's cannabis market, the report says: 'It is as if we are looking at the use of alcohol, but without the ability to distinguish between beer, wine and whisky consumption'.

Rising domestic production and import substitution

Inside Europe, indoor cultivation of herbal cannabis is limited only by access to electricity and water and sophisticated techniques (including hydroponics) are often used to increase the quantity and 'quality' (potency) of the product. Today 29 of the 30 **EMCDDA** reporting countries report some cultivation of herbal cannabis.

Today's report chronicles a dramatic shift in the European cannabis market over the last two decades, describing an overall trend towards 'import substitution' (imported cannabis products being replaced by those grown inside Europe's borders). The analysis shows that, in two-thirds of **Europe** (30 countries reporting to the **EMCDDA**; see Figure 5.4), cannabis consumption is now dominated by herbal products (and by imported resin

in the other third). In 10 of these countries (**Bulgaria, Czech Republic, Greece, Lithuania, Luxembourg, Hungary, Poland, Slovenia, Slovakia and Croatia**), 90% or more of the cannabis consumed is herbal.

Belgium, Denmark, the Netherlands, Finland and the **UK** have all experienced a steep growth in the levels of domestic herbal cannabis production in the last two decades. Data on the number of cannabis plantations discovered in Europe show signs of an increase in cannabis domestic production in most countries reporting data since 2004 (see Table 3.2).

Considerable challenges posed by indoor cultivation techniques have led to a number of intelligence-led approaches to market interdiction involving new technologies and information sharing. Among the innovative responses described in the report are partnerships between the police and sectors with a stake in preventing domestic production (e.g. electricity providers, housing authorities). An emerging specialised commercial sector is also providing services and equipment (radars, thermo-imaging cameras) to reduce cannabis supply.

Yet, most law-enforcement attention still appears to be focused on cannabis use rather than supply (Figure 6.2). The report shows that in 19 out of 22 countries with sufficient data, the majority of cannabis offences are related to use, with proportions varying between 51% and 96%.

Imported cannabis resin and the ‘Big five’ — Morocco still Europe’s main supplier, but production estimates misleading

Cannabis is the most widely cultivated illicit drug plant worldwide. Today’s report describes the ‘Big five’ regions considered the main sources of cannabis products (mainly resin) imported into Europe. These are: **North Africa** (Morocco), **South-west Asia** (Afghanistan); the **Balkans** (Albania); the **Middle East** (Lebanon) and **sub-Saharan Africa** (South Africa) (see Figure 2.1).

‘Although Europe has been one of the world’s largest and wealthiest consumer markets for cannabis resin for more than 30 years, little cannabis resin is produced there, and practically all consumption must be supplied from abroad’, states the report. This is reflected in cannabis seizure data. The quantity of resin seized in 2009, for example, was almost six times the quantity of herb seized (approx 600 tonnes and 100 tonnes respectively).

Morocco consistently ranks first as exporter of cannabis resin to Europe, the product entering the region mainly via **Spain** and **Portugal**. Although some sources report vast decreases in Moroccan resin production between 2003 and 2009, these are called into question by European data suggesting that some production estimates for **Morocco** appear to be unrealistically low (Tables 2.2 and 2.3).

Notes:

(¹) The EMCDDA marks this International day with an event at its premises for the Lisbon diplomatic community and its partners from the Portuguese authorities. The United Nations Office on Drugs and Crime (UNODC) will be launching its *2012 World drug report* and promoting the theme ‘Global action for healthy communities without drugs’.