



# Overview

## Introduction

The illicit market for cannabis products is the largest drug market in Europe. Cannabis is also the most commonly consumed illicit drug both in Europe and worldwide. In the EU, it is estimated that about 84 million adults (aged 15-64) have tried cannabis at some point in their lives and 22.6 million have used it in the last year. The illicit cultivation of cannabis mainly yields two products: herbal cannabis (also known as marijuana) and cannabis resin (also known as hashish or charas). Lately, however, a broad variety of products have become available on the illicit cannabis market in the EU, which may be produced in Europe or smuggled from other regions. These products include oil and hash oil, other high-potency extracts collectively known as 'concentrates' and various edible and vaping products.

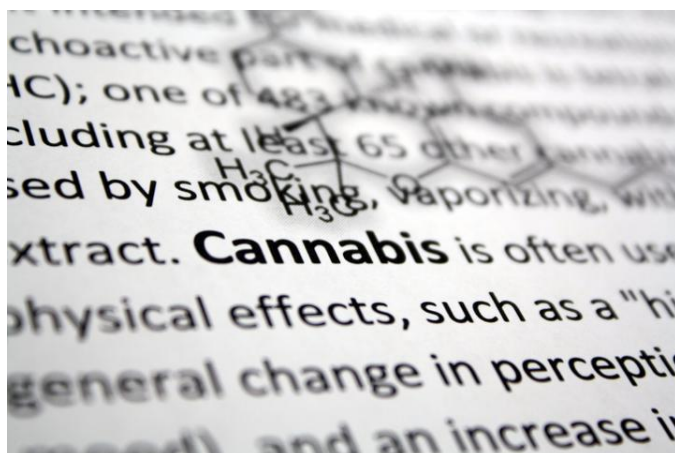
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## Key findings and threat assessment

The illicit cannabis retail market remains the largest drug market in the EU and most of the herbal cannabis detected in the EU appears to be cultivated in the EU. In 2021, seized quantities of herbal cannabis and cannabis resin in the EU reached their highest levels in a decade. Spain appears to be a key country where cannabis is illicitly produced in the EU and Morocco remains the largest supplier of cannabis resin to the European market. The potency of cannabis products has increased and an increasing diversity of cannabis consumer products has emerged, including several semi-synthetic cannabinoids

(such as HHC) and edibles containing highly potent synthetic cannabinoids that pose a high risk to users' health. Violence, corruption and the misuse of legal business structures are key enablers used by the diverse, adaptable and flexible criminal networks involved in the illicit cannabis market in the EU. The environmental impact of illicit cannabis production in the EU is considerable.

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## Cannabis in the global context

Cannabis is the most commonly used illicit drug globally and is reported to be produced in almost all countries in the world, both indoors and outdoors. In 2021, some 2 014 tonnes of cannabis resin was seized worldwide, about 8 % less than in 2020. In the same year, some 5 226 tonnes of herbal cannabis was seized, an 11 % increase compared to 2020 (UNODC, 2022, 2023). In two of the world's largest consumer markets for cannabis (the United States and Europe) a trend

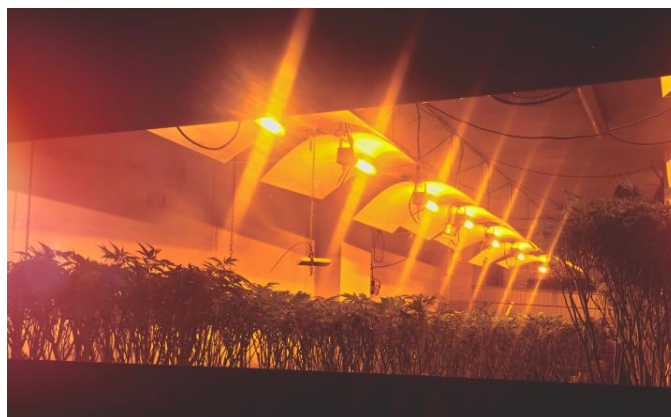


towards an increase in the potency of cannabis products has been observed. It appears that changes in cannabis policies, including the drug's legalisation for recreational use, are impacting on both licit and illicit markets. This can be seen in the diversification of products for sale containing cannabis, which complicates policy and operational responses. In the EU, important developments are taking place in this space, while at the international level some changes to cannabis scheduling have been discussed and implemented.

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## Cannabis production

Illicit cannabis cultivation is carried out in a variety of indoor and outdoor settings, from small home-cultivation to industrial-sized sites managed by criminal networks. Little is known about the scale of illicit cultivation in Europe due to challenges in monitoring and reporting. The cannabis crop is used to manufacture a range of consumer products, the most common of which have traditionally been herbal cannabis, cannabis resin and, to a lesser extent, cannabis oil. However, a broad range of new products are emerging on the market, some of which contain a very high proportion of THC (over 90 % in some cases). Most of the herbal cannabis in Europe is produced locally, whereas cannabis resin has historically been supplied from outside the EU. A range of cannabinoids are produced in the cannabis plant, the most important of which are THC and CBD. Notably, several substances apparently made by processing naturally occurring cannabinoids, such as CBD, into 'semi-synthetic cannabinoids' (such as delta-8-THC and HHC) have appeared on the market lately.



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## Cannabis trafficking and supply: record quantities seized in 2021

Since 2012, the number of seizures of herbal cannabis in the EU, Türkiye and Norway has exceeded that of cannabis resin, suggesting that herb is the most-consumed cannabis product in Europe. While the number of seizures of cannabis resin and herbal cannabis dropped in 2020 compared to 2019, most probably due to the impact of the COVID-19 pandemic on law enforcement activity, the quantities seized in 2021 reached their highest level in a decade. The largest quantities were seized in countries on major trafficking routes, such as Spain, France and Italy.

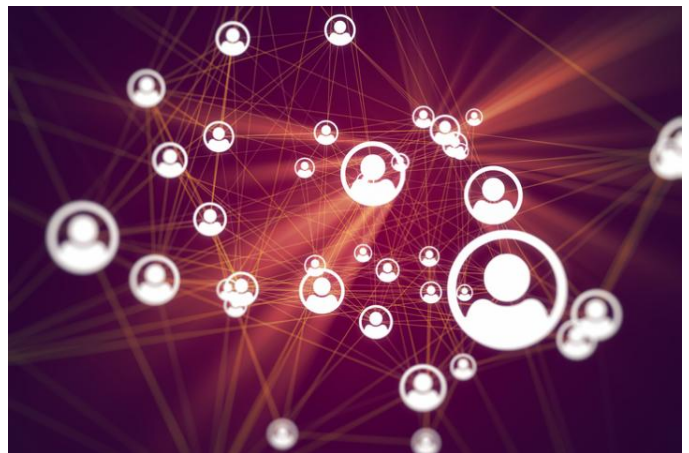


The Western Balkan region continues to be a source of herbal cannabis for the European market. Western Balkan criminal networks appear to be involved in both trafficking cannabis into, and cultivating cannabis within, the EU. Some of these networks may also be involved in the wholesale trafficking of cocaine to Europe.

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## Cannabis: an attractive market for serious and organised crime

A broad range of criminals are involved in the cannabis trade in Europe. They include both EU and non-EU nationals. Belgian, Dutch and Albanian networks appear to be the key players in cannabis cultivation in Belgium. Moroccan networks active in Spain and the Netherlands often manage the entire cannabis resin supply chain and also engage in herbal cannabis cultivation. These networks are highly cooperative, sharing resources, building partnerships and providing services. Dedicated networks supply cannabis traffickers with a variety of criminal services, from cultivation and



extraction, to transportation and distribution. In southern European entry points, dedicated criminal networks have specialised in building and delivering boats to cannabis traffickers operating in the region. At the same time, the cannabis trade is also driving violence among the criminals involved.

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## Retail markets for cannabis products

Cannabis is the most widely consumed illicit drug in Europe and accounts for the largest share of the illicit drug retail market in the EU, with an estimated minimum value of EUR 11.4 billion, with indicators pointing to overall stability in the market. Analyses of price and potency have shown that cannabis resin and herbal cannabis became more affordable in the EU between 2015 and 2021. The average potency of herbal cannabis and cannabis resin increased by about 60 % and nearly 200 % respectively between 2011 and 2021, while prices remained largely stable. The introduction of new strains and production techniques may have contributed to the steep increase in the potency of cannabis resin in particular. The retail market now

features a vast range of low- to high-THC products, covering different uses of the drug and designed for new routes of administration (such as vapes, edibles, oils). Meanwhile, cannabis is bought, sold and traded in a wide variety of ways across Europe, utilising both offline and online methods.

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## Actions to address current threats and increase preparedness

This analysis of the EU illicit cannabis market supports a number of overall conclusions with regard to public health and security. In particular, it is necessary to improve the intelligence picture by enhancing the monitoring of the emergence and health risks posed by new products. A robust framework for monitoring the impact of policy changes related to cannabis is needed to increase preparedness and assess their impact on the illicit market, public health and security. Responses should be strengthened in order to reduce supply and enhance security, public health and public safety. There is also a need to invest in capacity building by allocating adequate human resources to operational and strategic responses, fostering technological innovation, and further enhancing cooperation with key third countries.

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## Methodology and references

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**References:** Consult the [list of references](#) used in this module.

**Abbreviations:** Consult the list of [acronyms and other abbreviations](#) used in [EU Drug Markets: In-depth analysis](#).

**Figures:** Consult the list of [figures](#) included in this module.

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