



News release

2019 EU DRUG MARKETS REPORT FROM THE EMCDDA AND EUROPOL

New report highlights wide-ranging impacts of EU drug markets on health and security

(26.11.2019, BRUSSELS — **EMBARGO 10:00 CET Brussels/09.00 Lisbon**) Europeans are spending at least EUR 30 billion on drugs each year at retail level, making the drug market a major source of income for organised crime groups in the European Union. This figure is announced today in the **2019 EU Drug Markets Report**, released by the **EU drugs agency (EMCDDA)** and **Europol** ⁽¹⁾. Around two-fifths of this total (39%) is spent on cannabis, 31% on cocaine, 25% on heroin and 5% on amphetamines and MDMA (Figure 1.1) ⁽²⁾.

The two agencies have joined forces to provide their third state-of-the-art overview of the European illicit drug market. The report covers trends along the supply chain from production and trafficking to distribution and sales. It describes how the drug market has wide-ranging impacts on both health and security and how a holistic approach is crucial for effective drug control policies.

Presenting the report's findings today, **Dimitris Avramopoulos, European Commissioner for Migration, Home Affairs and Citizenship** said: 'Organised crime groups are quick to seize new opportunities for financial gain and are increasingly exploiting technological and logistical innovations to expand their activities across international borders. At the same time, drugs are now more accessible to European consumers, often via social media and the internet. Today's report proves once again that the illicit drug market remains a threat to the health and security of our citizens. We will continue working relentlessly with our Member States and international partners on strengthening our fight against drugs in all its aspects; for our youth, our citizens, our society.'

The strategic and action-oriented analysis combines data from the **EMCDDA's** drug monitoring system with **Europol's** operational intelligence on organised crime. The latest data ⁽³⁾ show that overall drug availability within Europe remains 'very high' and that consumers have access to a wide variety of high-purity and high-potency products at steady, or falling, prices. An important cross-cutting theme in the report is the environmental impact of drug production, including deforestation and the dumping of chemical waste, which can result in ecological damage, safety risks and high clean-up costs.

Rising violence and corruption linked to EU drug market activity

The report highlights the increasing importance of Europe, both as a target and drug-producing region, and shows how the violence and corruption, long seen in traditional drug-producing countries, are now increasingly evident within the EU. Among the wide-ranging consequences of the drug market presented in the analysis are its negative impacts on society (e.g. gang violence, drug-related homicide) and the strain on public institutions and governance. The drug market's links to wider criminal activity (e.g. human trafficking, terrorism) are also explored, along with its negative repercussions on the legal economy (e.g. how money laundering associated with the drug trade undermines legitimate businesses) (see Part I info graphic and Figure 1.2).

Trade, tech and criminal tools — driving and facilitating the market

According to the report, *globalisation, technology and innovation* and *criminal tools* are three forces driving and facilitating drug market developments. In a 'more globally connected and technologically enabled' market, organised crime groups are exploiting opportunities arising from expanding commercial

markets, associated logistical developments and digitalisation. The report raises concerns over the greater diversification of maritime drug trafficking (Figure 2.4) and the misuse of general aviation (e.g. private aircraft, drones) for criminal purposes (Figure 2.5). The use of post and parcel services to transport drugs is also expanding rapidly, following the rising trend of online shopping in Europe and the movement of larger volumes of goods.

Surface web and darknet markets, as well as social media, messaging services and mobile apps provide avenues for online drug sales. While darknet markets remain resilient (around 10 are still operating today — Figure 2.8), online vendor shops and markets targeting specific nationalities and language groups have also appeared. Illegal firearms, encrypted smartphones and fraudulent documents are among the key criminal tools increasingly used by drug dealers.

EMCDDA Director Alexis Goosdeel says: ‘This report is a clear wake-up call for policymakers to address the rapidly growing drug market, which is increasingly global, joined-up and digitally enabled. Hyper production of drugs, within and beyond EU borders, is leading to high availability of natural and synthetic substances. This means that consumers now have access to a diverse range of highly potent and pure products at affordable prices. A mounting concern is the rise in drug-related violence and corruption within the EU. Acting on the far-reaching consequences of the drug market for health and for security must now be an urgent priority.’

Europol’s Executive Director Catherine De Bolle stresses: ‘Europol sees a clear increase in trafficking activity through our operational work and the intelligence contributions we receive from EU Member States. Law enforcement needs to tackle this development and that is why we are investing heavily in supporting drug-related investigations in Europe. Europol is targeting in particular top-level organised crime groups which are making a lot of money for themselves on the back of their many victims.’

Key drug markets under the microscope

The report takes an in-depth look at the markets for the main drugs used in Europe, following the flow from production to use.

- **Cannabis — products increasingly diverse:** Estimated to be worth at least EUR 11.6 billion, this is the largest drug market in Europe, with some 25 million Europeans (15–64 years) having used the drug in the past year. The report illustrates that, while cannabis herb and resin still dominate, cannabis products are increasingly diverse in Europe. High-potency extracts, cannabis-based medicinal and health-orientated products and an increasing number of cannabidiol (CBD) or low-THC products are being sold in a range of forms (Figure 3.1). This makes close monitoring of their potency and potential health effects essential. Increased violence between organised crime groups dealing in cannabis is putting an added strain on law enforcement.
- **Heroin and other opioids — severe health risks and precursor concerns:** Opioid use still accounts for the largest proportion of harms, including deaths, associated with illicit drug consumption in the EU. With some 1.3 million problem opioid users (mainly of heroin) in the EU, the estimated retail value of the heroin market is at least EUR 7.4 billion per year. The Balkan route remains the key corridor for heroin into the EU, but there are signs of increased heroin trafficking along the Southern route, particularly through the Suez Canal (Figure 4.8). There is also evidence of diversion and trafficking of the heroin precursor acetic anhydride from the EU to heroin producing areas. Highly potent synthetic opioids (e.g. fentanyl derivatives) represent a growing health risk. These are increasingly traded online and dispatched by post, often in small packages containing large numbers of potential user doses.
- **Cocaine — record production and expanding markets:** This is the second most commonly consumed illicit drug in the EU, with a market retail value estimated at EUR 9.1 billion. Around 4 million Europeans (15–64 years) report having used the drug in the past year. Use is still concentrated in the south and west of Europe but the market appears to be spreading. Record production in Latin America has intensified trafficking to the EU (mainly in maritime containers), where record seizures have been recorded. The presence of European organised crime groups in Latin America allows them to manage the supply chain ‘end-to-end’. This may be driving competition within

the cocaine market, which is linked to violence within the EU. The EU appears to be emerging as a transit area for cocaine destined for other markets (e.g. Middle East, Asia).

- **Amphetamine, methamphetamine and MDMA — large-scale production in Europe for domestic consumption and export:** These make up around 5% of the total EU drug market, with an estimated EU retail market value of at least EUR 1 billion for amphetamine and methamphetamine and EUR 0.5 billion for MDMA. Around 1.7 million Europeans (15–64 years) have tried amphetamine or methamphetamine in the past year and some 2.6 million have tried MDMA ('ecstasy'). Production of these substances takes place sometimes on an 'industrial scale' within the EU for domestic consumption and for export. New production methods yield purer and cheaper products, with organised crime groups controlling the whole logistics chain.
- **New psychoactive substances (NPS) — fewer new detections but potent substances pose serious health threats:** These are diverse substances which are not subject to international drug controls. The value of the NPS market is unknown, however 55 NPS were reported to the EU Early Warning System in 2018, bringing the total number of NPS monitored to 731. The main source countries are China and, to a lesser extent, India. Policy responses and law enforcement activity in source countries are thought to have contributed to the slow-down in appearance of NPS (101 were reported in 2014). But NPS continue to pose serious cross-border threats to health, with potent synthetic opioids, cannabinoids and 'fake' benzodiazepines appearing on the market, associated with reports of health emergencies and deaths.

Tackling drug markets: actions for current and future scenarios

In a drug market which is 'increasingly complex, adaptive and dynamic', the report stresses that 'EU policies and responses need to be equally agile, adaptive and joined-up.' The report presents a wide array of ongoing actions to target the illicit drug supply chain, from operational measures to tackle corruption at ports to training for officials in dismantling illicit drug laboratories. It also describes a full range of policy tools available (e.g. coordination structures, legislation, cooperation programmes and financial instruments).

Among the key areas for action identified in the report are: tackling the business models of top-level organised crime groups active in the global drug market; reducing vulnerabilities at external borders; and investing in forensic and toxicological capacity to keep pace with innovations in drug production.

The agencies stress that taking a future-oriented approach will boost preparedness to respond to potential future challenges, such as virtual currencies, drone technology, automation in supply chain logistics and artificial intelligence.

Notes

⁽¹⁾ The *2019 EU Drug Markets Report* (including an executive summary) is available in English at www.emcdda.europa.eu/2019/drug-markets and www.europol.europa.eu

It is accompanied by 12 supporting papers addressing gaps identified since the 2016 report. This news release is available in 24 languages. The report is part of a series published every three years (since 2013).

⁽²⁾ The graphics in the report may be downloaded from the EMCDDA media library www.emcdda.europa.eu/media-library

⁽³⁾ Unless otherwise stated, data in this report relate to 2017.