



News release

from the EU drugs agency in Lisbon

NEW REGIONAL DRUG MARKET ANALYSES

EMCDDA releases new findings on drug markets in the eastern and southern European Neighbourhood Policy regions



(21.11.2022, LISBON) The emergence of new drug trafficking routes, the expansion of online markets, and the availability of a broader spectrum of substances, are among the findings highlighted in two new reports published today by the **EU drugs agency (EMCDDA)** ⁽¹⁾. Released in the framework of the EU-funded **EU4Monitoring Drugs project (EU4MD)**, the reports provide a picture of the drug market in the eastern and southern **European Neighbourhood Policy** regions (**ENP-East** and **ENP-South**) ⁽²⁾.

The analyses offer a top-level overview on drug production, trafficking, availability, use and health harms and explore the drivers and facilitators of drug markets across the two regions. Chapters dedicated to individual drugs are followed by future-oriented analyses, considering knowledge gaps and the impact of megatrends (e.g. digitalisation, globalisation, transnational mobility) on the regional drug situations.



The reports highlight specific drug-related threats and their potential implications for security and health in the two regions. Other challenges are also identified, including economic insecurity, corruption, ongoing conflict and the internationalisation of organised crime networks. In both regions, the availability of a wider range of substances is now reported, as is the growth of online markets, a trend boosted during COVID-19.

The findings are based on EMCDDA-funded studies implemented between 2019 and 2022, including over 100 qualitative interviews carried out with stakeholders in the two regions. Interviewees included customs and security officers, healthcare providers, researchers, NGOs, representatives of government and international organisations. These data sources were supplemented by secondary sources, including scientific literature, media articles and open-source material.

EMCDDA Director Alexis Goosdeel says: 'We are delighted to launch today our first regional strategic drug market analyses undertaken with our Eastern and Southern neighbours. They provide valuable insights into the latest drug-related health and security threats in these areas. The reports show how drug markets are developing in the two regions and how these developments may be impacting on good governance and the rule of law. They also reveal how patterns of drug use are changing, with a wider variety of substances used. While the reports present a number of important findings, they also demonstrate the need for closer monitoring and the systematic collection of reliable and comparable data'.

ENP-East: key findings

*The Eastern partnership of the European Neighbourhood Policy region (ENP-East) is a significant transit area for illicit drugs, as several major trafficking routes flow through it. **Belarus, Moldova and Ukraine** border the EU and are on the northern heroin trafficking route to Europe. Meanwhile, the **Southern Caucasus** countries, **Armenia, Azerbaijan and Georgia**, are situated near **Afghanistan**, the global centre for opium and heroin production and a recently emerging area of methamphetamine production. Two major heroin trafficking routes from **Afghanistan** (Balkan and Northern routes) impact on the region.*

- There are reports of a decline in heroin use in the **ENP-East** region and an increase in the use of synthetic opioids (e.g. 'street' methadone), especially in **Belarus, Moldova and Ukraine**. Possible driving factors for the interest in synthetic opioids are the low purity of heroin and the relatively low price of street methadone and medications diverted from opioid agonist treatment.
- Cocaine use and seizures appear to be low in the region. But there are signs that a new cocaine trafficking route may have developed recently, whereby the drug is trafficked from South America through countries bordering the Black Sea, potentially destined for the EU market. **Ukraine** reported the largest quantities of cocaine seized in 2019 and 2020 (2019, 837 kg; 2020, 166 kg). While information related to international drug-related criminal networks in the region is limited, the presence of the Italian 'Ndrangheta was reported in Ukraine in 2021, when 120 kilograms of cocaine were seized at the port of Odessa.
- A key regional development appears to be the expansion of online drug markets. These markets now play a more important role in the sale and purchase of drugs in **Armenia, Belarus, Georgia, Moldova** and, until recently, **Ukraine**. This development has been linked with a perceived increase in the availability of some NPS.
- Organised criminal networks play a role in the production of synthetic drugs in some countries in the region. This includes **Azerbaijan**, where methamphetamine production appears to have been scaled up since 2018.
- A potential threat to the region may be the production and trafficking of synthetic drugs originating in the EU. Some indirect evidence of this is reflected in the perception among experts that MDMA use has increased in some **ENP-East** countries.
- The report includes a section on the potential impact of the war in **Ukraine**. It is expected that the transit of drug shipments through Ukraine will reduce in the short term. In addition, it is possible that an increase in the use of other entry points for drug shipments will be seen in the Black Sea region. Domestic drug production is also likely to remain subdued, while health services, including drug treatment, will continue to face disruption and operational challenges. The report states: 'Ensuring the continuity of care for those fleeing the war should be regarded as a priority.' ⁽³⁾

ENP-South: key findings

*The Southern partnership of the European Neighbourhood Policy region (ENP-South) focuses on **Algeria, Israel, Jordan, Lebanon, Libya, Morocco, Palestine***, **Syria and Tunisia**. Some key global production areas for cannabis are located within this region (concentrated in **Morocco and Lebanon**), while the production of captagon tablets is reported to take place in **Syria and Lebanon**. The **ENP-South** region is perceived by informants as a growing consumer market for drugs. It also contains several drug trafficking hubs, the importance of which appear to be increasing.*

- Cannabis cultivation appears relatively stable on the **North African** side of the region, but there are some signs of increased cultivation in **Lebanon, Syria, Israel** and, to a lesser degree, **Palestine**. The past decade has seen changes in the legal framework of some forms of cannabis cultivation in **Lebanon and Morocco**. Herbal cannabis and cannabis resin are the substances most trafficked in the region, with routes transecting almost every **ENP-South** country.

- The **ENP-South** region is a key production area for amphetamine, particularly in the form of captagon tablets. Production appears to be concentrated in **Syria** and **Lebanon** and there have been reports of violent clashes between security forces and captagon traffickers along the Jordanian border with Syria. Captagon production and trafficking linked to state and non-state actors is becoming a growing security threat in the region, with routes spanning a large number of countries.
- Patterns of drug use appear to be shifting in the region towards a wider variety of substances. The use of synthetic stimulants, such as amphetamine, MDMA, some NPS, and diverted pharmaceuticals (e.g. pregabalin) are all reported as becoming more common. There also appears to be a growing market for methamphetamine in the region; mostly in the **Middle East**. Entrenched pockets of heroin use exist in some areas, including **Algeria, Israel, Morocco** and **Tunisia**.
- Ongoing economic challenges and conflict, for example in **Lebanon, Libya** and **Syria**, may have contributed to the expansion of the drug economy in the region, both in terms of heightened demand for illicit substances and as a driver for increasing participation in their production, trafficking and supply. In **Lebanon**, for example, some farmers appear to have switched from licit crops to cannabis to supplement their incomes.
- International crime networks in the **ENP-South** region pose a significant threat to security and health. There appears to be greater connectivity between criminal networks based in the region and those based in other geographical areas. Criminal networks sometimes exploit diaspora communities (mainly in Europe) to facilitate drug market activities (e.g. the 'Mocro' Mafia).
- State responses to drug problems in the region are predominantly oriented towards supply reduction, however, there has been some expansion of public health approaches in recent years.

The reports will be launched on 21.11.2022 at a side event of the European Conference on Addictive Behaviours and Dependencies ('Lisbon Addictions 2022'): <https://www.lisbonaddictions.eu/lisbon-addictions-2022/side-events>

Notes

⁽¹⁾ **Overview of drug markets in the European Neighbourhood Policy-East countries — Regional report**
https://www.emcdda.europa.eu/publications/regional-reports/overview-drug-markets-european-neighbourhood-policy-east-countries_en

Overview of drug markets in the European Neighbourhood Policy-South countries — Regional report
https://www.emcdda.europa.eu/publications/regional-reports/overview-drug-markets-european-neighbourhood-policy-south-countries_en

⁽²⁾ **European Neighbourhood Policy-East (ENP-South) region:** Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine. Due to Russia's invasion of Ukraine, and in line with the EU position, ongoing and planned bilateral engagement between the EMCDDA and Belarus has been suspended.

European Neighbourhood Policy-East (ENP-South) region: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia.

Egypt: Egypt was a potential beneficiary of the EU4MD project but decided not to participate. Where appropriate for the regional context, references to the drug situation in Egypt are provided. No specific analysis of drug markets in Egypt was completed for the purpose of this report.

Syria: The EU has suspended all bilateral cooperation with the government of Syria; Syria has not been included in the EU4MD project; information related to Syria is derived from sources unrelated to the government of Syria.

Palestine*: This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

⁽³⁾ **Responsiveness and preparedness in addressing drug-related needs of displaced Ukrainians in EU countries bordering Ukraine**, EMCDDA [trendspotter report](https://www.emcdda.europa.eu/publications/ad-hoc-publication/emcdda-trendspotter-briefing-ukraine_en) (July 2022).
https://www.emcdda.europa.eu/publications/ad-hoc-publication/emcdda-trendspotter-briefing-ukraine_en