



European Monitoring Centre
for Drugs and Drug Addiction

Where has Europe's Heroin gone?

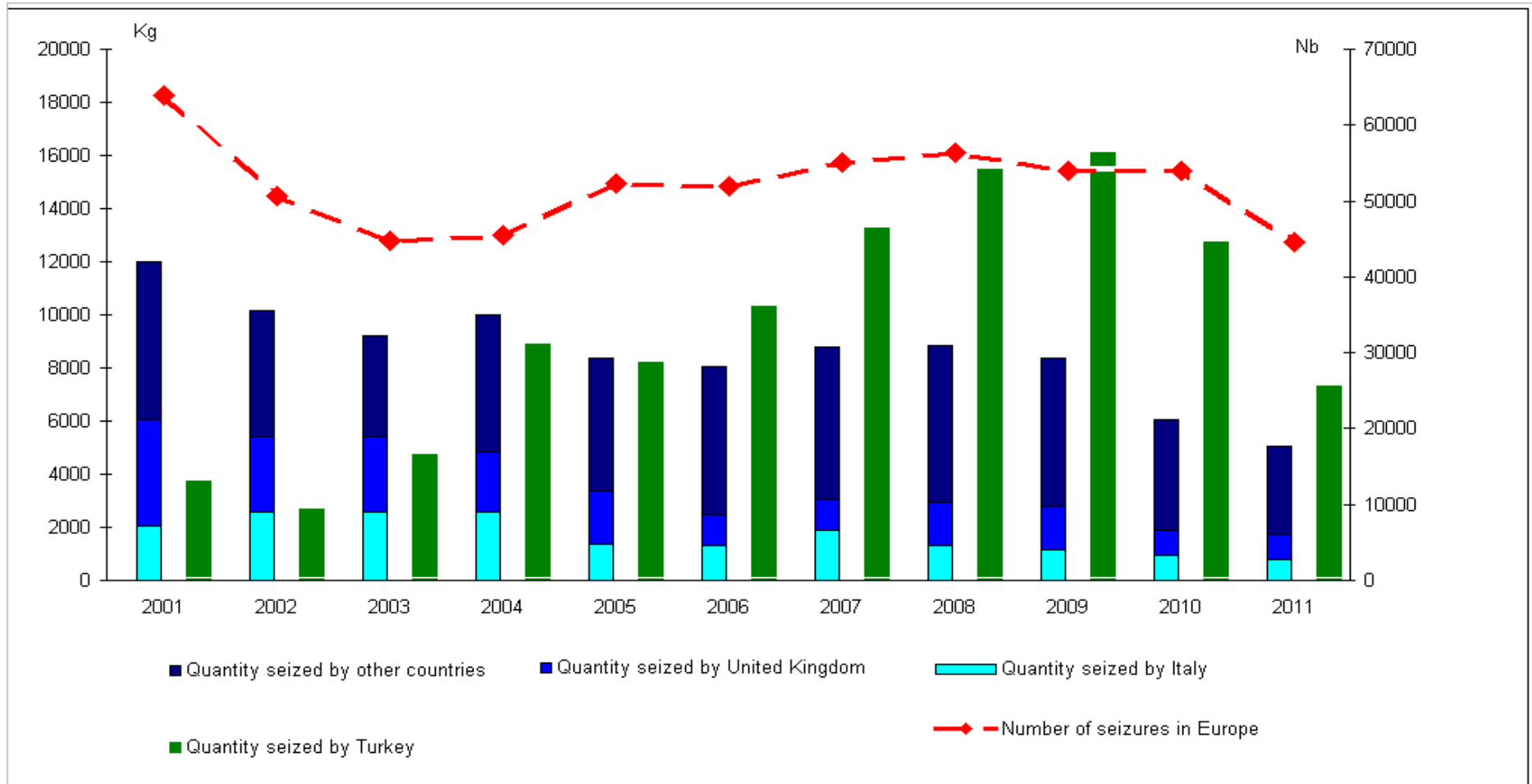
Expert meeting, PDU
EMCDDA, Lisbon, 26 October 2012
Laurent Laniel, SAT Unit, EMCDDA

Answers can only be speculative...

- Heroin has gone...
 - With the (statistical) wind?
 - To become a form of savings?
 - Out of fashion, substituted by opium consumption in Asia?
 - To 'new', non-western, poorly monitored, markets?



Seizures of heroin in Europe, 2001-2011

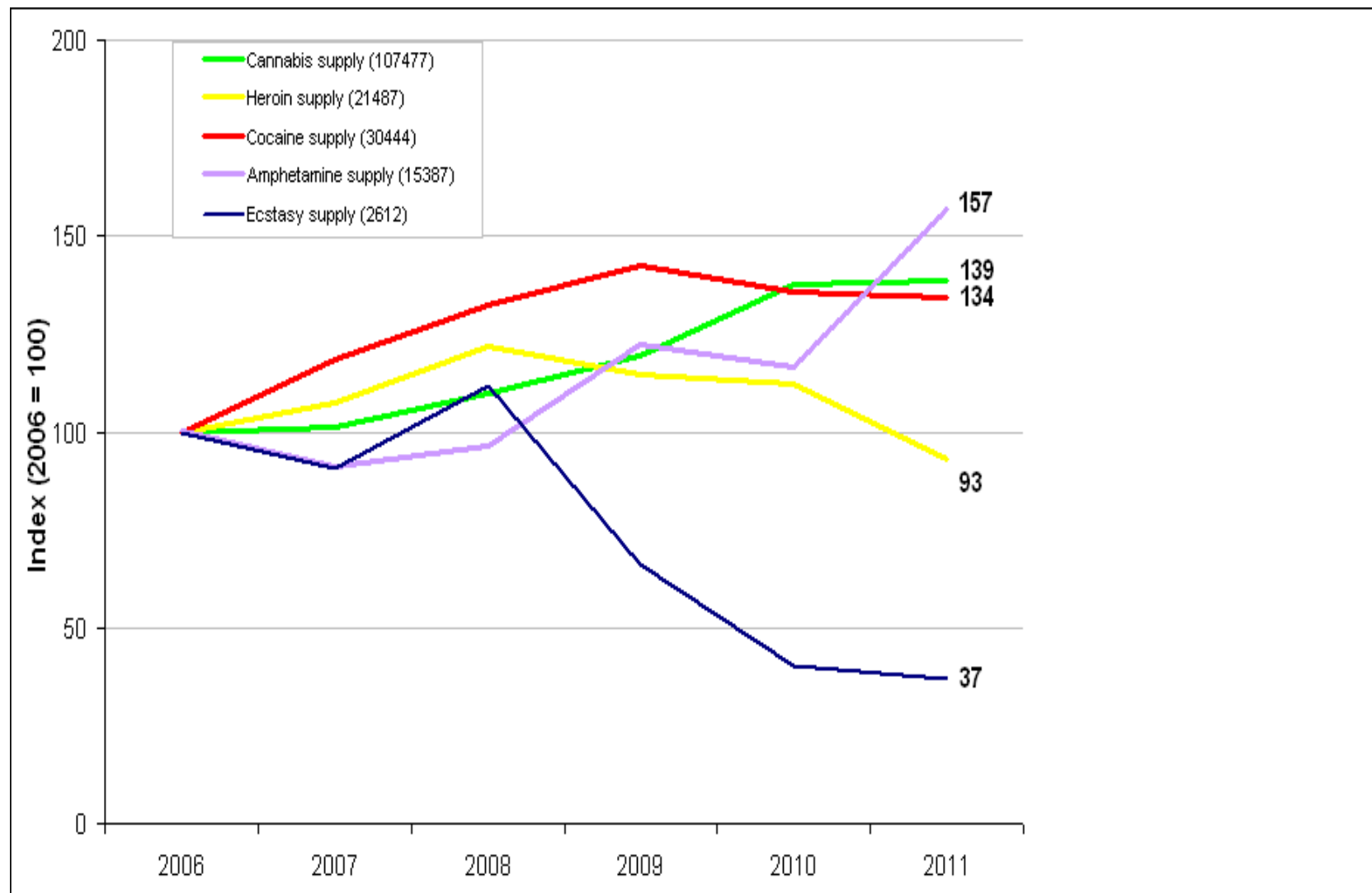


Note: All 30 European countries are included, except the Netherlands and Poland in the number of seizures (data not available). In the absence of 2011 data, 2010 data were used in 2011 for the United Kingdom.

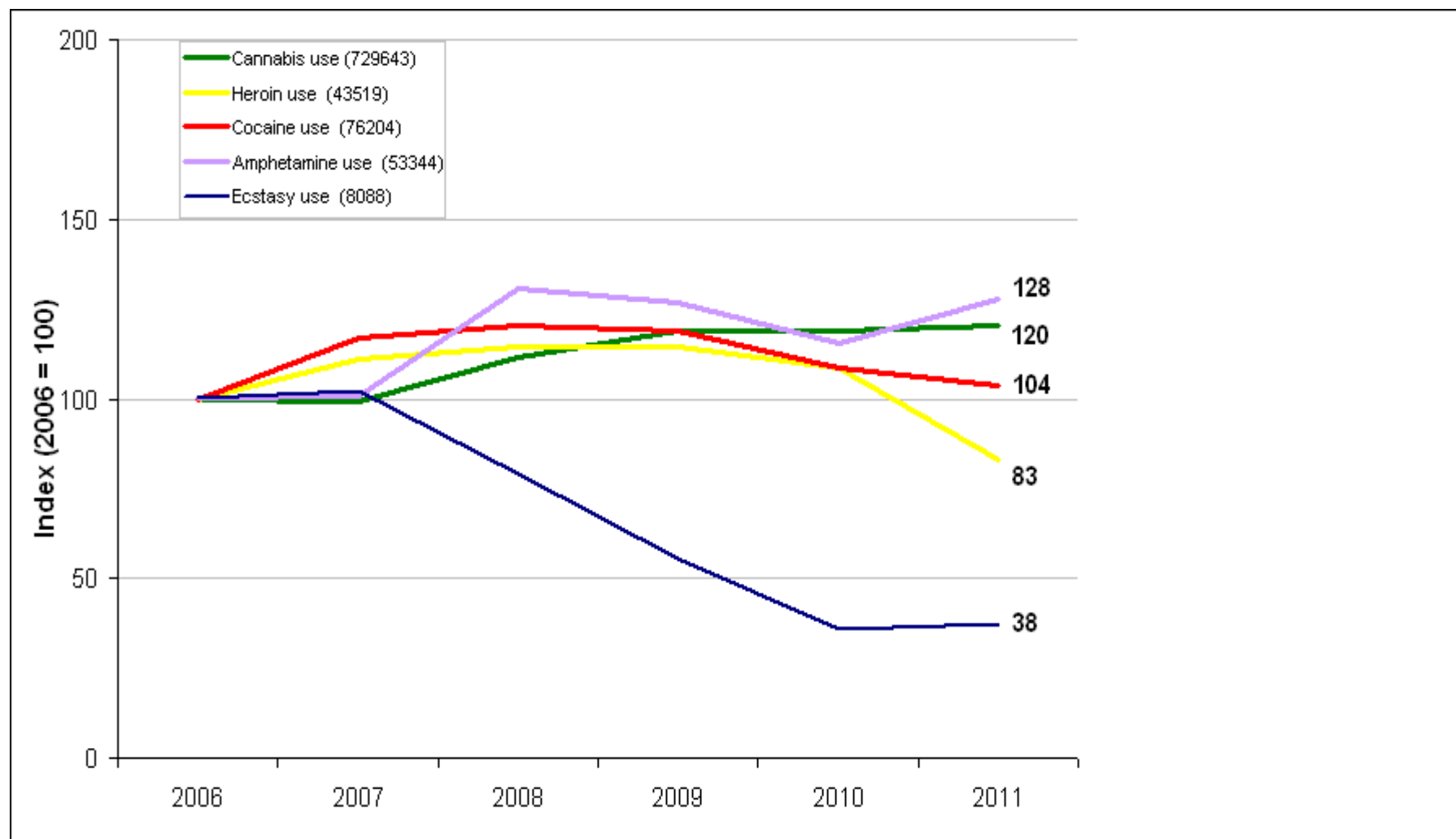
Source: EMCDDA/Reitox national focal points; EMCDDA (2012a).



Indexed trends in reports for offences related to drug supply in the EU, 2006–11



Indexed trends in reports for offences related to drug use or possession for use in the EU, 2006–11



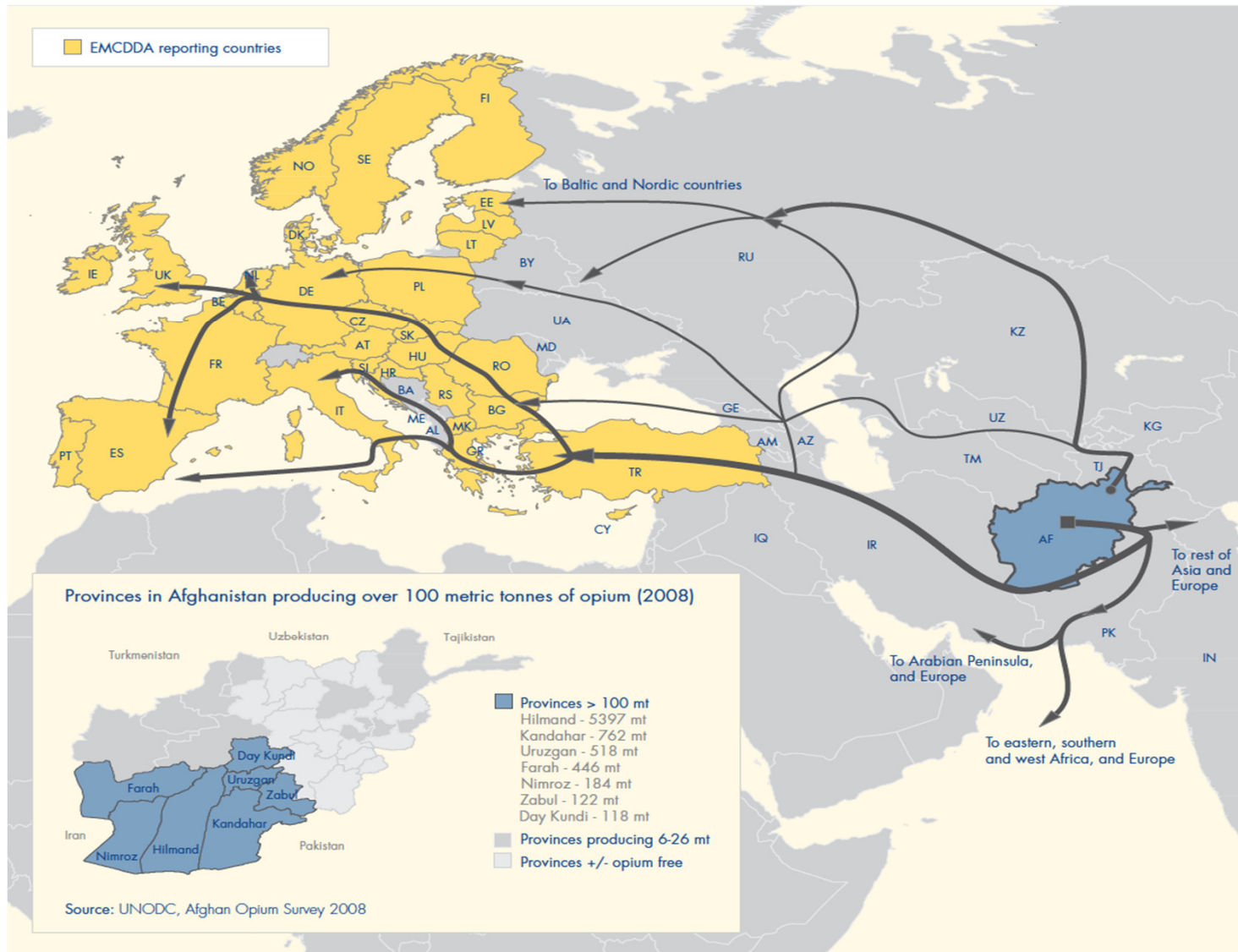
Other Western heroin markets also shrinking

- In 2010, 26 to 36 million users of opioids estimated worldwide, about 50% thought to be using opiates, especially heroin.
- There is now more use of prescription opioids (e.g. oxycodone) than of heroin in North America and Oceania (UNODC).



Heroin : Trafficking flows to Europe

Basic sketch of Afghanistan-Europe heroin routes (Source: EMCDDA)



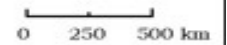
Opium and heroin: Asia



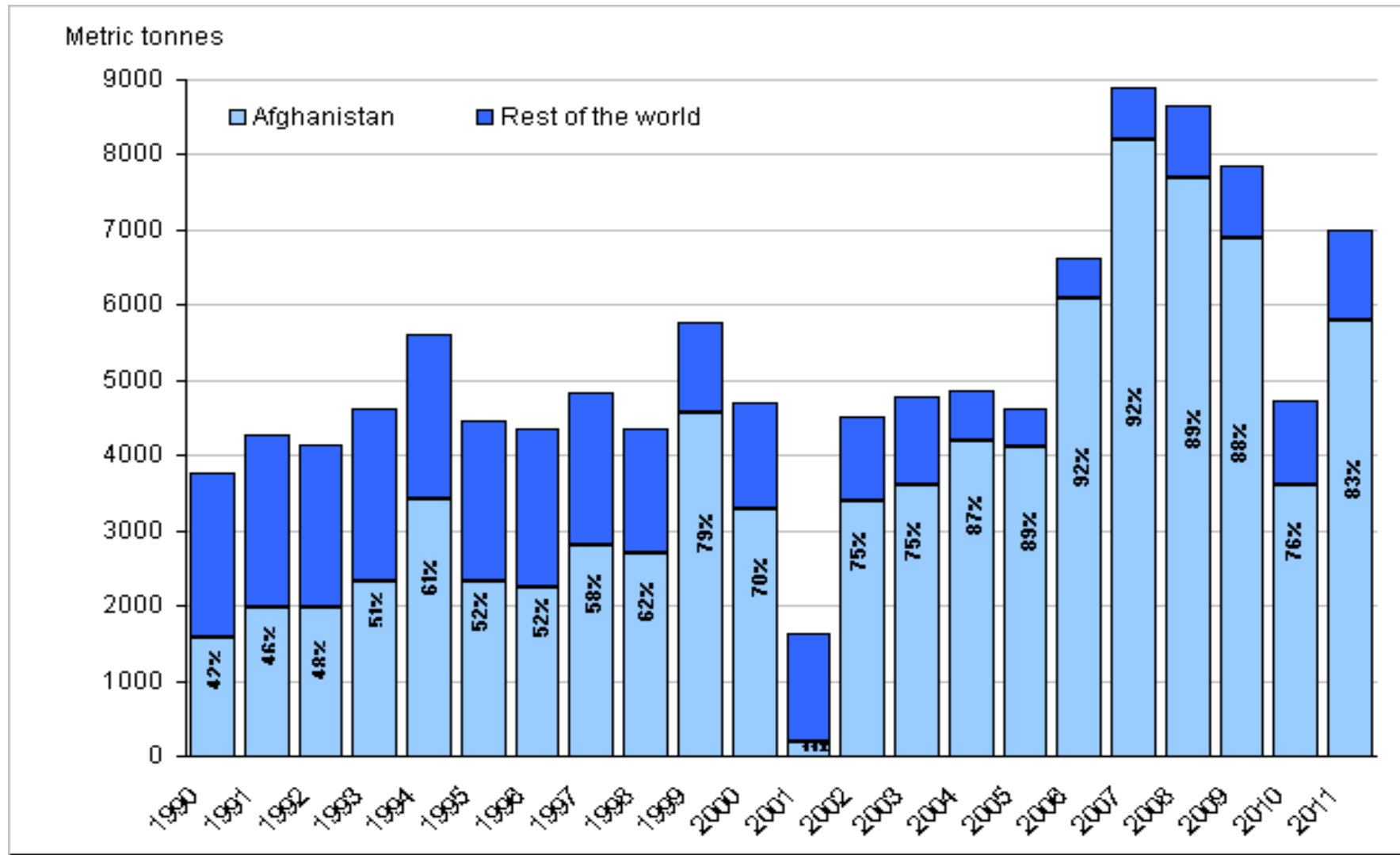
- Capitale nationale
- Ville majeure du trafic d'opiacés

- Itinéraire et direction du trafic d'opiacés en Asie
-> Itinéraire et direction du trafic d'opiacés hors d'Asie

— Frontière internationale



Estimated global illicit opium production and share of Afghanistan, 1990-2011



Source: UNODC (2007, 2008b, 2012a)



Opium and heroin: Global illicit production

Table 8. Potential illicit production of opium and manufacture of heroin of unknown purity, 2004-2011 (Tons)

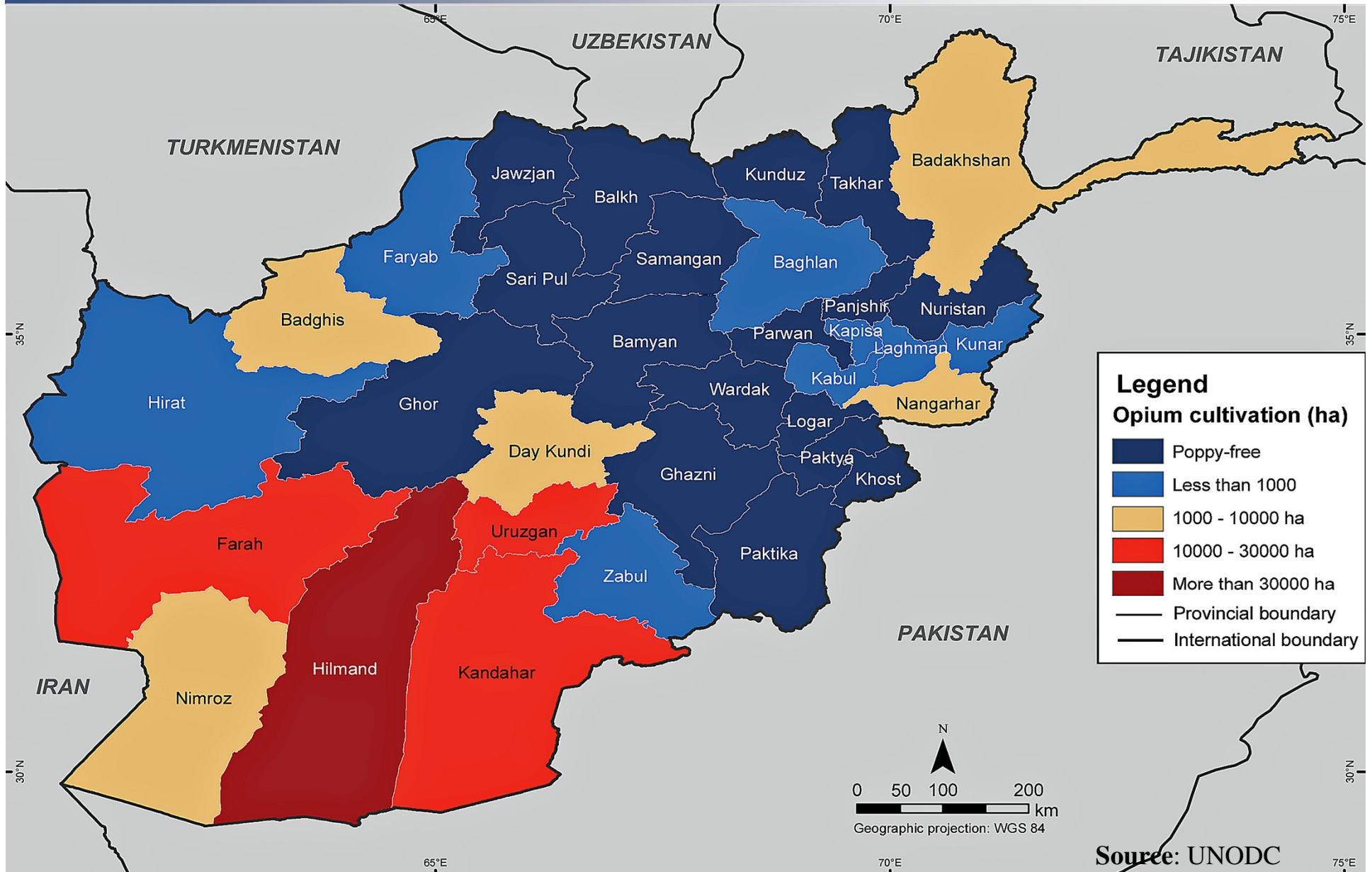
	2004	2005	2006	2007	2008	2009	2010	2011
Total potential opium production	4 850	4 620	6 610	8 890	8 641	7 853	4 736	6 995
Potential opium not processed into heroin	1 197	1 169	2 056	3 411	3 080	2 898	1 728	3 400
Potential opium processed into heroin	3 653	3 451	4 555	5 479	5 561	4 955	3 008	3 595
Total potential heroin manufacture	529	472	629	757	752	667	384	467

Note: The proportion of potential opium production not converted into heroin could be estimated only for Afghanistan. For the purpose of this table for all other countries it is assumed that all opium potentially produced is converted into heroin. If total potential opium production in Afghanistan in 2011 were converted into heroin, total potential heroin manufacture would be 829 tons (Afghanistan) and 948 tons (global). The 2011 estimate of "opium not processed into heroin" in Afghanistan was based exclusively on regional seizure data, in contrast to previous years, when information from key informants was also taken into consideration. The 2011 estimate is not directly comparable with previous years.

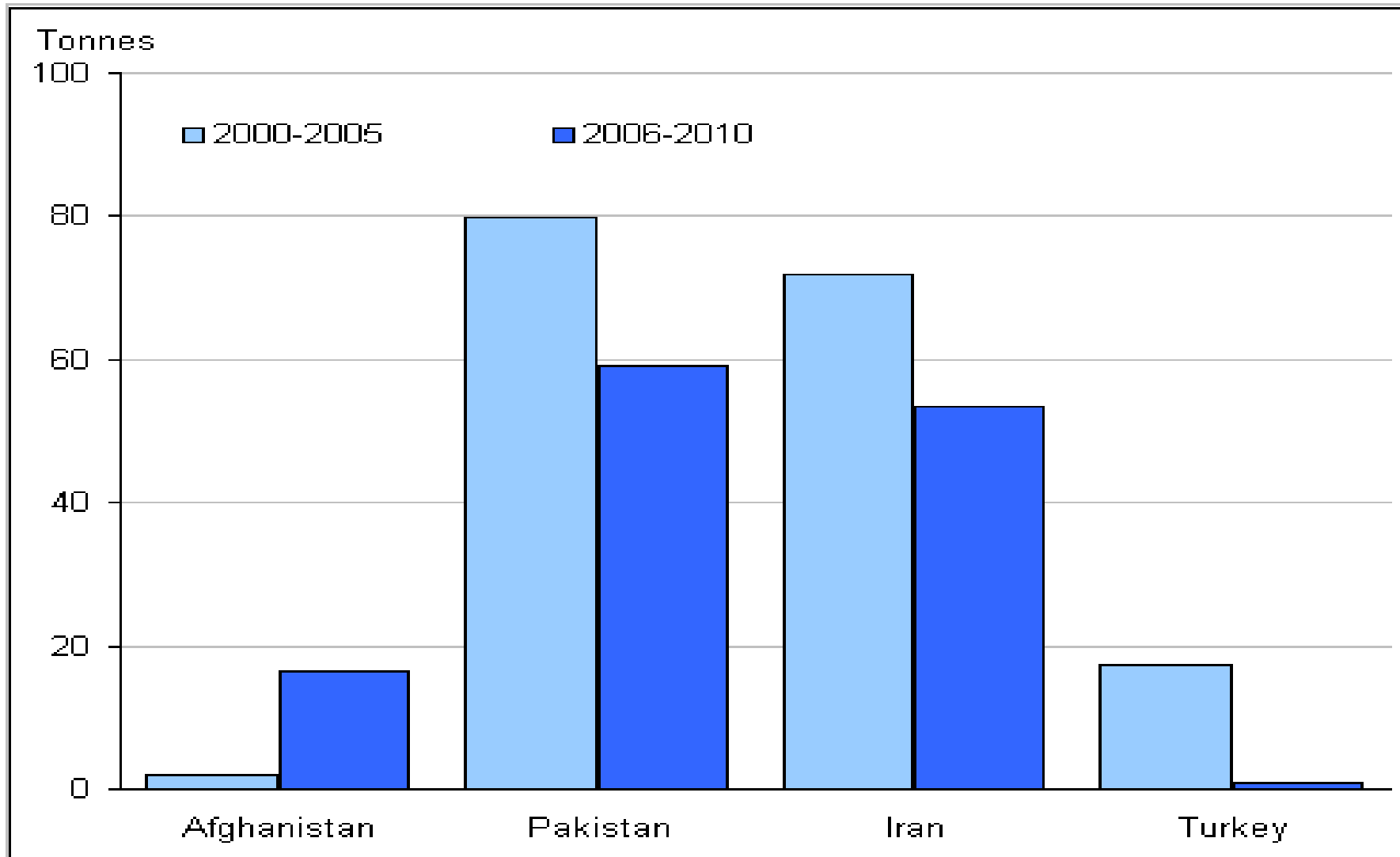
Source: UNODC, WDR 2012



Opium poppy cultivation, Afghanistan, 2011



Quantities of morphine seized in the four largest seizing countries, 2000-05 and 2006-10



Source: UNODC (2012a, 2007)

Opium 'not processed' can be...

- **Seized?**

- 500 tonnes of opium seized worldwide in 2010 (95% in Afghanistan, Iran and Pakistan). This would represent only about 14% of the UNODC 2011 estimate of 3,400 tonnes of unprocessed opium in Afghanistan.
- 81 tonnes heroin seized worldwide in 2010 (33% Iran; 16% Turkey; 11% Afghanistan). This is 17% of estimated global heroin production (467 tonnes).

- **Stocked?**

- UNODC (2009): 2 600 tonnes of opium or an equivalent amount of morphine and heroin stockpiled in Afghanistan and along trafficking routes (2009).
- UNODC (2011): existing opium stockpiles totalled 10 000 to 12 000 tonnes -- equivalent to about 2 annual Afghan opium harvests at 2011 level.
- Little empirical evidence of existence of large opium stockpiles, though not implausible

- **Consumed?**

- UNODC estimates vary widely: 4 million opium users worldwide (80% living in Asia), consuming a total of 1.3 tonnes (2008), or 1,300 tonnes (2009), of raw opium.
- 1,300 tonnes represent more than 33% of 'unprocessed Afghan opium' in 2011, but poppies also grow elsewhere (Myanmar, Laos).



Potentially expanding Non Western Heroin markets

- **Africa** – UNODC indicates potential expansion there (no data). Large markets already exist in Nigeria, Kenya, Tanzania, South Africa, etc.
- **Non-EU Europe** – UNODC indicates **Russia and South-Eastern Europe (Balkans)** as high heroin prevalence regions.
- **Mid-East** – Violence in Iraq and Syria (production, trade, perhaps use). Egypt?
- **Asia** – UNODC indicates potential expansion there (no data).
 - China and India: likely very large and increasing markets (no data)
 - Indonesia, Malaysia? (no data)





Thank you for your attention

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