European Monitoring Centre
for Drugs and Drug Addiction

Illicit drug markets

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The organised crime economy: Europe's most profitable business?

EMCDDA: the EU drug information agency

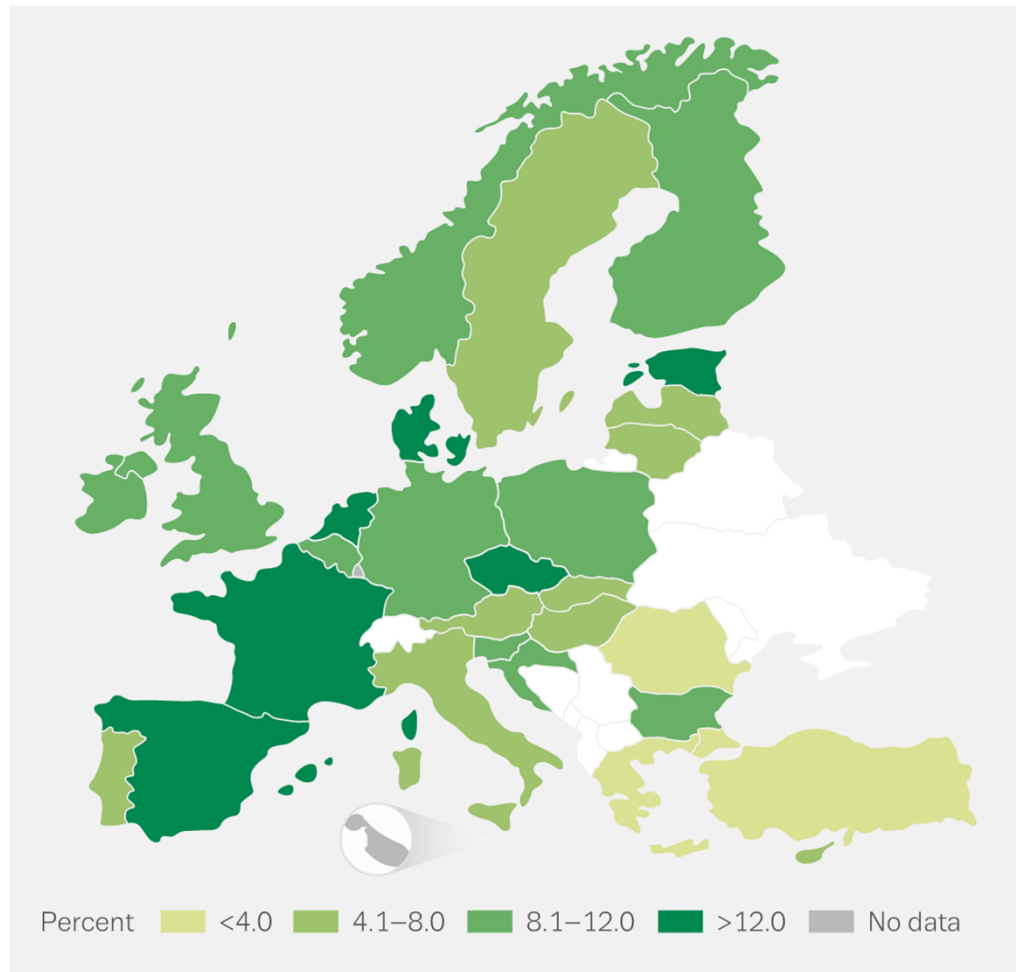28 EU Member States, Turkey and Norway

Cannabis

Cannabis: Europe's most commonly used drug

- 15 million young adults aged 15–34 used it in the last year

- A quarter of EU adults (79 million) aged 15–64 report lifetime use
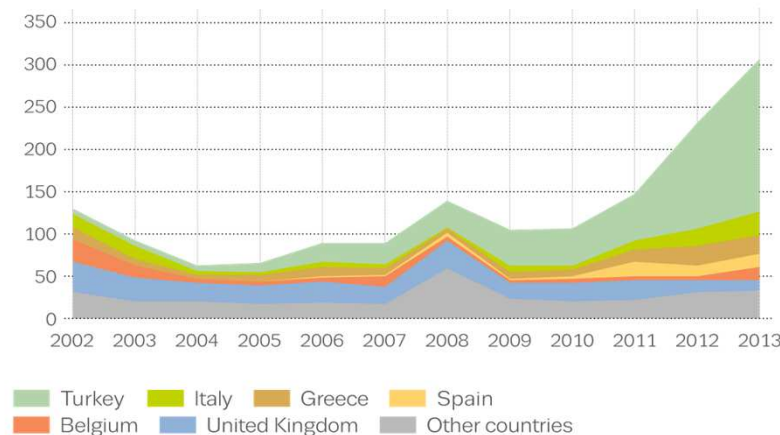
- Almost 1 % of adults daily users

Last year prevalence of cannabis use among young adults (15–34)

Percent   <4.0   4.1–8.0   8.1–12.0   >12.0   No data

Cannabis market trends

Trends in quantity of cannabis seized

Herb (tonnes)

Legend: Turkey, Italy, Greece, Spain, Belgium, United Kingdom, Other countries

Resin (tonnes)

Legend: Turkey, Other countries, Portugal, United Kingdom, Italy, France, Spain
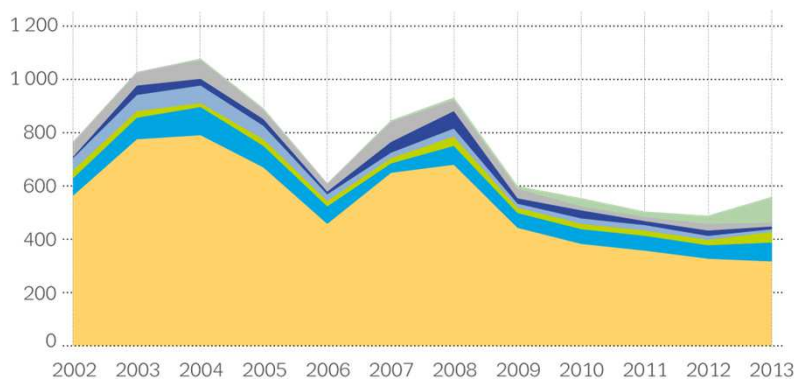
Seizures of herbal cannabis — increasing trend

…but quantity of resin seized higher than herb (460 vs. 130 tonnes)

Potency rises for both products
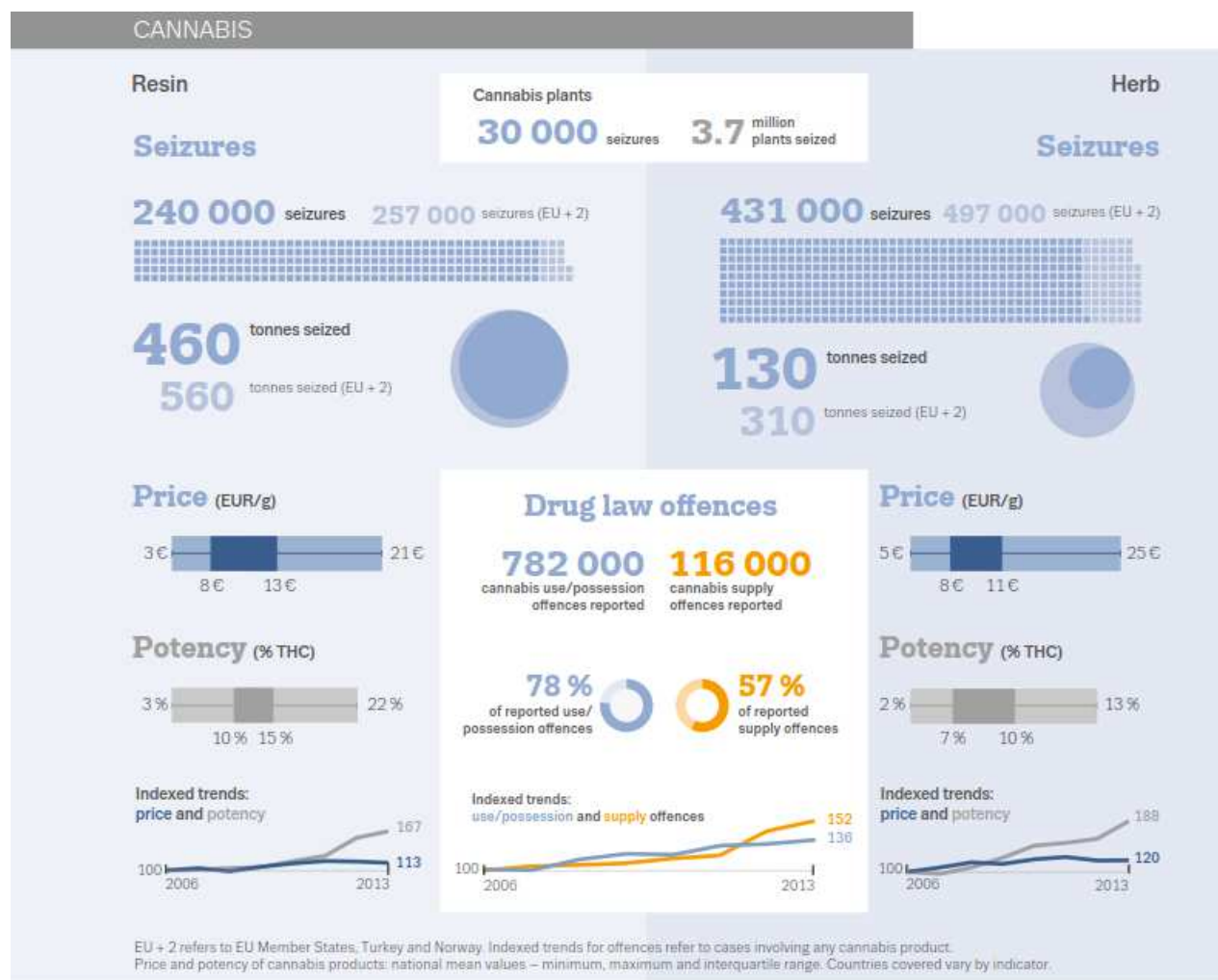
Price and potency
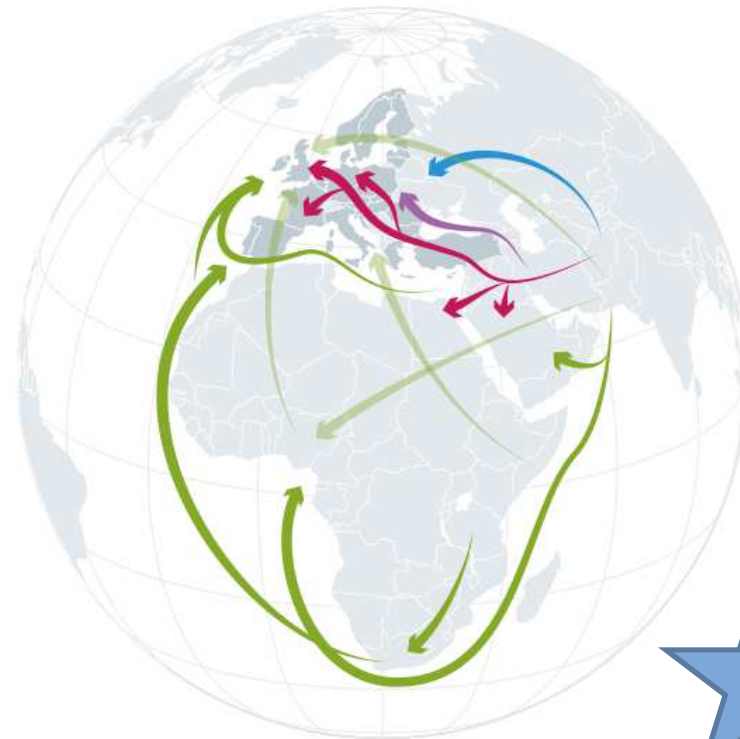
Heroin

Heroin production and trafficking

Increased opium production in Afghanistan

Multiple routes into Europe,

'Southern route' gaining importance

Some signs of EU heroin production

Balkan Route   Southern Route   Northern Route   Caucasus Route
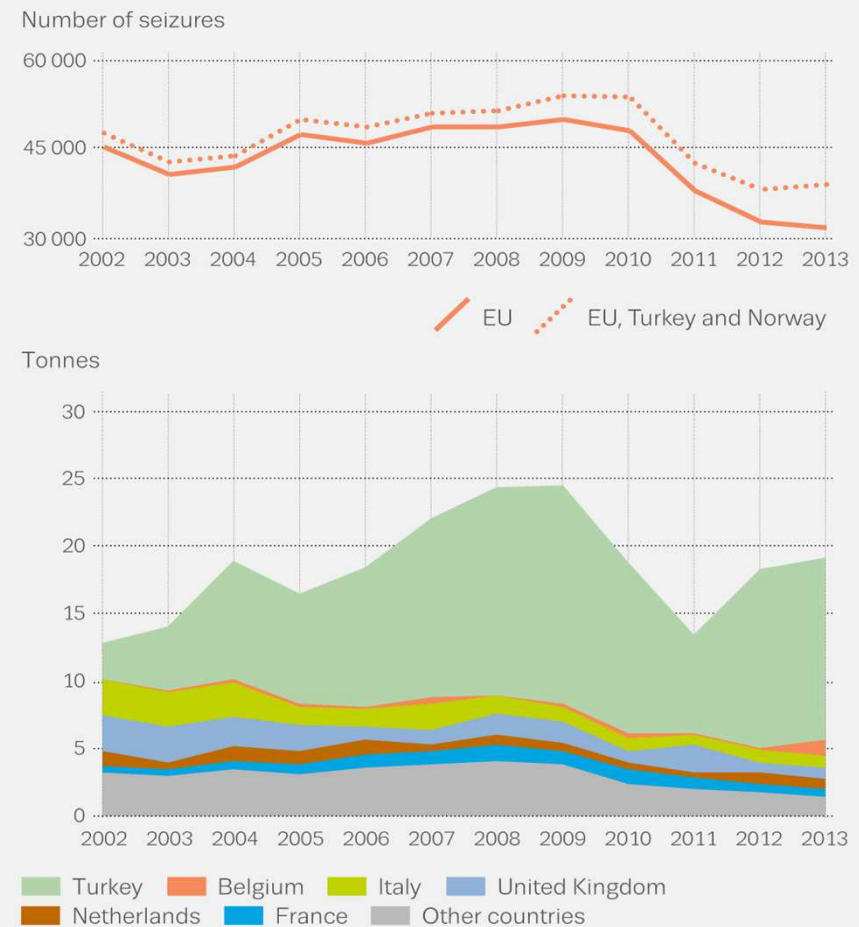
Source: UNODC

Heroin market: EU seizures continue to decline

Drop in seizures from
2009 and long-term
decline in quantities,
but increases for Turkey

Recent upturn in heroin
purity

Number of heroin seizures and quantity seized

Number of seizures

EU   EU, Turkey and Norway

Tonnes

Turkey   Belgium   Italy   United Kingdom
Netherlands   France   Other countries

1.3 million problem opioid users

New heroin clients more than halved from 2007 to 2013

Trends in first-time entrants

Legend:
- Other countries
- United Kingdom
- Italy
- Germany
- Spain

Price and purity

COCAINE

Seizures

78 000
seizures

80 000
seizures (EU + 2)

62.6
tonnes seized

63.2
tonnes seized (EU + 2)

Price (EUR/g)

47€   103€

52€   70€

Purity (%)

20%   75%

33% 50%

Indexed trends:
price and purity

100   101
        89

2006   2013

Drug law offences

72 300   **29 900**
Cocaine use/possession   Cocaine supply
offences reported   offences reported

7 %   **15 %**
of reported use/   of reported
possession offences   supply offences

Indexed trends:
use/possession and supply offences

            123
            119
100

2006   2013

EU + 2 refers to EU Member States, Turkey and Norway. Price and purity of cocaine: national mean values – minimum, maximum and interquartile range. Countries covered vary by indicator.
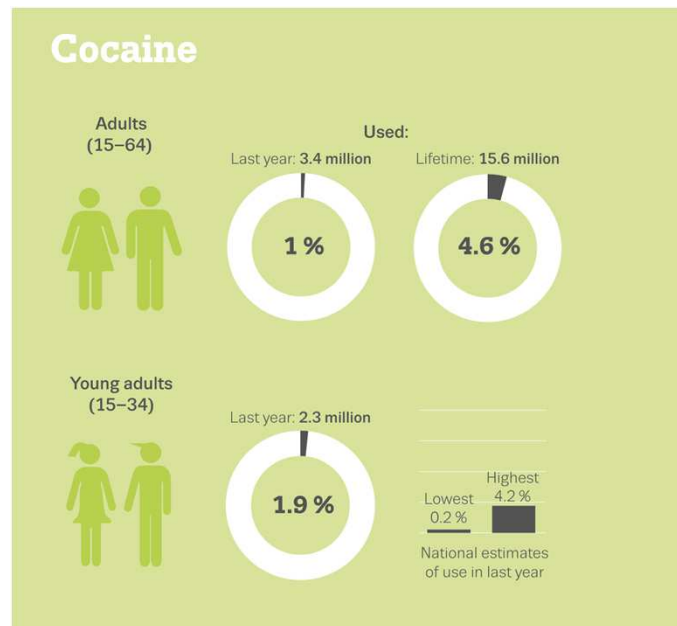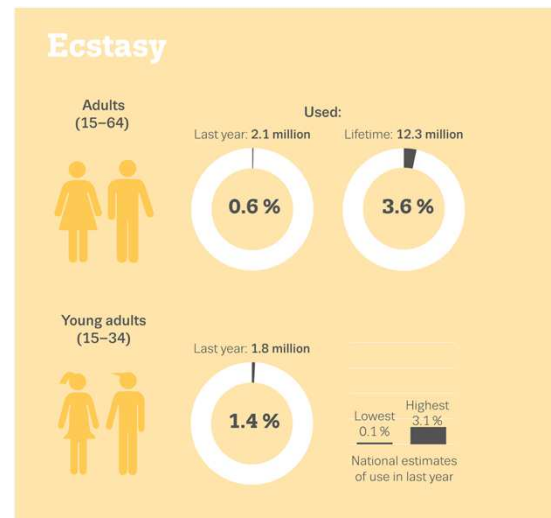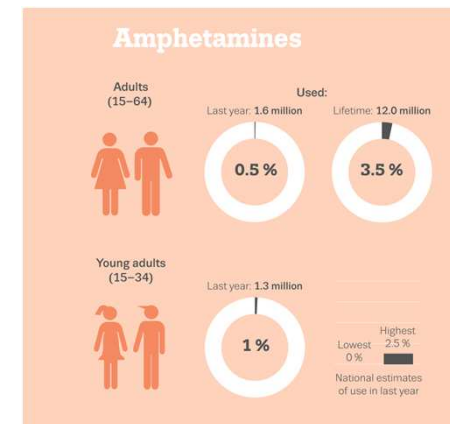
Stimulants

Prevalence of stimulants

2.3 million young adults
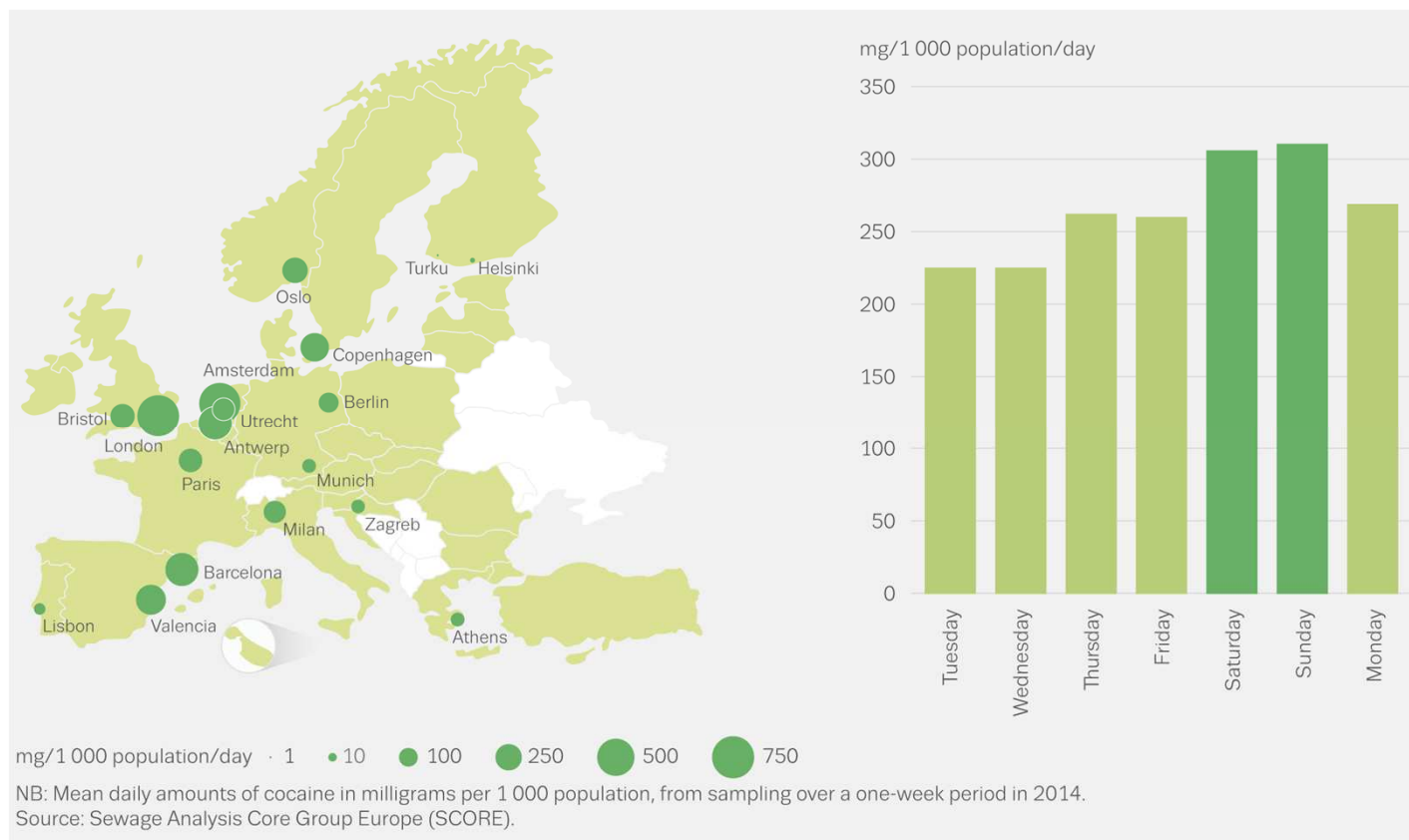
1.8 million young adults

1.3 million young adults
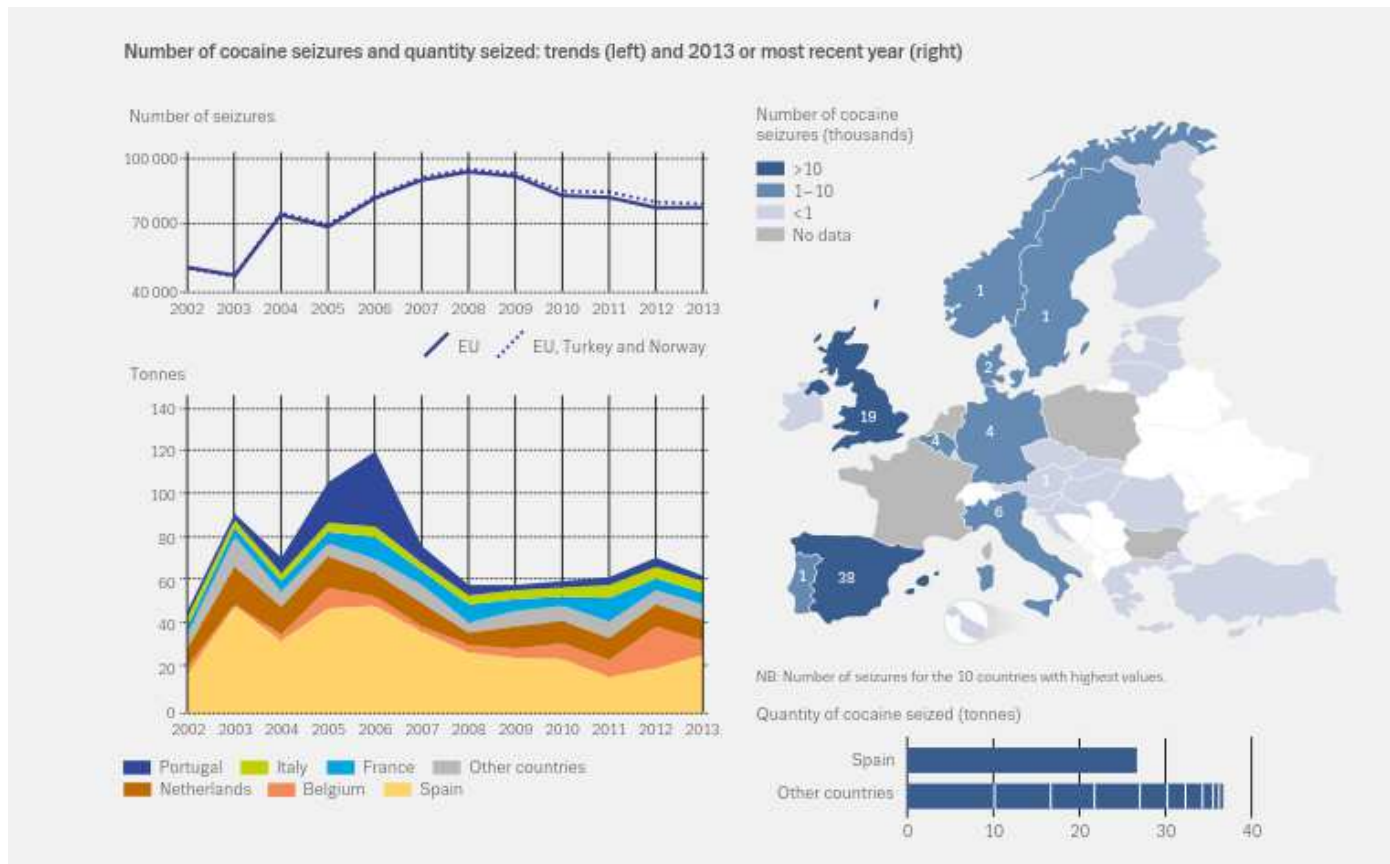
Patterns of cocaine use: wastewater results

## Geographical and temporal variation in levels of use

Cocaine residues in wastewater: in selected European cities and daily averages

mg/1 000 population/day · 1 · 10 • 100 ● 250 ● 500 ● 750

NB: Mean daily amounts of cocaine in milligrams per 1 000 population, from sampling over a one-week period in 2014.
Source: Sewage Analysis Core Group Europe (SCORE).

Cocaine market: stable market and increased purity

Number of cocaine seizures and quantity seized: trends (left) and 2013 or most recent year (right)
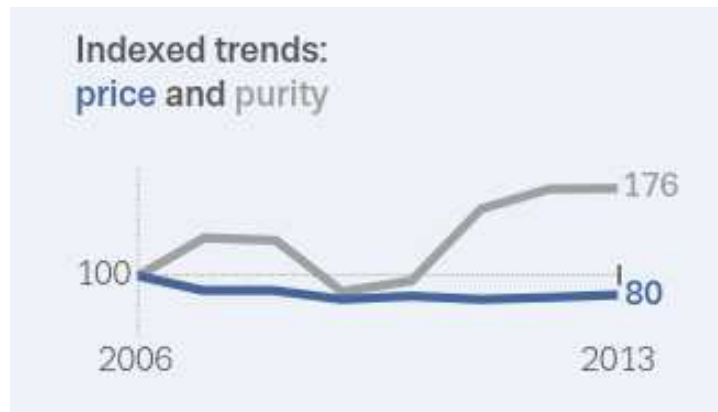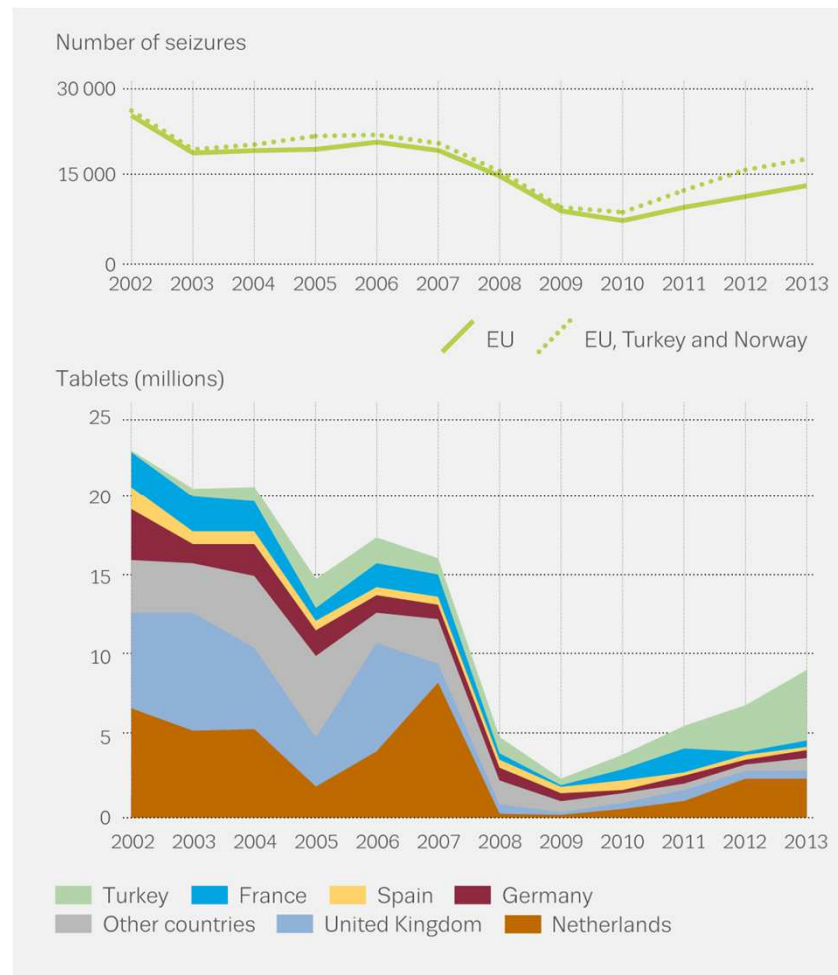
Cocaine - price and purity
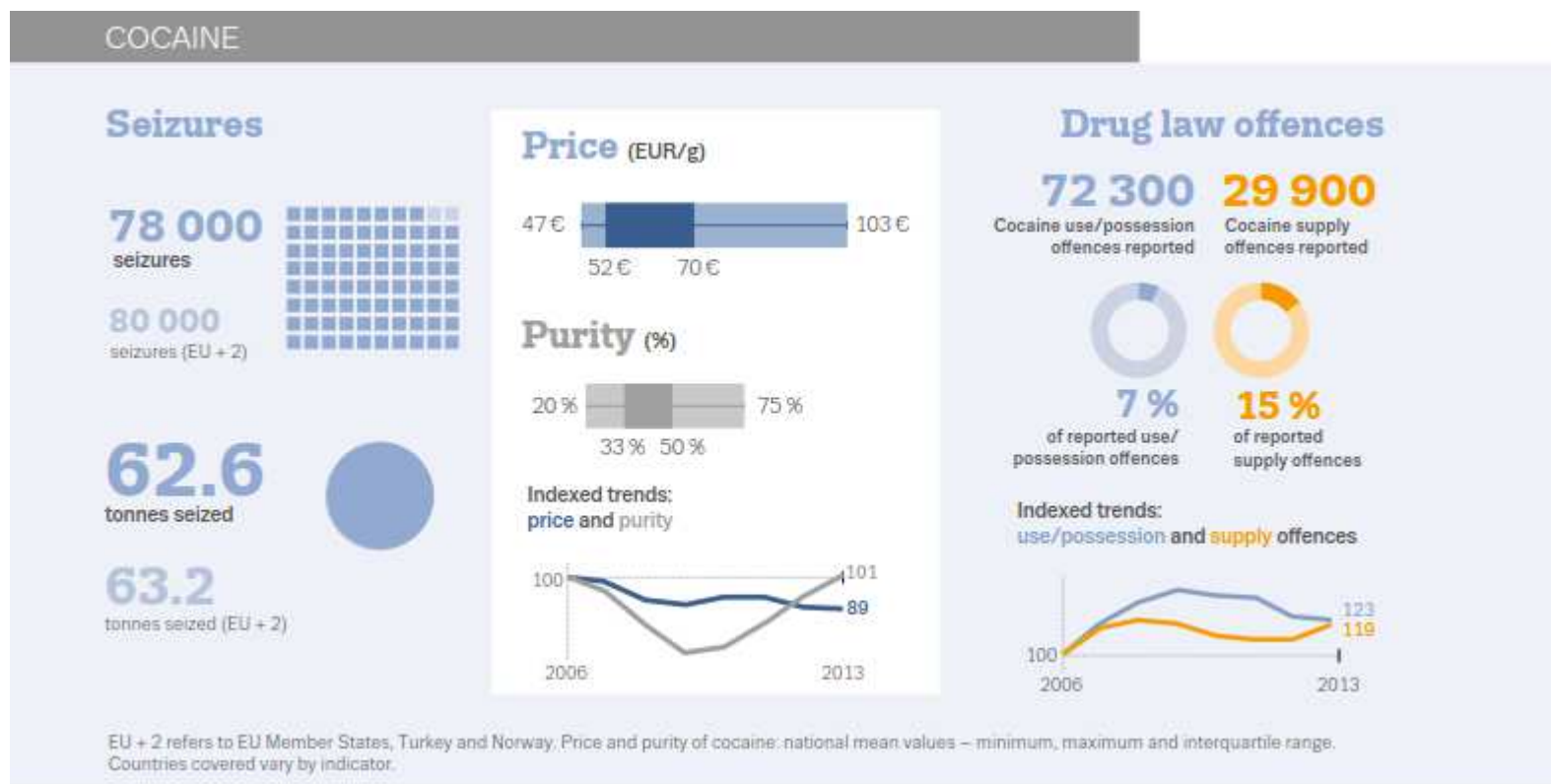
MDMA market: evidence of recovery

- MDMA seizures increasing
- Major seizures of MDMA precursors
- Large-scale production facilities dismantled (BE and NL)

Purity up

Indexed trends: price and purity

Numbers of MDMA seizures and tablets seized: trends

Number of seizures

EU   EU, Turkey and Norway

Tablets (millions)

Turkey   France   Spain   Germany
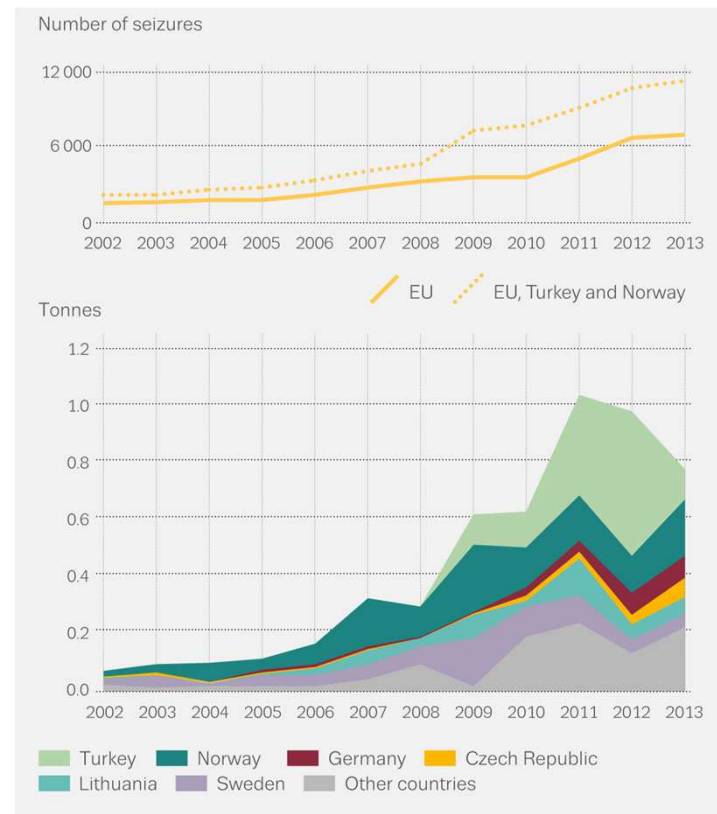Other countries   United Kingdom   Netherlands

Market: increased methamphetamine seizures

Amphetamine — after period of stability, increase in quantity
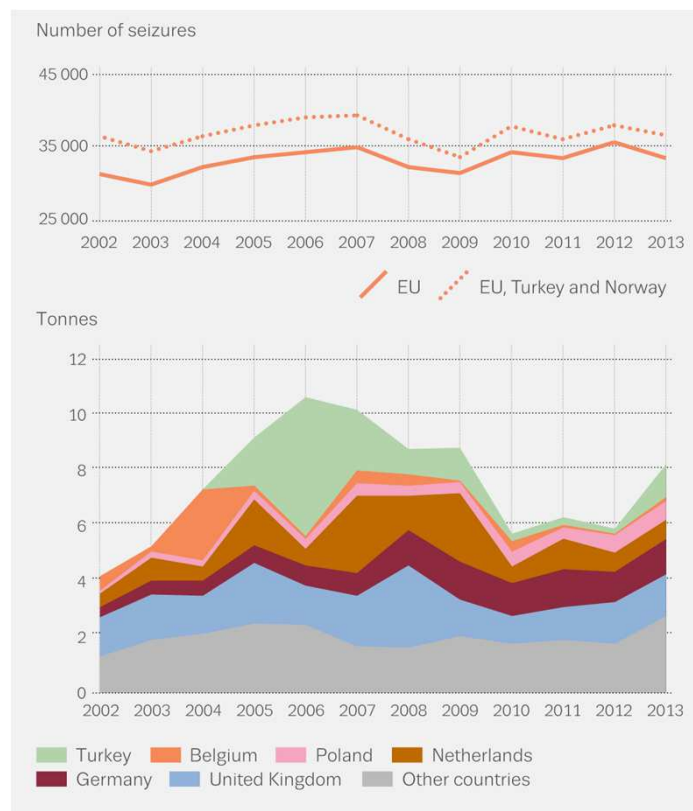
Methamphetamine — seizures are 1/6 of all amphetamines seizures, **but** increasing trends for both number and quantity since 2002

Cross-cutting: increases in potency and purity

Purity increases for established drugs
(medium to short term)

Technical innovation and market competition

Cannabis

- domestically produced high-potency herbal products
- increase in potency of resin — changes in production

Heroin

- rebound after drought?

MDMA

- precursor driven
- marketing strategy?

Stimulants

- competing stimulant products
- competition with NPS?

Market size estimates - 2nd EDMR

Two broad approaches

➤ Supply-side or top-down

Amount produced – (Seizures + Losses) = Amount available & consumed
Amount available * Purity adjusted price = Market value

➤ Demand-side or bottom-up

No. of LY users * Av. amount used/year = Total annual consumption (quantity)

Total annual consumption * Purity adjusted price = Market value (per year)

or

No. of LY users * Av. annual expenditure = Market value

Market size estimates – 2nd EDMR

Simple basic model but the devil is in the detail

Complex patterns of use

- Different patterns of use / types of user
- Polydrug use & substitution
- Modes of use & different forms of drugs

Data issues

- Availability (or lack of it)
- Timeliness – which year
- Quality (uncertainty, representativeness, coverage, validity)

Concluding remarks …

- Overall decrease in heroin problems and related harms, although supply indicators raise new concerns

- Treatment systems and law enforcement efforts — cannabis increasingly important

- Cross-cutting:
  - Market competition and innovation drive purity and potency increases, with new virtual marketplaces emerging.
  - Widespread ramifications of illicit drugs markets
  - …