

# EU Drug Markets Report

## About the EU Drug Markets Report

The EU Drug Markets Report 2016 is the second comprehensive overview of illicit drug markets in the European Union by the EMCDDA and Europol. Taking an evidence-based approach, the report considers the impacts of the drug market on wider society and reviews the markets for cannabis, heroin, cocaine, amphetamine, methamphetamine, MDMA and new psychoactive substances. It also provides concrete action points to inform policy development at EU and national level.

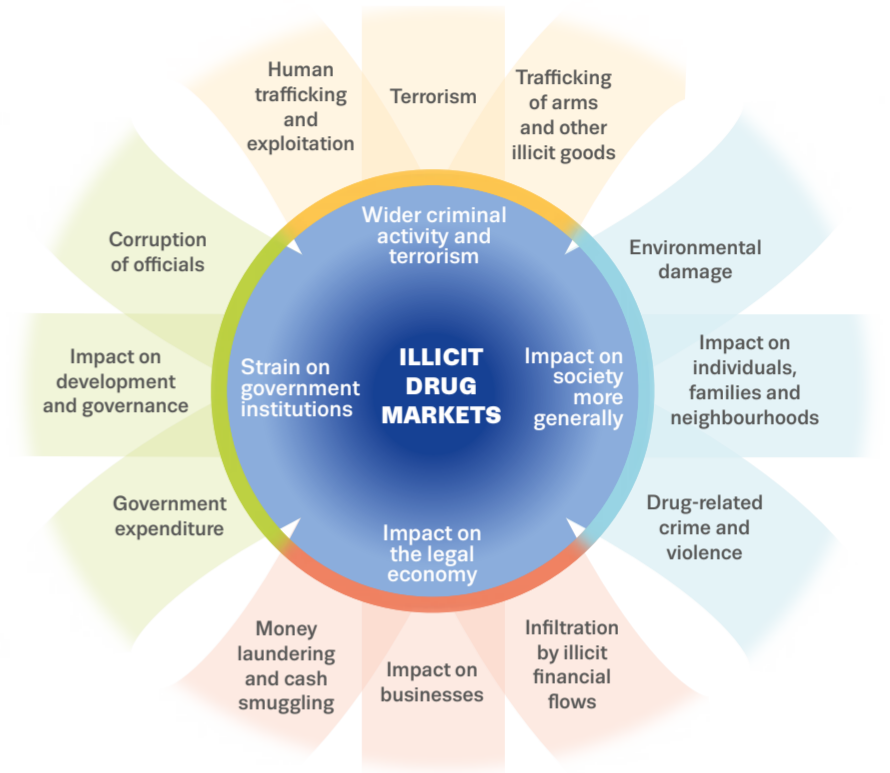


## Understanding the widespread ramifications of illicit drug markets

Drug markets have wide-ranging and varied impacts; linking to wider criminality and having negative effects on the licit economy, government institutions and society more generally. Drugs are big business: key concerns for most participants are maximising profits, ensuring sustainability and maintaining competitive advantage, while minimising risk. Understanding how they operate can identify opportunities to intervene and damage their operations.

Key influences on new developments in the markets and how the criminals involved operate are:

- **Globalisation** — this simultaneously facilitates drug supply, by generally improving its efficiency and multiplying opportunities for trafficking, while hampering drug supply reduction activities
- **Technological developments and the Internet** — these not only provide new ways to access customers and suppliers but also opportunities to enhance the efficiency and security of off-line criminal activities



## Main illicit drug markets in the EU

### Cannabis

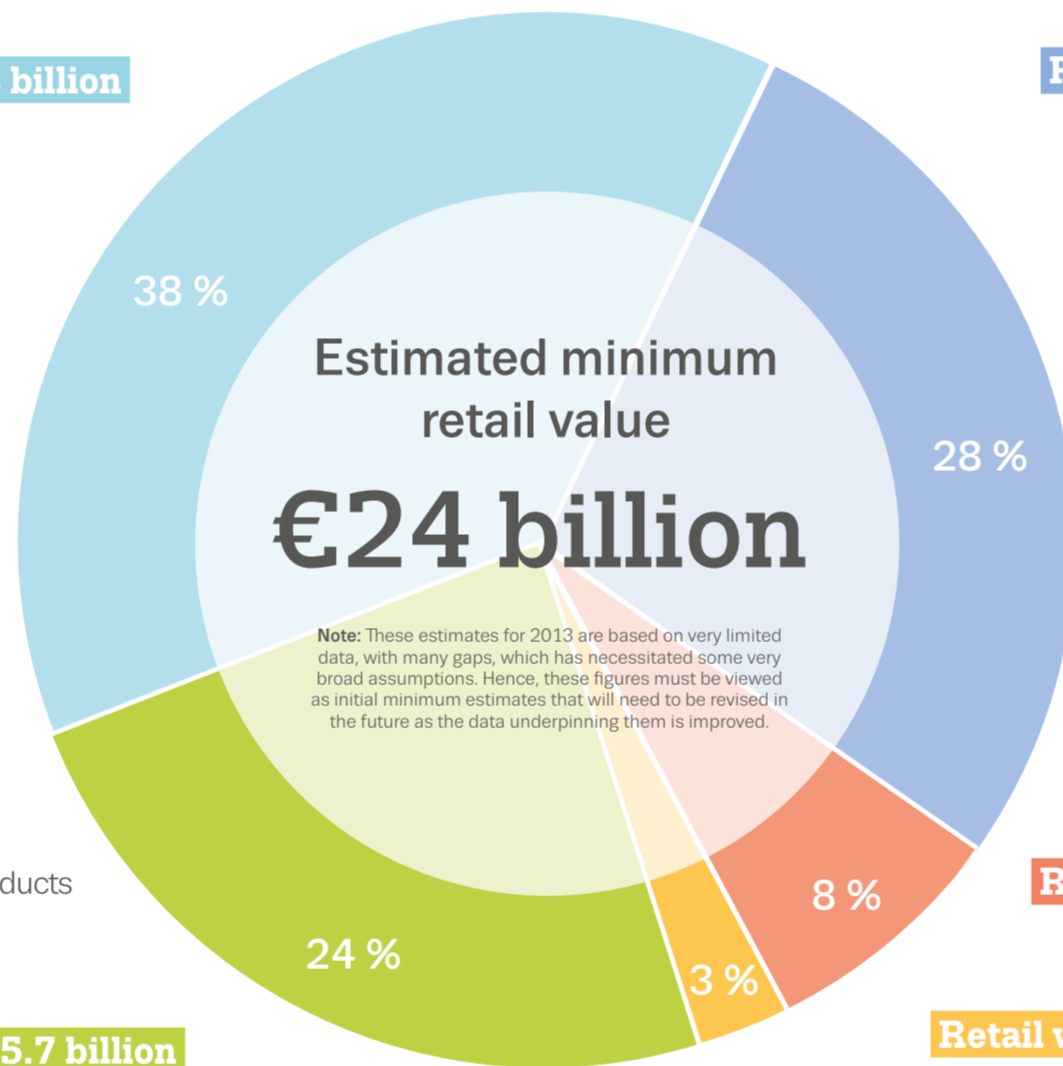
Retail value: €9.3 billion

#### Trends in cannabis potency in the EU



#### Key issues

- The market is dominated by domestic herbal product
- Potency increases but prices remain stable
- Cannabis use raises health concerns
- Organised crime plays a key role
- Moroccan cannabis resin is moving east
- Rapid innovation in production of resin, herb and other products



Estimated minimum  
retail value  
**€24 billion**

Note: These estimates for 2013 are based on very limited data, with many gaps, which has necessitated some very broad assumptions. Hence, these figures must be viewed as initial minimum estimates that will need to be revised in the future as the data underpinning them is improved.

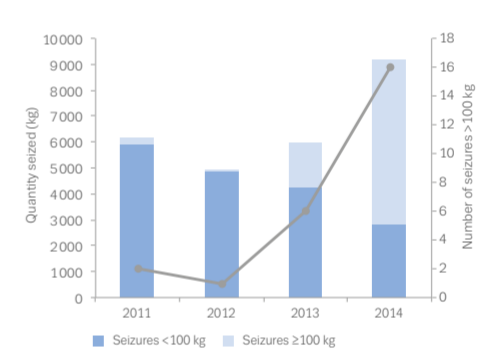
Retail value: €6.8 billion

### Heroin

#### Key issues

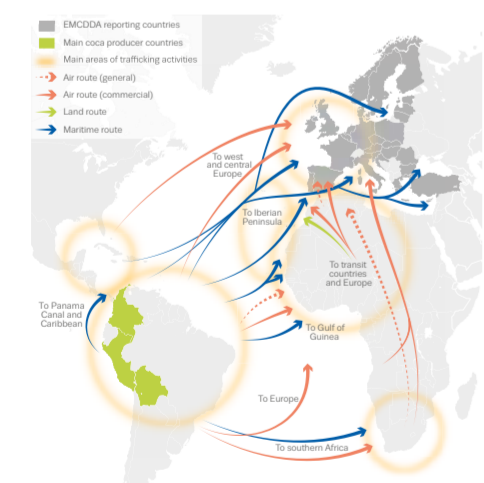
- Implications of large seizures must be understood
- Organised crime is changing practices
- The Balkan route remains important
- Trafficking routes have a wider impact
- Heroin causes most of Europe's drug-related health and social costs
- The opioid market is becoming more diversified and complex
- Understanding shifts in heroin production is essential

#### Trend in large seizures of heroin and their contribution to total seized in the EU



### Cocaine

Retail value: €5.7 billion



Main trafficking flows of cocaine to Europe

#### Key issues

- Trafficking routes are multiple and complex
- Demand is stable but availability may be increasing
- Production estimates are hard to interpret
- Precursor: continued vigilance is needed
- Secondary extraction labs: a threat?
- Organised crime: new ways, new players

Retail value: €0.7 billion

### Amphetamine, methamphetamine, MDMA

#### Key issues

- Production occurs in specific hotspots
- Innovation in production and marketing methods
- Production has a negative environmental impact
- Markets are complex and overlapping
- Highly potent MDMA tablets and more methamphetamine are available
- The EU is an export and transit zone
- Organised crime plays a major role

#### Amphetamine, methamphetamine and MDMA production sites in the EU, 2013-15

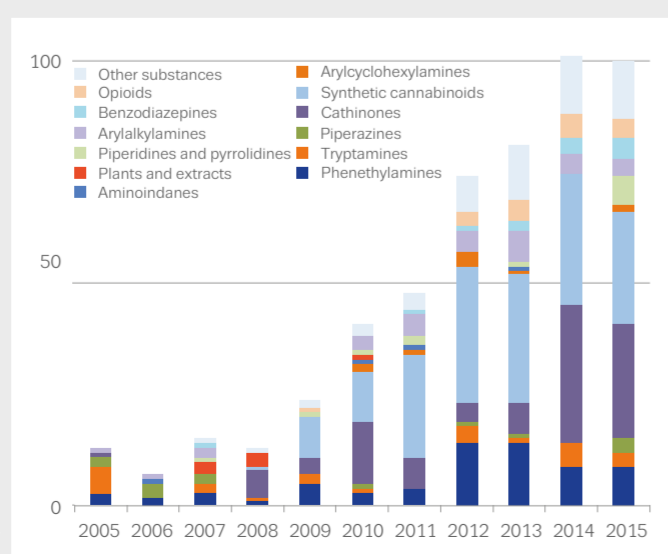


## New psychoactive substances

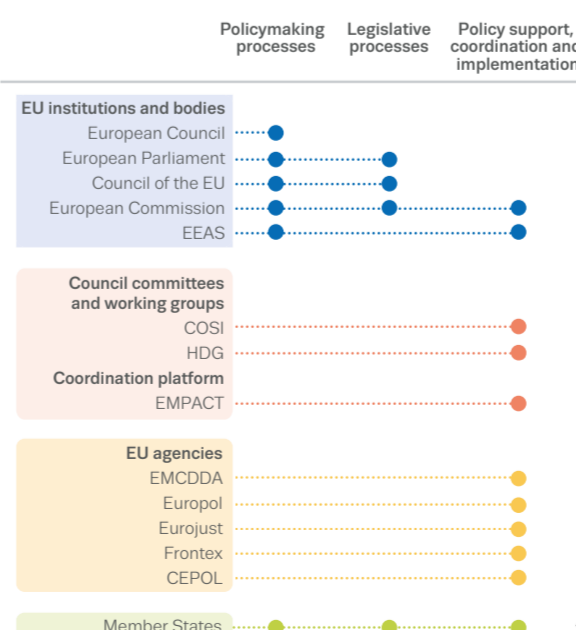
#### Key issues

- No slow-down in the number, type and availability
- Production and distribution is globalised
- The internet plays a key role
- Marketing strategies are sophisticated
- Health risks are significant

Number of NPS reported to the EU Early Warning System for the first time



## Tackling the illicit drug markets



In response to the widespread impacts of the illicit drug markets, drug supply reduction is addressed in several policy areas at EU level and is a core component of the drug strategies and responses of Member States. The EU Drugs Strategy (2013–20) and action plan (2013–16) provide a framework for addressing illicit drugs in the EU, complementing Member States' national strategies and supporting joint actions. The overarching objective of the EU Drugs Strategy in the area of supply reduction is a measurable reduction of the availability of illicit drugs through the disruption of illicit drug trafficking; the dismantling of OCGs that are involved in drug production and trafficking; efficient use of the criminal justice system; effective intelligence-led law enforcement and increased intelligence sharing; and an EU-level emphasis on large-scale, cross-border and organised drug-related crime.

Main EU structures addressing drug supply reduction issues