EU drug markets: signs of expansion and diversification

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CND Thematic session 1: The range of drugs and drug markets are expanding and diversifying
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The financial impact of drug markets

Estimated minimum retail value of the illicit market for the main drugs in the EU

- Cannabis: €9.3 billion (38%)
- Heroin: €6.8 billion (28%)
- Cocaine: €5.7 billion (24%)
- Ecstasy: €0.7 billion (3%)
- Amphetamines: €1.3 billion (8%)

Note: Percentages do not add up to 100% due to rounding.
Source: EMCDDA.
Growing levels of seizures: cocaine

Quantity of powder cocaine seized: trends and 2017 or most recent year

Tonnes
Growing levels of seizures: heroin

Quantity of heroin seized: trends and 2017 or most recent year

Tonnes


Turkey  Italy  France  Bulgaria
United Kingdom  Greece  Other countries
Europe producer & global supplier: MDMA

Dismantled laboratories related to the production of MDMA, 2017

Bulk freshly produced MDMA crystals seized in the Netherlands, 2015.

A professional tableting site dismantled in Dronten, the Netherlands, 2014

Photos © Dutch National Police/LFO
Increasing drug purity: cocaine and MDMA

Indexed trends

Price and purity

MDMA tablet content at 10-year high
Increasing potency: cannabis resin, 2007-17
Market diversification: cannabis products

Commercialisation, innovation

Significant changes in global cannabis markets

Shatter sample, 79 % THC. Potter et al., 2018

Crumble sample, 83 % THC. Potter et al., 2018

Crystalline form of THC

“Rosin” – heat and pressure ~80% THC

Edible cannabis products, DEA
Violence and corruption continuing concern

▪ Drug-related homicide
▪ Spread of gang influence, violence, exploitation and intimidation
▪ Corruptive influence in the EU
Expanding EU drug market
Thank you!

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