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Thematic debate on the follow-up to the twentieth special session of the General Assembly: general overview and progress achieved by Governments in meeting the goals and targets for the years 2003 and 2008 set out in the Political Declaration adopted by the Assembly at its twentieth special session

Complementary drug-related data and expertise to support the global assessment by Member States of the implementation of the declarations and measures adopted by the General Assembly at its twentieth special session

Report by EUROPOL**

Summary

Pursuant to Commission of Narcotic Drugs resolutions 49/1 "Collection and use of complementary drug-related data and expertise to support the global assessment by Member States of the implementation of the declarations and measures adopted by the General Assembly at its twentieth special session" and 50/12 "Measures to meet the goal of establishing by 2009 the progress achieved in implementing the declarations and measures adopted by the General Assembly at its twentieth special session", intergovernmental organizations active in the field of international drug control were invited to submit regionally consolidated comparative analyses of the current situation and trends in various areas of drug control in their fields of action with that prevailing in the period 1998-2000. Organizations were also invited to present the actions and changes that had taken place in their regions or fields of action in relation to the implementation of the goals and targets set in the Political Declaration and the measures to enhance international

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cooperation to counter the world drug problem, and related action plans, adopted at the twentieth special session of the General Assembly, 8 to 10 June 1998 (A/RES/S-20/2, A/RES/S-20/3 and A/RES/S-20/4).

Several organizations provided information in response to the above request. In addition, UNODC also received unprocessed data from a number of organizations.[1] Where relevant, this information was used to complement the data provided by Member States through the Biennial Reports Questionnaire (BRQ) and reflected in the fifth report of the Executive Director on the world drug problem (E/CN.7/2008/2 and Addenda 1 to 6).

The report by Europol contains a 10-year European Union overview of the production of, and trafficking in amphetamine-type stimulants and their precursors as well as information on related initiatives at European Union level.

[1] ASEAN and China Cooperative Operations in Response to Dangerous Drugs (ACCORD); Caribbean Financial Action Task Force (CFATF); South-American Financial Action Task Force (GAFISUD); South-Caucasus Anti-Drug Programme (SCAD) and the Joint United Nations Programme on HIV/AIDS (UNAIDS).

AMPHETAMINE-TYPE STIMULANTS IN THE EUROPEAN UNION 1998-2007 - EUROPOL

Executive Summary

Drug matters appear high on the political agenda of the European Union. In the last decade, two successive European Union Drug Strategies and their related Action Plans were endorsed and implemented. In the area of synthetic drugs, a specific Action Plan was endorsed and legal instruments were developed to monitor and act against new synthetic drugs.

Various initiatives have been undertaken to make law enforcement more effective. At European Union-level the model of intelligence-led law enforcement is being developed and implemented. This concept foresees a crucial role for the European Chiefs of Police Task Force, Europol and Eurojust. Furthermore, Europol and Member States developed Project SYNERGY, which is the main synthetic drugs project in the European Union. The Project is supported by the European Joint Unit on Precursors, the COSPOL Project on synthetic drugs and the CHAIN Project on amphetamine profiling.[2] However, in spite of considerable progress that has been made in international law enforcement cooperation between Member States and with Europol, there is still considerable room for improvement.

After a continuous rise in the 1990s, the global market of amphetamine-type stimulants (ATS)[3] has stabilised at a high-level. Annual global ATS production is estimated at 480 tons, the far majority being methamphetamine produced in Asia and North America.[4] Any stabilisation may be a reflection of various issues including improved international law enforcement co-operation, enhanced precursor and chemical control, increased awareness of industry on the potential diversion of chemicals and equipment, regular seizures of major illicit production sites and demand factors such as market saturation or preference for other types of drugs.

Despite several political and law enforcement initiatives to combat production and trafficking of synthetic drugs, the past decade has not seen any shortage of these substances on the consumer markets in the European Union. The steady decline of street-level prices suggests a stable level of supply or even a saturation of the consumer market rather than a substantial reduction of availability. According to the European Monitoring Centre for Drugs and Drug Addiction, in many European countries the second most commonly used illegal substance, after cannabis, is some form of synthetically produced drug.[5]

According to the UNODC,[6] the globalisation of illicit production, trafficking and consumption of drugs has resulted in a gradual diminishing of the distinction between producer and consumer countries. The abuse of various types of drugs, previously limited to some regions, has become prevalent worldwide. This global

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[2] Collaborative Harmonised Amphetamine INitiative.

[3] The term of amphetamine-type stimulants is used to refer to amphetamines (amphetamine, meth-amphetamine and related substances) and ecstasy (3,4-methylendioxymethamphetamine [MDMA] and related analogues).

[4] United Nations Office on Drugs and Crime (UNODC), World drug report 2006.

[5] European Monitoring Centre for Drugs and Drug Addiction, Annual report 2006 on the state of the drugs problem in Europe. Lisbon 2006.

[6] Global illicit Drug Trends, Vienna, 1999.

assessment to a large extent reflects the situation in the European Union. The worldwide demand for MDMA, commonly referred to as ecstasy, has lead to exportation of the drug from the European Union to markets in Central and Eastern Europe, Asia, the United States and Australia.

The last decade has seen a steady increase in synthetic drug production in the European Union. Member States consistently seize synthetic drug production facilities, with most high-capacity sites being in the Netherlands and to a lesser extent Belgium, with production of amphetamine in Poland at a comparative mid-level. Related criminal networks remain very active as the synthetic drug market is one of the most lucrative markets,[7] despite decreasing wholesale and retail prices. This is aided by relatively small capital investment, basic manufacturing methodology, low costs and availability of chemicals and equipment plus ever-increasing production capacities.

Although production of amphetamine and MDMA remains concentrated in Europe, manufacture of MDMA has spread to varying degrees to other parts of the world, notably North and South America, South Africa, Oceania and Asia. This is reflected in an apparent reduction in the export of MDMA from the European Union, to North America in particular.

Principal MDMA and amphetamine precursors PMK and BMK are both traditionally sourced in Asia, particularly the People's Republic of China. However, in recent years, BMK has also been sourced and trafficked from the Russian Federation, reflected in developments in the demographics of organized crime activity.

Seizure statistics show that all European Union Member States, without exception, are impacted by MDMA trafficking and that the majority are also highly affected by amphetamine trafficking. Overall MDMA seizures in the European Union in 2005 decreased by 43% while seizures of amphetamine increased by 45% when compared to 2004. In 2006, a reverse of this trend was observed, possibly a reflection of respective precursor availability. In addition, production and trafficking of methamphetamine, other synthetic and so-called 'designer' drugs are emerging threats.

Production and trafficking of synthetic drugs is in the hands of indigenous groups. These groups become increasingly co-operative with the formation of large international coalitions. This sometimes involves the exchange of chemicals for drugs and vice-versa.

Law Enforcement

Large scale production and trafficking of illicit drugs are core businesses of organized crime. Its activities fuel drug abuse, drug-related crime and public nuisance and are major sources for illegal profits. For those reasons, the combating of drug-related organized crime has been, and remains, a priority for law enforcement agencies in the European Union.

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[7] Europol: The Production and Trafficking of Synthetic Drugs, related Precursors and Equipment – A European Union Perspective. The Hague, July 2007.

In the last decade, Member States' law enforcement agencies achieved some remarkable results in combating international organized drug trafficking. The creation of specialised teams against specific types of crime, e.g. production of synthetic drugs also contributed to these results. In this respect reference is made to the European Joint Unit on Precursors (EJUP), which was created in 2003 as a multi-national, multidisciplinary operational unit to investigate serious criminal activity in the field of precursor chemicals. Furthermore, the Swedish CASE initiative[8] was developed: a pilot project on the profiling of amphetamine, in which seizure data and intelligence was provided to Europol, whilst at the same time samples of seized amphetamine were sent to the Swedish National forensic laboratory for profiling purposes with a view to identifying links between seizures, criminal investigations and criminal groups. The CASE Project ended in 2005 and was succeeded by the CHAIN Project.

Various other initiatives have been undertaken to make law enforcement more effective. It is increasingly common in the Member States to set up joint task forces for complex and large-scale investigations, by combining the manpower, knowledge and technical capacity of different law enforcement agencies such as the Police, Customs, Coast Guard and Revenue Services. In this respect it is worth mentioning that the Member States reached agreement on the creation of international investigation teams, similar to task forces that have been set up in several Member States. Other initiatives relate to the wider creation of national bodies for the collection and processing of criminal data and to the development or implementation of national strategies to combat the drug phenomenon.

International cooperation and the exchange of information and intelligence between Member States' law enforcement agencies take place on a daily basis. Drug Liaison Officers play a vital role in this. This has led to numerous investigations in recent years, resulting in the arrest and conviction of many suspects, the seizure of drugs and the confiscation of assets.

In spite of considerable progress that has been made in the international cooperation between Member States and with Europol, there is still room for improvement. Too often investigations into international drug trafficking organizations are limited to the competence of local or regional law enforcement agencies, with little attention being given to the international impact of a criminal group. Sometimes, the international dimension may be deliberately ignored to avoid interference from outside in the course of an investigation and the spending of resources, or due to local or regional priorities. Another problem is the fact that in many Member States information available to law enforcement agencies is still not collated and analysed at national level. Valuable intelligence that could be of interest to law enforcement agencies both in the Member State itself and in other Member States, is thereby lost.

The international nature of organized drug trafficking calls for a dynamic, co-ordinated response by all Member States, a response that not only takes into account national strategies, but also seeks to become an integrated, multi-disciplinary European Union strategy. With a view to making law enforcement more effective and efficient, Member States are developing the model of intelligence-led law enforcement.

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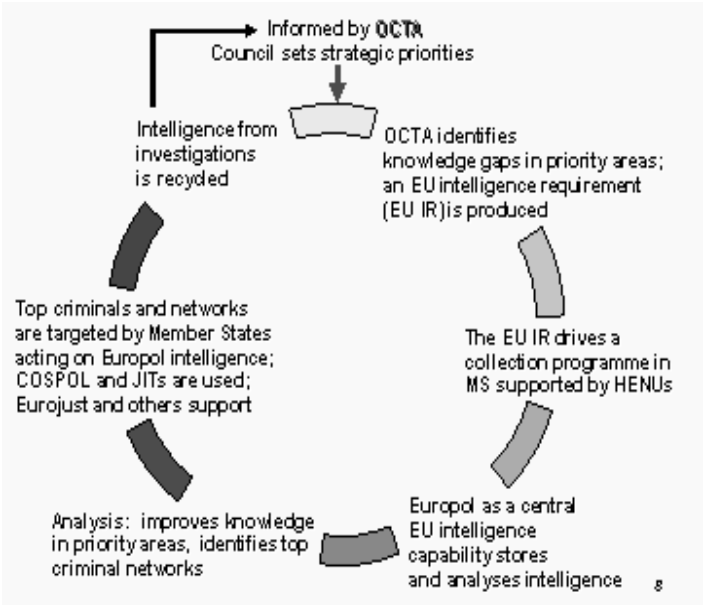
[8] Comprehensive Actions against Synthetic drugs in Europe.

Intelligence-led Law Enforcement

The concept of intelligence-led law enforcement is not a total revolution. After all, its main principle – the exchange of information and intelligence between law enforcement agencies – is being implemented in the Member States and at Europol every day. Intelligence-led law enforcement is meant to make this exchange of information more efficient and thus more effective, by allowing the selection of the most appropriate targets based on the assessment of their roles, their impact upon society and the environment in which they operate.

In practical terms this concept means that law enforcement moves away from ad-hoc actions based for instance on the arrest of a courier or a seizure of drugs, towards combating those criminal organizations that pose the most serious threat to a Member State. In other words, intelligence-led law enforcement moves away from the crime to the criminal organization; from reacting to incidents towards a pro-active, target-oriented approach; from un-co-ordinated interventions to strategic planning and from local to national and European Union-wide law enforcement priorities. When combating organized crime this requires a good understanding of current and future threats posed by criminal organizations, followed by priority-setting, identification of data requirements and operational actions.

A main tool to implement the concept of Intelligence-led law enforcement is the European Criminal Intelligence Model (ECIM), a cyclical process which starts with the Organised Crime Threat Assessment (OCTA), produced by Europol in close cooperation with the Member States. The OCTA is designed to identify current and future trends, knowledge gaps and intelligence requirements for data collection programmes in Member States and at European Union-level. This is to lead to the development of intelligence products, which are the basis for the targeting of top criminal organizations in the Member States, where appropriate with the support of Europol and Eurojust and by making use, where feasible, of Joint Investigation Teams.



Based upon the OCTA as the main strategic tool, the Council of Justice and Home Affairs (JHA) will set strategic priorities for combating the various types of organized crime. The implementation of Council priorities is monitored and guided by the European Chiefs of Police Task Force (CPTF). For operational activities the CPTF may use its COSPOL framework.[9]

The objectives of COSPOL projects are to facilitate best use of information, to identify opportunities for operational projects and to solve constraints in day-to-day law enforcement co-operation, by making use of existing tools, in particular Europol's analysis capacities. One of the priority areas identified by the CPTF for a COSPOL project relates to the combating of large-scale production and trafficking of synthetic drugs.

Law enforcement and international cooperation have their limitations in the availability of human and financial resources, priorities etc. The concept of intelligence led law enforcement should improve knowledge of the criminal threat and optimise the use of law enforcement capacities and capabilities.

Europol

Europol's Drugs Unit dedicates most of its resources to operational activities. Projects are carried out against the production and trafficking of heroin, cocaine, synthetic drugs and precursors. Each of these projects include an Analysis Work File (AWF), through which intelligence is collected, analysed and disseminated in support of live investigations in participating Member States. Projects are largely target oriented, identifying and combating specific criminal organizations by applying a regional concept, in which Member States that have a direct interest in combating a particular criminal group co-operate in sub-projects. Direct contacts are maintained with operational teams in Member States. The target oriented approach also extends to analysing data relating to a major modus operandi with a view to identifying the responsible criminal network for subsequent targeting.

Strategic products, such as drug situation reports, catalogues, bulletins and specialised reports on various aspects of the drugs phenomenon are produced and training is provided. The Unit also participates in policy frameworks such as European Union Council Working Parties, United Nations conferences and other regional or global initiatives.

Europol Project SYNERGY and its Analysis Work File gathers and exploits relevant information in the area of synthetic drugs and precursors, available within and outside of the Member States, in order to identify new criminal targets and target groups, initiate, support and co-ordinate law enforcement investigations and identify links between different investigations, whilst enhancing information exchange, knowledge and experience. The AWF currently has 21 associated Member States.

Project SYNERGY also includes the Europol Illicit Laboratory Comparison System (EILCS) and the Europol Ecstasy Logo System (EELS). The EILCS collates detailed photographic and technical information on synthetic drug production, storage and dump sites, enabling the identification of matches between seized equipment, materials and chemicals, initiating information exchange, backtracking

[9] Comprehensive Operational Strategic Planning for the Police.

investigations and forensic examination for the targeting of facilitators and criminal groups.

The EELS collates modus operandi, photographic and basic forensic information on significant seizures enabling the identification of matches between seizures or seized punches, initiating information exchange, further investigations and forensic profiling for the targeting of criminal groups. Related criminal data arising from the findings of the EELS and EILCS may be analysed within the AWF component. Furthermore, Europol specialists provide on-the-spot assistance to Member States in the dismantling of illicit synthetic drug production sites.

The 'European Union Training Course on Combating Illicit Synthetic Drugs Laboratories' has been regularly provided by Europol since 1999 to all European Union Member States and many Third Parties.

Project SYNERGY supports the activities of the European Joint Unit on Precursors (EJUP). EJUP national experts are experienced in investigating serious criminal activity related to the diversions and trafficking of precursors. Project SYNERGY is also supported by the CHAIN Project, a European Union initiative on the profiling of amphetamine for law enforcement purposes whereby significant seizures may be forensically matched.

The European Police Chiefs Task Force's COSPOL initiative also supports Project SYNERGY. The COSPOL synthetic drug group meets on a quarterly basis and comprises ten primarily affected European Union Member States and Europol.

Political Initiatives

Initiatives in the Member States

In the last decade the drug problem has continued to pose threats and challenges such as the growing popularity of synthetic drugs among youngsters and the phenomenon of the large number of juveniles involved with criminal groups in the trafficking and sale of drugs.

Member States have undertaken initiatives to implement a coherent and balanced drug policy with equal attention for the supply and demand sides. In many cases this meant a shift from a more repressive approach of the drug user towards efforts aimed at reducing demand and the negative effects of drug abuse, including health and social aspects, whilst at the same time reducing the availability of drugs by appropriate law enforcement efforts against production and trafficking.

Initiatives at EU-level

Since the early nineties drug matters appear high on the political agenda of the European Union and substantial achievements have been made towards the prevention and control of organized crime, including drug trafficking.

In 1998, the Member States of the European Union implemented concerted actions against new synthetic drugs, by adopting a Joint Action. This legal instrument[10]

[10] Council of the European Union, 97/396/JHA: Joint Action of 16 June1997 concerning the information exchange, risk assessment and the control of new synthetic drugs. Brussels, 16 June 1997.

aimed at the rapid exchange of information on new synthetic drugs, the so-called Early Warning System (EWS), the assessment of their risks and, if necessary, the application of control measures. The EWS, which entered into force in January 1998, has led to risk assessments on MBDB and 4-MTA and a decision to put 4-MTA under legislative control in all Member States. Following an evaluation of the Joint Action, it was replaced in May 2005 by a Council Decision.[11] Under this Council Decision, 21 new psychoactive substances have until now been notified to Europol and the EMCDDA.

In 1998 the European Judicial Network began to streamline international judicial co-operation. The Network established contact points in each Member State, available to judicial authorities to assist requests for judicial cooperation. In May 2000 the Justice and Home Affairs Council agreed to create Eurojust, composed of prosecutors, magistrates and police officers from the Member States. The objective of Eurojust is to improve the co-ordination of cross-border investigations into serious crimes between national prosecuting authorities, notably based upon Europol analysis. A Provisional Unit (Pro-Eurojust) was first set up in the Council General Secretariat in Brussels in 2001. Meanwhile, Eurojust is functioning and is based in The Hague.

In November 1999, the European Council endorsed the European Union Drugs Strategy 2000-2004.[12] The Strategy was put into practise through the European Union Action Plan on drugs 2000-2004.[13] The Action Plan had a 'global, multidisciplinary and integrated strategy to fight illicit drugs' with emphasis on demand reduction, reduction of illicit drug trafficking, international cooperation between Member States and with non EU-partners, and co-ordination of the various initiatives.

The Justice and Home Affairs Council of September 2002 decided that actions against the production and trafficking of synthetic drugs should be considered as a priority area during the remaining two years of the European Union Action Plan on drugs 2000-2004. This resulted in a separate Action Plan on synthetic drugs.[14] The Action Plan called for the setting up of a database on profiles of seized chemicals and actions against illicit laboratories, chemists and distribution networks. In addition a study was launched on the profiling of precursors.

In 2005, the Strategy and Action Plan for 2000-2004 were replaced by the EU Drugs Strategy (2005-2012) and it's Action Plan (2005-2008). The EU Drugs Strategy calls for 'a measurable improvement in the effectiveness, efficiency and knowledge base of law enforcement interventions and actions by the EU and its Member States targeting production, trafficking of drugs, precursors, including the diversion of synthetic drug precursors imported into the EU'.[15]

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[11] Council of the European Union, 2005/387/JHA: Council Decision on information exchange, risk assessment and control of new psychoactive substances. Brussels, 10 May 2005.

[12] Council of the European Union, 13395/99 CORDROGUE 73: European Union Drugs Strategy 2000-2004. Brussels, 26 November 1999.

[13] Council of the European Union, 9183/00, CORDROGUE 32: EU Action Plan on Drugs 2000-2004. Brussels, 7 June 2000.

[14] Council of the European Union, 12452/2/02 CORDROGUE 81: Implementation plan on actions to be taken in regard to the supply of synthetic drugs. Brussels, 26 November 2002.

[15] Council of the European Union, 15074/04 CORDROGUE 77, SAN 187, ENFOPOL 178

The Action Plan[16] contains several initiatives relating to synthetic drugs. These include actions aimed at reducing the manufacture and supply of synthetic drugs by developing operations and intelligence gathering projects. In this respect full use is required of the SYNERGY Project. Furthermore the Action Plan calls for 'the development of a long-term solution at EU level for the use of synthetic drug forensic profiling results for law enforcement strategic and operational purposes; the combating of serious criminal activity in the field of chemical precursor diversion, (inter alia by making use of EJUP); the prevention of the diversion of precursors, in particular synthetic drug precursors imported into the European Union, by implementing Community precursor legislation; strengthening of external border and intra-Community controls; supporting of INCB operations and a further development of cooperation between Member States' authorities competent for precursor control and industry'. The Action Plan is evaluated annually, allowing for adjustment of actions or priorities.

Precursors

Whilst most main consumer drugs originate from plants and are processed using only a few chemicals, synthetic drugs are almost entirely produced from chemicals. Therefore, the production of synthetic drugs depends on the availability of the necessary precursors. Increasingly, the European Union has recognised the importance of monitoring trade and combating suspected diversion of precursors and other chemicals required for the production of synthetic drugs. New Community legislation was adopted in 2004 and 2005 for the monitoring of intra community and external trade. In this regard, 'cooperation between operators and authorities is the cornerstone of this legislative framework'.[17]

Principal synthetic drug precursors[18] and essential chemicals[19] are traded in large quantities for legitimate purposes on regional and global markets. This licit international trade is monitored by the United Nations International Narcotics Control Board (INCB). Their production requires heavy infrastructure and as such they are rarely produced by the criminal networks that use them for the manufacture of synthetic drugs. Criminals tend to either smuggle main precursors into the European Union or divert essential chemicals from licit trade within the European Union.

The illicit trafficking of precursors is based upon the existence of legal manufacture, geography, availability, need, regular trade routes and feasibility of initial diversion. It involves communication between organized criminal networks in source countries

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RELEX 564: EU Drugs Strategy (2005-2012). Brussels, 22 November 2004.

[16] Council of the European Union, 8652/1/05 REV 1 CORDROGUE 25, SAN 63, ENFOPOL 59 RELEX 240: EU Drugs Action Plan (2005-2008). Brussels, 9 May 2005.

[17] Drug Precursor's Control in the European Union - Guidelines for Operators - 2007; Drafted by a working group involving the European Commission and several Member States' regulatory and law enforcement authorities in close cooperation with industry, distributors' representatives and Europol.

[18] Start substances for synthesis e.g. BMK, PMK, ephedrine etc. and the basis of the active ingredient. The molecular form is similar to the end product.

[19] Substances used in chemical synthesis which may be recognisable in the end product. These substances have alternatives and can be easily replaced.

and along trafficking routes and their (domiciled) counterparts in the European Union e.g. Chinese, Russian, Lithuanian and Polish nationals.

The chemical substances 1-phenyl-2-propanone (P2P), also known as benzyl methyl ketone (BMK) and 3,4-methylendioxyphenyl-2-propanone (MDP-2-P), also known as piperonyl methyl ketone (PMK), are the principal precursors required for amphetamine and MDMA production respectively. It should be noted that BMK and PMK can both be synthesised from so-called pre-precursors like phenyl acetic acid or benzyl cyanide for BMK and safrole, isosafrole[20] and piperonal for PMK.[21]

According to information available to Europol Project SYNERGY, over two tons of BMK and over five tons of PMK were seized in the European Union in 2005. In 2006, just over 1.8 tons of BMK[22] and only 55 kg of PMK[23] were seized. These figures clearly do not reflect their apparent availability and represent a continued downward trend whereas production of amphetamine and MDMA continues at a high level. According to seizure statistics and criminal intelligence information, millions of MDMA tablets are produced in the European Union annually, requiring thousands of litres of PMK.[24]

Up until late 2004 BMK and PMK were almost exclusively sourced from the People's Republic of China, where they are used legitimately in the chemical, pharmaceutical and cosmetic industries. They were smuggled by Chinese organized crime groups in large quantities, i.e. thousands of litres, into major European Union ports such as Antwerp, Hamburg and Rotterdam.

Interestingly, in 2005 there were no (maritime) seizures of BMK and PMK in Belgium or the Netherlands. In addition, precursors from China were not frequently seized or identified in illicit production units i.e. via packaging and forensic profiling. It should also be noted that from late 2004, the price for PMK on the black market increased. These findings are perhaps to some extent related to successful Dutch and Belgian investigations into Chinese organized crime. However, MDMA production continued, presumably using either PMK stockpiles or PMK diverted via unidentified sources or new routes and modus operandi.

A major relatively new trend in BMK trafficking has been identified. Sourced from the Russian Federation, since at least mid 2004, BMK is smuggled via Latvia, Belarus, Lithuania, Finland, Estonia, Denmark, Poland and Germany, for use in large-scale amphetamine production sites in the Netherlands and to a lesser extent in Belgium and Poland. By virtue of cultural and geographical links plus simple logistics, this is co-ordinated initially between Russian, Lithuanian and Estonian organized crime and subsequently with Polish groups. The sourcing and trafficking of such chemicals from the countries on the Eastern border of the European Union is a present and growing threat.

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[20] Safrole and isosafrole are sourced from the sassafras tree in South and East Asia.

[21] In the Netherlands in 2003 sassafras oil was used for the production of PMK and then MDMA.

[22] In addition, 400 kg of BMK were seized in the Russian Federation and 65 kg in Turkey.

[23] This 55 kg was seized in the Netherlands. In addition, 1,660 kg of PMK were seized in Croatia, trafficked via the United Arab Emirates and Italy, destined for the Netherlands.

[24] One ton of PMK is sufficient for the production of approximately ten million MDMA tablets, forming of course only a small proportion of that illicitly produced.

Member States' law enforcement investigations in cooperation with Europol have resulted in several major seizures of BMK in Denmark, Germany, the Lithuanian-Polish border region and the Russian Federation. German Customs seized more than one ton of BMK in two incidents in September and October 2005.

Three major seizures amounting to over 1,400 kg were made by Polish authorities in July 2005, April 2006 and October 2006. Another seizure of 400 kg of BMK was made in the Russian Federation in September 2006. Danish authorities in cooperation with Lithuania seized 600 kg in December 2006. Several smaller seizures (e.g. 40-200 litres) have been made in Estonia, Germany, Finland, Lithuania, the Netherlands and Poland. Some smaller BMK seizures in Lithuania are reportedly linked to methamphetamine production.

Significant profits are earned by criminal organizations involved in the trafficking of precursors BMK and PMK.[25] Information puts black-market BMK prices at approximately €190 per litre in Russia and €600-800 in the Netherlands. However, it must be noted that intelligence indicates that BMK trafficked to the Netherlands is to a lesser or greater extent traded for synthetic drugs, thereby reducing the cash movements.

The latest information indicates that BMK and PMK trafficking from China is once more apparent. This is reinforced by recent decreases in PMK prices on the illicit market in Belgium and the Netherlands and the regular re-appearance of Chinese style packing and labelling themes.[26]

A great variety of new routes can be used for smuggling BMK and PMK from China. An example of change in PMK trafficking modus operandi towards the European Union is the seizure, in December 2005, of 3,920 litres of PMK in a container with clove oil at the port of Marseilles, France, trafficked via Madagascar and destined for the Netherlands. Furthermore, in July 2005 a consignment of 1,660 kg of PMK was shipped from a Chinese port via the United Arab Emirates to the port of Taranto in Italy. Although subsequently forwarded to the port of Ploče in Croatia, where it was eventually seized in May 2006, it was ultimately intended for the Netherlands.[27]

Moreover, it is known that both BMK and PMK found in other parts of the world e.g. Australia and North America, namely Canada, continue to originate from China.[28] The Canadian authorities seized more than 5,000 litres of PMK trafficked from China in three incidents between September 2005 and January 2006. This included labelling similar to that previously seen on a regular basis in the European Union.[29]

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[25] There is a considerable differential between the legal value and the price paid on the illegal market, where prices can be inflated by ten to twenty times. Furthermore, black market prices increase as they are trafficked along the chain i.e. BMK on the illegal market in the Russian Federation is at least three times cheaper than in Western Europe whilst PMK in China costs up to ten times less than in the Netherlands.

[26] Chemical containers with BMK and PMK from China are often incorrectly labelled in order to disguise their content: Project SYNERGY.

[27] EJUP.

[28] Project SYNERGY – EILCS.

[29] Ibid.

A relatively recent phenomenon in the European Union is the considerable exportation, transhipment and diversion of (pseudo) ephedrine, the principal precursor for methamphetamine production.[30] In 2005, Greek authorities seized almost 1.1 tons of ephedrine, smuggled in sacks of rice from Pakistan, ultimately destined for the Netherlands. According to the INCB, 1.6 tons of (pseudo) ephedrine were seized in the European Union in 2005.

Seizures indicate considerably increased trafficking through the European Union in 2006 and 2007, often via West Africa and destined for Mexico. In May - July 2006, Belgian Customs in several interceptions seized more than 800 kg of pseudo-ephedrine shipped by air from the Democratic Republic of Congo and destined for Mexico with some diverted to the Netherlands. In July 2006, the United Kingdom Customs seized a consignment of 736 kg of ephedrine tablets[31] shipped from Pakistan.

In January 2007, French customs stopped a shipment of 2.76 tons of pseudo-ephedrine from the Islamic Republic of Iran destined to Mexico via the Democratic Republic of Congo. In January 2007, Customs authorities of Luxembourg seized a consignment of two tons of ephedra shipped from Germany to Mexico via Luxembourg.[32] In February 2007 Mexican authorities seized three tons of pseudo-ephedrine shipped from Hamburg to Mexico via Paris. Furthermore, there have been ephedrine consignments from the Balkans to the Czech Republic for methamphetamine production, as well as attempted ephedrine acquisition from Belgium by Mexico. In light of increased methamphetamine seizures in the European Union, the movement and potential diversion of such precursors should be closely monitored.

Synthetic drug production also requires catalysts such as platinum oxide and bulk amounts of other chemicals such as methanol, formamide, methylamine and acetone. Dutch and Belgian criminal networks acquire such chemicals from legitimate industry within their own country or, to spread the risk, neighbouring countries such as Germany and France or further afield, for example formamide from Spain. Blue plastic 200 litre drums with formamide from Spain were found in four production, storage and dump sites in the Netherlands in 2006. Similar drums had been found in 2004 in Belgium and the Netherlands.[33]

Equipment

Sophisticated industrial and custom-made equipment is used in most of the major amphetamine and MDMA production sites in the Netherlands and Belgium whilst the majority of illegal laboratories seized in other Member States such as the Czech Republic, Estonia, Germany, Lithuania, Poland and the United Kingdom are of relatively small-scale or so-called ‘kitchen labs’ equipped with only basic

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[30] Methamphetamine is generally produced using ephedrine or pseudo-ephedrine as a principal precursor, or by using BMK.

[31] Whilst ephedrine tablets can be abused in the body-building fraternity, ephedra can be extracted from tablets for use as methamphetamine precursor.

[32] International Narcotics Control Board (INCB), Project PRISM Special Alert No. 2/2007 of 23 January 2007.

[33] Project SYNERGY.

installations. However, recent reports indicate higher capacity facilities now in Poland, Estonia and Lithuania.[34]

High capacity 80-200 litres (exceptionally up to 900 litres) custom-made reaction vessels are almost always found in large production sites mainly in the south of the Netherlands and the north of Belgium, near the Dutch border.[35]

Furthermore, industrial equipment is sourced from a limited number of legitimate companies. For example, EILCS analysis reveals the use of common brands of industrial heating mantles in amphetamine production sites. Such heating mantles are sourced via a limited number of legitimate companies in several Member States and diverted for use in illegal laboratories in Belgium, Germany and the Netherlands.

Moreover, in recent years many common types and models of tableting machines have been seized in several Member States. They are diverted from industry or obtained on the second-hand market via original manufacturers, brokers, pharmaceutical companies etc. The vast majority of tableting machines seized within illicit production units in the European Union, mainly Belgium and the Netherlands, have simple functionalities and limited electronics.

Until 2003 and 2004 most seized tableting machines (70%) were of small or mid-scale capacity whilst in 2005 and 2006 the majority were of higher capacity (i.e. 15,000 to 60,000 tablets per hour). As a result of increased awareness among professional punch production companies on the potential illicit use, punches and logos found in synthetic drug production sites have often been custom-made. However, the increased use of old industrial machines has again necessitated criminal acquisition of punches from legitimate sources.

Production of Amphetamine and MDMA

As was the case in previous years, most amphetamine seized in the Member States in 1998 originated from the Netherlands, Belgium, the United Kingdom and Spain. Other sources were the Baltic States. In 1998, for instance, most amphetamine on the Finnish market originated from Estonia. Central and Eastern European countries, particularly Poland, the Czech Republic, Hungary and Bulgaria were also significant producers. In Poland, five amphetamine laboratories were seized in 1998.

In the Netherlands, 1,450 kg of amphetamine and 242,409 amphetamine tablets were seized in 1998, the largest quantity in the European Union. Also, fifteen amphetamine laboratories and two locations where there was production of both amphetamine and MDMA were dismantled. In February 1998, 27 tons of chemical waste were found at a location that had been used for the production of amphetamine. In total, 103 locations were discovered where chemical waste was dumped and 107,000 litres of chemical waste seized.

In 1998, in the Netherlands, six locations were identified where production of amphetamine tablets took place. Those tablets, with various logos, were sold as ecstasy with users unaware of the real content of the tablet. Large quantities have meanwhile been seized in the Netherlands, Germany and the United Kingdom.

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[34] Project SYNERGY– EILCS.

[35] Ibid.

In the United Kingdom, 1,354 kg of amphetamine were seized in 1998. Production in the country is thought to supply 20% of their market, with the remaining being imported from Belgium and the Netherlands.

In Germany, 310 kg of amphetamine were seized in 1998 and ten laboratories, in most cases kitchen-type, dismantled. Over 90% of seized amphetamine originated from the Netherlands and was destined for the German market or in transit to Denmark, Sweden and Norway, with German nationals dominating the trafficking. Although intelligence in Sweden suggested that most Polish amphetamine on the Swedish market transited Germany, there were no major seizures of Polish amphetamine in Germany.

In the Netherlands, 18 locations were discovered in 1998 where MDMA was produced or tableting took place. On three occasions, the laboratory was mobile (sea container, lorry, car). Dutch law enforcement agencies seized 1,163,514 MDMA tablets in 1998 and dismantled several criminal networks resulting from long-term investigations.

The European Union consistently reports to the EILCS the annual seizure of approximately 70-90 illicit production facilities. In 2006 the Member States reported the discovery of 83 synthetic drug production related units,[36] the majority concerned amphetamine (40) and MDMA (11). Whilst in the last decade the total number of seized units in the European Union is relatively stable, production capacity has generally increased in line with enhanced professionalism and sophistication of utilised industrial and custom-made production equipment. Of the 83 locations, 47 facilities of significant scale were discovered in the Netherlands. In the first semester of 2007, 24 illicit sites of various type and scale have been reported to the EILCS by Belgium, Hungary, the Netherlands and Poland. Of these, 19 were reported by the Netherlands, including two of the largest ever MDMA laboratories. In general, MDMA related sites have become more prevalent over the last year or so.

As with many synthetic drugs, there are several different routes that can be used to manufacture amphetamine and MDMA. Nevertheless, Leuckart and reductive amination with lifted pressure[37] methods remain the two most common methods used for the production of amphetamine and MDMA respectively. The process, from chemical synthesis to the end product and packaging, most often takes place in separate locations, including mobile facilities. This division of tasks reduces the risk of an inclusive production network being dismantled when one site is discovered by law enforcement.

Since 2002, large scale facilities i.e. sophisticated laboratories with typical daily production capacities of 20 kg of amphetamine or 30 kg of MDMA base were only seized in Belgium and the Netherlands, although amphetamine production in Poland is at comparative mid-level.

With regard to MDMA, a commonly used tableting machine produces 40,000 tablets per hour. Thus, when operational, accounting for time and resources involved in all preparations and processing, a typical MDMA production and tableting enterprise

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[36] This includes all illicit facilities for synthesis, tableting/packing and storage.

[37] So-called hydrogen gas–platinum oxide (H2–PtO2) method, one of the most common reductive amination methods.

can easily produce over 1 million tablets in a week.[38] However, with a view to production trends and developments, recently seized laboratories could feasibly realise over 100 litres of MDMA base in one batch in one day, sufficient for almost 1.2 million tablets. Furthermore, it should be noted that the production of up to 40 to 50 kg of amphetamine base per batch has been identified.

The production of synthetic drugs, in particular tableting and packing phases, is spreading slowly across the European Union. Smaller scale synthetic drug production facilities have been reported by Austria, Denmark, Estonia, Germany and Lithuania. Furthermore, Finland and Sweden have seized amphetamine identified as synthesised via the reductive amination method and suspected to have been sourced in Estonia.[39] This situation compares with previous years.

Production in the European Union is dominated by indigenous criminal networks. It should be noted that whilst qualified chemists are very rarely linked to the major synthetic drug production facilities in Belgium and the Netherlands, specialists are used with appropriate knowledge. However, Dutch organized criminals have exploited chemists in Central and Eastern Europe, for example for the synthesis of particular complex chemicals such as platinum oxide, an expensive catalyst for MDMA synthesis. This is flagged as a growing threat, possibly for the self-production or the synthesis of new 'designer' drugs or more complex and potent drugs such as fentanyl.

Increasing global seizures of PMK indicates that illicit manufacture of MDMA is expanding beyond Europe.[40] However, even though production of MDMA is spreading, in particular to Australia, North America, South Africa, China, South-East Asia[41] and more recently South America, the European Union remains a principal source.

After a drop in 2005, major MDMA seizures reported to Europol Project SYNERGY in 2006 indicate increased production and availability with considerable amounts seized in Belgium, France, the Netherlands and the United Kingdom, mainly destined for the latter. In 2006, more than 16 million tablets were seized in the European Union, with at least eight million seized in the United Kingdom[42] and high amounts of tablets and powder seized in the Netherlands, often ultimately identified as destined for the United Kingdom.[43]

The main production sources of amphetamine found in the illicit markets in the European Union remain in the Netherlands and to a lesser extent in Belgium. In addition Poland, Estonia and Lithuania play important roles especially in supplying Germany and Nordic Member States. Furthermore, amphetamine tableted with the 'captagon' logo is produced on a substantial scale in Bulgaria for the domestic market as well as for the export to Turkey and Middle East countries such as

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[38] This is calculated on the basis of a tableting machine operating 5 hours in a day and 5 days a week, thus allowing for maintenance and preparation of tableting powder.

[39] Task Force on Organised Crime in the Baltic Sea Region (BSTF) - Sub-Working Group on Precursors and Illegal Laboratories. Malmö, Sweden. 24-25 April 2007.

[40] International Narcotics Control Board (INCB), Precursors 2006. New York.

[41] The production of MDMA in e.g. China or Indonesia is easier and cheaper than in Europe as many chemicals are produced there.

[42] According to statistics provided by the Member States and Europol figures, this is a UK record.

[43] Incomplete data based upon partial Member State reporting on 2006 seizures.

Saudi Arabia.[44] More than 900 kg of amphetamine were seized in Bulgaria in 2006, the majority on its way to Turkey. Moreover, Turkey reported the seizure of nine amphetamine production, storage and tableting sites detected in its territory plus more than fourteen million amphetamine/'captagon' tablets as well as 65 kg of BMK.[45] According to Bulgarian information this production is controlled by Bulgarian organized crime.[46] In addition, over 1.4 million MDMA tablets were seized in Turkey in 2006.[47] The accession of Bulgaria to the European Union could quite feasibly accelerate the infiltration of related Bulgarian criminal groups into the wider European Union amphetamine market.

It is also expected that larger scale amphetamine and possibly MDMA production, using higher capacity industrial and custom-made equipment, will spread to Poland and possibly Baltic and Eastern European States. Indeed, in 2006 and 2007 tableting machines as seen in Belgium, the Netherlands and the United Kingdom have been seized in Poland. This has also been linked to amphetamine tableting. Furthermore, (partial) production facilities for tableting, cutting and packing may be expected in tourist destinations such as in Portugal and Spain.[48] Recent seizures of amphetamine liquid indicate as much.[49]

It is often observed that amphetamine is exported in 'wet' form to the United Kingdom where it is re-packed for subsequent distribution and that MDMA has been trafficked in powder form, indicating the existence of tableting facilities in that Member State.[50] With regard to MDMA, this is symptomatic of trafficking trends to Canada and to a lesser extent to Australia before these countries started identifying large-scale production facilities themselves of a scale similar to that observed in Belgium and the Netherlands. In some cases, the active use and support of Dutch expertise is identified. In consideration of these developments, it is thought that regions of the world will eventually become self-sufficient in MDMA production and distribution.

However, whilst Dutch and Belgian criminality continues to maintain its advantage with regard to logistics, expertise, use of technology, improved methodology, professionalism and production capacity, it is debatable whether their dominance, at least in the short to medium-term, will diminish significantly on the European Union level.

Trafficking of Amphetamine and MDMA

In the European Union, production and trafficking of drugs is in the hands of indigenous organized crime groups. In 1998, in Germany, in 40% of the investigations into organized crime groups, drug trafficking was the main activity.

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[44] World Customs Organization, Customs and Drugs Report 2005.

[45] South-East European Co-operative Initiative (SECI Centre), Report on South East European Drug Seizures January – June 2006.

[46] National Drug Co-ordinators meeting held in Berlin on 14-15 May 2007.

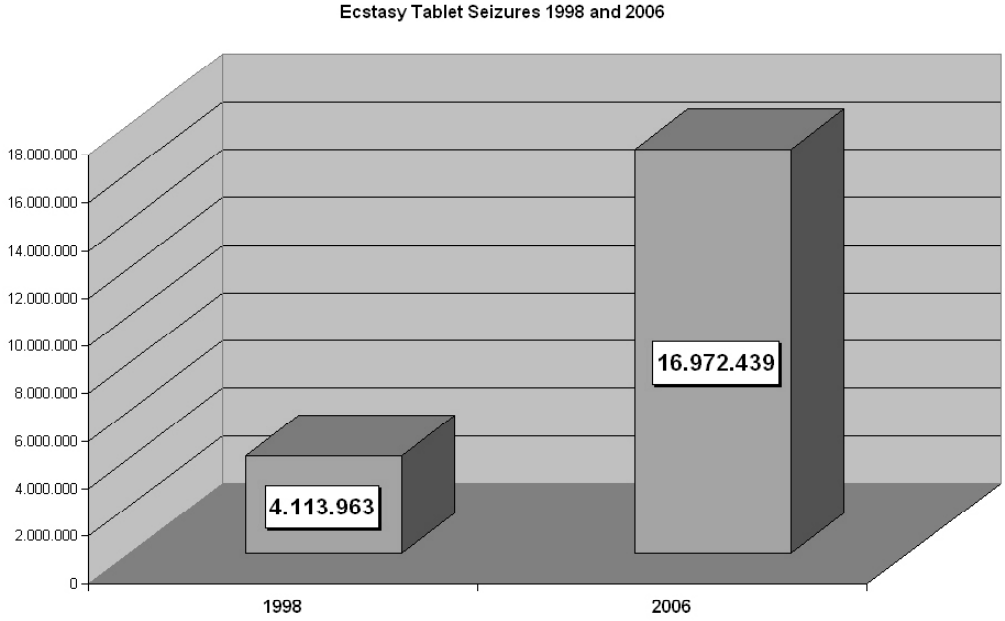
[47] United States Joint Interagency Task Force South, the International Weekly Round-up, 5 to 12 January 2007.

[48] A tableting unit was seized in Portugal in 2002 and MDMA powder has been seized in and on route to Spain in 2006 and 2007.

[49] Spanish contribution to COSPOL-meeting on synthetic drugs on 04 April 2007, Warsaw.

[50] According to open source information, 2.5 kg of MDMA powder were also seized in Ireland in January 2007.

In the United Kingdom, 72% of the organized crime groups identified in 1998, were thought to be involved in drug trafficking. In Spain, in 1998, drug trafficking was the main activity of 59% of the groups.

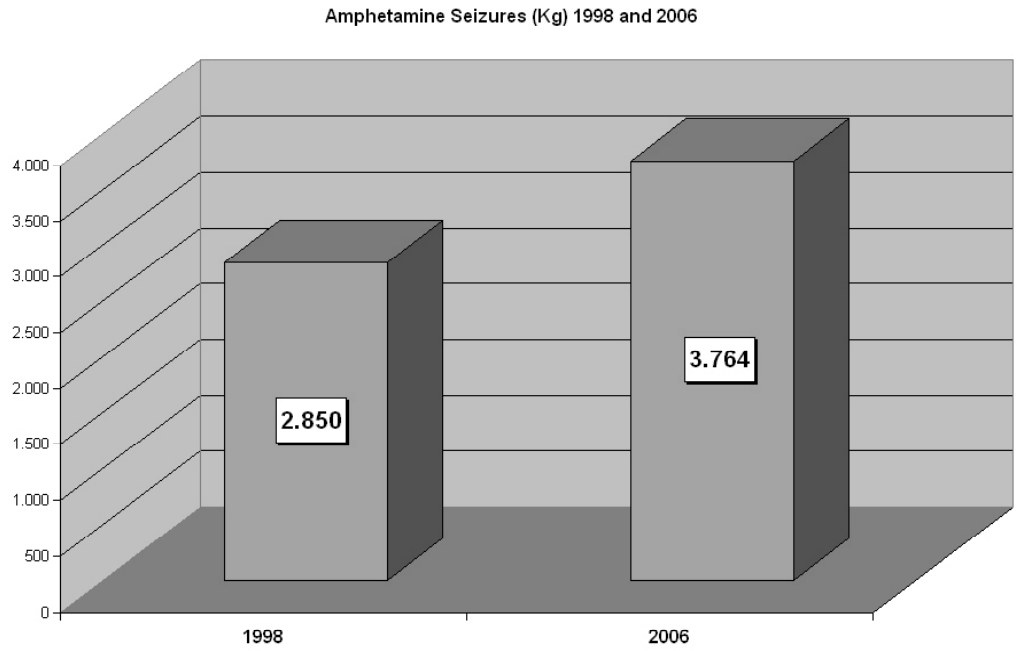


In 1998, law enforcement agencies in the Member States seized four tons of amphetamine and over four million MDMA tablets. In several Member States, there was a trend in which amphetamine tablets with various logos were sold as ecstasy tablets.

In France 1,142,226 MDMA tablets were seized in 1998, almost six times more than in 1997. Over 45% originated from the Netherlands and 37% from Belgium. The largest single seizure occurred in Coquelles, at the French side of the Channel tunnel: 355,000 MDMA tablets, destined for the United Kingdom, together with 177 kg of amphetamine were seized.

Most amphetamine on the Swedish market originated from Poland, the Czech Republic, Belgium and the Netherlands. There was small-scale amphetamine production in the country itself. Polish groups controlled the trafficking of amphetamine from Poland, via Germany and Denmark, to Sweden. A major seizure of MDMA occurred in Ireland, when 200,000 tablets were seized in November 1998. The drugs were marked with the Mitsubishi logo and were obtained from the Netherlands.

Over the last decade, Dutch, British and Belgian criminal groups have dominated large-scale amphetamine and MDMA trafficking. British criminals sometimes domiciled in the Netherlands and Spain control movements of large consignments to the United Kingdom, serving the main European market. Several seizures have been part of multi-commodity consignments, including substantial quantities of cannabis, cocaine and heroin.



Intelligence indicates that British criminals also play a role in trafficking of MDMA to countries such as Spain and Australia, by virtue of tourist and/or logistical pulls or close cultural links. Information also indicates the growing prominence of Polish and Lithuanian criminal groups in trafficking drugs obtained in the Netherlands to various Nordic and Baltic States, Ireland, the United Kingdom plus the United States and the Russian Federation.

In recent years, Chinese groups domiciled in the Netherlands have also become more prominent. They are now involved not only in the importation into the European Union of precursors e.g. PMK, BMK, ephedrine, safrole etc., as well as certain tableting machines, but also in the production and distribution of MDMA in Europe, Australia and Canada.

Amphetamine produced in the European Union is trafficked extensively within Europe and seizures have stabilised at a high level. More than 5.5 tons of amphetamine were seized in the European Union in 2005, a record, and over four tons in 2006. The largest seizures took place in the United Kingdom with several individual seizures between 100 and 500 kg, followed by the Netherlands, Germany, Spain and Sweden.

MDMA is trafficked not only to markets in Western Europe. Central and Eastern Europe plus Turkey and the Russian Federation are emerging as significant markets for MDMA sourced in Western Europe.[51] Moreover, MDMA is trafficked via European Union ports and airports to worldwide destinations, in particular to

[51] According to the Federal Drug Control Service of the Russian Federation, amphetamine and MDMA have become widespread drugs on Russia's illicit market. At the same time there exists a significant source of precursor chemicals in Russia, as well as professional chemists who can produce synthetic drugs on their own.

Australia, South Africa, North America, South America, South-East Asia, New Zealand and Japan. Whilst new markets will continue to be exploited, such global trafficking may decrease in frequency and volume in line with increasing production capacities in Asia, North America and Oceania.[52]

It is important to observe the dual use of the Balkan Route for smuggling heroin to and MDMA from the European Union with the strong involvement of Turkish organized crime. Also noted is the exploitation of routes for the trafficking of drugs and precursors i.e. BMK trafficking from the Russian Federation to the Netherlands and Belgium and the return transportation of amphetamine as well as MDMA or, in some cases, cannabis. Indications of MDMA trafficking in exchange for cocaine from South America are also observed.

The gradual global spread of MDMA production has been illustrated by trafficking indicators over the last few years. These have included the bulk trafficking of MDMA powder from the Netherlands to Australia, China and Canada for tableting, the latter for subsequent smuggling to the United States.

Even though MDMA seizures in the European Union decreased in 2005 and 2006 in comparison with previous years, amounts seized in the Netherlands, the United Kingdom and Belgium remain high. The fact that wholesale and retail prices of amphetamine and MDMA in the Member States have dropped significantly reflects a possible saturation of the traditional markets. In the last five years decreases in retail prices reached 47% for MDMA and 20% for amphetamine.[53] Nonetheless, the substantial profits to be made from synthetic drugs are thought to be a critical factor in the influence and scope of organized crime, enabling more or other drugs to be sourced as well as funding other criminal activities, acquisition of considerable assets and laundering of profits.

Whilst significant profits are made at the production stage, it would appear that larger profits are at the importation and wholesale phases. This could be one of the factors that explain why major production has not spread more rapidly in the last decade despite the availability of chemicals, equipment and proximity and access to expertise and required knowledge. Whilst greater margins may be at the regional and street distribution stage, profits are of course divided among many actors.

Other Synthetic Drugs

Although amphetamine and MDMA are the two most prevalent synthetic drugs in the European Union, organized crime groups, in an effort to maintain profits, continue to exploit new market opportunities. In the last decade, investigations and seizure statistics demonstrate increased production and trafficking of psychoactive substances such as methamphetamine, fentanyl, GHB and other synthetic and so-called ‘designer’ drugs.

In 1998, new or relatively unknown varieties appeared on the market in several Member States. In June 1998, Belgian Police seized 10,000 tablets of 4-MTA. In July 1998, British Customs seized 25,000 tablets of 4-MTA. In October 1998, 330,000 tablets of DOB were seized in Calais, France.

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[52] COSPOL meeting 3/4 July 2007, information provided by Germany and the Netherlands.

[53] European Monitoring Centre for Drugs and Drug Addiction, Annual report 2006 on the state of the drugs problem in Europe. Lisbon 2006.

Since 2005, an increase has been seen in the production and trafficking of 'designer' drugs such as BZP, DPIA, pFPP and particularly 1-(3-chlorophenyl) piperazine, in short mCPP, a commercially available powder with stimulant effects used in the manufacture of antidepressant medicine trazodone.

Significant mCPP seizures were reported to Europol and the EMCDDA[54] by Belgium, Estonia, Finland, France, Germany, Greece, Hungary, Malta, the Netherlands, Slovakia, Spain and the United Kingdom. Several other Member States reported minor seizures. More than 800,000 mCPP tablets were seized in the European Union in 2006. Seizures were made of off-white, multicoloured tablets[55] plus tablets with logo imprints and those containing both mCPP and MDMA. In a storage site in the Netherlands, 255,000 tablets bearing the Shark logo were seized. Furthermore, the discovery of traces of mCPP in major MDMA production/tableting sites in the Netherlands strongly indicates the involvement of organized crime. Member States' enquiries, involving Europol support and forensic profiling, have thus far led to the discovery of mCPP acquisition and attempted acquisition from various sources both within and beyond the European Union as well as sales conducted via the Internet.[56]

In early 2007, eight Member States reported seizures of 1-benzylpiperazine (BZP) to Europol, including a seizure of 64,900 tablets in the United Kingdom.[57] A risk assessment procedure has been implemented as foreseen by the Article 6 of Council decision 2005/387/JHA. The risk assessment report recommends the placement of BZP under legislative control in all Member States.[58]

Investigations and seizure statistics also demonstrate increased misuse and spread of anaesthetic medicaments e.g. ketamine and gamma-hydroxybutyric acid (GHB). Ketamine, which is an anaesthetic commonly used in veterinary practice, is misused within the club scene due to hallucinogenic properties. In September 2006, Belgian police intercepted a shipment of 250 kg of ketamine coming from India. The illicit manufacture and trafficking of GHB has become a problem in a number of Member States.

In recent years there have been indications from various regions of the world that fentanyl[59] and its derivatives are becoming more prevalent, with North America and Mexico seemingly most affected by the phenomenon. The substance is known by different terms e.g. alpha-methylfentanyl, 3-methylfentanyl, "China white", "China girl", "Persian white", "Egg white", "crocodile", "Dragon", "999" etc. Information indicates that fentanyl, albeit not currently widespread within the European Union,

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[54] In compliance with the Council decision on information exchange, risk assessment and control of new psychoactive substances (2005/387/JHA).

[55] Joint Dutch / German investigations, supported by Europol, led to the dismantling of the criminal group producing the so called 'Harlequin' multi-coloured mCPP tablets.

[56] Council of the European Union, 14409/05 CORDROGUE 73:Europol-EMCDDA Joint Report on a new psychoactive substance: 1-(3-chlorphenyl) piperazine (mCPP). Brussels, 17 November 2005. An update was provided in 2007.

[57] Council of the European Union, 6645/07 CORDROGUE 17: Europol-EMCDDA Joint Report on a new psychoactive substance: 1-benzylpiperazine (BZP). Brussels, 21 February 2007.

[58] Council of the European Union, 10458/07 CORDROGUE 35: Risk Assessment Report of a new psychoactive substance: 1-benzylpiperazine (BZP). Brussels, 5 June 2007.

[59] A powerful analgesic often referred to as a 'synthetic heroin', significantly more potent than heroin itself.

is becoming available in some Member States e.g. Estonia, Finland, Latvia, Lithuania and Sweden and countries on the Eastern border of the European Union.[60] Whilst information suggests that fentanyl in these European Union markets may have originated from the Russian Federation and Ukraine, since 2003, experimental fentanyl production has been reported by Austria, Germany, Portugal and Slovakia.[61] The Russian authorities reported the seizure of a large scale 3-methylfentanyl laboratory in Leningrad Province in 2007. Fentanyl is complex to produce illicitly, requiring advanced chemical knowledge and laboratory conditions.

In the last decades, the production of methamphetamine has been concentrated outside the European Union e.g. in East and South Asia, namely China, Indonesia, Myanmar, the Philippines and Thailand, plus the Americas, significantly Mexico, and Australia. Small-scale but increasing production takes place in the European Union, with facilities reported in Bulgaria, the Czech Republic, Estonia, Germany, Lithuania, Slovakia,[62] the United Kingdom[63] and Portugal.[64] Whilst prevalence of methamphetamine in the European Union remains low and limited to some Member States, there is a notable increase in frequency and quantity of seizures, whilst several noteworthy cases have been reported to Europol since 2005.

There have been limited indications of methamphetamine related organized criminal activity in the European Union. However, the aforementioned (pseudo) ephedrine trafficking, with connections to the Netherlands and the discovery of recipes for the significant production of methamphetamine within Belgian and Dutch synthetic drug investigations indicate a rise in related criminal activity.

Conclusions

- Production and trafficking of synthetic drugs pose a serious threat to Member States of the European Union. Despite continuous political and law enforcement initiatives, the past decade has not seen a shortage of these substances on the consumer markets in the Member States.
- The Netherlands and, to a lesser extent, Belgium remain dominant in the production of amphetamine and MDMA within the European Union. Substantial production of amphetamine also occurs in Poland.
- Whilst the number of seized major amphetamine and MDMA laboratories in the European Union is relatively stable, their capacity has increased in line with enhanced professionalism and sophistication of industrial and custom-made production equipment utilised.
- Continued spread across the European Union of expertise and production methodology is anticipated, as is the division of production steps. The latter is

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[60] Project SYNERGY.

[61] Ibid.

[62] Methamphetamine illicitly synthesised in the Czech Republic and Slovakia is often referred to as Pervitine, a former trade name for methamphetamine.

[63] In recent years methamphetamine has become more prevalent in the United Kingdom with incidents of production identified. Methamphetamine recently was upgraded to a class ‘A’ drug.

[64] A ‘kitchen-type’ methamphetamine laboratory has been dismantled in a private residence near Porto in March 2007.

especially foreseen in major markets like the United Kingdom and in tourist destinations such as in Portugal and Spain.

- Significant European Union related (pseudo) ephedrine movements, an increase in methamphetamine seizures and recent intelligence indicate the emergence of methamphetamine production in the European Union.
- Manufacture of MDMA has spread to other global regions, notably North and South America, Oceania and Asia. This is reflected in an apparent reduction in the export of MDMA from the European Union and is likely to lead to these regions becoming self-sufficient in the mid to long term.
- Whilst China remains an important source of key precursors BMK and PMK, BMK has also been sourced and trafficked from the Russian Federation. The sourcing and trafficking of chemicals from the countries on the Eastern border of the European Union is a present and growing threat.
- The synthetic drugs trade is amongst the most prevalent and lucrative markets for organized crime. This is aided by relatively small capital investment, basic manufacturing methodology, low costs and availability of chemicals and equipment plus ever-increasing production capacities.
- Criminal groups have become increasingly co-operative with the formation of larger international coalitions. This sometimes involves the exchange of chemicals for drugs and vice-versa as well as the shipment of large multi-commodity consignments.
- Organized crime continues to exploit new market opportunities. Production and trafficking of so-called ‘designer’ drugs are emerging threats in the European Union.
- New consumption markets bordering the European Union are emerging. The Russian Federation is seen as a potential synthetic drugs production market with access to precursors, skilled chemists and other specialists.
- At European Union-level, the model of intelligence-led law enforcement was introduced to make law enforcement more effective. In the area of synthetic drugs, multi-disciplinary and specialised law enforcement teams have been created and specific programmes such as Project SYNERGY and the CHAIN and COSPOL initiatives have been set up.
- In the last decade, two successive European Union Drug Strategies and their related Action Plans were endorsed and implemented. Furthermore, a specific Action Plan against synthetic drugs was endorsed and legal instruments developed to monitor and act against new synthetic drugs.

Annex

Drug Seizure Statistics

	Ecstasy Tablets Seizures		Amphetamine Seizures (Kg)	
	1998	2006	1998	2006
Austria	114.677	30.855	0	38
Belgium	271.080	482.904	445	119
Bulgaria	0	15.050	0	958
Cyprus	21	9.103	0	0
Czech Republic	0	26.259	0	6
Denmark	27.038	22.712	25	79
Estonia	222	12.094	2	13
Finland	3.320	39.185	25	129
France	1.142.226	833.648	165	111
Germany	419.329	1.082.820	310	713
Greece	101	150.788	0	1
Hungary	11.785	161.760	10	17
Ireland	604.827	327.172	45	11
Italy	129.976	145.426	1	14
Latvia	1.020	4.640	0	11
Lithuania	973	58.509	0	35
Luxembourg	145	555	0	0
Malta	153	67.182	0	0
Netherlands	1.163.514	12.097.329	1.450	641
Poland	1.796	129.211	52	316
Portugal	1.127	133.385	0	34
Romania	0	17.314	0	1
Slovakia	0	8.485	10	7
Slovenia	4.763	3.151	0	3
Spain	194.597	821.517	177	85
Sweden	21.273	291.385	134	422
United Kingdom	0	0	0	0
Total	4.113.963	16.972.439	2.850	3.764

Seizure statistics are compiled from data provided by Member States. Comprehensive seizure data is only available on two widespread types of synthetic drugs i.e. MDMA and amphetamine. Seizure statistics for Estonia, France, Greece and Ireland are from 2005 as the 2006 statistics have not been provided, yet.

Quantities of individual substances seized are reported to Europol using different units. To enable a proper comparison of collected information, it is important that all data are collected in a standard form. In relation to MDMA tablets, the statistics include the seized MDMA powder and paste that have been converted into tablets.

The conversation rate is based on an average of 100 mg active substance per tablet. In cases were MDMA tablet seizures were reported in weight instead of number of tablets, the conversion rate is: 1 kg MDMA tablets = 4,000 tablets.

The United Kingdom could not provide reliable seizure statistics for the years 2003-2006. Whilst recognising that the United Kingdom is one of, if not the, major markets, to allow for a long term comparison of data, demonstrating the development of seizures in the European Union, British seizure data was removed from all statistical overviews in this annex. However, according to the data reported to Project SYNERGY, considerable amounts of amphetamine and MDMA were seized in the United Kingdom in 1998 and 2006.