



EUROPEAN DRUG TRENDS MONITOR



About this report

This is the first report of the Global Initiative Against Transnational Organized Crime's (GI-TOC) European Drug Trends Monitor, an output of our Observatory of Organized Crime in Europe. This series of bulletins will track developments in European drug markets to provide an analysis of trends in availability, pricing and criminal dynamics across 11 major cities (see the map above).

European drug markets are undergoing considerable changes, triggered by the confluence of several major trends in supply and demand. These include an oversupply of cocaine, a growing crack epidemic, significant shifts in the production of heroin in Afghanistan, the gradual emergence of synthetic opioids, the

partial legalization of cannabis in some countries and the rise in synthetic stimulants such as synthetic cathinones, especially against the backdrop of Russia's war against Ukraine. As drug markets rapidly transform, with consequences for public health, criminal dynamics and related violence, the European Drug Trends Monitor seeks to provide up-to-date analysis to inform public debate and supplement data from governments and international organizations.

Trends are being monitored in Antwerp, Barcelona, Bucharest, Eindhoven, Hamburg, Istanbul, Kyiv, London, Marseille, Milan and Stockholm. In each city, information is gathered on drug availability, retail and wholesale prices, and criminal dynamics in

trafficking activities. The monitor relies on field research, analysis of data provided by authorities, information gained through interviews and the monitoring of media and incidents such as drug seizures. It also draws on analysis of social media channels where illicit drugs and prescription drugs are being commercialized. The field research findings are referred to in the text but are not referenced throughout.

The European Drug Trends Monitor initiated its first round of data gathering and field research in September 2024. This bulletin

summarizes key findings for two sets of substances that are of major concern: opioids and cocaine/crack cocaine. There are methodological limitations and caveats on how to interpret the findings: no toxicological analysis of the surveyed substances can be conducted, therefore caution needs to be applied in analyzing the data; the analysis lacks comparisons due to the absence of previous data; and the research focuses only on the supply of illicit drugs, not the potential demand for them, limiting explanations of the size of drug markets. ■

KEY TREND 1: Heroin is still available but there are signs of change.

With the exception of Kyiv, where war has disrupted supplies, heroin is still widely available across Europe and prices are stable. There are signs of gradually reduced purity, which may be a consequence of growing scarcity.

The second Taliban opium ban, imposed in 2022, has fueled widespread concern that heroin may soon become scarce across Europe, forcing long-term drug users to switch to synthetic opioids.¹ These potent substances, especially fentanyl and its derivatives,² have become notorious in North America in the past two decades for creating an epidemic of opioid-related overdose deaths with hundreds of thousands of victims.³ There are fears that Europe might face a similar situation, with devastating effects on public health. Research on the effects in northern Europe and the Baltics of the first opium ban in Afghanistan in 2000 uncovered instances where the absence of heroin led to a permanent switch to synthetic opioids – fentanyl in Estonia and buprenorphine in Finland, for example. In other cases, user populations returned to heroin use when supply was restored.⁴

Evidence from the 11 European Drug Trends Monitor cities shows that heroin is still widely available, and at mostly stable retail prices. The highest prices were found in London and Hamburg, the lowest in Istanbul and Bucharest, potentially related to these cities' proximity to traditional heroin trafficking routes. There is also evidence of continued seizures in Afghanistan's neighbouring countries and along the Balkan smuggling route, indicating that the heroin pipeline to Europe has not been sustainably interrupted.⁵ Despite massive reductions in the area under cultivation in Afghanistan, there are reports that opium poppies are still being grown in some regions and that opium stockpiles are abundant.⁶ While the area under cultivation is minimal compared with the situation before the ban, between 2022 and 2023 a slight increase in cultivation was reported.⁷

The monitor's field research shows that the only exception to the pattern of continued heroin availability is Kyiv, confirming

previous GI-TOC research findings that supply to Ukraine has been permanently disrupted since the Russian invasion in February 2022. The traditional northern heroin trafficking route to Ukraine and western Europe has been closed by the war in eastern Ukraine, pushing the country's relatively large community of long-term heroin users towards alternatives, mostly synthetic cathinones.⁸

With the exception of Kyiv, the retail and wholesale prices of heroin are stable, though the wholesale price ranges widely between €20 000 and €40 000 per kilogram. Evidence from Barcelona and Hamburg indicates a growing trend of combining heroin or its methadone substitute with cocaine, crack or other stimulants.⁹ This pattern is confirmed by European Syringe Collection and Analysis Enterprise data showing a frequent pattern of injecting polydrug use, with opioids and cocaine being the most frequent mix of substances detected in European cities.¹⁰

This trend of combined use may be a response to the frequent observation during field research that the purity (and therefore potency) of heroin is perceived or reported to be decreasing. This is a potential hint of a growing scarcity not yet signalled through higher retail prices. Such perceptions were reported from Antwerp, Barcelona and Milan. Heroin is frequently adulterated with caffeine and/or paracetamol, and even before the 2022 ban its purity levels were low compared to cocaine. According to the European Union Drugs Agency (EUDA), in half of the countries that consistently report price and purity data, the mean purity of heroin at retail level was 16–24% in 2021, the rest being adulterants.¹¹ While the scope of this research could not verify the perception of reduced quality, the recent trend of decreasing purity of heroin at retail level has been confirmed by consulted forensic and testing facilities and official reports.¹²

Some observers believe recent episodes of violence within Turkish organized crime groups across Europe hint at a shrinking heroin market.¹³ GI-TOC field research does not confirm a

pattern of market contraction and related violence but suggests a broader diversification of wholesale and retail actors than usually suspected. In Germany's latest official data, Turkish suspects remain the largest group of non-Germans in the heroin trade.¹⁴ Sources consulted in Antwerp and Milan confirmed that Turkish

organized crime groups are also considered to be dominant in the heroin business in these cities. In other cities, a broader mix of actors is reported, most frequently domestic actors and criminal networks from northern Africa, the Middle East and the Western Balkans. ■

KEY TREND 2: While there is almost no explicit demand for fentanyl and nitazenes, trafficking in prescription opioids is an emerging phenomenon.

Demand for fentanyl is mostly limited to illegally retailed prescription products, with no evidence for organized crime involvement. There is also a large market for prescribed pharmaceutical grade opioids, but no demand for nitazenes.

Field research shows limited end-user demand for illicit synthetic opioids in Europe. In the context of a still stable European heroin market, albeit with decreasing purity and the growing popularity of combining heroin with stimulants, is there cause for concern about a potential influx of synthetic opioids?

The catastrophic North American death toll from fentanyl and its derivatives appears to have largely deterred European drug users from experimenting with these synthetic opioids. Whereas in North America the opioid crisis was largely triggered by misguided prescription practices, in Europe medical access to synthetic opioids is significantly more limited. In line with this generally more cautious approach, field research indicates that there is also widespread concern in opioid user communities that heroin and other substances may be contaminated with fentanyl or the even more potent and deadly nitazenes.¹⁵ In Germany, there is limited evidence of heroin being contaminated with fentanyl, but more research is needed to confirm that this is a continuing pattern.¹⁶

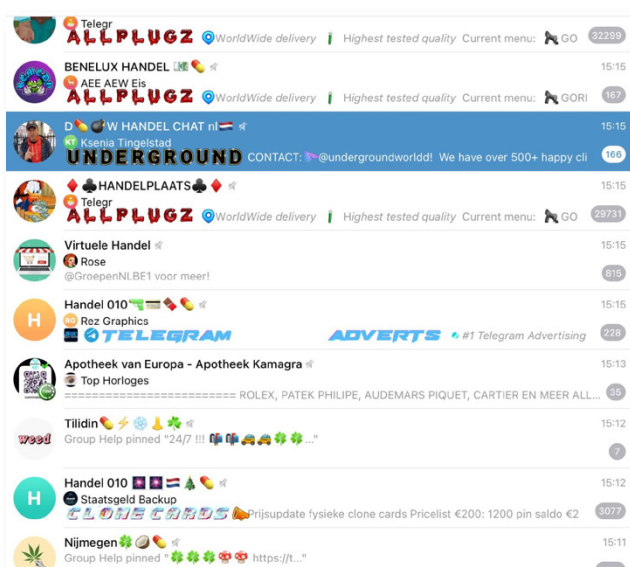
The EUDA and the EU Agency for Law Enforcement Cooperation (Europol) report some dark web supply options for heroin laced with fentanyl and nitazenes¹⁷ but online research for this report could not confirm a relevant end-user market for these substances. Explicit demand for fentanyl appeared to be limited to illegally retailed prescription-only pharmaceutical products containing fentanyl, mostly patches. Nitazenes have no end-user market, being absent from street and online markets in all cities researched. Nitazenes have no medical use and no prescription drugs contain these opioids.

Fentanyl patches have been found for sale in street market settings in Hamburg, Kyiv and Barcelona, and their availability was confirmed on social media channels and dark web pages. Telegram channels showcased the lowest mean prices in the Netherlands and Germany, with the highest in Kyiv (see Figure 1). One German Telegram channel had a special offer of five fentanyl

patches for €100 in October 2024. In Bucharest, pharmaceutical-grade fentanyl pills were being trafficked. In all cases, research suggested the pharmaceutical products had been diverted from licit prescriptions, and in two cases the availability was related to individual theft from pharmacies. No link to organized crime could be confirmed in any of the cities with illicit market availability of pharmaceutical-grade fentanyl.

However, there is a category of opioids that is frequently overlooked in the debate about the risk of a forthcoming European opioid crisis. Research for this report indicates that there is a widespread market for prescription opioids such as Tramadol, oxycodone and tilidine, and that this phenomenon has attracted far less awareness and research as compared to other so-called new psychoactive substances.¹⁸ While official data for the past decade shows a stark increase in prescriptions for pharmaceutical opioids in Europe,¹⁹ there is little data about the non-medical use of prescription opioids and associated trafficking dynamics.

Especially across western European online and offline markets, field research shows high availability of prescription opioids at prices that are modest compared to those for illicit synthesized options.



Telegram channels illicitly supplying pharmaceutical drugs to users in Europe, 8 September 2024. Photo: supplied

Even compared to fentanyl patches, the availability of drugs such as oxycodone or Tramadol was considerably higher, measured by how often they are offered on social media. On 46 Dutch drug retail channels on Telegram in September 2024, the mean price for an oxycodone pill was €8.67 and they were usually sold in bulk with a discount. The average price for a Tramadol pill was €1.41. In Germany, 21 Telegram drug retail channels offered oxycodone for a mean price of €9.02 per pill and Tramadol for €0.71.

There appears to be a relationship between the potency of prescription opioids and their price. While this data needs to be considered with caution, since the authenticity and active ingredients could not be verified, the high level of retail transactions and active engagement by users on these channels suggest a dynamic and functional supply of these commercialized medicines.

Pills are usually offered in higher numbers, either in blister strips or full packs, and from dozens to hundreds or even thousands of items, with a decrease in the price per unit as purchase volume increases.

Availability differs between jurisdictions. Tilidine, a prescription opioid-based painkiller, is frequently available on German Telegram channels and from home-delivery services in Hamburg but is rarely found on the Dutch illicit market. This is probably because it is frequently prescribed in Germany but is not available from the Dutch public health system. On British illicit markets the variety of available prescription opioids appears to be even higher. Tapentadol, Tramadol, oxycodone and several codeine-based drugs are on the menu of social media drug retailing channels. They are slightly more expensive than in mainland Europe but still much cheaper than illicit non-pharmaceutical opioids. As well as on Telegram, there are supply options in dark



Sources of pharmaceutical drugs on Telegram – Oxydolor from Poland, Tilidin from Germany, Xanax from Turkey and Tramadol from Spain, 8 September 2024. Photo: supplied

web marketplaces, as suggested by anecdotal evidence gathered in fieldwork and other available research.²⁰

Information gathered from Telegram channels suggests the prescription drugs they sell are sourced from medical prescriptions, pharmacies, hospitals and production sites, despite strict control regimes in many countries. However, packaging and language differences suggest some channels are selling opioids from different jurisdictions, pointing to a transnational illicit market for these substances.

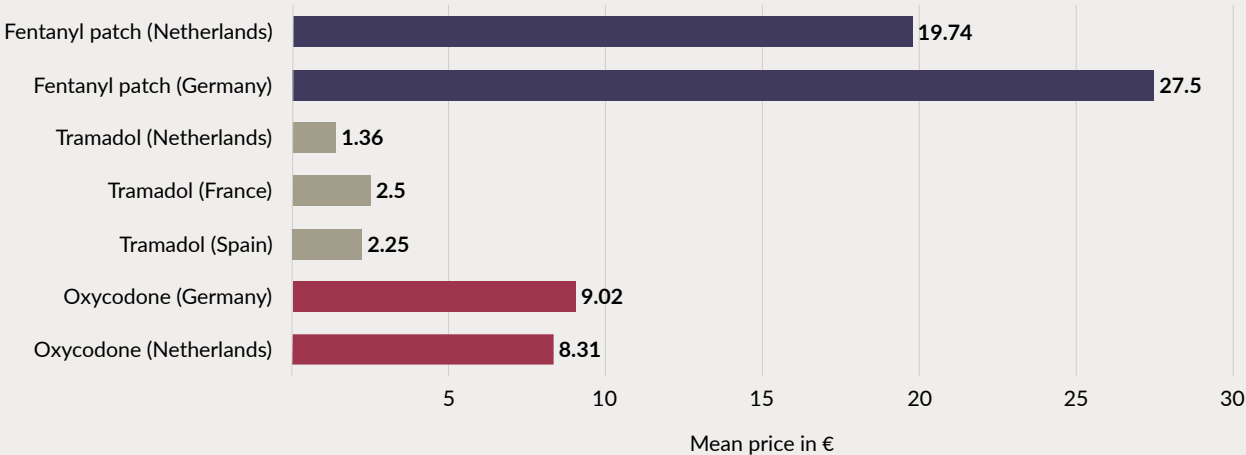


FIGURE 1 Prescription opioids, € per item (mean).
SOURCE: GI-TOC field research findings, September 2024

Again, caution is needed due to the lack of forensic testing of products on offer and the possibility that the product supplied does not match the online vendors' advertisement images. Therefore, the advertised prescription drugs may also derive from illegal production of falsified medicines.

While the trade in fentanyl patches appears to be organic rather than organized, several of the monitored social media channels have a more professional retailing system that resembles licit online stores. This is especially true of channels that operate as marketplaces with a broad array of sellers. Handel Hollandia, for instance, which had thousands of members as of October 2024, hosts dozens of retailers. Over a week, more than 30 000 individual messages were exchanged on its channel. Each seller promotes its services

and menus, trying to attract customers to join its individual channel, much like vendors in a physical marketplace.

Several sellers seek to stand out by offering a distinctive service, such as delivery within 24 hours, or by having customer-service chat bots, shopping carts, track-and-trace tools or a checkout process that allows for a broad array of payment options, including cryptocurrencies. Such patterns of professionalized retailing of illicit drugs have also been recently confirmed for the Russian drug market, increasingly shifting from offline to online retailing schemes.²¹ For the European channels researched here, there is evidence to suggest that wholesale transactions are also organized through Telegram channels. Finally, these channels actively recruit staff, mostly delivery drivers, while seeking to portray themselves as legitimate and legal. Similar dynamics are seen in the Russian drug market.²² ■

KEY TREND 3: Trafficking in prescription opioids may herald highly potent illegal synthetic opioids.

Readily available illicitly trafficked prescription opioids and benzodiazepines, which attract little attention from law enforcement and customs authorities, may increasingly become contaminated with nitazenes – a possible development that raises the spectre of a European opioid crisis.

The absence of evidence about the origins of illegally trafficked synthetic opioids across Europe, combined with the wide availability and affordability of illegally trafficked prescription drugs, is a dangerous mix that may favour the emergence of a European opioid crisis – although in a way that may not have been expected.

Most of the public discussion about synthetic opioids considers whether Afghanistan's opium ban will result in heroin users in Europe turning to synthetic alternatives. Just as important, however, is the question of whether the booming illicit market for prescription drugs will pave the way for a larger market in non-pharmaceutical opioids.

While no prevalence data is available for the illegal use of prescription opioids, our research shows that it appears to be widespread, analyzed from a supply perspective and based on accounts from field research. Prescription opioids are widely available and pricing is attractive compared to heroin and illegal drugs in general. Trafficking patterns appear to be highly coordinated and match those implemented by organized crime in other illegal drug markets. The low prices for illicitly sold prescription drugs may be due to the low risk associated with this market, given the little enforcement pressure compared to other illicit drug markets.²³

The use of pharmaceutical-grade prescription drugs with controlled and standardized ingredients and potency is widely perceived to be safer than the use of illegal drugs with high levels of uncertainty about their composition. However, recent developments show that illegal and potent synthetic opioids have entered Europe not necessarily in contaminated heroin but rather in falsified prescription drugs that frequently contain nitazenes. Users are usually not aware of this contamination, given the high risks associated with its consumption. Contamination may occur intentionally or unintentionally along the supply chain,²⁴ while the criminal intention behind nitazene contamination is not understood yet.

Twenty-one EU states and Norway seized and identified nitazenes between 2019 and 2023.²⁵ In 2023, six out of seven new synthetic opioids reported in the EU belonged to the group of nitazenes, which now surpass fentanyl and its derivatives in new synthetic opioids reported at the European level.²⁶

Contamination was not limited to prescription opioids such as oxycodone. In several cases it involved benzodiazepines, a widely available class of depressant drugs in illicit European online markets, better known by brand names such as Xanax (alprazolam) or Valium (diazepam).²⁷ Of all prescription drugs analyzed for this report in September and October 2024, benzodiazepines were the most universally available on Telegram channels.

Incidents from 2023 and 2024 in the UK and Ireland show that falsified benzodiazepines, opioids and synthetic cannabinoids had been contaminated with nitazenes, leading in several cases to overdose clusters and dozens of fatalities.²⁸ Several incidents

involved nitazene contamination in falsified prescription drugs.²⁹ At the end of 2023, British authorities seized a production site and 150 000 nitazene pills.³⁰ In 2024, Dutch authorities seized allegedly falsified oxycodone pills that were contaminated with nitazenes.³¹ In a case reported from Slovenia in 2021, a prescription opioid sold online contained a nitazene.³² There were also nitazene-related fatal overdoses in Estonia, Latvia and the French overseas department of Réunion in 2023, even though the means of provision could not be confirmed.³³ It is possible that higher numbers of opioid-related deaths have gone undetected due to the low frequency of autopsies and toxicological analyses following overdoses across Europe. (As an example, Germany conducts autopsies in only roughly half of overdose-related fatalities, and even then a full toxicological analysis may not be done.³⁴)

With the high availability and affordability of prescription opioids in illicit drug markets in Europe, there is an overlooked risk of a further influx of contaminated medicines. GI-TOC research in Sierra Leone and Guinea-Bissau shows how nitazenes can find their way into domestic drug markets, with potentially devastating effects.³⁵

While European law enforcement and customs authorities focus heavily on disrupting transnational cocaine supply,³⁶ there appears to be widespread ignorance about the gradual appearance of deadly nitazenes and fentanyl, especially in falsified medicines. Heroin availability and pricing are monitored, and there are occasional tests for contamination with synthetic opioids, but the overt market for prescription opioids appears to enjoy an astonishing level of impunity. There is little available information and reporting about the supply chains for diverted or falsified prescription drugs such as benzodiazepines in Europe.³⁷ A highly organized criminal market has emerged on social media platforms, opening the door for falsified medicines containing potentially deadly ingredients.

The organized criminal supply channels of prescription drugs and illegal illicit opioids remain opaque, with seizures accounting for only a few kilograms annually in the EU.³⁸ Because of the high potency of illegal synthetic opioids, and therefore the minimal volumes needed to meet illicit demand, European authorities are confronted with a massive challenge. While cocaine is trafficked in tonnes, fentanyl and nitazenes are dealt with in grams and kilos. Nonetheless, it is vital to identify and target the organized crime networks involved in trafficking and supplying prescription drugs and potent synthetic opioids. The effort required is similar to that undertaken two decades ago by Scandinavian authorities, which constrained the flow of fentanyl into northern Europe after Afghanistan's first opium ban.³⁹

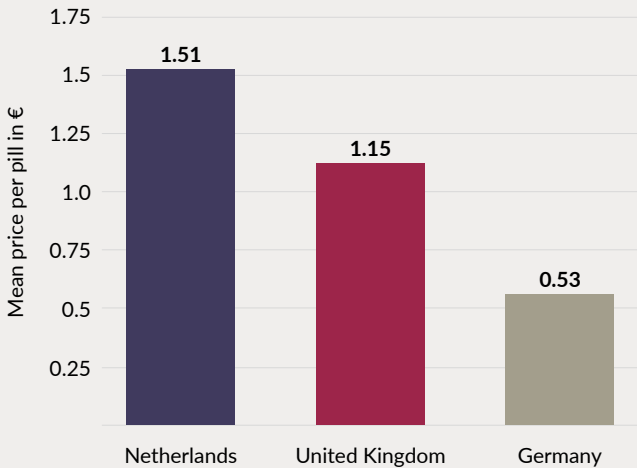


FIGURE 2 Benzodiazepines, € per pill (mean), as advertised on Telegram channels.

SOURCE: GI-TOC field research findings, September 2024

There is a widespread assumption that synthetic opioids and their precursors originate in China, with some reports also implicating Russia and India.⁴⁰ There is also evidence for illicitly traded benzodiazepines in Europe to originate mostly in China, but also in India.⁴¹ At the same time there have been limited accounts of illicit EU opioid production sites in Europe, including in Belgium, Germany, Latvia and Spain; there are also hints about production in the Netherlands.⁴² While a production site for nitazene-contaminated falsified medicines has been found in the UK, the criminal industry behind this phenomenon is barely understood in Europe.

Though there are rumours about the involvement of the Italian 'Ndrangheta and Mexican organized crime groups in the market for synthetic opioids,⁴³ no cases have confirmed these allegations. Within the scope of this report, no organized crime-related European production of synthetic opioids could be confirmed. The GI-TOC has found evidence of the processing of fentanyl-based products in a more organized fashion in Sweden and Ukraine but these seem to be isolated cases.⁴⁴ Seizure data is limited and investigations appear to be rare. The same applies to the highly organized online criminal markets for prescription drugs in general. The absence of evidence about the origins of illegally trafficked synthetic opioids across Europe, combined with the wide availability and affordability of illegally trafficked prescription drugs, is a dangerous mix that may favour the emergence of a European opioid crisis – although in a way that may not have been expected.

RECOMMENDATIONS

To detect and prevent a shift towards synthetic opioids, European governments should:

- Strengthen their efforts to monitor and disrupt uncontrolled social media markets for prescription drugs.
- Conduct more autopsies and toxicological analyses for drug-related deaths.
- Legalize and expand drug-checking capabilities to allow for the testing of recreational drugs for contamination, including through the provision of test kits for fentanyl.
- Enhance the awareness and vigilance of law enforcement and customs authorities towards the trafficking of illegal synthetic opioids and their precursors.
- Raise awareness about the risks associated with the unregulated and medically unguided purchase and use of prescription drugs.

KEY TREND 4: Declining seizures at ports do not tell the real story about increasing cocaine availability.

After reaching record levels in 2023, cocaine seizures slumped in the first half of 2024. Nonetheless, the drug's availability and price have remained stable.

In 2022, for the sixth successive year EU states seized a record amount of cocaine: 323 tonnes, 6.6% more than in 2021. Belgium, the Netherlands and Spain continued to be the countries reporting the highest volumes of seizures, reflecting their importance as entry points for cocaine trafficking to Europe. In 2023, the quantity of cocaine seized in Antwerp increased for the seventh successive year, reaching 116 tonnes, and Germany made seven times more seizures than in 2018.⁴⁵ In 2024, Spain reported its largest seizure of cocaine (13 tonnes) in a single shipment, concealed in bananas from Ecuador.⁴⁶

Except for isolated cases, in the first half of 2024 Europe's main cocaine entry points reported a sharp decrease in cocaine seizures — down 40% in the Netherlands and nearly 50% in Belgium. German authorities also confirmed a decrease at the port of Hamburg.⁴⁷ While this might suggest reduced cocaine inflows, the trend might be the result of drug trafficking organizations changing routes and adopting new concealment methods due to increased security. Rotterdam, for instance, now scans all containers from Latin America, and authorities have strengthened their collaboration with Latin American partners and businesses.⁴⁸

While usage rates and patterns differ significantly across European nations, cocaine availability has been stable, if not on the rise. For several years it has been the most commonly used illegal drug in Europe after cannabis.⁴⁹ Among the 13 countries that have conducted prevalence surveys on consumption habits since 2021, five reported an increase in estimates of cocaine

use compared to their prior survey, while the others showed consistent trends.⁵⁰

While survey-based prevalence data should be treated cautiously, wastewater analyses tend to reflect cocaine consumption patterns more accurately, particularly in urban areas.⁵¹ According to the latest EUDA wastewater data, cocaine use remains particularly high in cities across western and southern Europe, especially in the UK, Belgium, the Netherlands and Spain.⁵² Most eastern European cities report lower levels of use, though recent data suggests gradual increases in this region.⁵³ Between 2011 and 2015, cocaine use across most cities was relatively steady. From 2016, usage rates began rising annually in most cities surveyed. In 2023, cocaine residue data indicated further annual increases, with 49 out of 72 cities reporting higher levels.⁵⁴ Data collection and interviews for this report with law enforcement agencies and people who use drugs confirm high cocaine availability and consistent mean retail prices between 2022–2023 (€73–€73.30 per gram) and 2024 (€73.50). Mean purity was between 64% and 76%.⁵⁵

Higher cocaine use rates in Belgium and Spain are further supported by retail price data, with Antwerp showing prices around €50 per gram and Barcelona €60 per gram — notably lower than other monitored locations. These prices are probably influenced by the large volumes passing through the port cities, which have direct connections with Latin American ports and facilitate lower wholesale prices.

Research for this report suggests that low retail prices generally correspond to low wholesale prices, particularly in port cities. As illustrated in Figure 4, wholesale and retail prices in Antwerp, Barcelona and Hamburg are lower than those in landlocked cities (Bucharest, Milan). The supply in non-port cities generally

results in a mark-up derived from additional logistical costs and the associated risks of land transportation. In Milan, where most wholesale cocaine is typically supplied by 'Ndrangheta clans in partnership with Albanians, the price of 1kg of cocaine ranges between €33 000 and €40 000. It is sold for €80–€90 a gram, mainly by street dealers of Nigerian and Moroccan origin.

However, additional factors may contribute to the price differences between cities. In the absence of much information on

purity levels and perceived quality, Barcelona's lower price point could be partly attributed to fewer competing traffickers each with their own portion of the market, potentially leading to stable supply channels that allow for more consistent pricing at the wholesale level. Fieldwork in the Spanish city shows that unlike other key entry ports such as Algeciras and Valencia, wholesaling is handled almost entirely by Spanish-speaking transnational groups with links to the Caribbean (Costa Rica and Dominican Republic)⁵⁶ and South America (Paraguay).⁵⁷

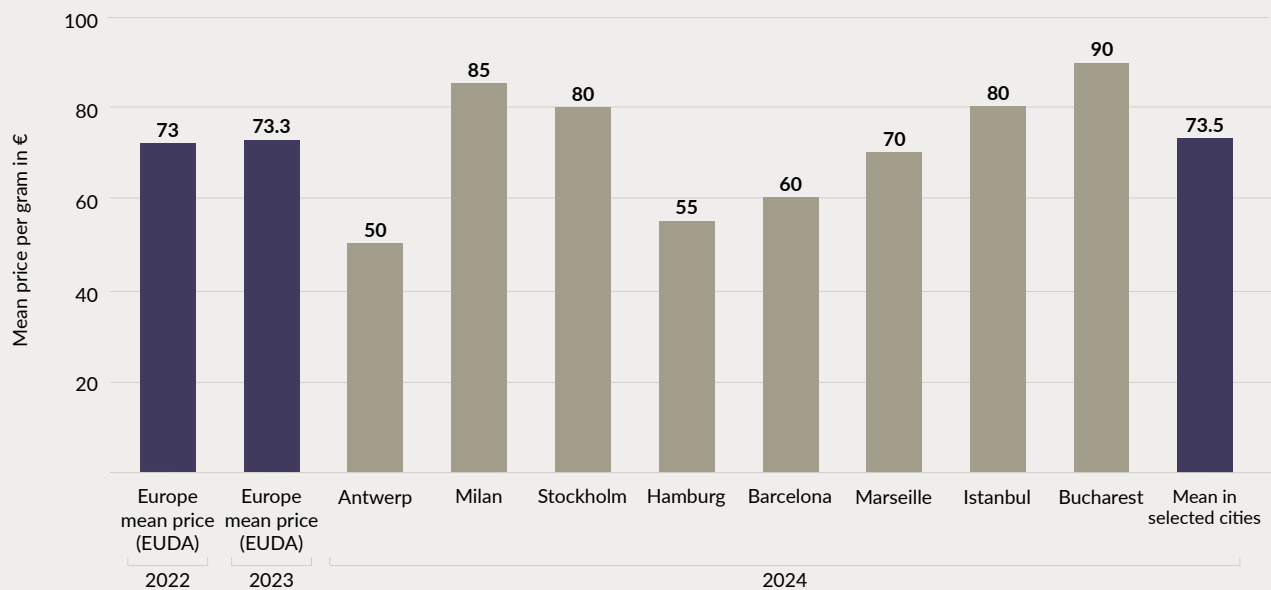


FIGURE 3 Retail cocaine prices in selected cities and European mean prices, 2023 and 2024.

SOURCES: EUDA and GI-TOC

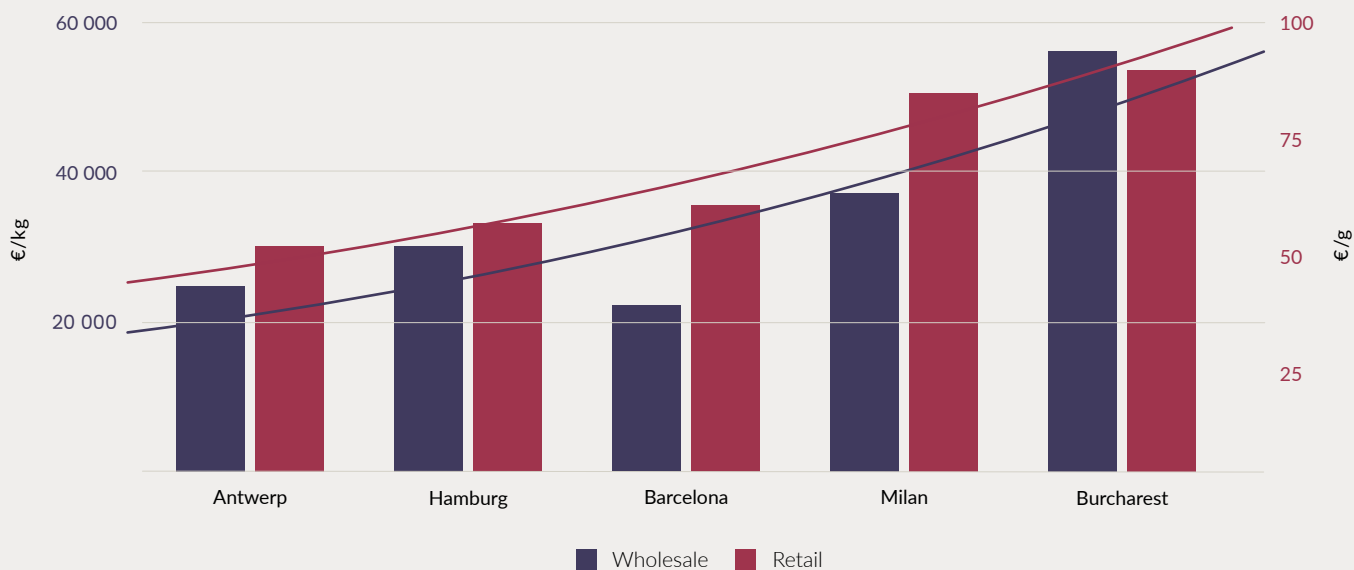


FIGURE 4 Wholesale and retail cocaine prices in selected European cities, 2024.

NOTE: The trend lines highlight the positive correlation between distance from ports and higher prices at both wholesale and retail levels.
SOURCE: GI-TOC field research findings, 2024

In Antwerp and Hamburg, the ports' commercial significance attracts major international wholesalers (Albanian, Turkish, Italian and Dutch-Moroccan). These groups compete to supply street dealers, frequently of north African and Middle Eastern origin, probably contributing to lower retail prices through high availability and market competition. A decrease in seizures in the first half of 2024 points to a contraction in supply, if fewer seizures are taken as an indicator of lower amounts of incoming cocaine.

But field research shows that the wholesale price for cocaine in Hamburg and Antwerp has remained stable, which does not suggest a decrease in incoming cocaine. While there is isolated evidence for a decrease in cocaine purity and an increase of the anaesthetic procaine as an adulterant (found in toxicological analysis of cocaine in German and Dutch cities),⁵⁸ these trends remain to be confirmed in the medium term. Price data points to stable cocaine supply levels in the major port cities. ■

KEY TREND 5: Alternative trafficking methods and routes may explain the stable supply of cocaine in Europe.

Traffickers are increasingly shipping liquefied cocaine that is returned to its solid form in clandestine labs across Europe. They are also responding to enhanced security by switching to smaller ports.

Alternative concealment and trafficking methods may partly explain why cocaine availability and prices have remained stable

in European cities. A technique used by traffickers is the use of liquefied cocaine to circumvent traditional detection methods and optimize transport across borders. Although probably still less common than traditional trafficking methods such as 'hide-and-seek' and 'rip on/rip off',⁵⁹ liquid cocaine is increasingly infiltrating supply chains by enabling seamless concealment.

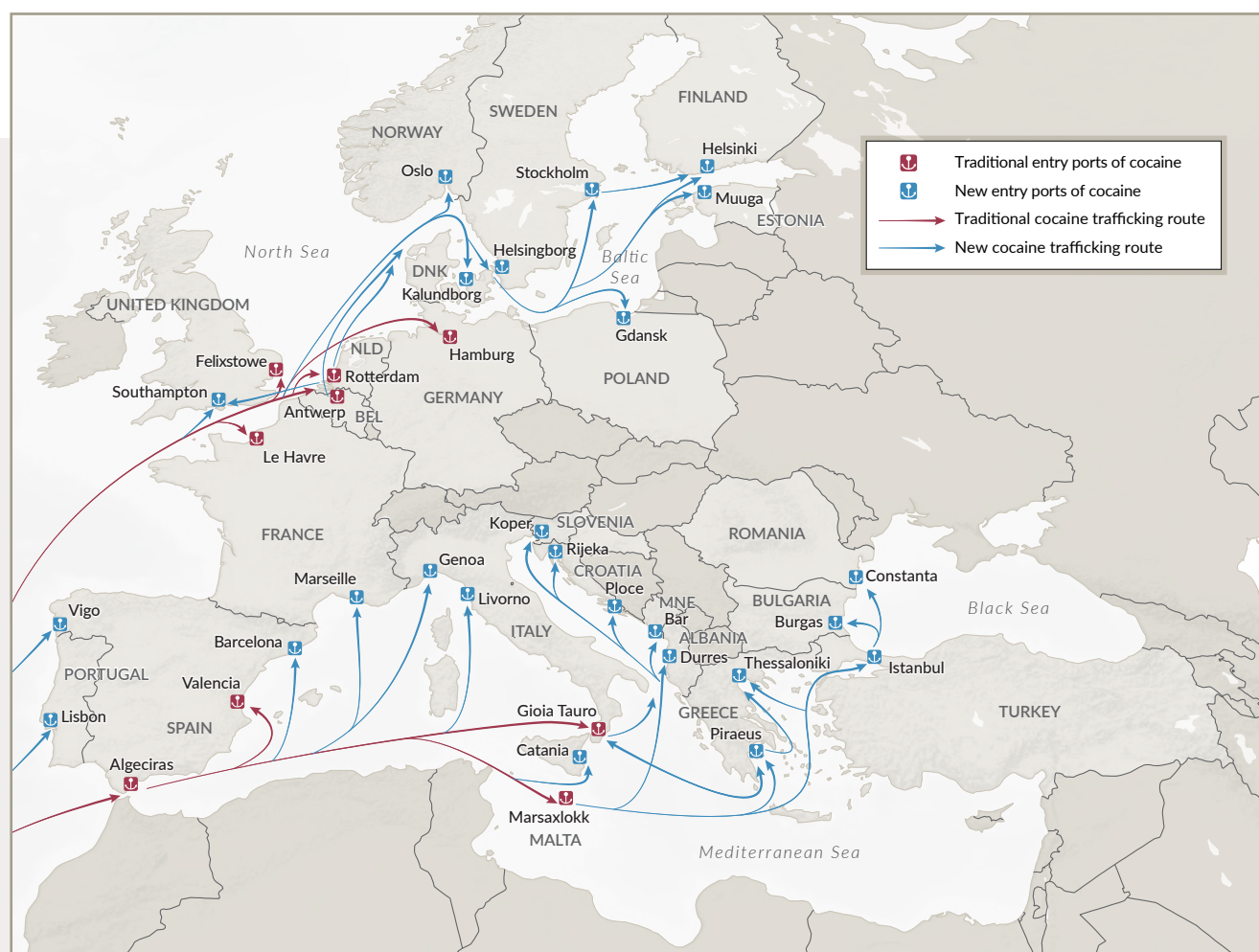


FIGURE 5 European ports of entry for cocaine.

Colombian authorities recently intercepted several liquid cocaine shipments destined for major markets in Spain, demonstrating this method's viability for transnational trafficking.⁶⁰

This tactic bypasses standard security measures such as scanners and drug-sniffing dogs, making liquid cocaine a preferred option for traffickers. The process involves dissolving cocaine in solvents, which is then used to impregnate charcoal, for example, as observed in Buenaventura, Colombia.⁶¹ Liquefied cocaine is also trafficked in everyday items such as shampoo or wine bottles, and even soaked into porous materials such as textiles, wood shavings or cardboard. Once these materials are dry, it is difficult to detect the cocaine they contain without advanced chemical testing.⁶²

The trafficking of liquid cocaine has led to an increase in clandestine labs in Europe that finalize production near consumer markets by returning the drug to its solid form. In 2022, law enforcement dismantled 39 labs, with subsequent discoveries in Spain, Portugal and Belgium revealing highly organized operations capable of processing substantial amounts of cocaine.⁶³ These suggest a potential shift toward European processing and decentralization of cocaine production.

In addition to new forms of trafficking, a possible reason for the constant high cocaine availability observed might be that organized crime groups respond to port security improvements in certain hotspots by switching to smaller, less-regulated ports and exploiting weaknesses across the broader supply chain. The North, Baltic and Mediterranean seas have dozens of commercial ports connected via land infrastructure to landlocked cities analyzed in this report.

As shown in Figure 5, evidence from police and customs operations suggests that traffickers have not only adapted by routing shipments through smaller western ports such as Southampton in the UK (127 km from London),⁶⁴ Nynäshamn in Sweden (54 km from Stockholm)⁶⁵ and Vado in Italy (140 km from Milan)⁶⁶ but also expanded their trans-shipment points. They are using less common routes via West Africa and the Sahel region as well as eastern and southern Africa,⁶⁷ and performing 'rip on/rip off' by using containers transiting from non-risky areas to evade scrutiny.⁶⁸ These strategic shifts highlight traffickers' resilience and their ability to stay ahead of law enforcement efforts. To supply other European markets, traffickers have also started targeting ports in south-eastern Europe such as Constanța in Romania,⁶⁹ Piraeus in Greece⁷⁰ and Koper in Slovenia.⁷¹ ■

KEY TREND 6: Crack cocaine use is on the rise.

The use of crack, and its geographical and social distribution, is growing, but seizures remain low. There is an urgent need to enhance testing protocols and law enforcement capabilities.

Europe is witnessing a complex shift in crack cocaine use characterized by local consumption hotspots among marginalized communities.⁷² Since its availability is significantly tied to the presence of powder cocaine, results from municipal wastewater analyses show that cocaine and crack patterns are similar. Data from 2022 and 2023 shows an increase in cocaine's availability in two-thirds of the cities analyzed. This suggests that crack use has become more widespread, as has its geographical and social distribution.⁷³

Crack is a smokable form of cocaine that is less expensive than powder cocaine. It is sold as rocks, which according to GI-TOC research in other regions weigh between 0.1g and 0.2g at retail level.⁷⁴ Because crack combines cocaine with a bulking agent, it is potentially much more profitable for traffickers.⁷⁵ This is amplified by the higher frequency of crack consumption compared with cocaine. However, as seizure data from European law enforcement agencies shows, transnational wholesale trafficking in crack appears to be a limited phenomenon and production of crack in the end-consumer segment of the supply chain is more common.⁷⁶

Most seizures involve large quantities of cocaine at ports and borders, and it is uncertain how much of it would have been used to produce crack. Consequently, an understanding of seizures targeting crack trafficking at the retail level might show more relevant patterns. As shown in Figure 6, numbers of seizures increased sharply in certain European countries between 2012 and 2022, pointing to an increased focus on crack by law enforcement authorities.

In general, however, seizures of crack remain low across Europe even though it is responsible for a significant portion of drug-related treatment needs and challenges. Since it is less costly and produces a rapid effect, purchases are on the rise among marginalized communities⁷⁷ and a rock is sold for as little as €5 in Palermo (Italy), Barcelona and Hamburg. However, little is known about consumption patterns in the cities observed for this study.

According to the EUDA, the use of crack in Europe has seen significant regional concentration and a rising demand for treatment, underscoring the need for nuanced and targeted public health responses. Between 2017 and 2022, first-time treatment cases presenting with crack as the primary drug increased by almost 45%, from 1 900 to 2 750 clients.⁷⁸ Similarly, a 2021

survey by the Europe-wide Sewage analysis to Monitor Emerging drug problems detected crack residues consistently in municipal wastewaters of 13 cities. Notably, Amsterdam and Antwerp had the highest levels.⁷⁹

These trends are indicative of crack's growing presence in European cities and signal a shift in the demographic affected by crack dependence, often towards marginalized populations. In Barcelona, for example, consumption of crack cocaine occurs in areas where heroin is also commonly sold. In Germany, crack use has been rising steadily, particularly in western cities and frequently in the framework of polydrug use and within populations in medically-assisted treatment programmes, such as methadone.⁸⁰

In 2022, just six EU countries accounted for a striking 90% of the estimated 8 100 crack-related treatment cases.⁸¹ This figure reflects a rise from the 7 500 recorded in 2021, with 3 000 of the new cases being first-time clients presenting with crack as the primary drug.⁸² However, it is worth noting that the definition and reporting of 'crack' are not entirely consistent across EU nations, which may affect these statistics. In Milan, for example, there are no recorded crack seizures or evidence of its presence. Users confirm its consumption but the term 'crack' is misused. Users often smoke a mix of heroin and cocaine in its powder form, rather than the substance commonly known elsewhere as 'crack'. In fact, as it emerges from 2023 hospitalization data at 11 health facilities across Europe, 65% of cases involved the use of more than one drug, particularly cocaine, heroin and synthetic opioids.⁸³

This points to a significant inconsistency in the terminology used on the street, which obscures any understanding of the true composition of substances in circulation. It also highlights an urgent

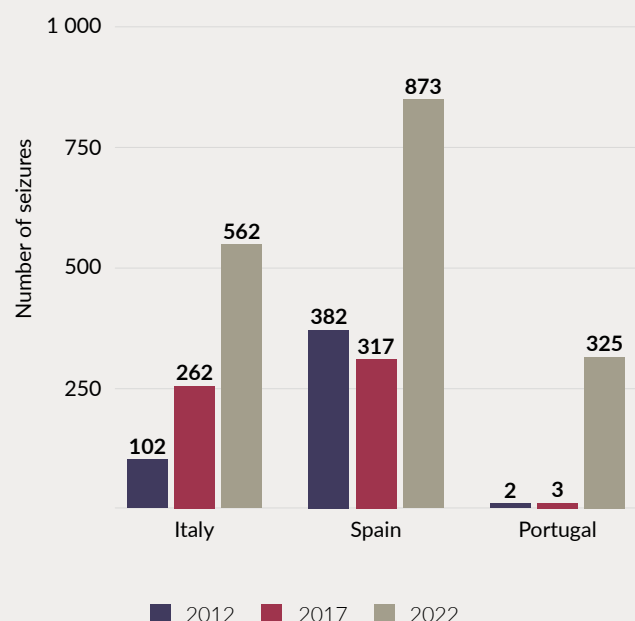


FIGURE 6 Seizures of crack cocaine in Italy, Portugal and Spain, 2012, 2017 and 2022.

SOURCE: EUDA

need to enhance testing protocols and law enforcement capabilities to better identify substances at the retail level. Retailing crack is particularly lucrative for trafficking networks. Accurate testing and proper categorization are crucial for effective interventions and to provide clearer insights into crack use trends, particularly because in contrast to methadone-based opium-substitution therapy for heroin, there is no substitution therapy for crack and other stimulants.

RECOMMENDATIONS

To counter the diversification of cocaine supply chains, European governments should:

- Strengthen cooperation with authorities at trans-shipment hubs in regions like West Africa and south-eastern Europe to counter traffickers' adaptive strategies and decentralized supply chains.
- Invest in advanced chemical testing and detection technologies to identify cocaine concealed in liquid form or impregnated in porous materials, focusing on major entry points like Spain and smaller ports increasingly used by traffickers.

To have a better understanding of crack use patterns, European governments should:

- Standardize testing protocols and improve substance identification at the retail level to accurately track crack cocaine trends and distinguish it from other stimulants.
- In the absence of substitution therapies, invest in the development of tailored harm reduction and psychological programmes for crack cocaine users, such as cognitive behavioural therapies aimed at supporting long-term abstinence.

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