The issues facing Europe

An overview

Andrew Cunningham
Supply reduction and New Drugs unit
28 May 2015
Opiates (heroin)

Europe’s main drug issue (still)

1.3 million problem users
Less heroin in Europe?

Indexed EU trends in important standard data sets related to heroin

- TDI new - numbers, heroin
- TDI all - numbers, heroin
- DLOs heroin
- #s seizures - EU+2
- #s of seizures - EU
- price index of heroin
- purity index of heroin
- DRD EU-28
- POU prevalence

Less heroin in Europe?
More than a million receive treatment in Europe

734,000 receiving substitution treatment in Europe in 2012

50% coverage for POUs

Methadone most common (67%)
Cannabis

73.6 million adults ever used cannabis

14.6 million young adults used last year
Cannabis: divergent national trends

9 countries — statistically significant trend

Regional patterns observable

Latest surveys — divergence continues
Cannabis-related problems continue

Almost 1% of adults daily users

Most frequently reported drug by new treatment entrants
Trends in cannabis resin seizures in Europe, 2002–12
Domestic Cannabis cultivation

Number of Cannabis Plants

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantity Seized (x1000 Plants)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>0</td>
</tr>
<tr>
<td>2003</td>
<td>0</td>
</tr>
<tr>
<td>2004</td>
<td>0</td>
</tr>
<tr>
<td>2005</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>0</td>
</tr>
<tr>
<td>2007</td>
<td>0</td>
</tr>
<tr>
<td>2008</td>
<td>0</td>
</tr>
<tr>
<td>2009</td>
<td>0</td>
</tr>
<tr>
<td>2010</td>
<td>0</td>
</tr>
<tr>
<td>2011</td>
<td>0</td>
</tr>
<tr>
<td>2012</td>
<td>0</td>
</tr>
</tbody>
</table>

Countries: Other, Greece, Poland, Czech Republic, Germany, France, Belgium, United Kingdom, Netherlands, Italy
Cannabis supply

Domestic production up

Innovation

Cultivation of plants high in THC

Potency increases for herb and recently resin
Stimulants
A geographically divided stimulant market

2.3 million Europeans (15–34 years old) used cocaine in the last year

1.4 million used ‘ecstasy’

1.3 million used amphetamines
2.3 million young adults used last year
Cocaine: continued signs of decline

Declines in 11 of 12 new surveys

Decrease for first-time treatment entrants
Synthetic drugs

1.4 million young adults used ecstasy/MDMA last year
1.3 million used amphetamine/methamphetamine
Ecstasy: increased availability of high purity MDMA powder

- Low and stable prevalence trends
- Seizures decline — small rebound
- Upturn mirrored in purity data
- Highlights impact of precursor controls (PMK)
Amphetamine use stable: new methamphetamine outbreaks

**CZ and SK:** longer term entrenched patterns of use, but treatment up

**CZ/DE:** cross border markets

**North:** interlinked with amphetamine

**South:** crystal smoking for first time, pipes used

MSM in large cities — IV use (slamming)
Wastewater analysis — city-level variation in use of amphetamine
Synthetic drug production, precursors and pre-precursors

Each time a precursor chemical is placed under control, producers find a new one …
Synthetic drugs, precursors and pre-precursors: understanding the connections

Click on a synthetic drug, precursor or pre-precursor, to see how it is connected to the other elements. In some cases, additional information may be available.
Synthetic drugs, precursors and pre-precursors: understanding the connections
Synthetic drugs, precursors and pre-precursors: understanding the connections
New drugs
Number of NPS reported to the EU-EWS (2005-2014)

101 NPS reported for the first time in 2014
>450 NPS currently monitored

all detections analytically confirmed
New psychoactive substances...

Just like synthetic drug precursors....

Each time a new drug is placed under control, producers find a new one ...
Number of seizures of NPS

Number and quantity seized, 2005-2013

46,730 seizures in 2013 amounting to more than 3.1 tonnes in Europe

299 different NPS detected in 2013

Numbers and proportion of seizures by category, 2013

7-fold increase in seizures 2008–13
The NPS Market

Legal highs
Marketed in bright and attractive packaging. Sold openly in head/smart shops and online. Aimed at recreational users.

Research chemicals
Sold under the guise of being used for scientific research. Aimed at 'psychoactive substances. Sold openly online.

Food supplements
Sold under the guise of being food or dietary supplements. Aimed at people wanting to enhance their body and mind. Sold openly in shops and online.

Designer drugs
Passed off as drugs such as MDMA and heroin. Produced in clandestine labs by organised crime. Sold on illicit drug market by drug dealers.

Medicines
Medicines that are diverted from patients or illegally imported into Europe. Sold on illicit drug market by drug dealers.
Chemical companies in China and India synthesise the NPS powder in bulk.

The NPS powders are shipped to Europe by air and sea.

8% young Europeans have used NPS in their life. (Eurobarometer, 2014)

Legal highs, research chemicals and dietary supplements are processed and packaged in EU.

They are sold openly in shops and on the Internet.
Market transition example: Hungary

Courtesy of the Hungarian Institute of Forensic Sciences
Key points

**Greater interaction**
- Diversification in trafficking routes
- Is the face of organised crime changing?

**Globalisation is the key driver of change**
- The growing importance of the Internet
- The impact of new markets
- EU as a producing region
- Innovation

**Significance of different drugs is changing**
- The heroin problem is changing
- The drug marketplace is less discriminating
- Cannabis market – pervasive and resilient
- New drugs entering the market in parallel
Thank you

Andrew.cunningham@emcdda.europa.eu