



European Monitoring Centre
for Drugs and Drug Addiction



Cultivation, supply and trafficking of cannabis in Europe

Findings from the 2016 EU Drug Markets Report

Tim Surmont, EMCDDA
GPS expert meeting 2017

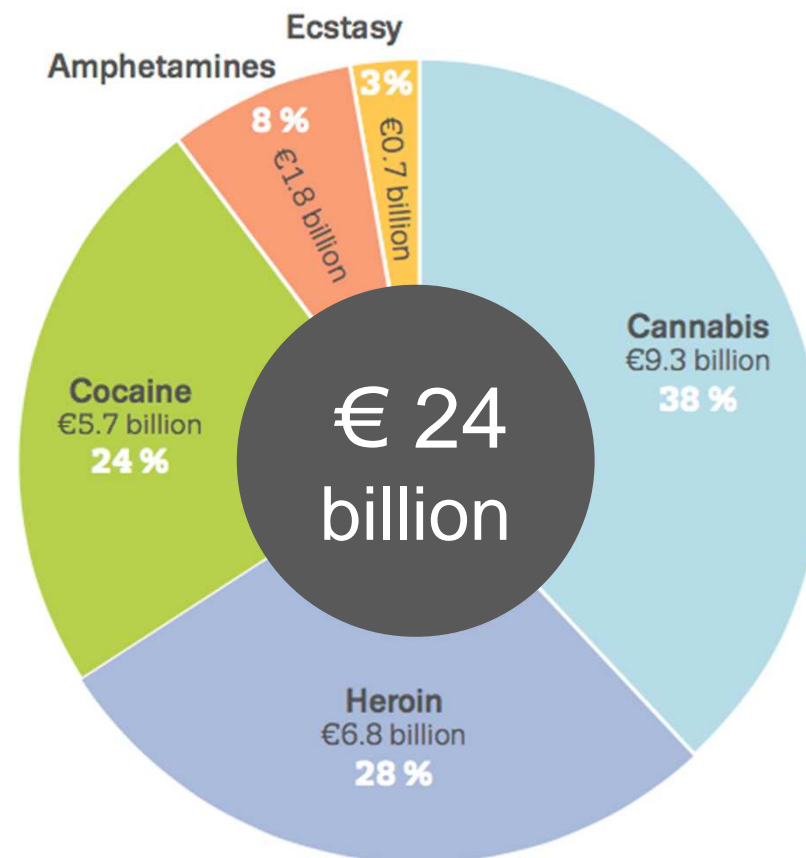


Cannabis markets in the EU



Cannabis: Europe's most valuable drug market

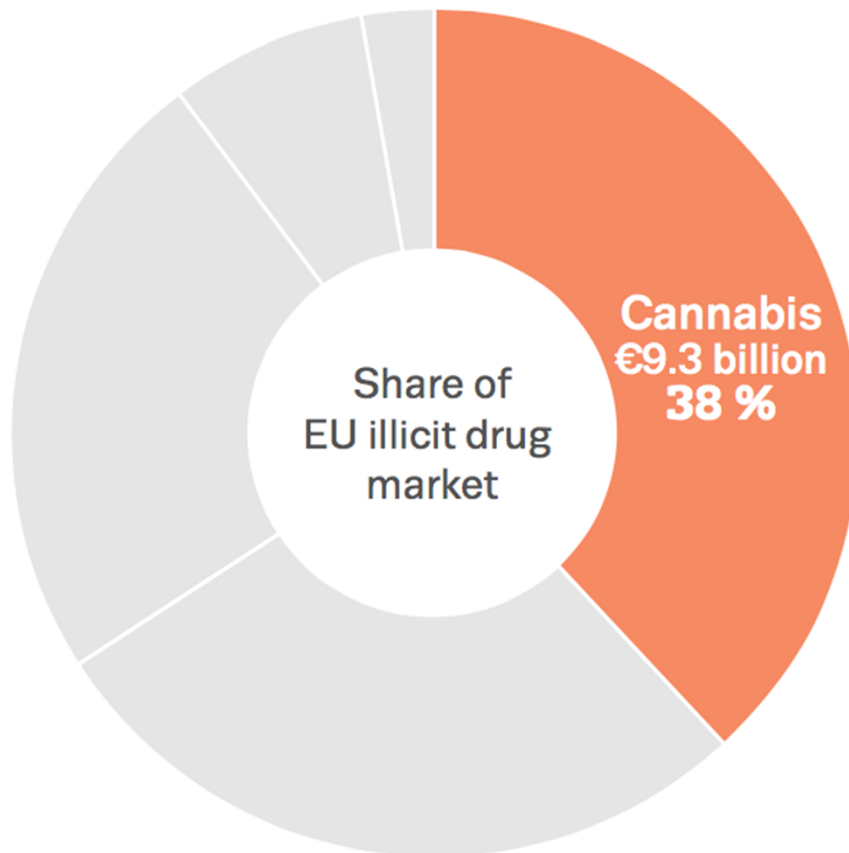
Estimated minimum retail value of the illicit market for the main drugs in the EU



Note: Percentages do not add up to 100 % due to rounding.
Source: EMCDDA.



Cannabis market share: EUR 9.3 billion



- Key figures 2014

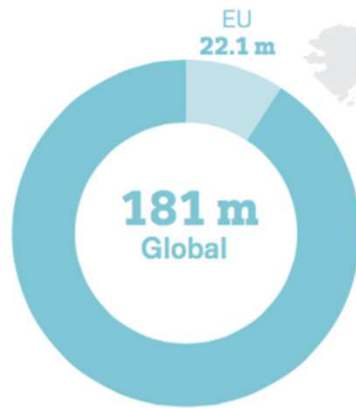
- It is estimated that:

- 22 million used it in the last year
- About 3 million adults use it on a daily basis
- About 640 tonnes each of herbal and resin consumed (2013)
- 139 000 people entered treatment
- 820 000 offences
 - 138 000 supply offences



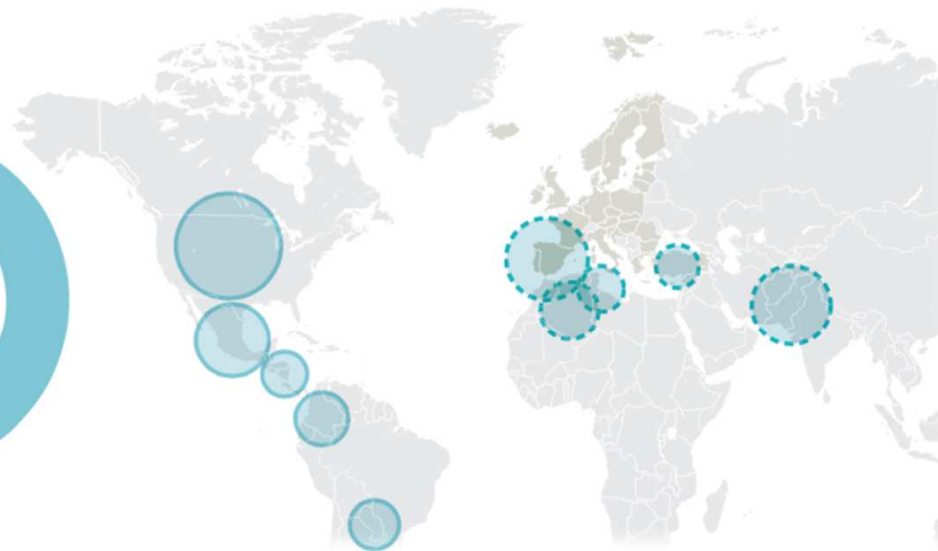
Global overview

Estimated users
Past year,
aged 15–64



Main seizing countries

● Cannabis herb ● Cannabis resin



Proportion of global seizures 2013

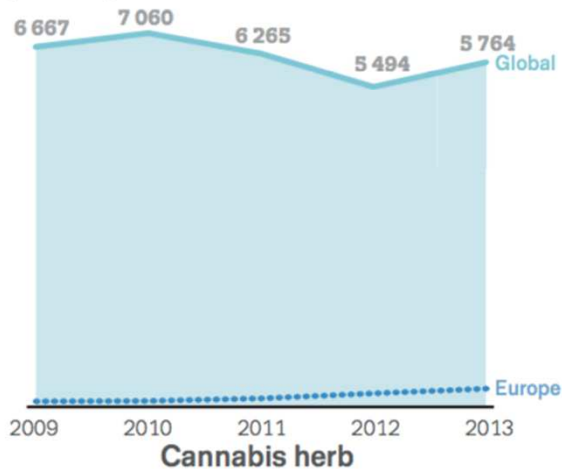
Cannabis herb

USA	29 %
Mexico	17 %
Paraguay	8 %
Colombia	7 %
Nicaragua	4 %

Cannabis resin

Spain	23 %
Pakistan	22 %
Algeria	15 %
Morocco	8 %
Turkey	7 %

Quantities seized (tonnes)



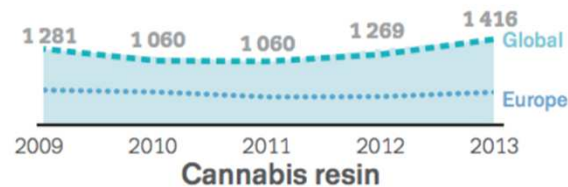
Proportion of European seizures 2013

Cannabis herb

Turkey	58 %
Italy	9 %
Greece	7 %
UK	6 %
Spain	5 %

Cannabis resin

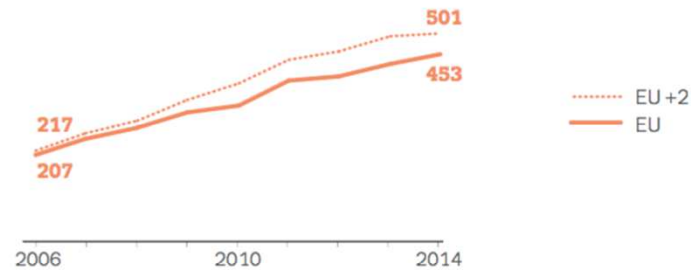
Spain	57 %
Turkey	17 %
France	13 %
Italy	7 %
Portugal	2 %



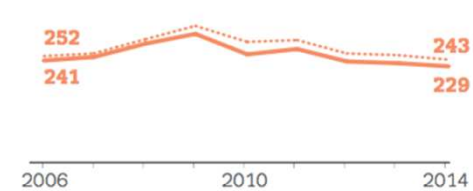
Seizures

Seizures of cannabis reported in Europe, 2006–14

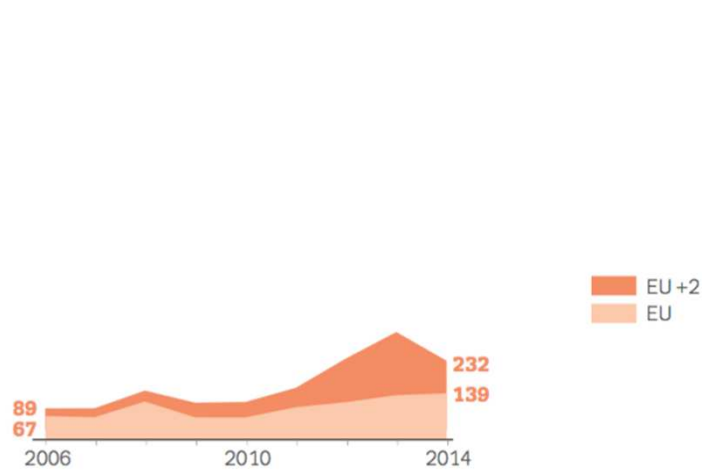
Herb: Number of seizures (thousands)



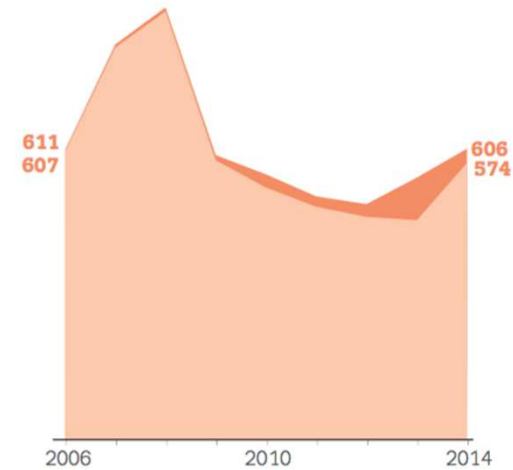
Resin: Number of seizures (thousands)



Herb: Quantities seized (tonnes)



Resin: Quantities seized (tonnes)



Note: Some data for 2014 is not available and the most recent data has been used instead, except for the number of seizures for the Netherlands, France and Poland where no recent data is available so they are not included.

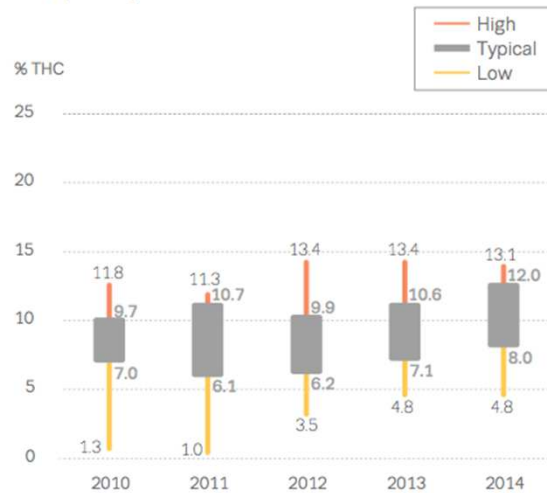
Source: EMCDDA/Reitox national focal points.



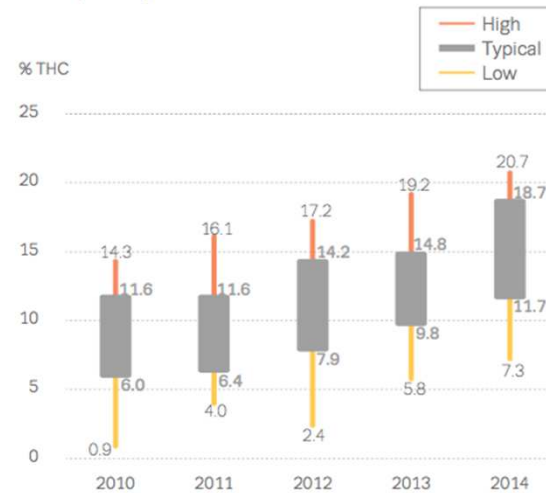
Trends in price and potency

Trends in cannabis potency and retail price in the EU, 2010–14

Herb potency



Resin potency



Herb price



Resin price



Products and market innovation



Herb

- Intensive and sophisticated domestic production techniques and modus operandi
- Increased potency
- Licit commercial cannabis market (USA) and product innovations are likely to have knock-on impact for EU

Resin

- Imported mainly from Morocco
- Increased potency
- Some high potency resin made in Europe

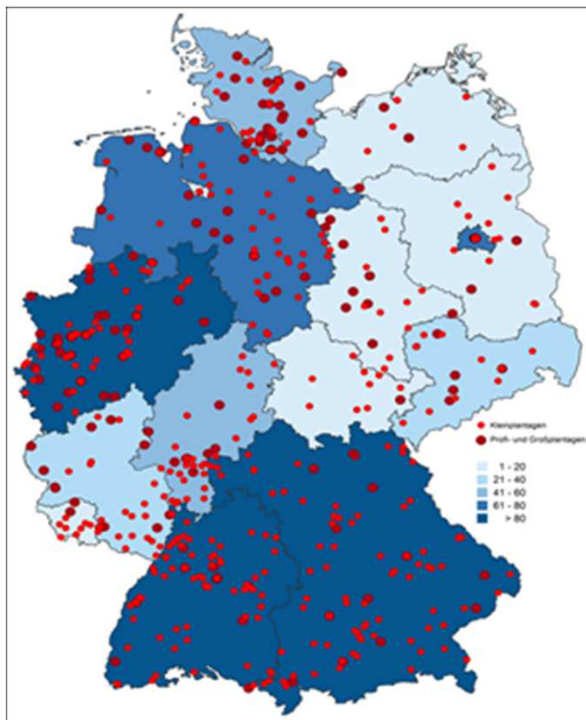
Products and market innovation

YIELD and PROFITS of indoor cultivation sites

- Intensive and sophisticated domestic production techniques and modus operandi
- Belgian study (Vanhove et al., 2014) concluded that surface is more determining than number of plants for yield calculation
- Under 600W lamps and average 16 plants/m²: 575 grams per m² yield
- Financial gains (ROC – Return on Costs) calculated between 2.8 – 6.8



Products and market innovation – ERICP



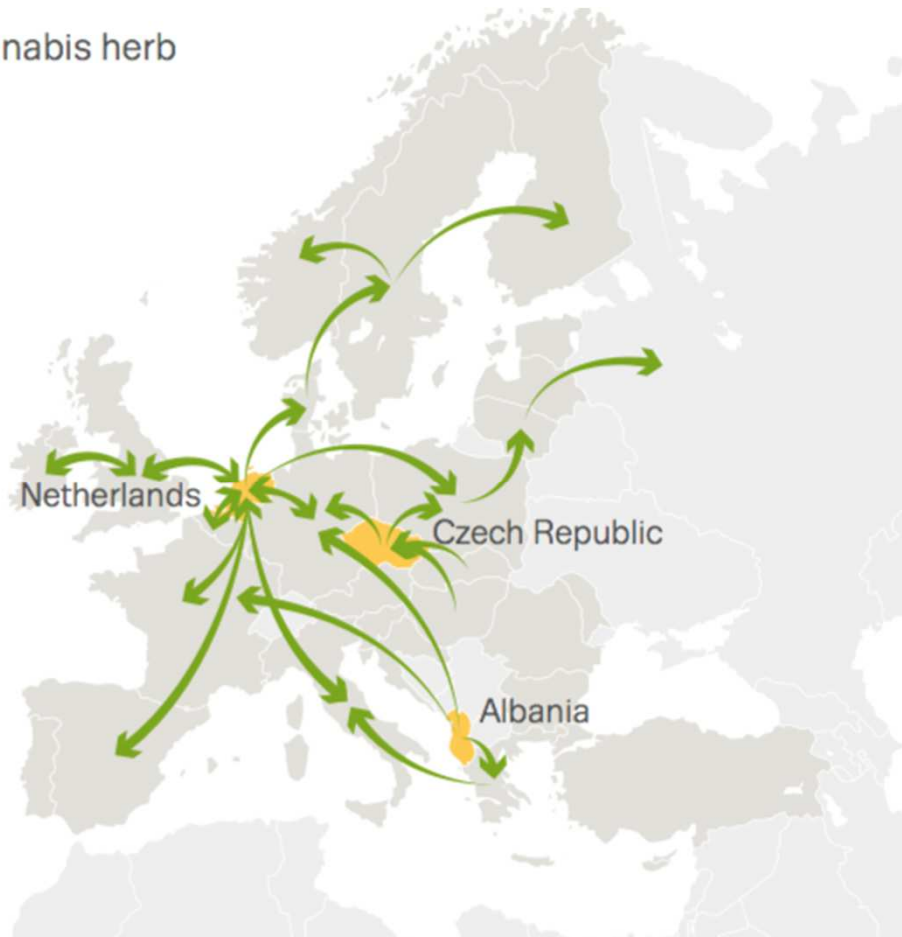
ERICP

- Information gap:
 - EMCDDA has total number of dismantled sites in many (not all) countries
 - Need for other information on size, types, methods, etc.
- At national level also, ERICP should be helpful
- Exchange of information: ERICP makes it easier to exchange comparable information across countries



Trafficking flows of cannabis herb

Cannabis herb

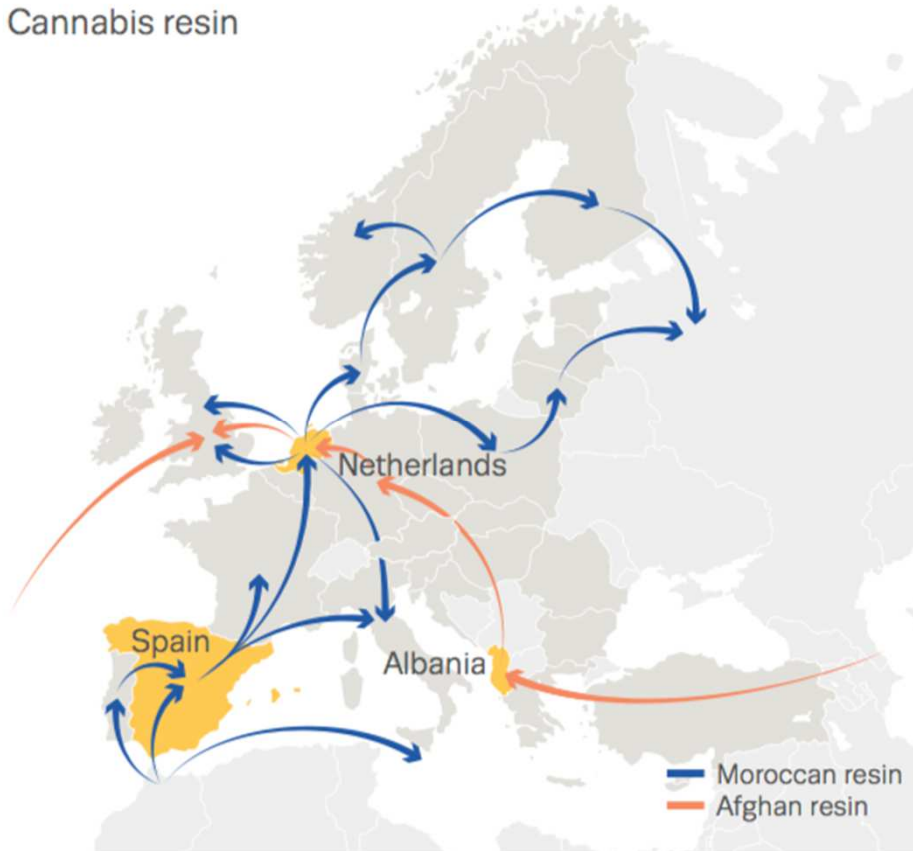


- Key players: Dutch and ethnic Vietnamese organised crime groups
- Albanian-speaking OCGs and motorcycle gangs also active
- UK, Italy, Belgium, Netherlands: major producing countries
- ‘Delocalisation’ of production
- Violence



Trafficking flows of cannabis resin

Cannabis resin



- Key players: Moroccan organised crime groups
- Dutch and Albanian-speaking groups also active
- Netherlands: key distribution hub (**Moroccan** and **Afghan**)
- Afghan hash makes inroads (Albanian groups)
- Violence



Moroccan resin goes east

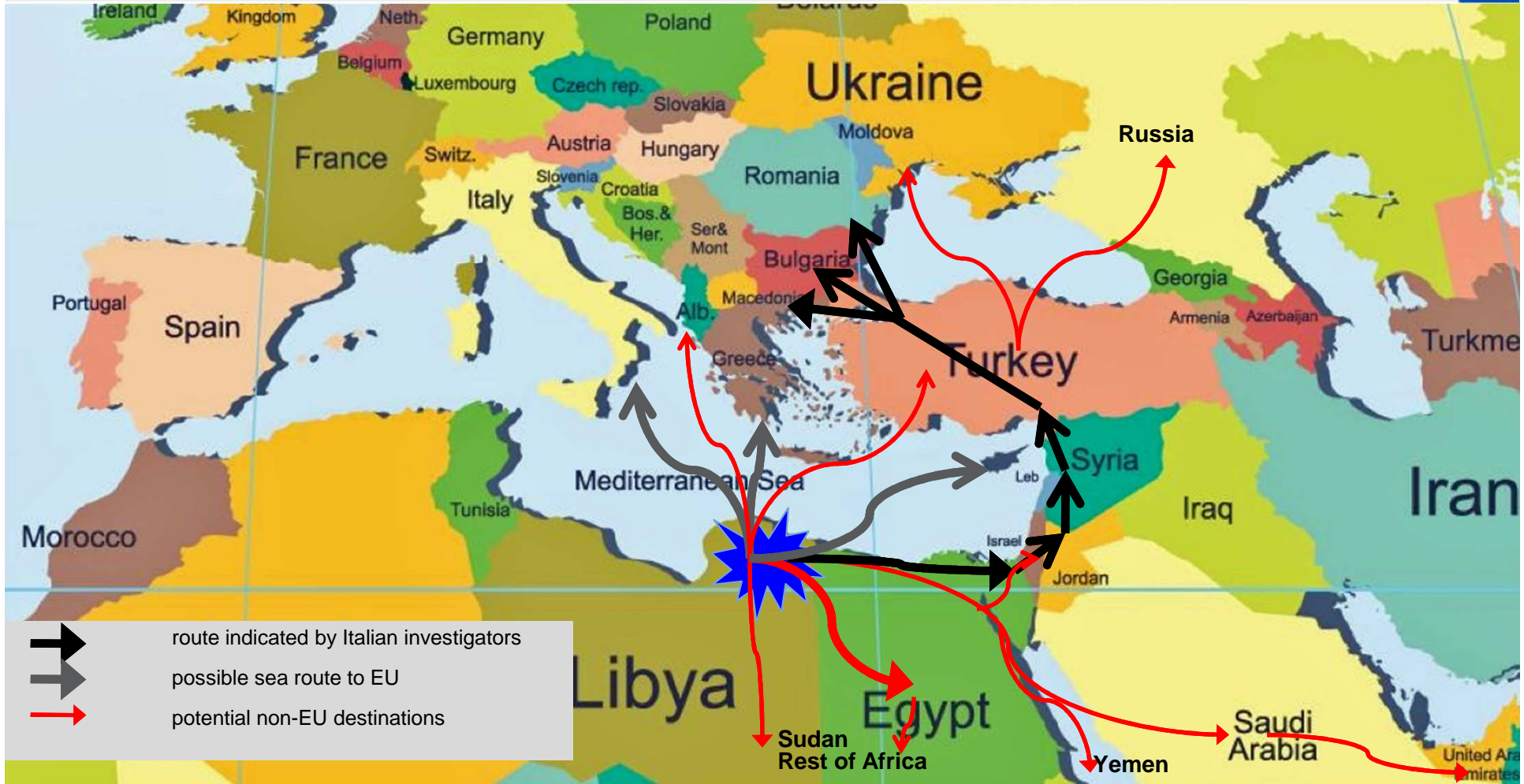


- Cannabis: very important in Rif region
- European market share shrinking
- Large amounts exported towards eastern Mediterranean
- For Europe? Middle East?
- Links with migrant smuggling?
- Who sponsors, who benefits?

Libya: between the Rif and the Bekaa



From Libya to...? Effect on trafficking routes?



What about oil?



- Pressed from herbal cannabis
- High potency
- Easier to conceal
- In 2015: 335 seizures in Europe, mainly Greece and Turkey
- Western Balkans

- Butane hash oil
- 'home-made'
- May lead to 'in house' fires and explosions
- 'Dabbing'



'Dabbing'



Key issues

- **Largest drug market in Europe**
- **Market dominated by domestic herbal product**
- **Rapid innovation in production**
- **Potency increases, prices remain stable**
- **Health concerns both on use and 'self-production'**
- **Organised crime plays a key role**
- **Moroccan resin moving east**



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