



# EU DRUG MARKETS REPORT

## A STRATEGIC ANALYSIS

### Case study 1

### Cannabis: changing demand and an increase in domestic production

Europe remains one of the world's largest consumer markets for cannabis resin, the majority of which continues to be sourced from Morocco. Traditionally associated with resin consumption, the western part of the region is now increasingly dominated by herbal cannabis.

An estimated 2 500 tonnes of cannabis are consumed every year in the EU and Norway, corresponding to a retail value of between 18 and 30 billion euros. The largest markets for cannabis resin are Italy, Spain and France, and for cannabis herb, the United Kingdom and Germany.

Cannabis cultivation techniques have advanced and indoor cultivation has spread, reducing the demand for imported products ('import substitution'). Domestic cannabis production is widespread throughout Europe, taking place both indoors and outdoors, and is increasing.



Indoor cannabis cultivation site.  
Photo: Spanish Guardia Civil via Europol.

Although there are a number of growers catering for their own needs, the use of large-scale production facilities run by criminal groups is increasing in some countries, while some of them now tend to run multiple small-scale plantations to mitigate risks.

Domestic production of herbal cannabis in Europe is a major challenge for law enforcement. Production is difficult to detect, especially when occurring indoors, and trafficking of the drug, now often intra-regional, is more difficult to interdict than that of imported resin. This is reflected in the estimated interdiction rates at around 30 % for resin and below 10 % for herb in the EU.

