

**Key trends of the illicit drugs
market in the EU:
What do experts anticipate
for the coming years?**

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Scope of presentation

Study in the framework of study:

Trautmann, F., Kilmer, B. and Turnbull, P., editors (2013). "Further insights into aspects of the EU illicit drugs market."

Called for by the European Commission

1. Approach of the study
2. Explored trends
3. Findings/discussion
4. Issues for the future

1. Expert consultation - Delphi method

- Consulting EU (drug) experts about key trends of the illicit drug markets and policy responses in the EU and about their future development;
- 1st round: Assessing importance of key trends identified in our global drug markets study through a web-based survey;
- 2nd round: Assessing views on the development of the selected and added trends in the next five years through a web-based survey;
- 3rd round: Assessing views on new issues taken from 1st and 2nd round through mail.

2. Selected drugs market trends

- A relative growth of the market share of illicit 'synthetic' drugs (amphetamine type stimulants, etc.) compared to the market share of 'natural' drugs (heroin, cocaine and cannabis);
- A trend towards bigger scale (for example industrial) production of illicit drugs replacing small scale production;
- A growing globalisation of the supply of illicit drugs, i.e. cross-border organisation of production and trafficking in the EU;
- A growing diversification of illicit drugs / markets in the EU;

2. Selected drug policy trends

- 1st trend consists of two linked trends:
 - decriminalisation of use of illicit drugs (and possession of small quantities for personal use),
 - a tougher, more punitive approach to the production and trafficking of illicit drugs.
- 2nd trend: a wider acceptance and implementation of harm reduction strategies targeting users of illicit drugs.
- 3rd trend: regulation instead of prohibition in drug control policies.

2. Additional trends

- Impact of economic crisis on drugs market
- Impact of economic crisis on drug policy
- Increase of poly substance use
- Growing importance of internet as drug market place
- Diverging tendencies in EU drug policy

3. Analogy of illicit drugs market with licit markets

- General characteristics of markets or 'economic laws' are seen as shaping the illicit drugs market
 - scaling up production (including joint small-scale production)
 - growing globalisation of drugs supply
 - growing diversification of the market
- *Unintended consequences of drug policy*
Drug control measures fuel globalisation and diversification
- *Growing importance of internet as drugs market place*

3. Important factors shaping the market

- Globalisation of criminal organisations
- Globalisation includes global trafficking, local/regional production for local/regional markets and at the same time cross-border trafficking (B-NL)
 - *Free movement of people, goods and services (open European market) are seen as important*
- Bulk production cheaper than small-scale production, the need to reduce the costs
 - supports relocation of production and trafficking to places with less risks / less costs

3. Important factors shaping the market

- Variations of traditional drugs to fast changes and short hypes of new psychoactive substances
 - Mainly synthetic
 - Poly-substance use (economic crisis)
- Also important: diverted pharmaceuticals
- Advanced pharmacological and technological knowledge

3. Increase of market share synthetic drugs

- Easy and cheap to produce
- Easy to relocate, not geographically bound
- Response to intensified control measures
- Cheap to buy
- Differentiation between producing and consuming countries becomes irrelevant

3. Decriminalisation of use and tougher approach to supply

- Seen as two sides of one medal: the user is a patient, the supplier is a criminal
- Doubt about usefulness and effectiveness of criminalisation
- High economic and social costs of law enforcement / criminalisation
- Fits the general conservative mood and greater tolerance of users
- Stronger emphasis on security by national governments and at EU level
- Seen as counterproductive, fuelling illicit economies and advancing structure of criminal organisations

3. Wider acceptance of harm reduction

- Seen as effective, less controversial
 - mainly applied for heroin use, less for other drugs
- Seems to have had its peak
- Less important due to economic crisis and rising conservatism
 - Growing emphasis on drug-free treatment
 - Divergence tendencies in EU drug policy

3. Regulation instead of prohibition

- Mainly limited to cannabis
- Emergence of new substances opportunity to explore the feasibility of regulation instead of prohibition
- Supporting factor: ineffectiveness and high economic and social costs of prohibition policies
- Rising conservatism might work against the trend

3. Impact of economic crisis

- On drugs markets:
 - Unemployment, marginalisation lead to increase of (problem) use
 - In particular synthetic drugs / poly substance use (search for cheaper drugs, falling retail price/quality)
 - Growing involvement in illicit drugs business
- On drug policy
 - Financial cuts might affect especially demand and harm reduction
 - Rise of political conservatism, affecting social and health policies and supporting a tougher approach in drug policy
 - Drug policy loses priority on political agenda

4. Issues for further discussion/research

Exploring drug policy alternatives:

- Temporary control measure
 - option between prohibition and regulation
 - implemented in three EU Member States
- Regulation policies
 - cannabis: using the momentum to change from prohibition to regulation
 - new psychoactive substances: alternative for prohibitionist approach

4. Issues for further discussion/research

- Cost-effectiveness of policy
 - in particular for supply reduction
- effects of (combinations of) new psychoactive substances
 - limited knowledge on short and long-term effects
- Exploring the functioning and importance of internet as drugs market place
 - 'broker', chat rooms, etc.

**Thank you for your
attention**

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