



## DRUGS 2006

### Introduction

Production and trafficking of drugs remain the prime activities of criminal groups in the European Union. In maximising their profits, most organised crime groups no longer limit their activities to one type of drug which is reflected in the increasing number of 'poly-drug' seizures and the alarming rise in 'poly-drug' consumption.

With a variety of European Union drug production and entry points, there is a large-scale intra-European Union trafficking of all types of drugs. Cannabis from Morocco, for instance, is transported along the South-North axis, from Spain all the way up to Denmark and Sweden. Synthetic drugs produced in the Netherlands and Belgium are finding their way to markets in all the Member States, as is the case for cocaine that mainly enters the territory of the European Union via Spain, the Netherlands or Belgium. Criminal opportunities for this intra-European Union trafficking have been assisted by the abolition of internal border controls, by differences in legislation in the various Member States and sometimes insufficient levels of international law enforcement and judicial co-operation.

### Synthetic Drugs

According to the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA), after cannabis, the most commonly used drugs in the European Union are synthetic drugs, either amphetamine or ecstasy. Methamphetamine and LSD abuse is emerging slowly in some parts of the European Union.

Most major production and storage sites of amphetamine and ecstasy are identified in Belgium and the Netherlands, where advances in methodology plus the invariable use of sophisticated industrial and custom-made equipment have resulted in increasing production efficiency and capacity.

Major production and trafficking remains controlled of Belgium and Dutch criminal groups. The production process i.e. chemical acquisition, synthesis, tableting, packaging and waste dumping is invariably separated

between different locations. Often, this involves co-operation between criminal groups operating across borders thus reducing the risk of an inclusive production network being dismantled. Examples of these are the trafficking, from Belgium and the Netherlands, of 'ecstasy' powder to Portugal for tableting and of amphetamine powder to the United Kingdom for cutting and re-packing with a logo.

Investigations in the Member States, several of which have been initiated by Europol, demonstrate the crucial role of facilitators in supplying chemicals, materials and equipment sourced from across Europe and beyond.

Significant amphetamine production also occurs in Poland, whilst amphetamine and 'ecstasy' production of varied scale is reported across the European Union, in particular the Baltic States and in Bulgaria, the latter sourcing amphetamine tablets with the 'Captagon' logo trafficked in large amounts to the Arabian Peninsula.

Increasingly frequent seizures in the European Union during 2004 and 2005 of large amphetamine consignments up to 500 kg indicate an escalation of this market and of the production of amphetamine, with trafficking limited to a regional intra-European level. Of particular note is the considerable amount of amphetamine that is seized in or destined for the United Kingdom i.e. at least 1500 kg in 2005. Investigations indicate the continued emergence of co-operation between Russian, Polish, Lithuanian, German and Dutch organised criminal networks in the trafficking of the relevant precursor chemical BMK towards large scale amphetamine production facilities in Western Europe.

Substantial 'ecstasy' seizures in the European Union have been less frequent in 2005. The fact that retail prices remain low and stable in major consumer countries such as Ireland and the United Kingdom possibly reflects a reduced demand. Reduced 'ecstasy' seizure levels may be attributable to decreased precursor chemical

availability reflected in higher prices. This situation may be due to intervention efforts made and control measures being introduced.

Seizure levels in some Adriatic and Mediterranean countries have increased and large scale exportation of 'ecstasy' from the Union to other regions in the world continues; in 2004 and 2005, in the course of just 4 investigations, over 12 million tablets and 340 kg MDMA powder were seized in or destined for Australia, trafficked in air and sea-freight via Belgium, the Netherlands and Italy. Furthermore Turkey, with the expansion of tourism, is emerging as a significant destination for ecstasy sourced in Western Europe. In this regard, increased dual use is expected of the Balkan Routes for smuggling heroin to and ecstasy from the Union. Production of amphetamine with the 'Captagon' logo, previously reported in Bulgaria, has also recently emerged in Turkey.

## Heroin

Afghanistan is the major supplier of heroin for the European markets. In addition to opium poppy cultivation, the country has developed into a major processor of the final product: heroin. UNODC estimates that 72% of opium is converted to heroin in Afghanistan. Some 10.000 tonnes of chemicals, including 1.000 tonnes of acetic anhydride are needed for this process. The Tajik Drug Control Agency estimates that there are more than 400 heroin laboratories in Afghanistan, with 80 of them situated along the border to Tajikistan.

Significant efforts by the Afghan authorities, with the support of the international community, have resulted in a 21% reduction of the area under opium poppy cultivation in 2005. However, due to higher yields per hectare this has only resulted in a 2% reduction of the total amount of raw opium: 4,100 tonnes versus 4,200 tonnes in 2004, which equates to approximately 410 tonnes of heroin.

Obstacles that hinder effective eradication efforts are corruption, a lack of alternative livelihood for farmers who want to stop opium poppy cultivation and the lack of an infrastructure, which hinders the transport of legitimate crops. Commitments by donor countries have not been fulfilled in many cases. For instance, farmers who were promised seeds to grow legitimate crops did not receive them and have now returned to the cultivation of opium poppy.

The Afghan Special Narcotics Force (ASNF), created in January 2004, so far has seized 135 tonnes of opiates, over 25 tonnes of precursors and 120 drug processing laboratories. The Counter Narcotics Criminal Justice Task Force is operational since July 2005 and includes investigators, prosecutors and judges.

Experts from NGOs operating on the spot believe that it will take a new generation until the situation in Afghanistan can be stabilised; the central Government will have sufficient control over the territory and a free market economy will exist that will no longer be dominated by illegal activities. In the meantime, it can be anticipated that the supply of heroin from Afghanistan is not likely to change dramatically in the years to come and that opium poppy cultivation will continue to impact upon the livelihood of a considerable part of the Afghan population. An estimated 135 tonnes of heroin are needed annually to supply the consumer markets for heroin in the European Union. According to the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) there have not been signs in recent years that point to a significant decrease of the market. Even though the market is stabilising or slightly decreasing in some Member States, there is an increase in the demand for heroin in others, particularly in some of the new Member States. There are no indications that this general situation will drastically change in the next years.

By far most heroin that enters the territory of the European Union originates from the opium poppy fields in Afghanistan. The Netherlands, and to a lesser degree Belgium, play an important role in the secondary distribution of heroin across the Union. For instance, most heroin destined for the United Kingdom, one of the major consumer markets in Europe, is supplied from the Netherlands and Belgium. In addition, France, Germany and Spain have experienced over the years that a considerable part of the heroin seized in their countries is being supplied via the Netherlands and Belgium.

Trafficking of heroin towards the European Union continues to be dominated by Turkish and associated criminal groups. These groups make use of facilitators in Southwest Asia to liaise with domestic criminals or brokers who can purchase large quantities of heroin directly from source countries. Very rarely do heroin consignments travel the whole way from Afghanistan to Europe in a single journey; they are bought and sold by different criminal groups along the route.

The liaison between organised crime groups trafficking different commodities is expected to continue. This co-operation refers, for instance, to South American criminal groups exchanging cocaine for heroin with Turkish traffickers, who, in turn, liaise with indigenous wholesalers of amphetamine type stimulants. Thus, heroin may be transported in multi-drug consignments, which include synthetic drugs, cocaine and cannabis. Heroin trafficking is sometimes also associated with the trafficking of human beings and/or illegal immigration to increase efficiency and profit.

Iran and Turkey are amongst the most important transit countries of Afghan sourced heroin destined for the European Union. Iranian law enforcement efforts concentrate on the borders with Afghanistan and Pakistan and on internal trafficking, rather than on drugs leaving the country into Turkey. In 2004, Iranian law enforcement agencies seized some 4 tonnes of heroin, 12 tonnes of morphine base and 174 tonnes of opium.

Equally, Turkish law enforcement priorities are on the situation in the country and on the exportation of heroin via the Istanbul area along the Balkan Routes into Western Europe. In 2004, Turkish law enforcement agencies seized 6,515 kg of heroin and 4,491 kg of morphine base.

Illicit opium poppy cultivation in Pakistan was reduced to almost nil during the late 1990s, but re-emerged as from 2003. In addition, opiates from Afghanistan transit the country on their way to Iran. Heroin is also trafficked out of the country by sea on board vessels leaving the ports of Karachi, Port Qasim and smaller ports along the Makran coast, and through the airport of Karachi.

A UNODC survey in 2005 noticed an increase in the trafficking of opiates from Afghanistan into Iran from 40% of the total volume in 2004 to 61% in 2005. Some 20% passed through Pakistan and the remaining 19% through central Asia.

Turkey remains, due to its geographical position, the main corridor for heroin trafficking towards the European Union. The country serves as a starting point for the Balkan Routes. Most heroin from Southwest Asia reaches Europe via these routes.

Whilst awaiting onward transportation into Western Europe, heroin is often stockpiled in countries along the Balkan Routes. The dual use of the Balkan Routes for smuggling heroin to and ecstasy from the European Union is noteworthy.

Significant trafficking of heroin takes place along the Silk Route. This route starts in Afghanistan, crosses the central Asian States and leads via the Russian Federation or the Caucasian countries and Turkey into Europe.

Porous borders with Afghanistan and between the central Asian States plus the presence of contacts between particular ethnic groups residing in the countries along these routes facilitate the trafficking, as do ineffective law enforcement controls due to lack of human and technical resources and experience.

Trafficking along the Silk Route involves different means and stages of transport. Smugglers bring opiates from Afghanistan into the neighbouring central Asian countries by foot or using beasts of burden and onwards into Europe by air, rail, all types of vehicle over land and to maritime

ports in Russia. The routes are also used in reverse to smuggle multi-tonne quantities of acetic anhydride to illicit laboratories in Afghanistan.

In 2004, Tajik and Russian border guards seized more than 6.5 tonnes of heroin along the Tajik-Afghan border. The country ranks third in global heroin seizures. The withdrawal of Russian border guards significantly reduces the control capacity in one of the most important transit countries for Afghan heroin.

Even though the 'Silk Route' via central Asia is emerging, with indications of increased trafficking activities, it can be expected that the Balkan Routes will remain the most prominent supply routes for heroin in the coming years.

## Cocaine

The Andean region remains the major production area of cocaine in the world. Colombia, Bolivia, Peru are the only countries where cocaine is produced.

A climax was noted in 1999 when annual cocaine production reached 950 tonnes. Between 1999 and 2003 production decreased from 950 tons to 650 tons and since then has remained stable. The decrease in production is mainly due to the eradication plans implemented in Colombia where the coca cultivation areas were reduced from 160,100 hectares in 1999 to 86,000 hectares in 2004, a drop of over 50%.

Cocaine is transported from South America to the European Union, across the Atlantic Ocean ostensibly by air or maritime routes.

Multi-tonne maritime shipments of cocaine are transported from Colombia, Venezuela, Brazil, Ecuador, Suriname, and Argentina to main seaports in Spain (Galicia), Portugal, the Netherlands, Belgium and France.

Historical trading and linguistic ties with Latin America influence in particular, the role of Spain and Portugal. The Vigo area in northern Spain for example, has featured as a major cocaine reception point in Europe. The four largest reported single seizures of cocaine in Europe in 2005 have been in either Spain or Portugal. The largest, six tonnes of cocaine stored in a warehouse, was seized recently in Portugal. French nationals and Colombian nationals were involved.

Cocaine is also shipped from South America to Europe via the Caribbean Islands. This in part can be explained due to the historical links that exist between the Caribbean and some European countries, for example Curacao and the Netherlands or Jamaica and the United Kingdom. It is reported that other European overseas territories such as Martinique and Guadeloupe are becoming increasingly significant.

Fast boats, cargo freighters and container ships remain the most common conveyances for moving the drug through the region but traffickers can also use aircrafts for air droppings in international waters. In 2005, Colombian authorities even reported the seizure of a submarine under construction. This vessel would have been able to transport 15 tonnes of cocaine through the Caribbean Sea.

Each year, about 30 tonnes of cocaine is transported by air couriers from South American countries and Caribbean Islands to European main airports in The Netherlands (Amsterdam Schiphol), Spain (Madrid Bajasas), Portugal (Lisbon), the United Kingdom (London) and France (Roissy) .

North America remains the largest consumer market for cocaine. However, since 1995 cocaine seizures have been decreasing and the United States market is said to be saturated.

The European Union is the second largest consumer market for cocaine. An estimated 250 tonnes of cocaine enter the Union annually via maritime shipments, air freight and air couriers. In 2004, 75 tonnes of cocaine was seized in the European Union; about 65% of this amount was seized in Spain and the Netherlands. This underlines the prominent role of these countries as entry and subsequent distribution points for cocaine to other Member States.

Colombian criminal groups still control the large scale importation of cocaine into the Member States. Language often proves an obstacle to direct contacts with Latin America. Spanish speaking brokers are crucial to engage with the Latin American suppliers on behalf of criminal groups based in Europe.

The Netherlands plays a vital role in Europe as a centre for the transportation, facilitation and preparation of polydrug consignments.

Non-Dutch criminals are basing themselves in the Netherlands in growing numbers to conduct polydrug trafficking business, e.g. from United Kingdom and Ireland. They work closely with Dutch brokers to facilitate the supply of cocaine and other drugs to the United Kingdom and Ireland.

- Drugs are often professionally secreted in purpose built concealments within the framework of vehicles or within the legitimate consignment of goods being carried. Special concealments either in the packaging or within the goods themselves have also been found. For example, coffee beans are used as a cover load for large scale importations from Latin America; this modus operandi was evident in a recent seizure of 400 kg cocaine made in London.

Motorcycle gangs are involved in cocaine trafficking and have close cooperation with other criminal groups; for example in United Kingdom, the Netherlands and Lithuania.

Many criminal organisations trafficking cocaine are involved in diverse criminal business. Sometimes, investigations are initiated with a specific focus on cocaine trafficking, but in the end criminal assets, firearms, heroin and cannabis are seized. Arrays of businesses are used as cover to facilitate the trafficking of cocaine and the laundering of the proceeds. Favoured businesses are still restaurants, bars, cafes, estate agents, travel agents, transportation and vehicle repair companies and fast-food franchises. Other company structures used by cocaine brokers are those dealing in perishable foodstuffs (e.g. fish, fruit, vegetables and meat products), construction materials and vague import / export businesses. Some organised crime groups are also involved in telecommunication and money exchange outlets providing opportunities for secure communication and money laundering.

Effective communication remains a prerequisite for a successful drug trafficking business. While face to face contact still prevails among the criminal groups involved it is complemented by the use of pre-pay mobile phones, international call centres and calling cards.

### Projects of the Drugs Unit

The Drugs Unit dedicates most of its resources to operational activities. Projects are carried out against the production and/or trafficking of heroin, cocaine, synthetic drugs and precursors. Many of these projects include an Analysis Work File (AWF), through which intelligence is collected, analysed and disseminated. Projects are target oriented, combating specific criminal organisations by applying a regional concept, in which Member States that have a direct interest in combating a specific criminal group cooperate in sub-projects. Direct contacts are maintained with operational teams in Member States.

Strategic products, such as drug situation reports, catalogues, bulletins and specialised reports on various aspects of the drugs phenomenon are produced and training is provided. The Unit also participates in policy frameworks such as European Union Council Working Parties, United Nations conferences and other regional or global initiatives.

The Heroin Section provides information and expertise to Member States and Third States. Project MUSTARD assists Member States in combating Turkish and associated criminal groups operating towards and within the European Union and engaged in the trafficking of drugs, primarily heroin, and related crime. The project

has several sub-projects and gives operational support to live investigations in participating Member States. Project Mustard also enhances the strategic intelligence picture by providing insight into the activities of Turkish organised crime and associated groups. Investigative teams in the Member States use Project MUSTARD as a supplementary tool to enhance their intelligence position.

The Cocaine Section carries out Project COLA, including an AWF, aimed at the identification and targeting of Latin American and associated criminal groups operating towards and within the European Union and engaged in the trafficking of drugs, primarily cocaine, and other related crime. This includes several sub-projects and provides operational support to live investigations in participating Member States. It also enhances the strategic intelligence picture by providing insight into Latin American, notably Colombian, criminal groups in the trafficking of drugs as well as the expertise and knowledge in this area.

The Europol Cocaine Logo System (ECLS) collates modus operandi, photographic and other information on cocaine seizures and on logos and markings on the drugs and their packaging, enabling the identification of matches between seizures with a view to promoting international law enforcement cooperation and exchange of information. Annual updates of the Europol Cocaine Logo Catalogue are produced in CD and hard copy format.

The Synthetic Drugs Section has a variety of projects and activities.

Project SYNERGY provides for the collection and analysis of high level synthetic drugs and precursor related criminal intelligence. Priority is given to investigating criminal groups and/or significant modus operandi. The Project continues to support the CASE Pilot Project, a Swedish initiative on amphetamine profiling, plus the European Joint Unit on Precursors (EJUP), comprising experts from six Member States.

On-the-spot expert assistance in dismantling illicit synthetic drug production sites is provided on a regular basis to Member States.

The Europol Ecstasy Logo System (EELS) collates modus operandi, photographic and basic forensic information on significant seizures, enabling the identification of matches between seizures, and with seized punches, initiating law enforcement information exchange, further investigation and forensic profiling for evidential purposes and for the targeting of criminal groups. The annual Europol XTC Logo Catalogue is produced in CD and hard copy format.

The Europol Illicit Laboratory Comparison System (EILCS) collates detailed photographic and technical information

on synthetic drug production, storage and dump sites, enabling the identification of matches between seized equipment, materials and chemicals, initiating information exchange, back-tracking investigations, forensic examination for evidential purposes plus the targeting of facilitators and criminal groups. Europol, via the EILCS, is the European focal point for Project PRISM - Equipment, the United Nations INCB global back-tracking program on tableting machines and other synthetic drug production equipment.

### Europol Training Courses

To promote best practise in the Member States of the European Union, in the applicant countries and beyond, Europol is providing training. Such training courses e.g. in the area of criminal analysis have been provided for many years to law enforcement agencies, either at Europol or in the field to countries requesting such a training.

Training on actions against illicit synthetic drug production facilities has been regularly provided by Europol since 1999. At that time, a common course standard was drafted by Europol, in close co-operation with the Member States experts and the Commission. Regular training has since been provided, by Europol, to several Member States and Third States

However, standardised training on the combating of illicit synthetic drugs laboratories remains limited. Europol's partners in law enforcement frequently and clearly express a constant and increasing requirement for training in combating synthetic drugs. Europol, in close co-operation with Member States' experts, has continually updated course elements to account for with latest trends and developments. In addition, the updated 'European Union Training Course on Combating Illicit Synthetic Drugs Laboratories' also now includes new and significant law enforcement tools / initiatives in combating both synthetic drug production and distribution.