European Monitoring Centre
for Drugs and Drug Addiction

Recent changes in Europe's cocaine market

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Background

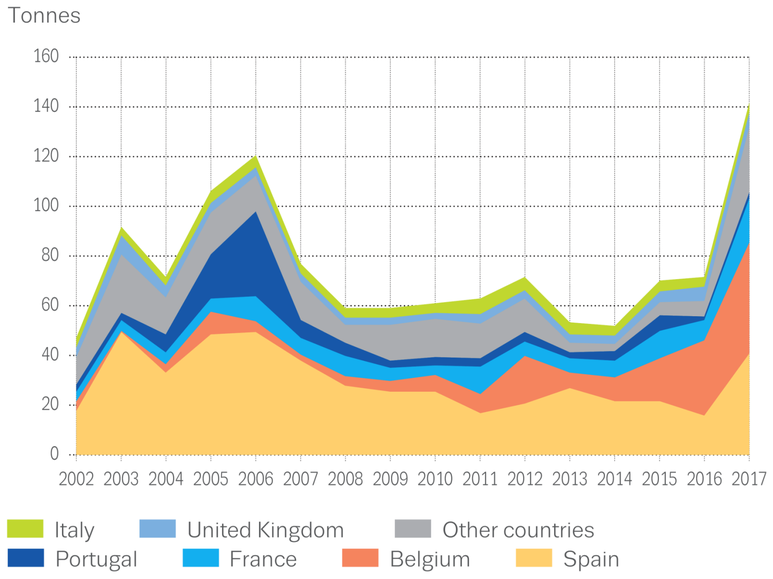
Europe is the second largest market for cocaine. In recent years, signals have been indicating increased cocaine production and availability. To investigate these changes and developments in the supply and demand of one of Europe's more established illicit drugs, a targeted 'trendspotter' study ([1]) was carried out by the EMCDDA in 2018 ([2]).

Findings

Increased availability, use and harms

- In 2017, the number of cocaine seizures and the quantity seized in the European Union reached the highest levels ever recorded (Figure 1).
- The purity of cocaine has increased since 2010, while retail price remained stable.
- Wastewater data reveal an increase in cocaine residues in 22 of the 38 cities for which data were available for 2017 and 2018 (Figure 3).
- The overall number of cocaine first-time treatment entrants in Europe increased by 37 % between 2014 and 2017 (Figure 2).
- Increases in cocaine-related deaths have been reported by 12 out of 19 countries with available data.

FIGURE 1. **Trends in the quantity of powder cocaine seized**



Competition and innovation — 'Uberisation' of the cocaine trade

- A greater number of organised crime groups, operating in the European cocaine market, are now directly involved in the trade with cocaine source countries.
- Novel technologies, such as encrypted communication applications, cryptomarkets and social media are playing an increasing role in enabling smaller groups and individual 'entrepreneurs' to engage in cocaine dealing.
- Innovative distribution strategies include cocaine-exclusive 'call centres' with couriers delivering 'anywhere at any time'.

Spread to new and emerging markets — rural areas, eastern Europe and Asia

- Cocaine is emerging in new markets, with organised crime groups (OCGs) in some countries expanding their operations from major cities to smaller towns and rural areas.
- There are signs that cocaine is spreading into new markets in eastern Europe.
- Has Europe become a transit region for new cocaine markets in western Asia?

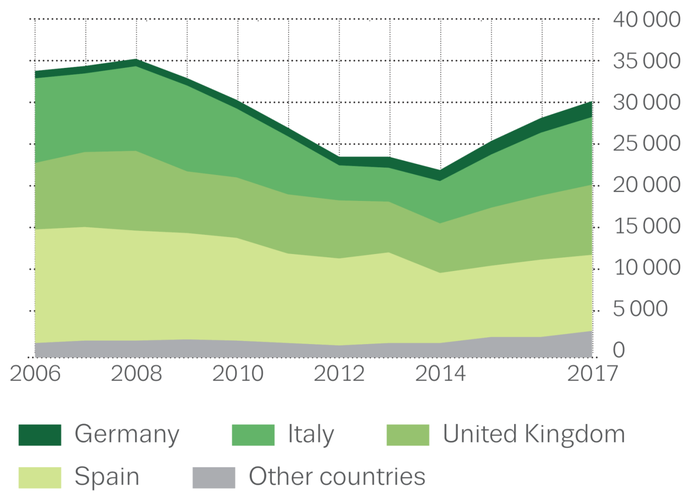
Consumer dynamics — 'normalisation'

- There appears to be a lower risk perception towards cocaine in certain youth cultures. Increasing acceptability and 'normalisation' of the use of powder cocaine across diverse social groups is observed, manifested in 'greater overtness and visibility of use'.

Harms and implications for policy

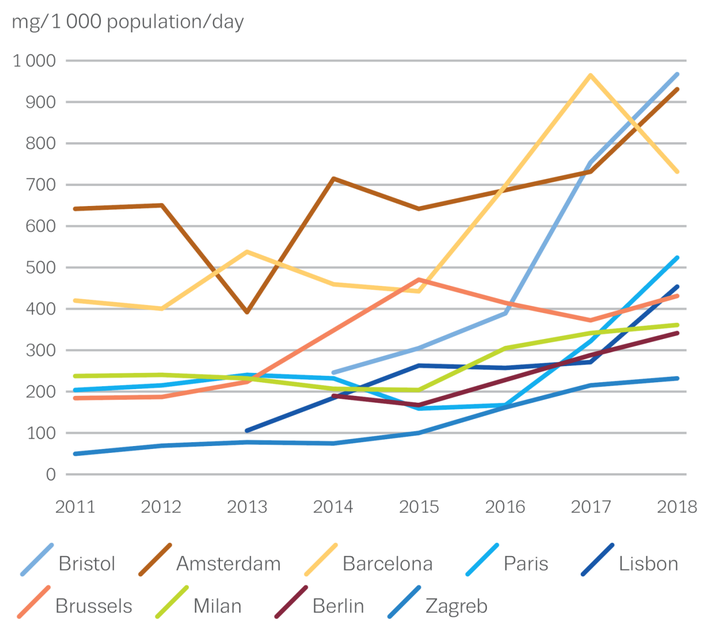
- At societal level, violence is reported among small OCGs competing for local cocaine markets.
- At consumer level, it is primarily a young population of cocaine users which appears in emergency rooms at weekends. Health experts highlighted the limited availability of tailored treatment and harm reduction options for stimulant users and stressed the need for further investment.

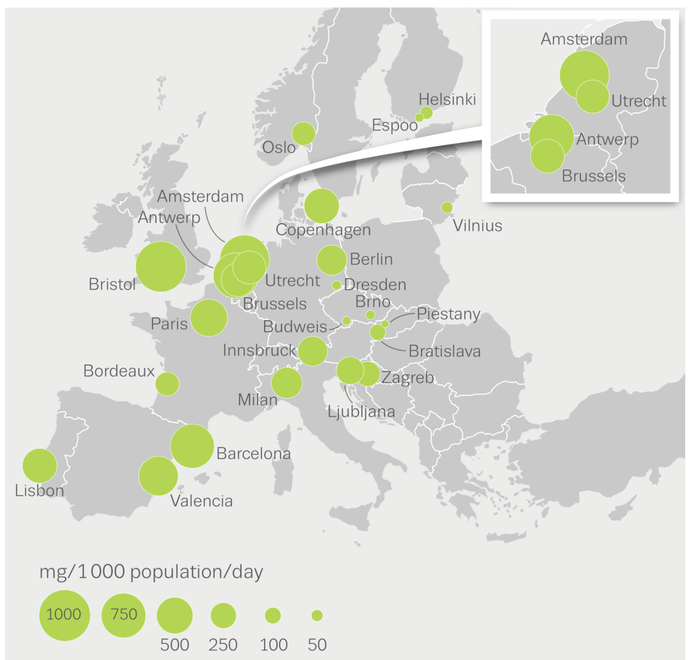
FIGURE 2. **Trends in first time treatment entrants for problems related to cocaine use**



NB: Trends in first-time entrants are based on 24 countries. Only countries with data for at least 11 of the 12 years are included in the trends graph. Missing values are interpolated from adjacent years. Due to changes in the flow of data at national level, data since 2014 for Italy are not comparable with earlier years. Due to changes to the reporting system, 2017 totals for Germany are estimates based on 2016 data.

FIGURE 3. **Cocaine residues in wastewater in selected European cities: trends and most recent data**





NB: Mean daily amounts of benzoylecgonine in milligrams per 1 000 population. Sampling was carried out in selected European cities over a week in each year from 2011 to 2018. Source: Sewage Analysis Core Group Europe (SCORE).

Sources

([1]) Trendspotter manual — A handbook for the rapid assessment of emerging drug-related trends (December 2018).
([2]) Rapid communication — Recent changes in Europe's cocaine market: results from an EMCDDA trendspotter study (December 2018).