

TRENDS AND INSIGHTS IN THE EU HEROIN MARKET

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Abstract

In the past 50 years, heroin was an essential factor of the drug problem in Europe. According to statistics it is difficult to quantify the extent of this phenomenon because there are large variations between drug uses in EU countries. This paper refers to the understanding of how the drug phenomenon will develop in the future considering the trends in the illegal drug market and the efficiency of the policies implemented in their area. We've considered several factors of influence such as the expansion of globalization, the impact of the economic crisis on drug market and the growing importance of the Internet as a tool used in drug distribution activity.

Keywords: *economic crisis, globalization, drug market*

1. Introduction

Global illicit opiate market is more complex than that of other types of drugs, given that both illicit cultivation and production is limited to certain countries and regions. In order to satisfy the global demand it is necessary for this type of drugs to be trafficked through several countries and over longer distances. There are at least three geographic regions where illicit opium poppy is cultivated: Latin America, Southeast Asia and Southwest Asia.

At global level, in 2005 it was reached the lowest level of opioids culture, and in 2013 it was observed a high level comparable to that achieved in 1991. Trafficking in heroin implies the existence of a global network of routes, as well as helping them by national and international criminal groups. Although there is a continuous evolution of the trajectories of heroin, its traffic is well established on certain routes that go from producing countries, especially Afghanistan, to international consumers.

The selection of traffic routes is done either for geographical reasons or in association with obtaining higher returns, lower risks, or the existence of a simple logistics.

Over time several trafficking routes of heroin have formed, namely: the Northern route, which connects Afghanistan to the main markets of the Russian Federation, the Southern route, which travels through south either by Pakistan or by Iran to Europe and Asia and the Balkan route, the oldest one, that cross Iran, Turkey and South-East Europe and heads to Central and Western Europe. Both organized crime and drug trafficking involve challenges to the rule of law, the health and the growth of the region's transit.

Therefore, the limitations of these phenomena go beyond the goal of a single government and require international cooperation, thus linking the developed countries to less developed countries.

2. The Balkan Route

For a long time, many countries located along the Balkan Route were integrated politically and economically. However, due to the events of the late twentieth century the region was fragmented. As a result, there was an adjustment of the Balkan Route, but in this period it still continues to function. Thus, there has been a change in the route of the Western Balkans (Albania, Croatia, Montenegro, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Kosovo and Serbia) in to the Eastern Balkans (Romania and Bulgaria) (UNODC, 2011). Currently, the traffic in the Western Balkan Route is restored (UNODC, 2012a), being the route with the highest bid of heroin in Europe (UNODC, 2013). Now, there is a division of the Balkan Route in three branches according to the trajectories identified and to the geographic criteria (EMCDDA, 2008). These branches are not definitive, they can divert to other countries depending on traffickers decisions in response to various external factors (law enforcement activities, the evolution of demand and the changes at the borders).

In addition, the goods can be repackaged or redistributed along the transport activity in order to increase profits. This activity is found mostly on the southern branch that passes through Greece to Italy and through the west branch to Western Europe. The most important operations are coordinated at a central level: this is the case of the northern branch whose main destinations are Germany and the Netherlands (EMCDDA, 2008).

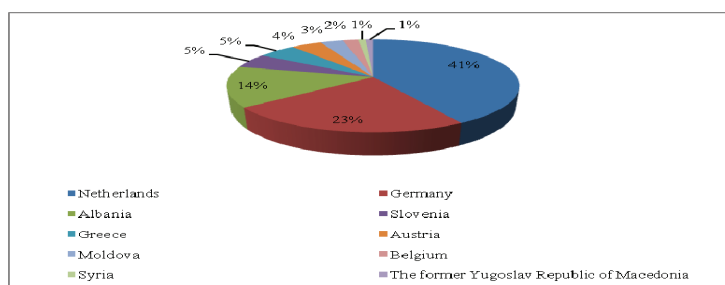
The Northern Branch (Bulgaria – Romania – Hungary – Austria – Germany - the Netherlands) is mainly involved in drug trafficking by land, while the western and southern branch includes maritime traffic. What differentiates branches between them is the scope of action (given by the membership of the European Union) and the area covered by each of them. Northern branch has a single point of entry into the EU through Romania

and Bulgaria, while the western branch crosses many borders of the EU which is more risky for traffickers. Drug transport developed in the Southeast of Europe is multimodal and includes road, rail, and internal links for navigation, ports and airports. However, the majority of transportation is multimodal, but transport by road (SELEC, 2012) is preferred because the cars that are registered in the EU are less controlled than the others.

Maritime routes are the most common along the Adriatic Sea, ferries being used in Greece, Italy and Albania. In the period 2008-2009, the ports from Bulgaria and Romania were used, but meanwhile there was a reduction of traffic in these areas (SELEC, 2012). Thereby, heroin routes through the Black Sea represent an alternative to traditional land route.

As mentioned before, the Balkan Route begins in Afghanistan and Pakistan, where networks send Afghan heroin in Iran. This cargo is discharged by certain groups that manage transport to the border area of Turkey (UNODC, 2011b). Due to tighter border controls between Turkey and Iran seen in recent years, there was a sub-branch to Iraq (UNODC, 2013). For example, during 2013-2014, there were large captures in Georgia and Armenia, used as an alternative route to get to Europe. However, most flows are directed from Iran to Turkey. Here Turkish groups act as coordinators of shipments in and through Turkey, as Afghan groups do not operate outside national borders when we speak about the activity from Balkan route. Instead, groups from Iran, Bulgaria, Albania and Nigeria are much more active regarding the trafficking of opium in Turkey. The main destinations of heroin trafficked through Turkey are Bulgaria and Greece. In the period 2011-2012, the principal destination was the Netherlands, followed by Germany (Turkish National Police, 2012). Between these two countries, Germany is considered a final destination, while the Netherlands play the role of a centre of redistribution. From there, the drugs are diverted to Germany, France and the United Kingdom. In 2011, Albania and Greece was identified as transit points for Italian market.

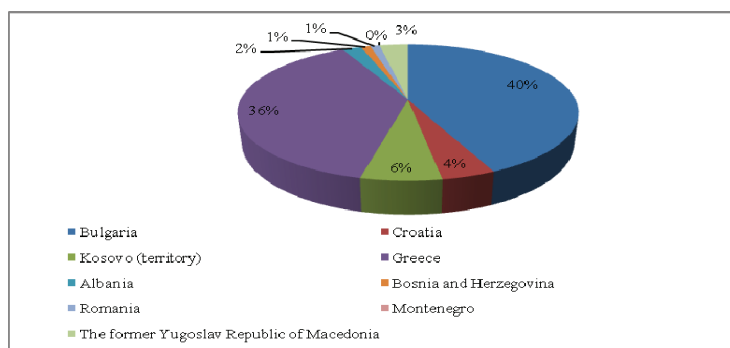
Fig. 1. Destinations of heroin seized in Turkey, 2011



Source: Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2011, p.24

Northern Route refers to a direction that starts from Turkey to the EU via Bulgaria, Romania and Central Europe and then to Germany, United Kingdom and France (German BKA, 2010). Most heroin shipments enter in Bulgaria, this type of drug seizures representing approximately 40% of the total region (see figure 2). In 2012, it was captured a quantity of 195 kg heroin, a relatively small amount compared to previous years (for example, in 2011, 384 kg of heroin was seized and 55 cases).

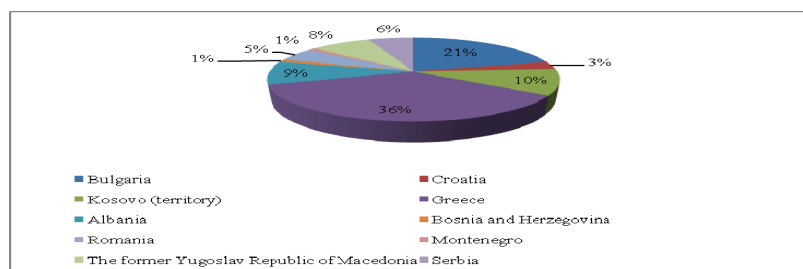
Fig. 2. Heroin seizures in South-Eastern Europe by Northern Route, 2012



Source: UNODC, The Illicit Drug Trade Through South-Eastern Europe, March 2014, Vienna

Southern route (Turkey-Greece-Italy / Western Europe) refers to the route of heroin from Turkey via Greece to Schengen countries. Usually, the final destination is the Italian market but there were some cases when heroin came to England and the Netherlands (EMCDDA, 2012).

Fig. 3. Heroin seizures in South-Eastern Europe by Southern Route, 2012



Source: Annual SELEC Questionnaire on Drug Trafficking for 2012 (Greece, Albania, Serbia); Annual Report, 2012

Western Route involves traffic throughout the Western Balkans and took place on two axes. One axis crosses the west by Albania, and the other passes through the northern region. There are several alternative routes travelled by heroin traffickers, namely:

- The Former Yugoslav Republic of Macedonia - Albania - Western Europe
- The Former Yugoslav Republic of Macedonia - Kosovo / Serbia - Bosnia and Herzegovina - Croatia - Western Europe
- Bulgaria - Serbia - Bosnia and Herzegovina - Croatia - Western Europe

Unlike other routes of Balkan route, traffickers of heroin must leave at some point the European Union (Bulgaria / Greece) and then they have to re-enter along the route.

3. Heroin market evolution in Romania and in the European Union

Heroin imported into the European continent comes in two forms:

- Brown heroin coming from Afghanistan;
- White heroin coming from South-East Asia, but in the present is produced also in other regions.

In Europe the production of opiates is limited, especially the products that are artisanal manufactured and which are reported in the eastern part of the continent. The amount of heroin seized in 2011 (6.1 tons) was the lowest amount reported in the last decade being equivalent to only half of the amount seized in 2001 (12 tons). The number of reported captures during this period has decreased from a maximum of 63,000 in 2001 to just 40,500 in 2011. This decrease can be explained by the increasingly number of seizures in Turkey in 2002-2009 periods. Since 2006, it has had recorded the largest seizures of drugs comparative with other countries taken together.

The use of heroin remains the primarily responsible for a disproportionately high rate of mortality and morbidity caused by drug consumption in Europe. The heroin consumed in Europe can be snorted, smoked or injected. Besides health problems, opioid users who seek treatment generally report higher levels of unemployment and homelessness and also lower levels of education compared to consumers of other drugs (EMCDDA, 2013).

As we mentioned before, the main heroin trafficking routes used form the next circuit: Afghanistan, Pakistan, Iran, Turkey, the former Yugoslav states and Western Europe states. The main destinations are England, Romania and the Netherlands. Regarding Romania, in 2012 there

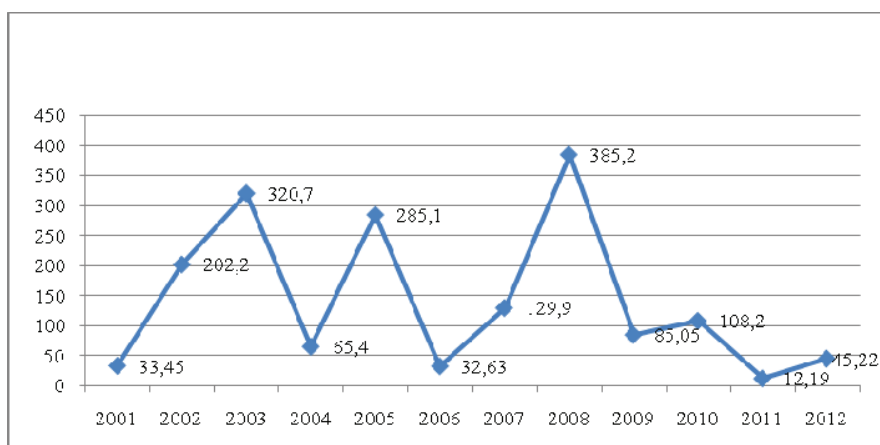
was a significant increase of 60% from the overall volume of drugs comparative with previous year (see table 1 and figure 4).

Table 1 Total drugs seized in Romania, 2012

Type of drugs	Volume (kg)	Tablets	Litres	Doses
High risk drugs	115,117	14,471	2,643	104
Risk drugs	679,211	2,057	1,083	-
Total	794,328	16,528	3,726	104

Source: National Report on Drug Situation 2013. Romania – New Developments, Trends and in-depth Information on Selected Issues, Ministry of Internal Affairs, National Anti-Drug Agency, Romanian Monitoring Centre for Drugs and Drugs Addiction

Fig. 4. Drugs seized in Romania during 2001-2012 (kg)



Source: Based on data from Central Laboratory for Drug Analysis and Profile - GIRP

We can observe, compared with 2011, a large increase in the quantity of heroin seized and in the number of seizures due to a higher presence of traffickers on illegal heroin market (see table 2).

Table 2 Heroin seizures in Romania, 2011-2012

2011				2012					
Total seizures		Significant seizures		Total seizures			Significant seizures		
Number	Quantity	Number	Quantity	Number	Quantity	Trend	Number	Quantity	Trend
314	12.191	17	11.490	215	45.217	↗	3	44.800	↗

Source: Central Laboratory for Drug Analysis and Profile – GIRP

From table 2 it appears that the quantity of heroin seized in 2012 was 45,217 kg of total 215 seizures from which:

- 206 were analyzed by the Central Laboratory from Bucharest;
- 8 were analyzed in Regional Laboratory from Timisoara;
- 1 was analyzed by Regional Laboratory from Iasi.

Compared to the previous year there was a 3.7% increase in the amount of heroin seized. According to the UNODC, opium cultivated areas were expanded in 2011 and 2012, which led to the prediction of large quantities of heroin at the international level and thus in Romania. From the total quantity seized, about 88% were destined to the Netherlands.

Regarding the price of heroin, this has continued to decline slightly with a variation between 15% and 18.52%. In the period 2004-2008 it was observed a relatively stable level of prices for all drugs except the heroine minimum price that rose to 50 euro / gram in 2012.

Fig. 5. Evolution of the minimum and maximum price of retail drug (Euro/g)

Source: Anti Drug Service, General Inspectorate of the Romanian Police

Regarding the concentration of heroin sold on the streets, this varies between 0.22% and 46%. Analysis laboratories have reported concentrations between 34 and 50, 36% for larger quantities seized. For 2012, the average purity of heroin at retail sale was 19.62%, and the most used additives were: caffeine, paracetamol and dextrometoprofan.

Table 3 Evolution of minimum and maximum heroin purity, (%)

Purity	2008	2009	2010	2011	2012
Min	5	23.9	3.25	0.38	0.22
max	63	47.3	38.49	47.86	46

Source: Central Laboratory for Drug Analysis and Profile - GIRP

4. Conclusions

From the analysis of some aspects of heroin trafficking and market we can draw the following conclusions:

- European continent, especially the south-eastern region, is an essential step in the circuit of heroin smugglers along the Balkan route. The importance of this route lies in large quantities of heroin seized and in large drugs shipments. But here we can talk about an area of vulnerability due to the disappearance of internal borders of the EU member countries and to an accelerating regional integration.
- Romania is becoming increasingly a destination country for most drugs due to the large seizures evidenced in 2011 and 2012 (if we refer to the number of seizures, the quantities seized, types of confiscated drug and their allocation in Romania).
- Romania is not a drug producer country, but it is a very important route for traffic.
- Given that the areas cultivated with opium in Afghanistan rose significantly in 2011 (61%) and 2012 (18% compared to 2011), Romania should be prepared for a possible upward trend of the quantities of heroin that will transit through the national territory. The main destination of heroin transiting Romania is the Netherlands.

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