





# THE ILLICIT DRUG TRADE THROUGH SOUTH-EASTERN EUROPE



**UNODC**

United Nations Office on Drugs and Crime





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## ABBREVIATIONS

<b>O</b>	<b>4-MMC</b>	Mephedrone (also known as MCAT)
<b>A</b>	<b>AA</b>	Acetic Anhydride
	<b>APAAN</b>	Alpha-phenylacetoacetonitrile
	<b>ARQ</b>	Annual Report Questionnaire
	<b>ATS</b>	Amphetamine-Type Stimulant
<b>B</b>	<b>BKA</b>	Bundeskriminalamt (Federal Criminal Police, Germany/Austria)
	<b>BMK</b>	Benzyl Methyl Ketone
<b>C</b>	<b>CARICC</b>	Central Asian Regional Information and Coordination Centre
	<b>CCP</b>	Container Control Programme
	<b>CSTO</b>	Collective Security Treaty Organization
<b>D</b>	<b>DEA</b>	Drug Enforcement Agency (United States)
	<b>DCSA</b>	Direzione Centrale per i Servizi Antidroga (Central Anti-Narcotic Directorate, Italy)
	<b>DLO</b>	Departmental Liaison Officer
<b>E</b>	<b>ECO</b>	Economic Cooperation Organization
	<b>EMCDDA</b>	European Monitoring Centre for Drugs and Drug Addiction
	<b>ESPAD</b>	European School Survey Project on Alcohol and Other Drugs
	<b>EU</b>	European Union
	<b>EULEX</b>	European Union Rule of Law Mission in Kosovo
<b>G</b>	<b>EUOCI</b>	European Union Office for Criminal Intelligence
	<b>Europol</b>	European Union law enforcement agency
	<b>GCC-CICCD</b>	Gulf Cooperation Council – Criminal Information Centre to Combat Drugs

<b>I</b>	<b>IDU</b>	Injecting Drug User
	<b>INCB</b>	International Narcotics Control Board
	<b>INCSR</b>	International Narcotics Control Strategy Report
	<b>INTERPOL</b>	International Criminal Police Organization
<b>K</b>	<b>KLPD</b>	Korps landelijke politiediensten (National Police Services Agency, the Netherlands)
	<b>KOM</b>	Department of Anti-Smuggling and Organized Crime, Turkey
	<b>MDMA</b>	3,4-methylenedioxy- <i>N</i> -methylamphetamine (commonly known as ecstasy)
<b>N</b>	<b>NPS</b>	New Psychoactive Substances
<b>O</b>	<b>OCTA</b>	Organised Crime Threat Assessment
	<b>OCRTIS</b>	Office central de répression du trafic illicite de stupéfiants (Central office for the repression of the illicit traffic in narcotic drugs, France)
	<b>OECD</b>	Organisation for Economic Co-operation and Development
	<b>OSCE</b>	Organization for Security and Co-operation in Europe
<b>P</b>	<b>PDU</b>	Problem Drug User
	<b>PPP</b>	Purchasing Power Parity
<b>S</b>	<b>SEE</b>	South-Eastern Europe
	<b>SELEC</b>	Southeast European Law Enforcement Centre
	<b>SIPA</b>	State Investigation and Protection Agency (State police agency of Bosnia and Herzegovina)
	<b>SOCA</b>	Serious Organised Crime Agency, United Kingdom
	<b>SOCTA</b>	Serious and Organised Crime Threat Assessment
<b>T</b>	<b>THC</b>	Tetrahydrocannabinol (primary psychoactive constituent of cannabis plant)
<b>U</b>	<b>UNMIK</b>	United Nations Mission in Kosovo
	<b>UNODC</b>	United Nations Office on Drugs and Crime
<b>W</b>	<b>WCO</b>	World Customs Organization





## KEY FINDINGS

- South-Eastern Europe<sup>1</sup> has long represented a crucial stage of the “Balkan route”; a well-worn heroin supply route that travels westward by land from Afghanistan to reach the lucrative destination markets of Western and Central Europe.
- The continued importance of the Balkan route is evident in large seizures at key stages of the route. Turkey seized 13.3 tons of heroin in 2012 (versus 7.2 tons in 2011) - one of the highest seizure totals worldwide. This is not, however, matched at the “Balkan” stage of the route, with South-Eastern Europe’s collective heroin seizures falling to a 10-year low of less than 1 ton in 2012.
- Large single seizures of heroin upstream and in destination markets suggest that while large shipments are moving through South-Eastern Europe, there appears to be less such actionable information being generated in the region itself. This is an area of vulnerability in the context of disappearing internal borders resulting from European Union (EU) accession and accelerating regional integration.
- At a regional level, South Eastern European countries have responded by cooperating increasingly through the Southeast European Law Enforcement Centre (SELEC). It may be beneficial to extend this cooperation along the entire length of the Balkan route, in line with the UNODC Paris Pact Initiative, which advocates shared responsibility on the part of all countries affected by Afghan opiates.
- The latest UNODC estimates suggest that between 60-65 tons of heroin flow into South-Eastern Europe annually. There have been developments that may have led to a decrease in this flow, notably the emergence of alternative trajectories in the form of a “southern route”, which travels southward from Afghanistan, either through Pakistan or through the Islamic Republic of Iran to Western and Central Europe.
- South-Eastern Europe is seeing an expansion in the trafficking of Albanian cannabis. Cannabis herb seizures in the region doubled from 23 tons in 2011 to a 10-year high of 48 tons in 2012. As supply has increased, traffickers may be looking to develop and expand their supply chains into markets in Western and Central Europe – notably Germany, Italy and the Netherlands. Profit margins are substantial, given the proximity between source and destination.
- Cocaine trafficking along the Balkan route to markets in Western and Central Europe is increasingly marginal in comparison to multi-ton trafficking directly to seaports in Western and Central Europe. Some 350 kg of cocaine were seized in South-Eastern Europe in 2012. In 2009, a high of 2.2 tons were seized in South-Eastern Europe, still far below the 53 tons seized in Western and Central Europe that same year.

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<sup>1</sup> For the purposes of this report, South-Eastern Europe is understood to include the following: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Montenegro, Romania, Serbia, the former Yugoslav Republic of Macedonia and Kosovo under United Nations Security Council Resolution 1244.

- Nationals from South-Eastern Europe have established close connections with cocaine producers in South America and are active in direct trafficking to Western and Central European ports. Although little of this cocaine actually transits South-Eastern Europe, it cannot be excluded that proceeds from this trafficking are in turn impacting the region. In this way, transatlantic cocaine trafficking poses an indirect threat to South-Eastern Europe.
- Amphetamine-type-stimulants (ATS) production within South-Eastern Europe continues to decline. Large scale production of ATS, particularly in Bulgaria, may have ceased only for traffickers to establish laboratories elsewhere, notably in the destination markets of the Near and Middle East.
- The Netherlands continues to act as a redistribution centre for heroin travelling along the Balkan route but also for shipments arriving along the southern route. The relationship between the Netherlands and South-Eastern Europe extends into other drugs (cocaine and cannabis) as well as precursor chemicals. Nearly one ton of Alpha-phenylacetonitrile (APAAN), a chemical used in ATS manufacture, was seized in 2012 transiting South-Eastern Europe to ATS laboratories in the Netherlands.
- South Eastern Europe is not only a “transit” region along the Balkan route; it also faces consumption challenges in its own right. While estimated opiate user populations in most countries and territories in the region are relatively small, the combined regional user population is estimated at some 117,000 people, which compares well with the largest consumer markets in Western and Central Europe. Moreover, regional cocaine and ATS prevalence is in some cases higher than the global average, but reliable data on local drug markets remains very limited.



## EXECUTIVE SUMMARY

### The Balkan route

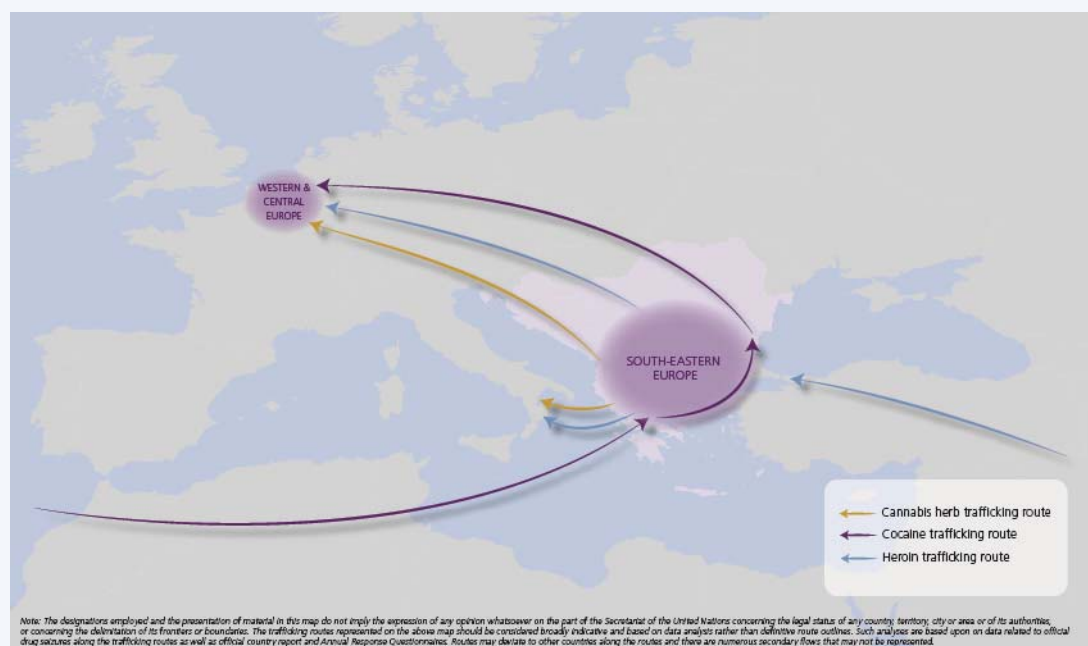
South-Eastern Europe has long served as a corridor for several drug-trafficking routes to Western and Central Europe. Owing to its geographical position between Afghanistan, the world's most important opiate-producing country, and the large and lucrative markets for opiates in Western and Central Europe, South-Eastern Europe<sup>2</sup> is a crucial stage on one of the world's most important heroin trafficking routes, the "Balkan route".

Diverse drug flows come from multiple directions. Externally, cocaine arrives from South America. Internally, South-Eastern Europe produces relatively large amounts of cannabis, most notably in Albania, and the region also has a recent history of producing and trafficking amphetamine-type-stimulants (ATS). Of all these drug flows, however, only heroin flows can be considered strategically significant to consumption markets in Western and Central Europe.

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<sup>2</sup> For the purposes of this report, South-Eastern Europe is understood to include the following: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Montenegro, Romania, Serbia, the former Yugoslav Republic of Macedonia and Kosovo under United Nations Security Council Resolution 1244.

**Map 1: General trafficking routes for cocaine, heroin and cannabis through South-Eastern Europe, 2010-2012**



Source: UNODC

It is important to note that South-Eastern Europe is not only a transit region, but also faces drug consumption challenges in its own right and is vulnerable to corruption. In order to place policymakers and law enforcement analysts in a better position to evaluate the drug-trafficking situation and make informed decisions regarding responses, this report analyses the major and emerging drug trends, including use, for heroin, cocaine, ATS and cannabis.

Based on findings from data submitted to UNODC by countries and territories, reports from regional organizations such as SELEC and Frontex and publicly available publications and scientific literature, the report also looks at the responses of countries in the region to related challenges. With a particular focus on heroin, it analyses the Balkan route from its origin on the borders of Afghanistan, through the Islamic Republic of Iran and Turkey, into South-Eastern Europe and up to its end point in Western and Central Europe, where the four principal opiate user markets it serves (the United Kingdom, Germany, France and Italy) are located.

## Heroin

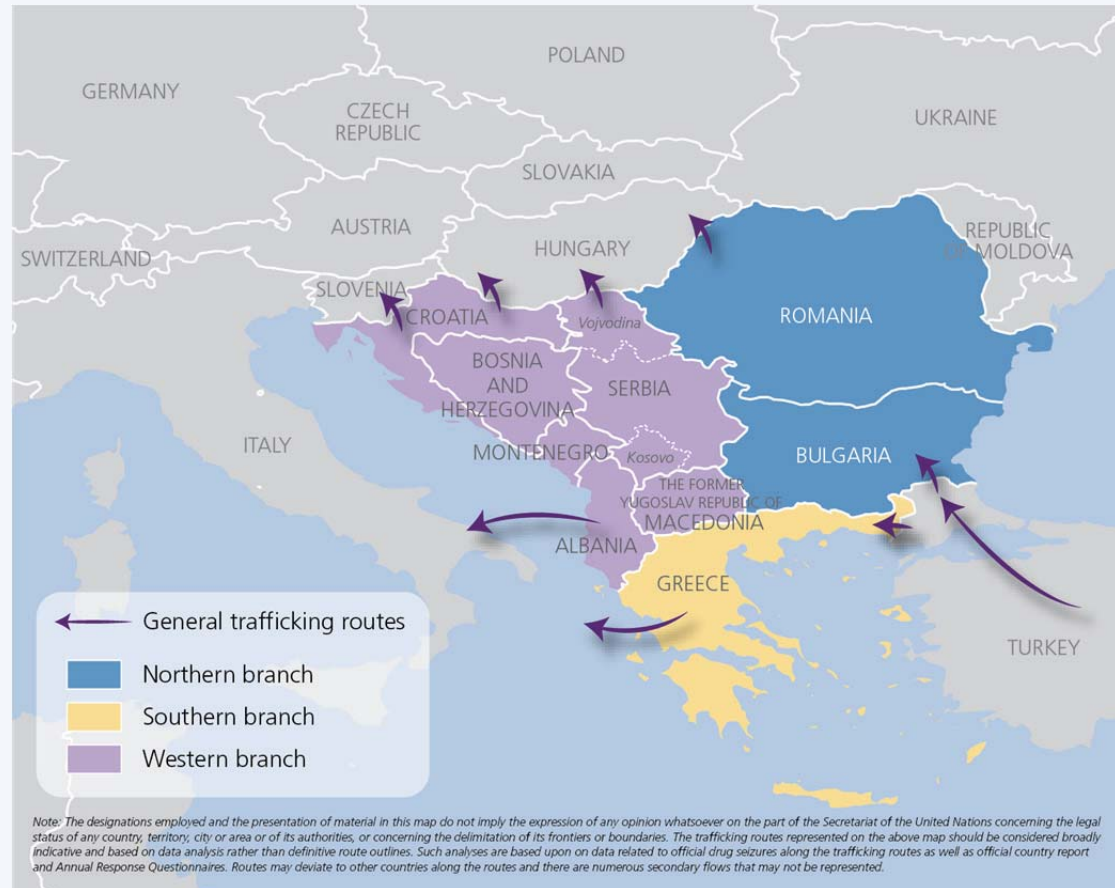
Afghan heroin is trafficked to every region of the world except Latin America. The Balkan route is the most important heroin trafficking route to Western and Central Europe. Owing to border controls, network allegiances and risk analysis carried out by traffickers themselves, the Balkan route of heroin splits upon entering South-Eastern Europe. This report divides the Balkan route into three branches.<sup>3</sup> The northern branch traverses the Eastern Balkans (Bulgaria-Romania-Western and Central Europe), while the

<sup>3</sup> There are other classification schemes. For example, EMCDDA divides the Balkan route into two branches: "From Turkey, the route then diverges into a southern branch through Greece, the former Yugoslav Republic of Macedonia, Albania, Italy, Serbia, Montenegro and Bosnia-Herzegovina and a northern branch through Bulgaria, Romania, Hungary, Austria, Germany and the Netherlands." See EMCDDA, *Monitoring the Supply of Heroin to Europe*, 2008, p.10.



southern branch involves only one South-Eastern European country – Greece – and generally leads to Italy. The western branch refers to trajectories through the Western Balkans towards Western and Central Europe and involves both sea and land trajectories.

**Map 2: Identified branches of the Balkan route of heroin in South-Eastern Europe**

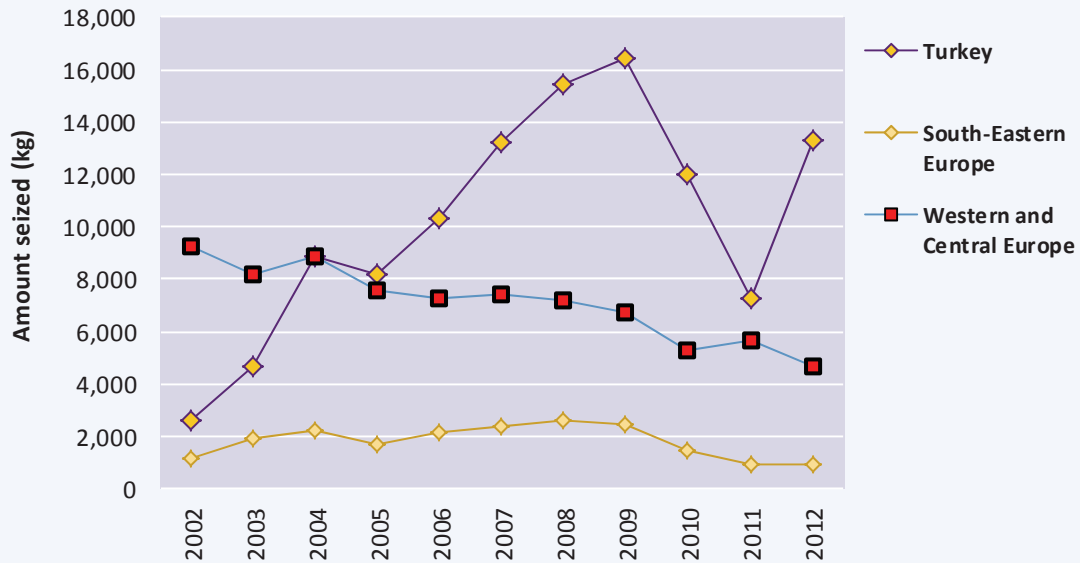


Source: Annual Report Questionnaire (ARQ) data, supplemented by national government reports and other official reports

Over the years, seizure volumes have been significant both at the start (Turkey and the Islamic Republic of Iran) and at the end (Western and Central Europe) of the Balkan route but they have declined recently, most notably in South-Eastern Europe.<sup>4</sup> In 2012, the 10 countries and areas that comprise South-Eastern Europe seized less than 1 ton of heroin, a 10-year low. By contrast, 13.3 tons were seized “upstream” in Turkey that year and about 5 tons “downstream” in the route’s destination markets in Western and Central Europe, suggesting that shipments are continuing to make it through South-Eastern Europe.

<sup>4</sup> UNODC, *Crime and its Impact on the Balkans*, March 2008, p.13

**Figure 1: Heroin seizures in Turkey, South-Eastern Europe and Western and Central Europe, 2002-2012**



Source: ARQ data, supplemented by national government reports and other official reports. Note: 2012 figures are preliminary and will be updated when information becomes available

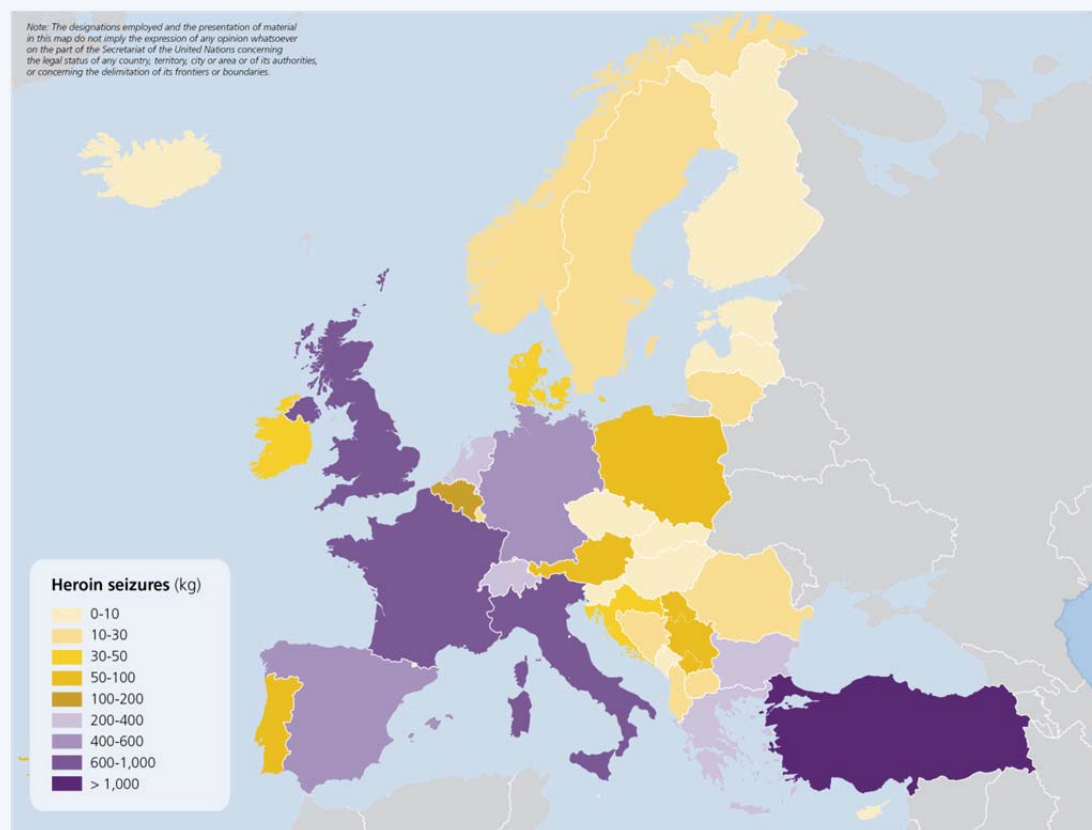
The Balkan route is still the main heroin conduit to Europe<sup>5</sup> and, despite a decline in seizures in South-Eastern Europe since 2009, some of its countries continue to make consistently high seizures. For example, Greece and Bulgaria accounted for 67 per cent of all the heroin seized in 2011-2012 in the region.<sup>6</sup> Beyond these two frontline countries, however, large-scale trafficking in South-Eastern Europe becomes somewhat less visible relative to its importance, as illustrated by seizures made both upstream and downstream on the route.

<sup>5</sup> UNODC, *World Drug Report 2013*, p.ix; Europol, *Organised Crime Threat Assessment (OCTA)*, 2013, p.11; Council of the European Union, report to the Dublin Group by the Hungarian Regional Chair for the Western Balkans, *Regional Report on the Western Balkans*, January 2011, Brussels, p.1, available at <http://register.consilium.europa.eu/pdf/en/11/st05/st05583.en11.pdf>.

<sup>6</sup> ARQ 2012, Romania, Bosnia and Herzegovina; Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece, Albania, Bulgaria, Serbia; Anti-Drug Unit of Kosovo Police; Ministry of Interior of Montenegro; Ministry of Interior of the former Yugoslav Republic of Macedonia.



**Map 3: Heroin seizures in South-Eastern Europe, Turkey and Western and Central Europe, 2011**



Source: ARQ 2011; Annual SELEC Questionnaire on Drug Trafficking for 2011 (Serbia); Anti-Drug Unit of Kosovo Police; Ministry of Interior of the former Yugoslav Republic of Macedonia

### How is heroin trafficked through South-Eastern Europe?

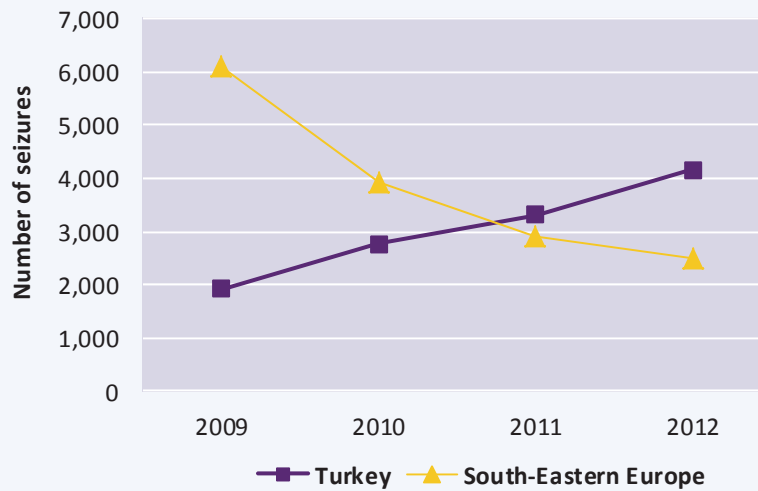
The core transportation network in South-Eastern Europe is multimodal and includes road, rail and inland waterway links, along with a number of seaports, river ports and airports. Most drug trafficking is not multi-modal and road vehicles are the preferred mode of heroin transportation through South-Eastern Europe. Some official country reports,<sup>7</sup> as well as large seizures of heroin in Turkey and in the destination countries in Western and Central Europe, suggest that large shipments are being trafficked both upstream and downstream along the Balkan route. But as there is no evidence of large seizures in South-Eastern Europe itself, there could be different explanations as to how heroin is trafficked through the region.

No single seizure of more than 100 kg was reported in South-Eastern Europe in 2011-2012,<sup>8</sup> despite evidence that Balkan route trajectories downstream were carrying large shipments. Taken together, large seizures before and after South-Eastern Europe appear to indicate that the Balkan route remains a major conduit for heroin and that logistics for large shipments are exceedingly well organized.

<sup>7</sup> ARQ Romania, 2011, Q9-10; EMCDDA, 2012 National Report (2011 data) to the EMCDDA by the Reitox National Focal Point, Croatia, New Development, Trends and in-depth information on selected issues, p.150

<sup>8</sup> SELEC, Report on Drug Seizures in South Eastern Europe, 2011, 2012

**Figure 2: Number of heroin seizures in South-Eastern Europe and Turkey reported to SELEC, 2009-2012**



Source: SELEC, *Report on drug seizures in South-Eastern Europe*, 2010, p.8; 2012, p.11

There are two possible explanations as to why large seizures of heroin are being made outside South-Eastern Europe but not within the region itself. While a large number of small seizures are occurring in South-Eastern Europe (see figure 2), large quantities may simply be going undetected as they transit the region. Alternatively, traffickers may be splitting some large shipments into smaller quantities, which are subsequently consolidated beyond the borders of South-Eastern Europe, closer to the principal markets in Western and Central Europe. There is evidence to suggest that heroin is adulterated and repackaged in South-Eastern Europe, as there have been official reports of processing facilities in Greece<sup>9</sup> and repackaging/storage activities in Albania, Kosovo and the former Yugoslav Republic of Macedonia.<sup>10</sup> This may indicate that large-scale heroin adulteration for the export market takes place in the region, which may result in large heroin shipments being broken up.

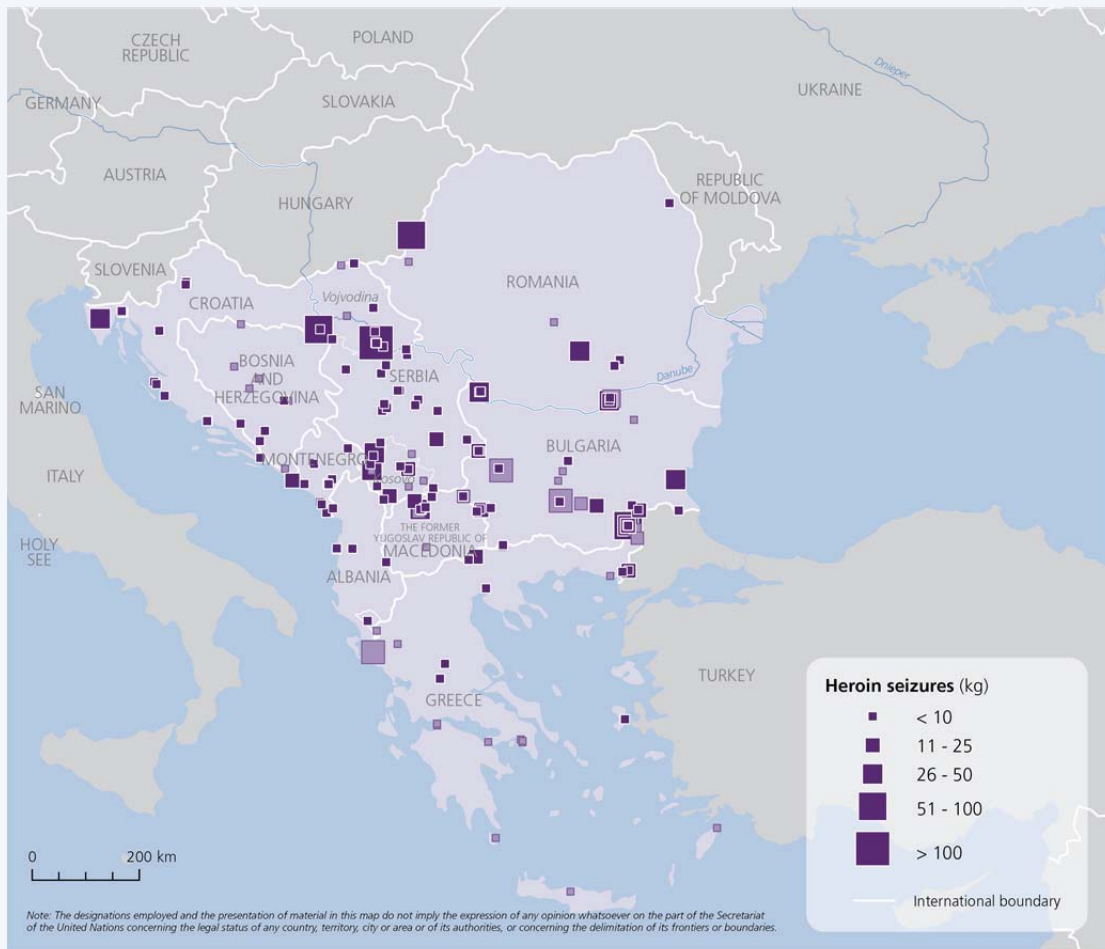
<sup>9</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece; See ARQ Greece, 2011, part iv.

<sup>10</sup> EMCDDA, *EU Drug Markets Report*, 2013, p. 33; Council of the European Union, report to the Dublin Group by the Hungarian Regional Chair for the Western Balkans, *Regional Report on the Western Balkans*, Brussels, January 2011.





**Map 4: Locations of heroin seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, 2010-2012**



Note: The seizures marked with darker colours were reported by official sources. Those marked with lighter colours were reported by media sources.

Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database, available at <http://drugsmonitoring.unodc-roca.org>; ARQ data, supplemented by national government reports and other official reports

## Alternative routes may be reducing the quantity of heroin trafficked via the Balkan route

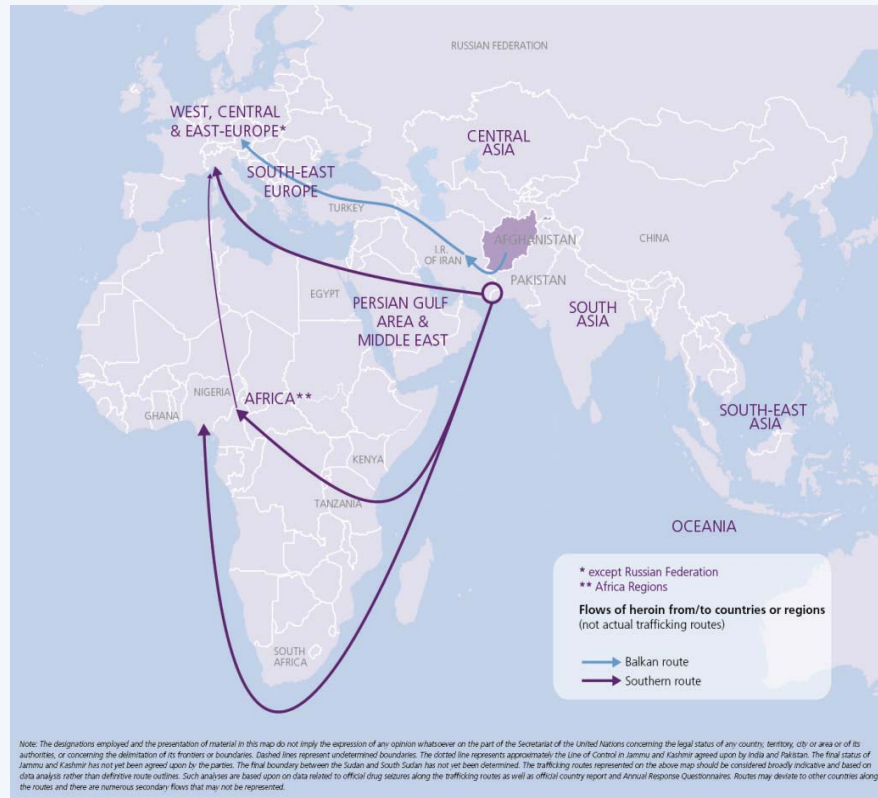
Although low seizure volumes have recently been recorded in countries downstream of South-Eastern Europe, there remains more interdiction of heroin trafficking both upstream and downstream than within the region itself. This may suggest that other drug-trafficking routes are affecting flows on the Balkan route.

Historically, Western and Central Europe has been supplied with Afghan heroin almost exclusively by the Balkan route, but the strengthening of borders at crucial stages of the Balkan route<sup>11</sup> may have encouraged some traffickers to seek alternative routes. This could involve bypassing the Turkish-Iranian border altogether by trafficking via the

<sup>11</sup> This includes, for example, the deployment of x-ray machines and ion scanners to the Eastern borders of Turkey. See United States Department of State, *International Narcotics Control Strategy Report (INCSR)*, 7 March 2012.

Caucasus<sup>12</sup> or the adjacent Iraqi border.<sup>13</sup> Another alternative involves travelling southwards from Afghanistan through Pakistan or the Islamic Republic of Iran and reaching Western and Central Europe via the Persian Gulf and Africa (along the so-called “southern route”), or directly by air from Pakistan.

**Map 5: Trafficking routes for Afghan heroin to Western and Central Europe**



Source: UNODC

The United Kingdom,<sup>14</sup> a major target market for Afghan opiates that in the past was supplied primarily by the Balkan route, is a prime example of this shift.<sup>15</sup> Shipments, which can amount to more than 200 kg, now arrive either directly from Pakistan or via Belgium and the Netherlands.<sup>16</sup> Although not considered significant consumption markets, the Netherlands and, to a lesser extent, Belgium act as transit

<sup>12</sup> Large heroin seizures in Georgia (116 kg) and Armenia (927 kg) in 2013-2014 illustrate the way in which traffickers opt to travel through the Caucasus to reach Europe. See Ministry of Internal Affairs of Georgia official website, “Ministry of Internal Affairs exposed the fact of international drug traffic”, 4 July 2013. Available at [police.ge/en/shinagan-saqmeta-saministros-gantskhadeba/5077](http://police.ge/en/shinagan-saqmeta-saministros-gantskhadeba/5077). See Customs Services of Armenia official website, “Nearly one ton of heroin detected at Meghri Customs point”, January 18 2014, [www.customs.am/csMD\\_News.aspx?ntname=csMDOOfficialNews&nid=1522](http://www.customs.am/csMD_News.aspx?ntname=csMDOOfficialNews&nid=1522)

<sup>13</sup> UNODC, *World Drug Report 2013*, p. 33

<sup>14</sup> In 2011, the United Kingdom reported a “reduction in heroin entering the United Kingdom via Turkey and an increase in heroin entering the United Kingdom directly from Pakistan (air freight/containers)”, adding that, “in 2011, nearly two thirds of heroin seized at United Kingdom borders had been trafficked directly from Pakistan”. See United Kingdom ARQ, 2011, p. iv.

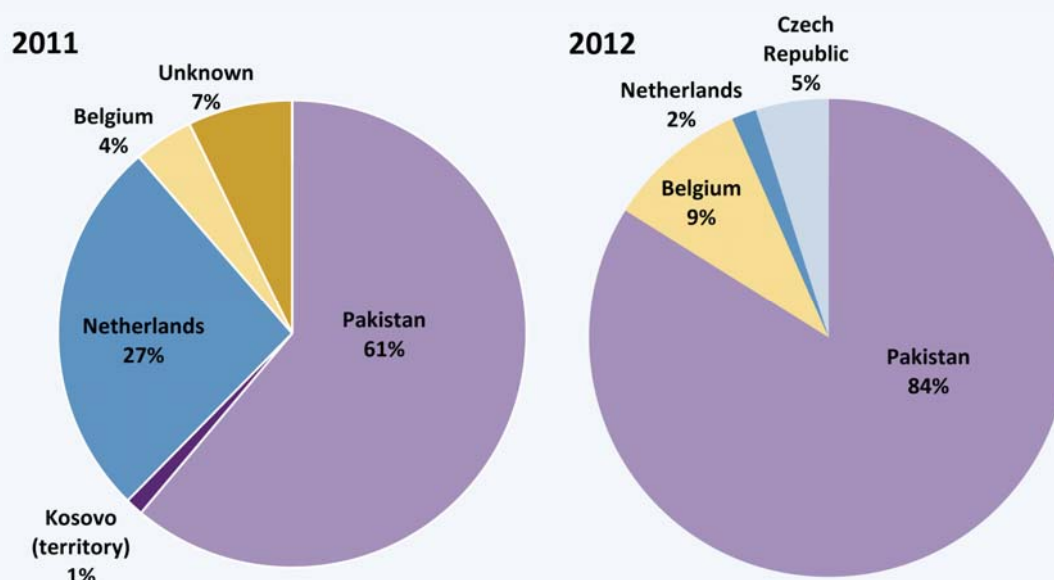
<sup>15</sup> According to the United Kingdom, “most seizures of heroin at the UK border are made from consignments originating in Pakistan. Since 2010, supplies of heroin to the UK from Afghanistan via Iran, Turkey and the European Balkan route have decreased. The heroin route via Turkey has been squeezed by multi-agency international activity against the main traffickers, which has resulted in an increase in the direct trafficking of heroin via Pakistan”. See United Kingdom ARQ 2012, Q. 9-10.

<sup>16</sup> According to the 2012 United Kingdom ARQ, “The Netherlands and Belgium still remain prominent as transit points for heroin trafficking to the United Kingdom via large goods vehicles and Ro-Ro ferries”.



points/redistribution centres<sup>17</sup> for both Balkan route<sup>18</sup> and southern route<sup>19</sup> shipments. This is suggested by the wholesale price of heroin, which is lower in these distribution countries than in other destination countries in Western and Central Europe (see figure 4).

**Figure 3: Departure country for UK border seizures of heroin (10 kg or more), 2011-2012**



Source: SOCA

In the context of the emergence of the southern route, it is noteworthy that 1 kg of heroin costs around US\$ 4,000 in Pakistan,<sup>20</sup> which means that mark-ups may be considerable for those bypassing the Balkan route and trafficking via direct southern route trajectories to the United Kingdom.<sup>21</sup> This trafficking appears to benefit mainly Pakistani organized criminal groups, which are increasingly active in the United Kingdom<sup>22</sup> and other European countries such as Spain.<sup>23</sup> There may even be a strategy on the part of some networks to purposely avoid Turkish groups by bypassing the Balkan route altogether and using the southern route instead.<sup>24</sup>

<sup>17</sup> For example, the major market of France reports that the Netherlands and, to a lesser extent, Belgium are heroin storage areas and the main redistribution centres for France. See Office Central pour la Répression du Trafic Illicite des Stupéfiants (OCRTIS), *Tendances du trafic de stupéfiants en France en 2012*, p. 4. See also France ARQ 2012, Q 4-6.

<sup>18</sup> UNODC, *World Drug Report 2012*, p.78

<sup>19</sup> See SOCA, *Annual Report and Accounts 2011/12*, p.11.

<sup>20</sup> Typical price, 2011. See UNODC, *World Drug Report 2013*

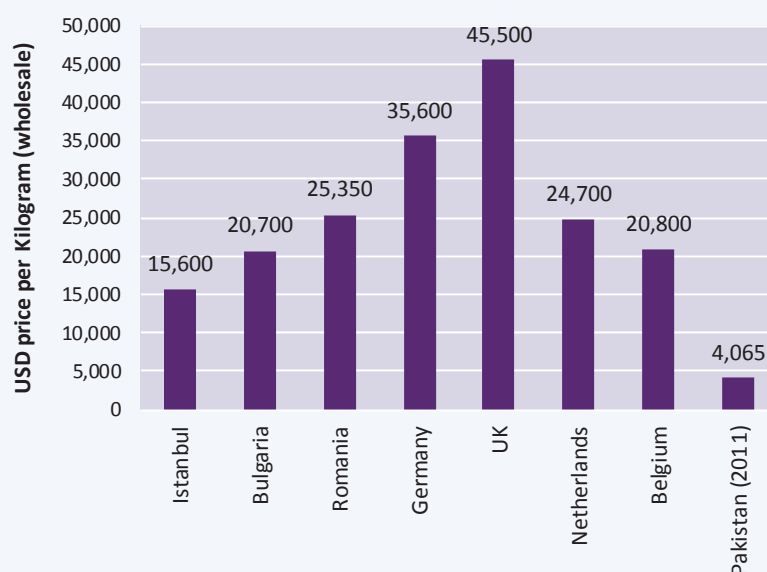
<sup>21</sup> ARQ United Kingdom, 2012. Mean GBP 30,000 (range: 25,000-35,000)

<sup>22</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.32

<sup>23</sup> Europol, *OCTA*, 2011, p.12

<sup>24</sup> Europol, *SOCTA*, March 2013, p.8

**Figure 4: Price in US\$ for 1 kilogram of heroin wholesale in Istanbul and selected countries on the Balkan and southern routes, 2012 unless otherwise indicated**



Source: ARQ 2012 (Germany, Romania, Bulgaria, United Kingdom); ARQ 2011 (Pakistan); KLPD, Central Unit, Central Intelligence Division; Belgian Federal Police; Turkish National Police, KOM. Note: Figures are rounded; prices are not purity adjusted.

Heroin shipments reaching Western and Central Europe via the southern route can be quite high in volume, both relatively and in absolute terms. A single southern route seizure of 863 kg at Antwerp seaport in Belgium in 2013 was almost equivalent to total heroin seizures in South-Eastern Europe in 2012 (930 kg rounded). There are also indications that the use of air routes is on the rise, particularly from East Africa. Italy, a major heroin market, reported important increases in heroin trafficking from East Africa by air in 2011-2012.<sup>25</sup> While air transportation is generally used for smaller amounts, aggregated annual totals can be significant.

The emergence of the southern route constitutes the strongest evidence of quantitative changes in heroin flows on the Balkan route. Having said that, with the exception of the United Kingdom, the Balkan route seems to have maintained its market share in the key destination countries of Germany,<sup>26</sup> Italy<sup>27</sup> and France<sup>28</sup> during 2011-2012. Moreover, certain Balkan route trajectories continue to target the United Kingdom, as noted in official Turkish reports to UNODC in 2012.<sup>29</sup> Whether the emergence of the southern

<sup>25</sup> DCSA, *Annual Report*, 2011 and 2012. This appears to be an emerging trend in Italy, given that East Africa is either not mentioned at all as a departure region for Italy-bound heroin or accounts for a very small proportion of seizures reported in previous years (2007-2010). Africa in general does not figure prominently as a source region until 2011, while South-Eastern Europe and Turkey appear dominant until that year. See DCSA, *Annual Report*, 2007, 2008, 2009 and 2010.

<sup>26</sup> German Bundeskriminalamt (BKA) (Federal Criminal Police), *Largest seizures of heroin in Germany*, 2011. See also the section of this report entitled "Getting to markets in Western and Central Europe".

<sup>27</sup> Italy states that, "Heroin reaching Italy mainly originated in Afghanistan, via Turkey and the Balkan Peninsula". See DCSA, *Annual Report*, 2012.

<sup>28</sup> Both France's national report to EMCDDA and its national drug situation report for 2012 cite the Netherlands and Belgium as the main departure points for the heroin seized in France. While it is assumed that this heroin was first trafficked through South-Eastern Europe, it could also have travelled along the southern route. See EMCDDA, *Rapport national 2012 (données 2011) à l'OEDT par le point focal français du réseau Reitox, France: Nouveaux développements, tendances et information détaillées sur des thèmes spécifiques*, p.10 and p.176. See also OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 159.

<sup>29</sup> ARQ Turkey, 2012, Q.4-6



route is a temporary or lasting trend remains to be seen and more research is needed to understand all the drivers behind this apparent displacement.

### **Are there shifts within the Balkan route itself?**

Since the entry of Bulgaria and Romania into the EU, the northern branch now crosses only one EU border, while the western branch crosses multiple borders, making it a riskier option for traffickers. However, recent border seizures indicate that, for some networks, the strength of local partners on the western branch can compensate for any risk associated with entering the EU more than once.<sup>30</sup> More research should be undertaken to establish whether the reduction in border crossings resulting from the accession of South-Eastern European States to the EU is likely to have an effect on patterns of heroin trafficking through the region.

### **Cocaine**

In contrast to the Balkan route of heroin, South-Eastern Europe provides only a secondary route to the Western European markets for cocaine produced in the Andean countries of South America. Spain, the Netherlands, Portugal and Belgium are the main points of entry for cocaine destined for those markets. This is illustrated by the fact that Spain, Belgium and the Netherlands seized 20.7, 17.5, and 10 tons of cocaine respectively in 2012,<sup>31</sup> while South-Eastern Europe seized only 356 kg, equal to just 1 per cent of all the seizures made in Western and Central Europe that year. Even in 2009, when cocaine seizures peaked in South-Eastern Europe, the amounts seized represented only 4 per cent of the 53 tons seized overall in Western and Central Europe.<sup>32</sup> Since 2009, cocaine seizures within South-Eastern Europe have continued to decline, with occasional fluctuations.<sup>33</sup>

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<sup>30</sup> Two single heroin seizures of 330 kg and over 700 kg were made in Turkey in July-August 2013, where the drugs were destined for the Western Balkans. See “Drug Trafficking Situation in South Eastern Europe”, presentation by SELEC delegate, third meeting of UNODC informal working group on heroin and acetic anhydride trafficking to/from Europe, 9 September 2013, Lisbon, Portugal.

<sup>31</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.45. Belgium is also a major distribution centre for cocaine. See Frontex, *Annual Risk Analysis 2013*, p. 48: “Cocaine trafficking towards the EU is strongly diversified, whereas Spain is a main entry point and distribution centre for cocaine from Latin America. According to Europol, large amounts of cocaine are dispatched from Latin America through container vessels to the European ports of Antwerp and Rotterdam.” Official submission by Belgian Federal police to UNODC

<sup>32</sup> UNODC Delta database

<sup>33</sup> In 2013, there was an individual seizure of over 500 kg of cocaine in Rhodes and Athens. However, this seizure was an anomaly and not originally destined for South-Eastern Europe. Information provided by the US DEA in Greece, August 2013

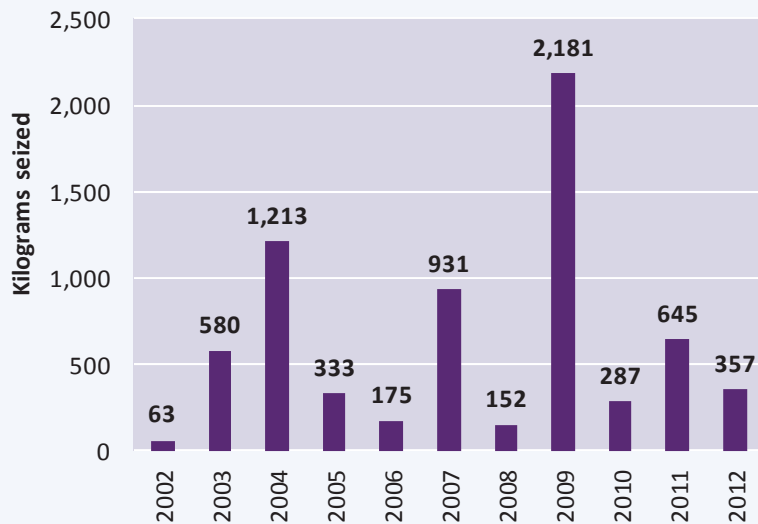
**Figure 5: Cocaine seizures in South-Eastern Europe and Western and Central Europe, 2002-2012**



Source: UNODC; data from ARQ and other official sources

Although it is likely that groups indigenous to South-Eastern Europe control cocaine trafficking through the region, West African traffickers also appear to be active there. In Romania, law enforcement has reported the increased role of cocaine trafficking groups run by Nigerians,<sup>34</sup> and Bulgarian officials report that a large cocaine trafficking group led by Nigerians was dismantled in 2012.<sup>35</sup> It is also possible that South-Eastern Europe plays an important indirect role in cocaine trafficking. In recent years, for example, South-Eastern European nationals have been intercepted in transatlantic cocaine anti-trafficking operations carried out by European authorities.<sup>36</sup>

**Figure 6: Cocaine seizures in South-Eastern Europe, 2002-2012**



Source: ARQ and national reports; SELEC data 2012; Delta database; Kosovo seizure data from Kosovo Police *Annual Report 2012*, p.6

<sup>34</sup> ARQ Romania, 2011

<sup>35</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria.

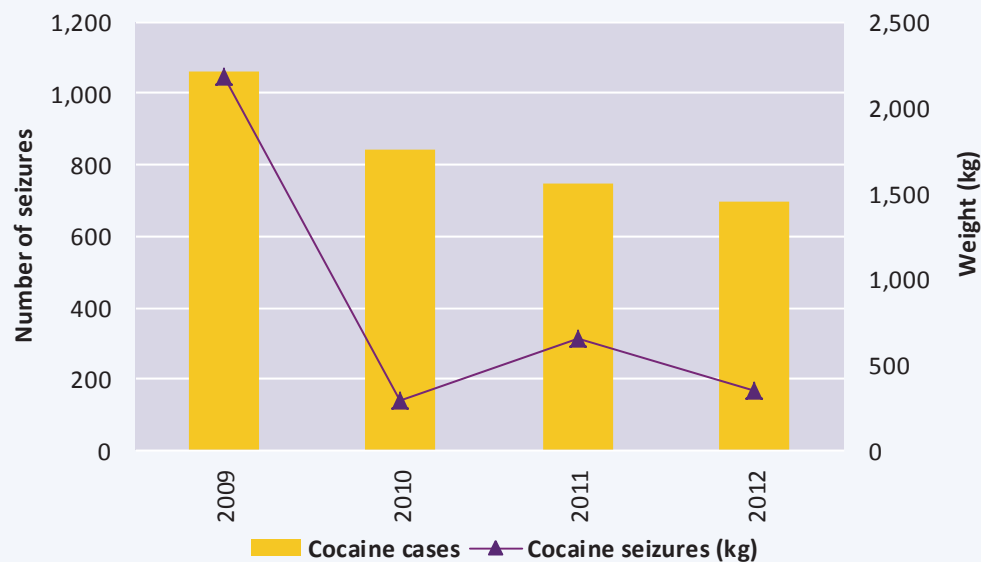
<sup>36</sup> Frontex, *Annual Risk Analysis*, 2013, p.48; Council of the European Union, Report to the Mini-Dublin Group by the Austrian Regional Chair of the Dublin Group, Regional report on Western Balkans, 2012 p. 52, 55, Europol, *OCTA*, 2011 p.12.



Most cocaine shipments crossing South-Eastern Europe appear to travel from Greece, either through Bulgaria, Romania and Hungary and further into Western and Central Europe or directly across the Adriatic Sea into Italy. Historically, larger shipments have been seized or found to be destined for ports along the Adriatic coast,<sup>37</sup> but there is little current evidence of seizures being made along the Adriatic coast itself. Seizures within the Western Balkans remain low, with the highest annual seizures reported in Croatia (5 kg).<sup>38</sup>

For its part, Turkey has a small market and plays an increasing role as a transit country.<sup>39</sup> Trafficking to Turkey through South-Eastern Europe may well be occurring, as indicated by a seizure of 48 kg of cocaine in Satu Mare, Romania, in 2012.<sup>40</sup> Turkey saw an increase in cocaine seizures to 475 kg in 2012<sup>41</sup> and Turkish law enforcement has reported that cocaine smuggling to Turkey will become a greater threat to the country in the near future.<sup>42</sup>

**Figure 7: Number and volume of annual cocaine seizures in South-Eastern Europe reported to SELEC, 2009-2012**



Source: SELEC, *Report on drug seizures in South-Eastern Europe*, 2010, 2012

## Cannabis

The most widely used illicit drug globally, cannabis has two principal manifestations: herb and resin. Also known as *marijuana*, cannabis herb is not only consumed in almost all countries, it is also produced in most of them. Meanwhile, the production of resin, or

<sup>37</sup> In June 2008, 365 kg of cocaine were seized in Koper, Slovenia. See

<http://www.policija.si/eng/index.php/component/content/article/13-news/534-sporo133>; A further example is the seizure of over 2.8 tons of cocaine destined for Europe, trafficked by Serbian and Montenegrin traffickers through Serbia in 2009. See OSCE, *Police Reform in Montenegro 2006-2011: Assessment and Recommendations*, p.7, <http://www.osce.org/montenegro/97001>

<sup>38</sup> ARQ Bosnia and Herzegovina, Croatia, Montenegro, 2012; Frontex, *Western Balkans Annual Risk Analysis*, 2013 p.38:

“According to Europol, particularly Croatia is used as an entry point for cocaine, which is mainly smuggled in sea containers”.

<sup>39</sup> ARQ Turkey, 2011

<sup>40</sup> SELEC *Report on Drug Seizures in South Eastern Europe*, 2012, p. 30.

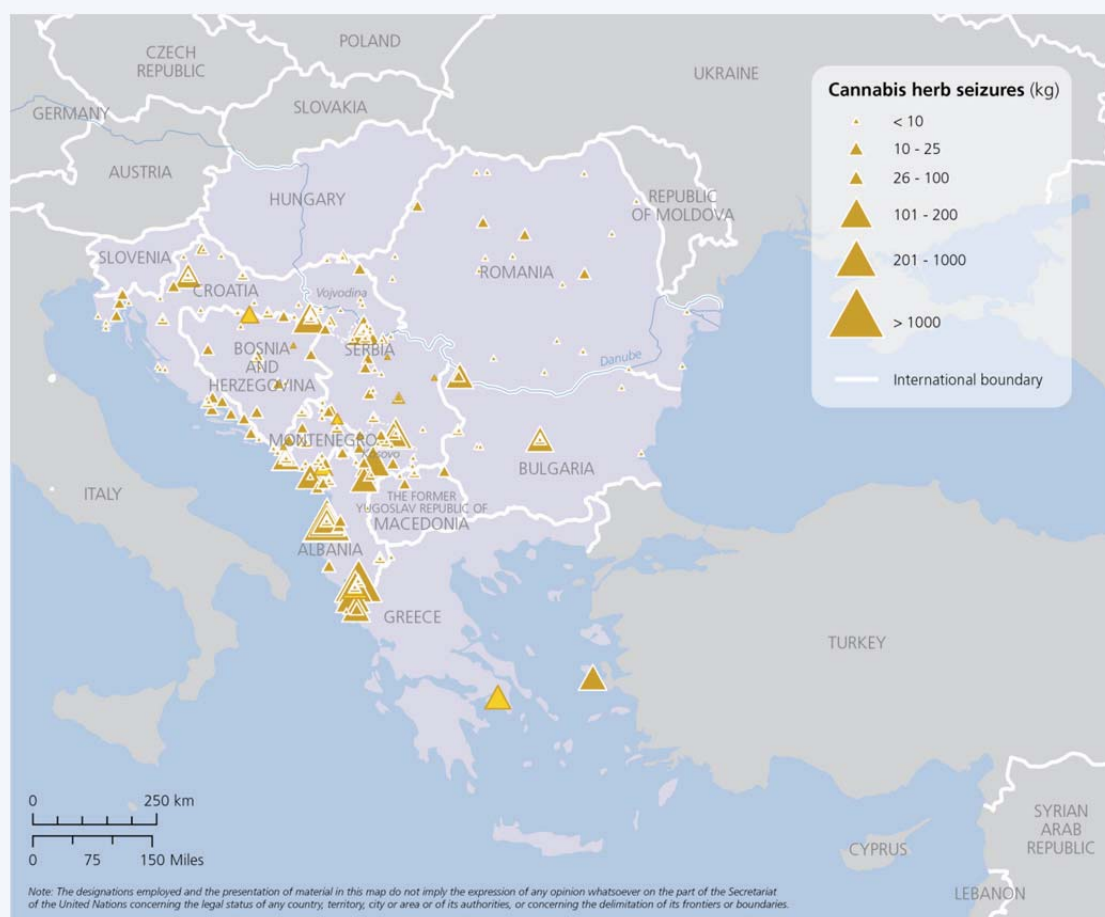
<sup>41</sup> ARQ Turkey, 2012

<sup>42</sup> Turkish National Police, Department of Anti-Smuggling and Organized Crime (KOM), *Annual Report 2012*, p.35

*hashish*, is confined to countries in North Africa, the Near and Middle East and South-West Asia.<sup>43</sup>

In contrast to trends in Western and Central Europe, it is cannabis herb that is consumed predominantly in South-Eastern Europe, almost to the exclusion of cannabis resin.<sup>44</sup> Various South-Eastern European countries seem to have reported some cultivation of cannabis herb, but it is Albanian cannabis which is most commonly seized in the region.<sup>45</sup>

**Map 6: Locations of cannabis herb seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, 2010-2012**



Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

<sup>43</sup> UNODC, *World Drug Report 2013*

<sup>44</sup> Cannabis resin seizures have been declining in recent years, representing less than 22 per cent of all cannabis seizures in South-Eastern Europe in 2011. See SELEC, *Report on Drug Seizures in South Eastern Europe, 2011*

<sup>45</sup> SELEC *Report on Drug Seizures in South Eastern Europe, 2012*, p.36



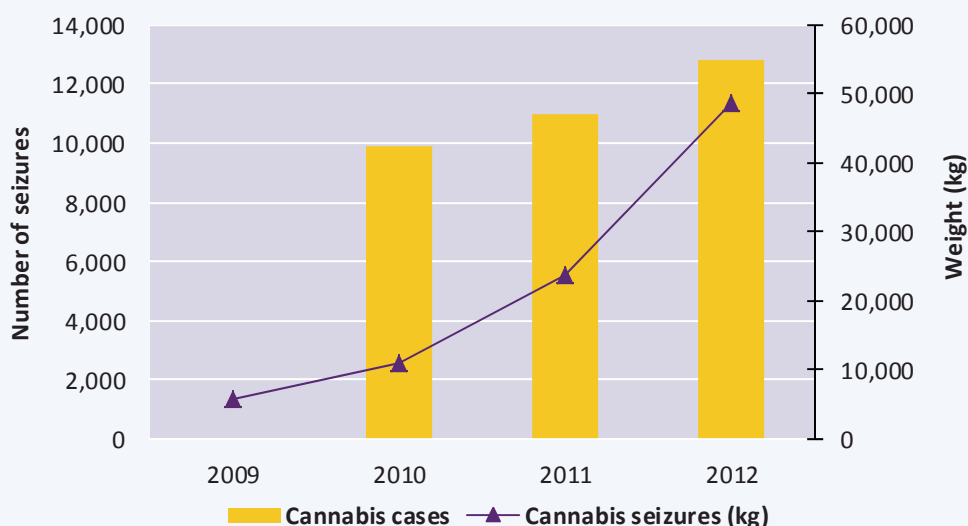


## Cannabis herb

Despite the reportedly low THC content of Albanian cannabis herb in comparison to the European average,<sup>46</sup> Albanian cannabis has been able to penetrate deeply entrenched European markets. Shipments of Albanian cannabis herb, which can amount to over 1 ton in volume, are transported from ports in north-western Greece for trafficking to destination markets in Italy, the United Kingdom<sup>47</sup> and other countries in Western and Central Europe.<sup>48</sup> There are also large flows across the Adriatic, either in speedboats or on ferries, from the Albanian ports of Durres and Vlore<sup>49</sup> (the majority of seizures have occurred in Durres).<sup>50</sup> With very few exceptions,<sup>51</sup> there is no evidence of sea trajectories for cannabis along the rest of the Adriatic coast.

The other route for Albanian cannabis herb appears to run north through Montenegro, Bosnia and Herzegovina, Croatia and Slovenia to Western Europe. Most of this trafficking is assumed to target Italy,<sup>52</sup> but the Netherlands may also be seeing attempts at market penetration by Albanian cannabis herb.<sup>53</sup>

**Figure 8: Number and volume of annual cannabis herb seizures in South-Eastern Europe reported to SELEC, 2009-2012**



Source: SELEC, *Report on Drug Seizures in South-Eastern Europe*, 2010, 2012

<sup>46</sup> EMCDDA, *European Drug Report*, 2013, p.17. The range of THC potency in Europe is 5-10 per cent, whereas Albania reported a typical THC potency of 3 per cent in 2012 and 4 per cent in 2010. See ARQ Albania, 2011, 2012

<sup>47</sup> ARQ Greece, 2012

<sup>48</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

<sup>49</sup> ARQ Albania 2012, Greece 2011. It should be noted that a previous moratorium on speedboats between Albania and Italy was lifted in April 2013. What effect this will have on trafficking is unclear.

<sup>50</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012 Albania

<sup>51</sup> One exception concerns a seizure in Bari, Italy, in February 2012. The report indicated that over 300 kg of Albanian cannabis herb had been trafficked from the port of Bar in Montenegro. See Azienda Dele Dogane Press Release, 22 February 2012, available at [http://www.agenziadogane.gov.it/wps/wcm/connect/3cf770804a426cbd86becf947a709800/cre-s-20120222-23601-BA\\_marijuana.pdf?MOD=AJPERES&CACHEID=3cf770804a426cbd86becf947a709800](http://www.agenziadogane.gov.it/wps/wcm/connect/3cf770804a426cbd86becf947a709800/cre-s-20120222-23601-BA_marijuana.pdf?MOD=AJPERES&CACHEID=3cf770804a426cbd86becf947a709800)

<sup>52</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.64.

<sup>53</sup> For example, there was a seizure of a 300-kg shipment of Albanian cannabis herb in Slovenia in 2011 and a more recent seizure of 698 kg in November 2013 in Germany, bound for the Netherlands. Information provided by Slovenian law enforcement, May 2013, and SELEC, November 2013.

The former Yugoslav Republic of Macedonia may be playing an increasingly important role in the trafficking of cannabis herb. A 900-kg seizure by Serbian authorities on the border with Croatia in 2013 indicated that the shipment had transited the former Yugoslav Republic of Macedonia on its way to destination markets in Western and Central Europe from Albania.<sup>54</sup> The figure above shows that seizures in the Western Balkans have increased considerably year on year, suggesting that this overland route may be of increasing importance to traffickers.

## Cannabis resin

As with cocaine trafficking from South America, South-Eastern Europe - or rather the Eastern Balkans - may be used as a “back door” to Western Europe for cannabis resin sourced in Morocco. The South-Eastern European market for cannabis resin is very small but a seizure of over 16 tons of Moroccan hashish in Bulgaria in May 2012 is an indication of the potential scale and sophistication of hashish trafficking in the region.

Although the well-worn Balkan route is the most direct way to traffic Afghan hashish to Western and Central Europe, there is no evidence of the Balkan route being used for this purpose. Indeed, the Turkish police report that Afghan hashish, which arrives in Turkey from the Islamic Republic of Iran and the Syrian Arab Republic, is required to meet increasing local demand, rather than being sent on to South-Eastern Europe.<sup>55</sup> But while there is little indication of a Balkan route of Afghan hashish, there have been several reports of multi-ton hashish shipments sent from Pakistan, sometimes in conjunction with heroin, by sea via the southern route directly to Western and Central Europe.<sup>56</sup>

## Amphetamine-type stimulants

Since the manufacture of ATS, which include amphetamine, methamphetamine and ecstasy-type substances, is not dependent on the cultivation of a plant-based raw material, it is not geographically restricted. Coupled with the fact that ATS are synthetic drugs, each with its own specific components, trafficking and abuse patterns, this makes ATS markets difficult to assess.

In the 1990s and 2000s, Bulgaria in particular was well known for carrying out large seizures, reaching a peak of 1.53 tons in 2004 (see table 1). There were reports of clandestine amphetamine laboratories (principally producing an amphetamine sold under the brand name of Captagon) built in Bulgaria on a scale large enough to supply both local markets and international markets in the Middle East.<sup>57</sup> However, this trend has also changed, and ATS seizures have declined dramatically in Bulgaria since 2004.

<sup>54</sup> Serbian Presentation at SELEC Anti Drug Trafficking Task Force meeting, May 2013.

<sup>55</sup> Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012, p.33

<sup>56</sup> See annex 4; Ministry of Narcotics Control of Pakistan, [http://www.anf.gov.pk/majorsz.php?grp\\_id=Feb-2013&currentItem=groupHQ](http://www.anf.gov.pk/majorsz.php?grp_id=Feb-2013&currentItem=groupHQ)

<sup>57</sup> “The origin of the amphetamine sold as Captagon in the region is unknown. Traditionally, the substance was believed to have been manufactured illicitly in South-Eastern Europe, notably in Bulgaria, and trafficked to the region, often transiting Turkey by air or sea”. See UNODC, *Amphetamines and Ecstasy*, 2012, p.45

**Table 1: Reported Bulgarian ATS seizures, 2002-2012 (kilograms)**

2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
211	623	1,530	1,120	955	213	563	278	195	409	54

Source: UNODC Delta database Note: Figures are rounded

The decline in ATS seizures in Bulgaria is generalized through much of South-Eastern Europe and elsewhere. While ecstasy seizures in Western and Central Europe peaked in 2002 at just over 8 tons, they saw marked declines to just over 1 ton in 2011.<sup>58</sup> Of particular note is the decline in the Netherlands,<sup>59</sup> from a peak of 3.6 tons in 2007 to less than 500 kg in 2011.<sup>60</sup>

Irrespective of the decline in local production in South-Eastern Europe, ATS produced in Western Europe and destined for eastern markets continue to be seized on the Balkan route heading east. Ecstasy and other ATS produced in the Netherlands have been seized while making their way by land and air into Turkey and other destination markets in the Middle East such as the United Arab Emirates and Saudi Arabia.<sup>61</sup>

Though not on nearly as large a scale as heroin trafficking, ATS trafficking from the Netherlands is still a cause for concern, especially since certain countries such as Serbia, Romania, Bulgaria and Croatia have reported that the ecstasy and much of the ATS sold in local markets come from the Netherlands.<sup>62</sup>

Authorities also report that some of the methamphetamine produced in the Islamic Republic of Iran transits Romania and Bulgaria, usually via international airports, to reach destination markets in East Asia.<sup>63</sup> Moreover, the skills and expertise of some of the people who worked in production labs in Bulgaria may have dispersed and shifted to Turkey, Serbia and the Czech Republic.<sup>64</sup> Turkey reported that almost a quarter of all foreign-born individuals arrested for ATS-related crimes in 2011 were Bulgarian nationals (they also represented the largest single group).<sup>65</sup> Two amphetamine laboratories that were closed down in 2010 in Serbia had been established with help from Bulgarian nationals.<sup>66</sup>

Despite an increase in methamphetamine seizures in the last few years, the amount of methamphetamine seized in Europe annually still remains significantly lower than the amount of amphetamine seized. However, recent evidence suggests that methamphetamine may be starting to replace amphetamine in some countries; several countries, including Romania and Turkey, reported larger seizures of methamphetamine

<sup>58</sup> Recent trends suggest increased ecstasy production in the Netherlands. See UNODC, *World Drug Report 2013*

<sup>59</sup> ARQ Netherlands, 2011

<sup>60</sup> While amphetamine seizures in Western and Central Europe peaked in 2007 at over 8 tons, they have since declined sharply to less than 5 tons in 2010, with only a slight increase witnessed in 2011. This has brought seizure levels back to where they were almost a decade ago in 2003. However, Western and Central Europe remains very important in amphetamine production. <sup>69</sup> amphetamine labs, the largest number globally, were dismantled in 2011. See UNODC *World Drug Report 2013*, p. 50.

<sup>61</sup> ARQ Turkey, 2012

<sup>62</sup> ARQ Turkey, 2011; UNODC, *Amphetamines and Ecstasy*, 2012, p.64

<sup>63</sup> ARQ Bulgaria, Q4-6, 2012; ARQ Turkey Q 4-6, 2012; Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012 p.40

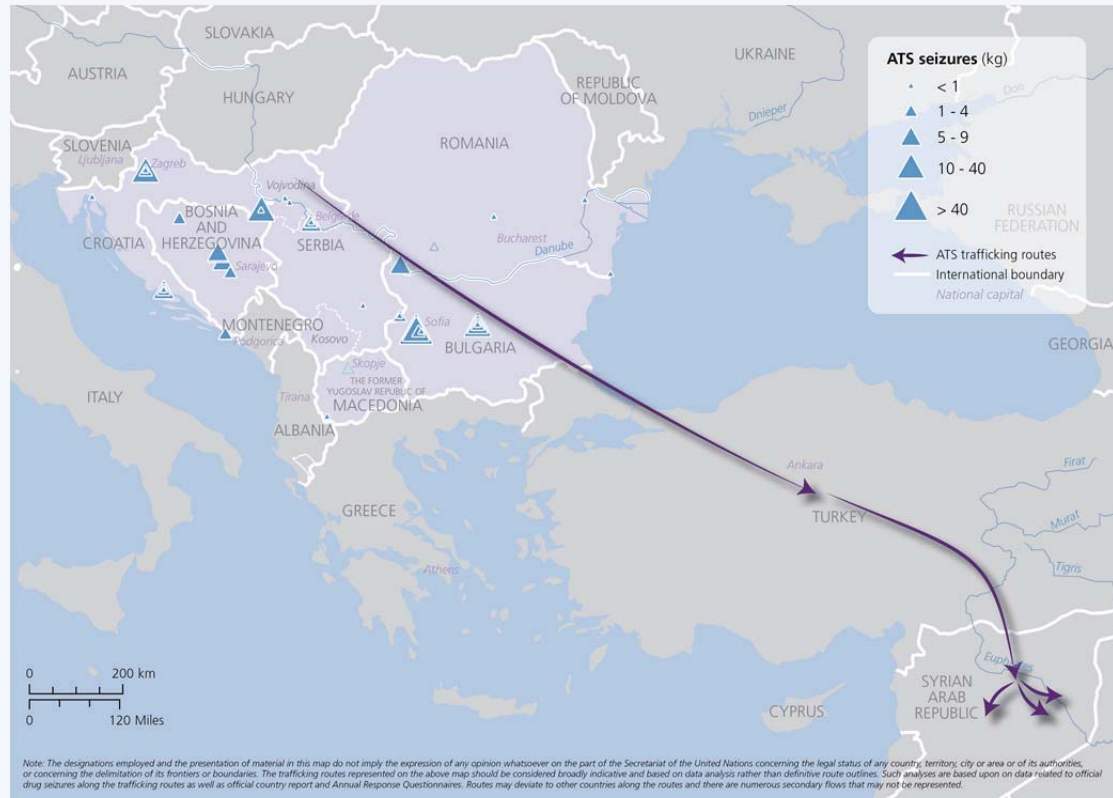
<sup>64</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria

<sup>65</sup> Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2011

<sup>66</sup> UNODC, *Amphetamines and Ecstasy*, 2012, p.65

than of amphetamine in 2011. However, while methamphetamine may be increasingly trafficked through the region, there is no evidence of increased use in South-Eastern Europe.

**Map 7: Locations of ATS seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, and general trafficking routes, 2010-2012**



Note: The seizures marked with darker colours ▲ were reported by official sources. Those marked with lighter colours ▲ were reported by media sources.

Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

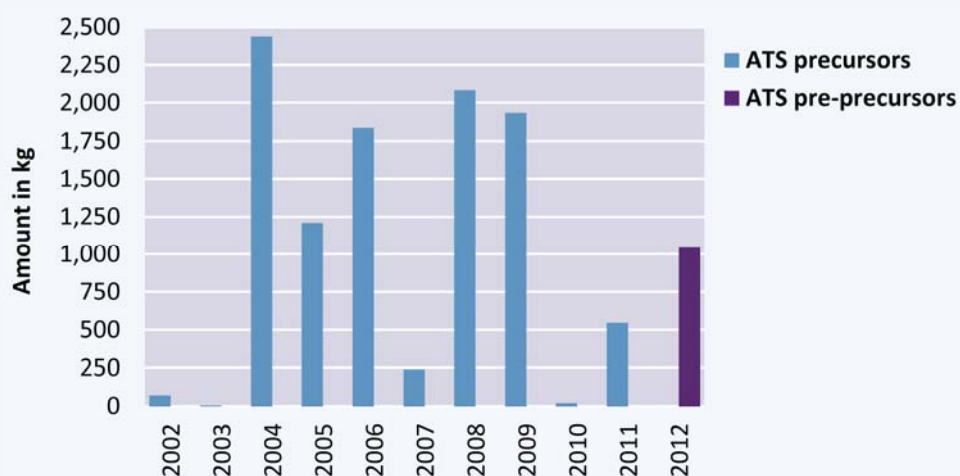
### ATS precursor chemicals and the Balkan route

ATS precursor chemicals ephedrine, pseudoephedrine and benzyl methyl ketone (BMK) are still seized in considerable, albeit declining, quantities on the Balkan route. Most of these precursors are destined for the Netherlands, the Czech Republic or Poland.<sup>67</sup>

<sup>67</sup> EMCDDA, *EU Drug Markets Report*, 2013.



**Figure 9: ATS precursor and pre-precursor<sup>68</sup> seizures in South-Eastern Europe, 2002-2012**



Source: INCB, *Precursors and chemicals frequently used in the illicit manufacture of narcotic drugs and psychotropic substances*, 2010; 2012 country data provided by SELEC

Note: ATS precursors include ephedrine, phenylacetic acid, piperonal, isosafrole, 3,4-MDP-2-P, P2P and safrole. ATS pre-precursors include APAAN. Countries reporting to INCB include Croatia, Bulgaria, Greece and Romania.

As regulatory authorities have strengthened controls over the main ATS precursors,<sup>69</sup> traffickers have reacted and reduced their risk by acquiring pre-precursors such as APAAN. These pre-precursors are less strictly controlled (or not controlled at all), are cheaper and can easily be converted into ATS precursors such as PMK or 1-phenyl-2-propanone (P2P).<sup>70</sup>

The first seizure of APAAN in South-Eastern Europe occurred in Romania in 2012 and consisted of 104 kg. However, this development has been particularly marked in Bulgaria, where in 2012 law enforcement reported seizing 941 kg of APAAN<sup>71</sup> destined for the Netherlands but only negligible amounts of ATS precursors.<sup>72</sup> On the periphery of the region, Hungary reported seizing 3 tons of APAAN in 2012 and Slovenia seized 1,000 litres of 3,4-methylenedioxyphenyl-2-propanone (3,4-MDP-2-P) in January 2013.<sup>73</sup> In all cases, the pre-precursors were destined for ATS labs in the Netherlands.<sup>74</sup>

<sup>68</sup> Illicit drug manufacture, i.e. synthesis of narcotic drugs and psychotropic substances, requires precursor and other chemicals. The key chemicals used in illicit drug manufacture are controlled under the 1988 United Nations Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances (1988 Convention). They may be, for instance, precursors (starting materials), acetylating agents, or oxidizing agents solvents, reagents and catalysts, etc., which traffickers require for clandestine drug manufacture. Those substances are “diverted” from licit channels (either from international trade or from domestic distribution channels) into illicit traffic, or they may be themselves manufactured in illicit operations from other, non-controlled substances (so-called “pre-precursors”).

<sup>69</sup> INCB, *Precursors and chemicals frequently used in the illicit manufacture of narcotic drugs and psychotropic substances*, 2011, pp. 18

<sup>70</sup> Ibid, pp. 10-16

<sup>71</sup> ARQ, Bulgaria, 2012

<sup>72</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria

<sup>73</sup> MAR-INFO Newsletter, Zollkriminalamt, Köln, Germany, 2013

<sup>74</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012 p. 55

## Drug use

As the Balkan route is one of the world's most important and established drug-trafficking routes, it is fair to assume that there could be a considerable "spill over" effect in terms of illicit drug use in South-Eastern Europe. However, since 2011 very few general population surveys have been conducted in the region, except in Croatia. Lack of capacity precludes a complete understanding of the health impacts of illicit drugs on the region. Moreover, information about the type of data available is not regularly updated and statistics are often reused over several years.

Some drug research is conducted in South-Eastern Europe. Of particular note is that of the European School Survey Project on Alcohol and Other Drugs (ESPAD), which uses targeted surveys of schoolchildren aged between 15 and 16 to collect comparable data on substance abuse, and is able to highlight new and evolving trends.

With these caveats in mind, available data shows most opiate prevalence rates in South-Eastern Europe to be below the global average of 0.4 per cent.<sup>75</sup> There are two exceptions: the former Yugoslav Republic of Macedonia, which is in line with the global average, and Albania, which has a higher rate.

**Table 2: Reported opiate, cannabis, cocaine and ATS (excluding ecstasy-type stimulants), annual prevalence as a percentage of population aged 15-64, 2011 or latest year available**

Country/territory	Opiate <sup>76</sup>	Cannabis	Cocaine	ATS
Albania	0.45	1.8	0.78	0.02
Bosnia and Herzegovina	0.3	1.6	0.63	0.5
Bulgaria	0.29	2.5	0.60	0.95
Croatia	0.4	5	0.5	0.8
Greece	0.32	1.7	0.1	0.20
The former Yugoslav Republic of Macedonia	0.4	0.63	0.08	N/A
Montenegro	N/A <sup>77</sup>	1.9	0.52	0.72
Romania	0.11	0.30	0.1	0.03
Serbia	0.28	4.07	0.54	0.24
Kosovo	N/A	N/A	N/A	N/A
Western and Central Europe	0.3 <sup>78</sup>	7.6	1.2	0.7
Global	0.4	3.9	0.4	0.7

Source: UNODC, *World Drug Report 2013*

The same can be said for cannabis and ATS, and while the average prevalence rate for cocaine is higher than the global rate in most countries, it is lower in South-Eastern Europe than in Western and Central Europe.

<sup>75</sup> UNODC, *World Drug Report 2013*

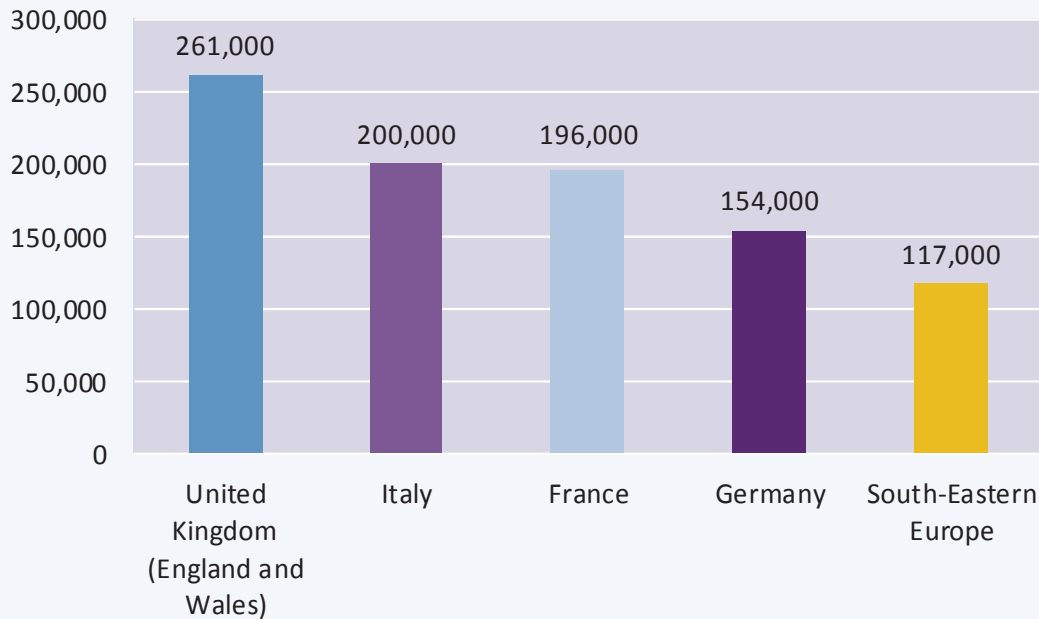
<sup>76</sup> Annual prevalence is given as a percentage of the population aged 15-64 (UNODC best estimate). See UNODC, *World Drug Report 2012*. These figures include all forms of drug administration (injecting and smoking).

<sup>77</sup> No recent reliable estimate. See UNODC, *World Drug Report 2012*

<sup>78</sup> UNODC best estimate for opiate users see *World Drug Report 2013*



**Figure 10: Estimated number of opiate users in the main markets of Western Europe compared with South-Eastern Europe, 2011 or latest year available**



Source: ARQ data; UNODC World Drug Report 2013

In absolute terms, the entire South-Eastern European heroin market is comparable in size to that of one of the four largest Western and Central European consumer markets. Therefore, the region should not be viewed solely as a transit route or hub, but also as a region that faces consumption challenges in its own right. It is noteworthy, however, that at retail level, heroin consumed in South-Eastern Europe has generally been found to be of lower quality than that consumed in the destination markets of Western and Central Europe.

### International cooperation

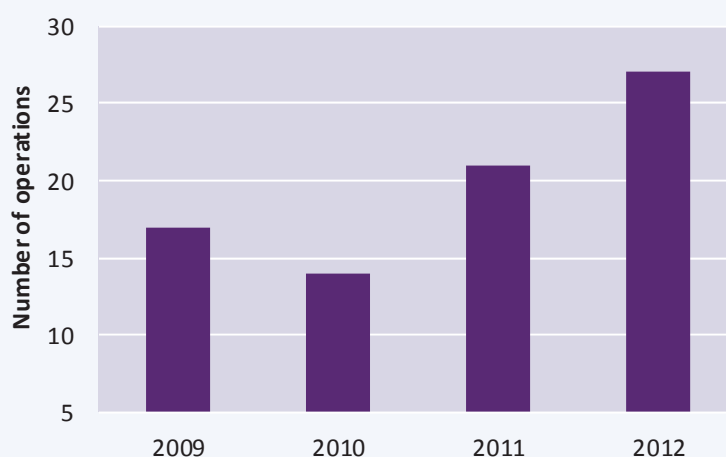
Since political tensions and turbulence in South-Eastern Europe came to an end, regional cooperation initiatives have flourished, often with international support. A partnership of more than 70 countries and international organizations, the Paris Pact Initiative is one of the most important frameworks and coordination bodies aimed at responding to the threat of Afghan opiates.<sup>79</sup> Its work includes the establishment of information focal points and the linking of strategic analysis along the entire length of the Balkan route, including in South-Eastern Europe.

At regional level, the establishment of SELEC (previously the SECI Centre) has helped increase regional cooperation and the production of tangible results. In 2011, SELEC helped facilitate 21 joint investigations, including “Operation SOYA”. This involved the law enforcement agencies of Serbia, Greece and the former Yugoslav Republic of Macedonia, with assistance from the United States Drug Enforcement Agency (DEA) and the British Serious Organised Crime Agency (SOCA), and resulted in the seizure of 169 kg of cocaine and 19 arrests. The trend for increased cooperation with SELEC

<sup>79</sup> See Paris Pact website, [https://www.paris-pact.net/index.php?action=cms\\_render&section=85&menu\\_loc=main&mm=mm2](https://www.paris-pact.net/index.php?action=cms_render&section=85&menu_loc=main&mm=mm2)

continued into 2012, with 27 joint operations including five transborder controlled deliveries.<sup>80</sup>

**Figure 11: Joint operations by SELEC member states, 2009-2012**



Source: SELEC

Cooperation with international law enforcement is not limited to SELEC. Most countries in the region also report good cooperation and links with the numerous Departmental Liaison Officers from Europe and North America. Foreign law enforcement not only provide operational assistance but also technical assistance and capacity building.

Countries in South-Eastern Europe are also pro-active in improving cooperation within the region. In 2010, Bulgaria initiated the establishment of a trilateral Contact Centre for Police and Customs Cooperation between Bulgaria, Greece and Turkey. Albania has also strengthened its links with neighbouring States, agreeing to the establishment of a new joint border control point with Montenegro and signing an agreement on exchange of information with the former Yugoslav Republic of Macedonia.<sup>81</sup> Elsewhere, a technical protocol for the implementation of Integrated Border Management was signed by Serbia and Kosovo,<sup>82</sup> which includes the exchange of information.<sup>83</sup>

Additionally, in September 2012, an agreement for the creation of Joint Investigation Teams was signed by the former Yugoslav Republic of Macedonia, Germany, Austria and the Netherlands. The continued importance of cooperation has been grasped by countries at both the beginning and the end of the Balkan route.

## Conclusion

While this Executive Summary describes the results of analysis by illustrating the dynamics and evolution of drug trafficking and use in South-Eastern Europe, the full report provides more in-depth analysis and presents evidence on seizures, price, purity and use of the four types of drug discussed.

<sup>80</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012, p. 58

<sup>81</sup> European Commission, *Commission Staff Working Document, Albania, 2012 Progress Report*, accompanying the *Communication from the Commission to the European Parliament and the Council, Enlargement Strategy and Main Challenges 2012-2013*, Brussels, 10 October 2012, p.56

<sup>82</sup> EULEX, *2012 Programme Report*, July 2012, p.34

<sup>83</sup> Serbia and Kosovo reached an agreement aimed at normalizing relations in April 2013.





The trafficking of Afghan heroin constitutes a threat to the security and public health of origin, transit and destination countries. Although heroin market restructuring in Western and Central Europe may be occurring,<sup>84</sup> Afghan heroin continues to flow virtually uninterrupted to those lucrative markets, underlining the continued importance of the Balkan route. With 2013<sup>85</sup> proving to be a record year for opium cultivation in Afghanistan, this seems unlikely to change in the short term.

Bulgaria, Greece, Romania and Croatia have all joined the EU. With the removal of border controls for freight goods, particularly between Bulgaria, Romania and Hungary, the interdiction of drug trafficking may involve new challenges. Moreover, Croatia's accession into the EU has opened a 1,377 km-long border between countries of the Western Balkans and the EU.

Given the significance of the Balkan route, fluctuations in East-West heroin flows are of great interest. The most important development may be that the Balkan route is being supplemented by trafficking along a South-North trajectory known as the "southern route". Competition from the southern route would negatively impact the total volumes of heroin flowing through South-Eastern Europe, but the amount reaching Western and Central Europe would remain essentially unchanged.

The nature of trafficking groups related to South-Eastern Europe continues to evolve. In the last decade, several major drug-trafficking groups, each focusing on one particular market (heroin, cocaine or heroin precursors), have been effectively dismantled. This monolithic approach to drug trafficking has increasingly given way to polydrug trafficking, which is more sensitive to changes in the market. Groups are also using better forms of communication, more sophisticated modus operandi and expanding into new markets, as well as building contacts at all stages of the supply chain.

The routes taken by traffickers have varied over the years, but the reasons behind the changes are not always self-evident. Traffickers make decisions that may initially seem counter-intuitive, but it is likely that observers do not have a complete picture of the options available to traffickers. Aggregate national seizure figures are not sufficient to understand the nature of drug trafficking and there are large information gaps linked to issues of data quality, data sharing and the secretive nature of the subject itself.

The lack of comprehensive knowledge of local drug markets is an area of concern and there is a need for improvement. Owing to a shortage of resources and capacity, important data on drug prices and purity is either incomplete or missing entirely. Law enforcement bodies in the region therefore have inconsistent information, which can lead to contradictory or incorrect assessments of the drug situation.

The combination of raised awareness, increased use and development of cooperation mechanisms and forensic capacity building are concrete measures that would place law enforcement and policy makers in a better position to evaluate the drug-trafficking situation in South-Eastern Europe and to make informed decisions on responses to the threat posed by illicit trafficking on the Balkan route.

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<sup>84</sup> See also the section of this report entitled "Getting to markets in Western and Central Europe" and the heroin overview section.

<sup>85</sup> UNODC, *Afghan Opium Poppy Survey*, 2013 p.4

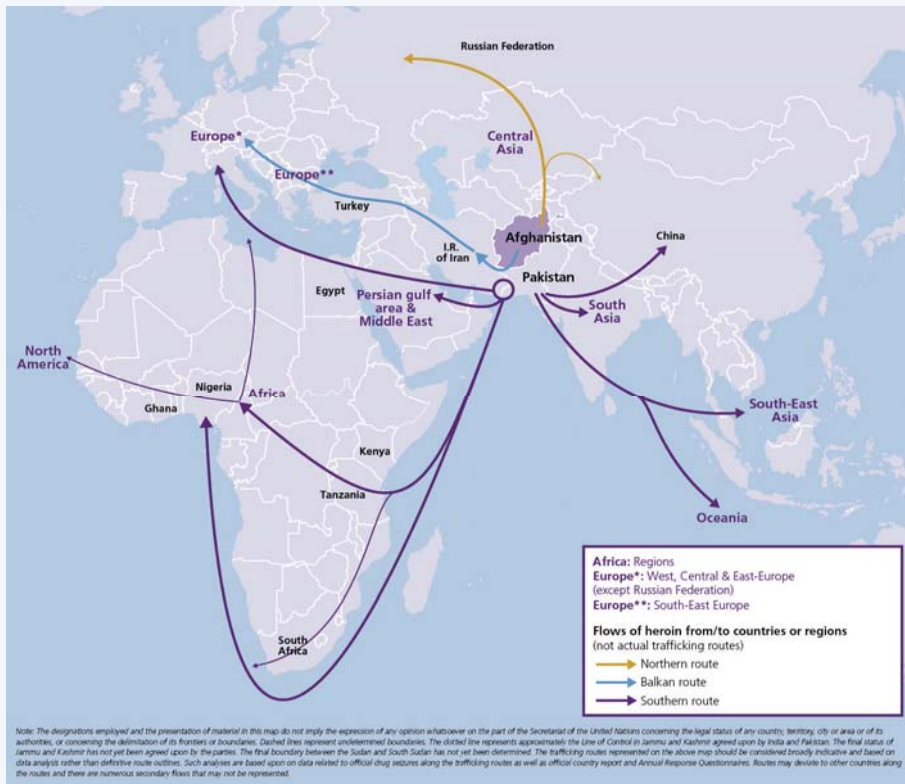




## INTRODUCTION

Afghan heroin is trafficked to every region of the world except Latin America. Heroin trafficking from production countries to consumer markets requires a global network of routes and facilitation by domestic and international criminal groups. Although the various trajectories are constantly evolving, there are certain well-established heroin trafficking routes from Afghanistan and other producing countries to international consumers. Some routes are chosen for geographic reasons, while others are associated with lower risk, higher profits or simpler logistics.

**Map 8: General Afghan heroin trafficking routes**



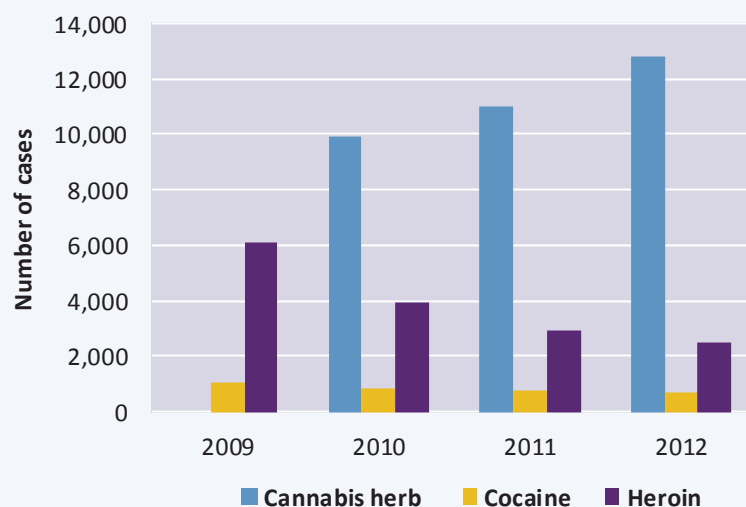
Source: UNODC AOTIP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

Despite the complexity of heroin trafficking routes, some global movements can be generalized for Afghan heroin. The “northern route” is the main heroin trafficking corridor linking Afghanistan to the large markets of the Russian Federation. An emerging network of trajectories known collectively as the “southern route” travels southward from Afghanistan, either through Pakistan or the Islamic Republic of Iran,<sup>86</sup> targeting both Europe and Asia. The third and oldest route<sup>87</sup> is an overland trajectory that travels via the Islamic Republic of Iran, Turkey and South-Eastern Europe to Western and Central Europe and is colloquially known as the “Balkan route”.<sup>88</sup>

This regional snapshot presents the drug trafficking situation in South-Eastern Europe with a focus on the Balkan route of heroin and its patterns and trends. The main objective of this report is to place policymakers and law enforcement analysts in a better position to evaluate the drug trafficking situation and make informed decisions regarding responses.

In Section 1 of this report, *Drug Routes and Trafficking Trends in South-Eastern Europe*, the general analyses made in the executive summary are explored further with particular emphasis on drug routes and the groups plying them. As this section will explore, groups indigenous to South-Eastern Europe work closely with international traffickers to transport illicit substances to destination countries. These groups may be diversifying their markets - cannabis seizures are increasingly reported in South-Eastern Europe while heroin, ATS and cocaine seizures are declining.

**Figure 12: Total number of seizure cases for heroin, cannabis herb and cocaine in South-Eastern Europe reported to SELEC, 2009- 2012**



Source: SELEC

While South-Eastern Europe is traditionally perceived as a transit region for heroin and other drugs reaching destination markets in Western and Central Europe, drug trafficking and organized crime pose a multifaceted challenge to health, the rule of law and development in the region. This challenge is largely beyond the individual reach of any single government; it links developed and developing regions and requires international

<sup>86</sup> UNODC, *World Drug Report 2013*, p.30

<sup>87</sup> UNODC, *World Drug Report 2012*, p.88

<sup>88</sup> *Ibid*, p.ix



cooperation. Section 2, *Challenges and Responses*, focuses primarily on these issues as well as looking at efforts aimed at increasing cooperation both within South-Eastern Europe itself and with source and destination countries.

The changing nature of trafficking presents significant challenges to counter-narcotics efforts in South-Eastern Europe and beyond. There is also the problem of knowledge gaps, which are particularly evident with regard to forensics and local drug markets. Having reviewed the latest trends in illicit drug supply and demand and the current efforts to stem trafficking within South-Eastern Europe, Section 3, *The Way Forward*, presents a selection of potential steps that could form part of an integrated and comprehensive response.





## 1. DRUG ROUTES AND TRAFFICKING TRENDS IN SOUTH-EASTERN EUROPE

South-Eastern Europe serves as a corridor for several drug trafficking routes to Western and Central Europe. Flows come from multiple directions. Externally, cocaine arrives from South America and almost all heroin comes from Afghanistan. Internally, South-Eastern Europe produces relatively large amounts of cannabis, notably in Albania. Of all the drug flows, only heroin flows can be considered strategically significant to consumption markets in Western and Central Europe.

The value of the Western and Central European retail cocaine market was estimated at US\$ 33 billion in 2011, while the retail heroin market was estimated at US\$ 13 billion in 2009.<sup>89</sup> There are no recent estimates of the value of the retail cannabis market, but it is also likely to be substantial. Proportional to their involvement in the drug trade, South-Eastern European traffickers receive part of the resulting profits. Increasingly, these traffickers are diversifying, cooperating and becoming more globalized.

### The Balkan route of heroin

For a significant part of the twentieth century, many of the South-Eastern European countries along the Balkan route were integrated politically and economically. Events at the end of the twentieth century fragmented this space. During the fragmentation process, the Balkan route was adjusted but continued to run through the region. For example, as a result of instability in the Balkans in the 1990s, the main Balkan route shifted temporarily from the Western<sup>90</sup> to the Eastern Balkans.<sup>91</sup> Once stability had been restored, Western Balkan trafficking trajectories were reactivated.<sup>92</sup> Today, the route is

<sup>89</sup> These figures are based on the total retail cocaine and heroin markets in Western and Central Europe, with a margin of error. See UNODC, *The Global Afghan Opium Trade: A Threat Assessment*, July 2011 and UNODC, *The Transatlantic Cocaine Market*, 2011. Cocaine and cannabis command a higher value than heroin on account of their larger user base. For example, it was estimated by EMCDDA in a report published in 2013 that 2,500 tons of cannabis were consumed in the EU. These estimates are difficult to compare but they do give an order of magnitude.

<sup>90</sup> For the purposes of this report, the Western Balkans is understood to encompass Albania, Bosnia and Herzegovina, Croatia, Montenegro, Serbia, the former Yugoslav Republic of Macedonia and Kosovo under United Nations Security Council Resolution 1244. See UNODC, *Corruption in the Western Balkans*, 2011

<sup>91</sup> For the purposes of this report, the Eastern Balkans will refer to Bulgaria and Romania. See UNODC, *The Global Afghan Opium Trade*, 2011, p. 117

<sup>92</sup> UNODC, *World Drug Report 2012*, p.78

still the channel via which perhaps the largest proportion of Europe's heroin supply travels.<sup>93</sup>

Owing to border controls, network allegiance and risk analysis carried out by the traffickers themselves, the Balkan route of heroin splits upon entering South-Eastern Europe. While complex, heroin flows through the Balkans can to some extent be categorized, based on the general trajectories and overall trends observed during data analysis. This report divides the Balkan route into three branches on the basis of geography and identified trajectories.<sup>94</sup>

It should be noted, however, that the branches described in the following section and represented on the map below should be considered broadly indicative rather than definitive. Branches may deviate to other countries along the Balkan route and there are numerous secondary routes that may not be represented. Moreover, routes and trajectories are not perfectly static and may change and/or overlap based, inter alia, on the decisions of traffickers in response to outside factors such as demand, law enforcement activities or changes in border control regimes.

**Map 9: Identified branches of the Balkan route in South-Eastern Europe**



Source: ARQ data, supplemented by national government reports and other official reports

<sup>93</sup> UNODC, *World Drug Report 2013*, ix; Europol, *OCTA*, 2013, p.11

<sup>94</sup> There are other classification schemes. For example EMCDDA divides the Balkan route into two branches: "From Turkey, the route then diverges into a southern branch through Greece, the former Yugoslav Republic of Macedonia, Albania, Italy, Serbia, Montenegro and Bosnia-Herzegovina and a northern branch through Bulgaria, Romania, Hungary, Austria, Germany and the Netherlands." See EMCDDA, *Monitoring the Supply of Heroin to Europe*, 2008, p.10





Along one branch, there may be a series of sales and re-sales that gradually move the drug towards its point of highest return. Along the way, shipments may be repackaged and cut with adulterants to increase profits. This appears to be a feature of the “southern branch” through Greece towards Italy as well as the “western branch” through the Western Balkans towards Western Europe. Of course, these features are not static in space and all three branches may display any of these characteristics.

Large shipments may also be centrally coordinated from origin to user; this appears to be the case for some large-scale trafficking on the “northern branch” (Turkey-Bulgaria-Romania-Western Europe), in particular as it concerns trajectories to Germany and the Netherlands.<sup>95</sup> The northern branch consists mainly of overland trafficking while the western and, in particular, the southern branch include sea trafficking at key stages.

A key difference between the branches is whether or not the areas they straddle are within or outside the EU. With the entry of Bulgaria and Romania into the EU, the northern branch became a single entry point into the EU. In contrast, the western branch crosses multiple EU borders, making it a riskier option for traffickers. There are, of course, additional factors to consider, and Greece provides an interesting example in that regard - despite having been a member of the EU since the 1980s (and Schengen since 2000), the country has not seen increased flows. It may be that other variables have mitigated the risk of trafficking, such as weaker networks linking Greece with earlier stages of the Balkan route, compared to the established connections linking various areas of South-Eastern Europe. All such factors could help predict the impact of disappearing borders on new EU members, such as Croatia.

While most branches of the Balkan route were once under the influence of Turkish/Kurdish criminal groups,<sup>96</sup> a shift occurred in the 1990s leading to Albanian groups from the Western Balkans gaining market shares,<sup>97</sup> in particular in transit or destination countries such as Italy, Greece and Switzerland.<sup>98</sup> Albanian groups generally purchase from Turkish wholesalers,<sup>99</sup> the latter of whom continue to handle large heroin consignments all the way along the Balkan route to destination markets.<sup>100</sup> Other traffickers indigenous to South-Eastern Europe often appear to be transportation professionals who are contracted to do the job, and are not necessarily members of the group that owns the drugs.<sup>101</sup>

The core transportation network in South-Eastern Europe is multimodal and includes road, rail and inland waterway links, along with a number of seaports, river ports and airports. Most trafficking is not multi-modal, however, and road vehicles are the preferred mode of transportation. Rail<sup>102</sup> and air routes<sup>103</sup> do not appear to be widely used

<sup>95</sup> According to the EMCDDA classification, “a northern branch through Bulgaria, Romania, Hungary, Austria, Germany and the Netherlands”. See EMCDDA, *Monitoring the supply of heroin to Europe*, 2008, p.10

<sup>96</sup> UNODC, *World Drug Report 2004*, p.71; *World Drug Report 2011*, p.65; *World Drug Report 2010*, p.57

<sup>97</sup> UNODC, *World Drug Report 2012*, p.84

<sup>98</sup> EMCDDA, *Monitoring the supply of heroin to Europe*, 2008, p.10

<sup>99</sup> A 2008 EMCDDA report makes mention of “Albanian-speaking traffickers, which reportedly buy heroin from Turkish wholesalers”. See EMCDDA, *Monitoring the supply of heroin to Europe*, 2008, p.10

<sup>100</sup> Siegel-Rozenblit, Dina, *Asian organized crime in the European Union*, p.11. Available from <http://www.europarl.europa.eu/activities/committees/studies/download.do?language=en&file=43151>

<sup>101</sup> UNODC, *The Globalization of Crime*, 2010, p.7

<sup>102</sup> The use of trains is rarely reported in the case of Balkan route trafficking. The largest rail seizure that UNODC is aware of occurred in December 2009 when Bulgarian Customs seized 53.56 kg of heroin at Svilengrad railway station. See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2009, p.11

to move heroin into or through the region. For example, the total amount of heroin reportedly seized on trains in South-Eastern Europe in 2011 amounted to little more than 4 kg.<sup>104</sup>

Trafficking and concealment methods tend to vary. Cars with EU license plates are thought to be under less scrutiny than those with non-EU license plates and are often used by traffickers.<sup>105</sup> Certain reported methods are able to bypass scanners, sniffer dogs and visual inspection.<sup>106</sup>

The Balkan route includes maritime trajectories. The most common involves the transportation of drugs across the Adriatic towards Italy on Greek or Albanian ferries. In 2008–2009, traffickers used the Black Sea ports of Romania and Bulgaria, but this appears to have declined in recent years.<sup>107</sup> Heroin trajectories across the Black Sea remain a possible alternative to the traditional overland trajectory.<sup>108</sup> For example, Turkey's anti-smuggling and organized crime department reported heroin seizures linked to the Black Sea coastline totalling 493 kg in 2012.<sup>109</sup>

**Map 10: Selected seaports in Italy, Albania, Montenegro, Turkey, Romania, Georgia and Bulgaria**



Source: UNODC

<sup>103</sup> INTERPOL indicates the existence of some air routes via Bulgaria (see INTERPOL, *SEETAC Drug Trafficking Report*, January-August 2010, p. 18).

<sup>104</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011

<sup>105</sup> Balkan Info *Seizure Report*, 2010, p.22

<sup>106</sup> ARQ, former Yugoslav Republic of Macedonia, 2010

<sup>107</sup> SELEC reports no “increased usage (...) via the Black Sea ports” in 2010-2011. See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011

<sup>108</sup> See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011

<sup>109</sup> See Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012, p.30

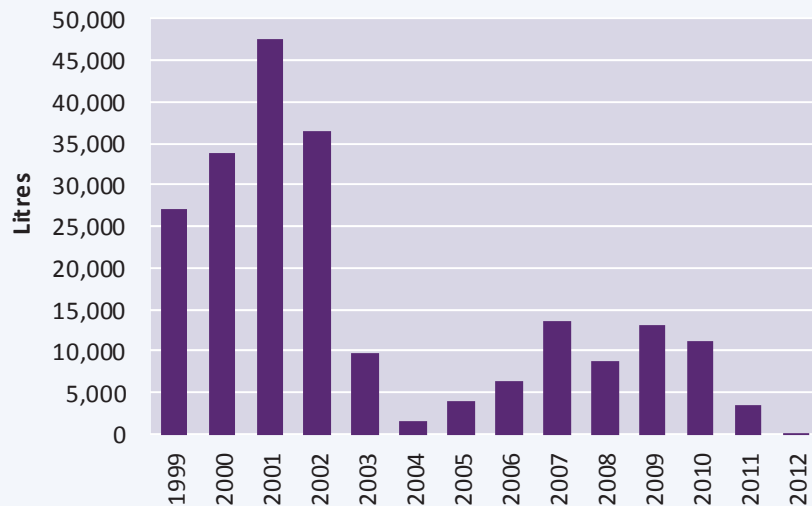


### Heroin precursors: The reverse Balkan route

The role of South-Eastern Europe as a transit zone for trafficking is not limited to illicit drugs - it was long the transit region for acetic anhydride (AA), the main precursor chemical used in heroin processing. The chemical was sourced in Western and Central Europe and shipped along the “reverse” Balkan route to Afghanistan through Turkey.<sup>110</sup> Over the last decade, the classic modus operandi for such trafficking has involved diversion from domestic trade channels in Europe followed by transportation by road - mainly along the Romania-Bulgaria-Turkey “northern branch” (although a Serbia-Bulgaria-Turkey trajectory also seems to have been used).<sup>111</sup>

There has been an almost total absence of AA seizures in South-Eastern Europe since 2010, when Bulgaria seized some 21 tons of the substance.<sup>112</sup> In 2012, the reverse Balkan route of AA appeared to be relatively dormant. Turkey, which in the past has seized anything from several hundred kilos to multi-ton shipments, saw its lowest seizures in over a decade. This is likely due to intensive law enforcement activity, including several international operations and the arrest of the main organized criminal group involved in the traffic of AA towards Turkey (the trial of the group leadership is underway).<sup>113</sup> Nevertheless, significant AA seizures in Turkey in 2013 appear to indicate that the route was still active.

**Figure 13: Acetic anhydride seizures in Turkey, 1999-2012**



Source: INCB; Ministry of Interior of Turkey

<sup>110</sup> INCB, *Report of the International Narcotics Control Board for 2008*, p.101

<sup>111</sup> UNODC, *The Global Afghan Opium Trade*, July 2011

<sup>112</sup> The last known seizure of AA destined to transit the region occurred in 2011 in Hungary and consisted of 6.5 tons. See UNODC, *The Global Afghan Opium Trade*, July 2011

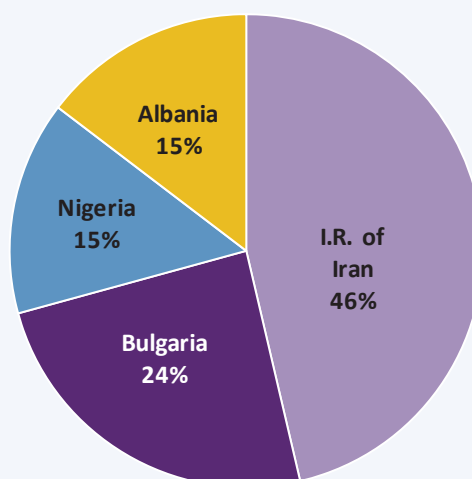
<sup>113</sup> See Europol, “Europol supports the seizure of 6.5 tonnes of heroin precursor”, 27 April 2011, available at <https://www.europol.europa.eu/content/press/europol-supports-seizure-65-tonnes-heroin-precursor-447>. This group is known to have trafficked at least 30 tons of AA to Afghanistan and was probably one of the main groups involved in AA trafficking from Europe.

## From Afghanistan to Turkey

The Balkan route begins in Afghanistan and Pakistan, where Afghan networks send heroin over the border into the Islamic Republic of Iran, offloading their shipments to groups that will manage transportation up to the border areas of Turkey.<sup>114</sup> In recent years, perhaps as a result of the strengthening of border controls between Turkey and the Islamic Republic of Iran, a sub route through Iraq may have emerged.<sup>115</sup> Large seizures in Georgia and Armenia in 2013-2014 represent examples of the way in which traffickers may opt to travel through the Caucasus to reach Europe.<sup>116</sup> Nevertheless, most of the flow travelling from the Islamic Republic of Iran continues into Turkey.

The main players organizing shipments into and through Turkey appear to be Turkish groups.<sup>117</sup> Afghan groups do not appear to operate beyond their national border when it comes to heroin trafficking on the Balkan route, but Iranian groups<sup>118</sup> and to lesser extent Bulgarian, Albanian and Nigerian groups are active in opiate (heroin and opium) trafficking throughout Turkey as attested by arrest statistics.

**Figure 14: Nationalities of foreign traffickers arrested on opiate trafficking charges in Turkey, 2012**



Source: Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012, p.32

Once in Turkey, heroin traffickers generally head towards the borders with Bulgaria or Greece. In 2011-2012, the main destination identified for heroin passing through Turkey was the Netherlands, followed by Germany.<sup>119</sup> Of those two countries, Germany is primarily a final destination country while the Netherlands serves more commonly as a

<sup>114</sup> UNODC, *The Global Afghan Opium Trade*, July 2011

<sup>115</sup> UNODC, *World Drug Report 2013*, p.30. See also *Report of the Subcommittee on Illicit Drug Traffic and Related Matters in the Near and Middle East* in its forty-seventh session, held in Antalya, Turkey, 19-23 November 2012.

<sup>116</sup> 116 kg of heroin seized in Georgia that was reportedly continuing to Ukraine and Moldova. See Ministry of Internal Affairs of Georgia official website, "Ministry of Internal Affairs exposed the fact of international drug traffic", 4 July 2013. Available at [police.ge/en/shinagan-saqmeta-saministros-gantskhadeba/5077](http://police.ge/en/shinagan-saqmeta-saministros-gantskhadeba/5077). On 18th January 2004, 927 kg of Afghan heroin was seized on the Iranian-Armenian Border Crossing Point (Meghri). The heroin was transiting via Armenia to Georgia. See Customs Services of Armenia official website, "Nearly one ton of heroin detected at Meghri Customs point", January 2014, [www.customs.am/csMD\\_News.aspx?ntname=csMDOfficialNews&nid=1522](http://www.customs.am/csMD_News.aspx?ntname=csMDOfficialNews&nid=1522)

<sup>117</sup> UNODC, *World Drug Report 2010*, p.57; Europol, *OCTA*, 2009, p.19, available at [www.europol.europa.eu/sites/default/files/publications/octa2009\\_0.pdf](http://www.europol.europa.eu/sites/default/files/publications/octa2009_0.pdf)

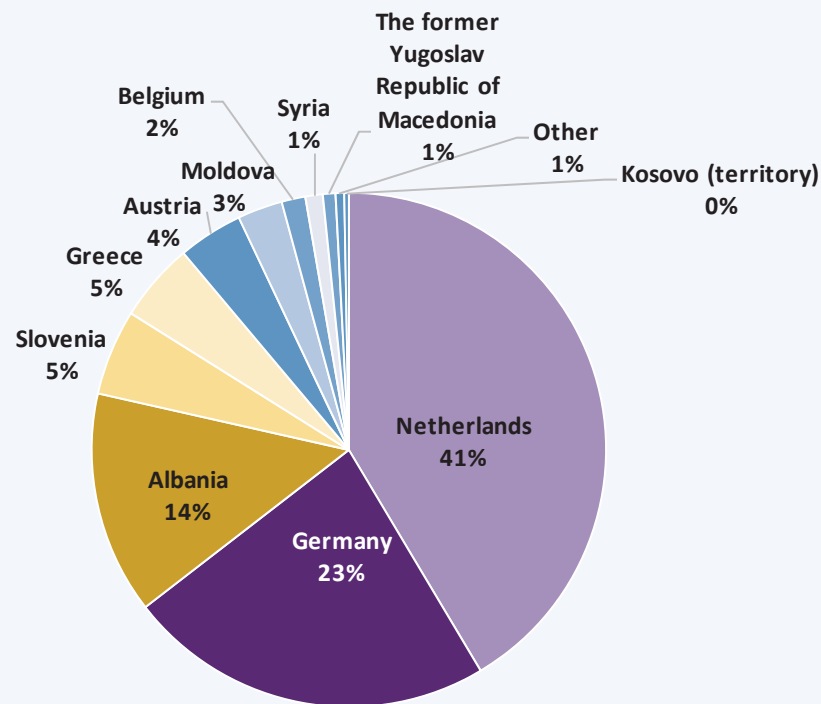
<sup>118</sup> According to Turkish law enforcement, "Iranians have been the dominant foreign actors in opiate trafficking schemes". See Turkish National Police, *Turkish Report of Anti-Smuggling and Organized Crime 2012*, p.32

<sup>119</sup> Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012, p.31; 2011, p.24



redistribution centre;<sup>120</sup> drugs are redistributed from there to Germany, France and the United Kingdom, among other countries. Other destinations identified by Turkish officials in 2011 were Albania and Greece, which are both important transit points on the way to the destination market of Italy.

**Figure 15: Identified destinations of heroin seized in Turkey, 2011**



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

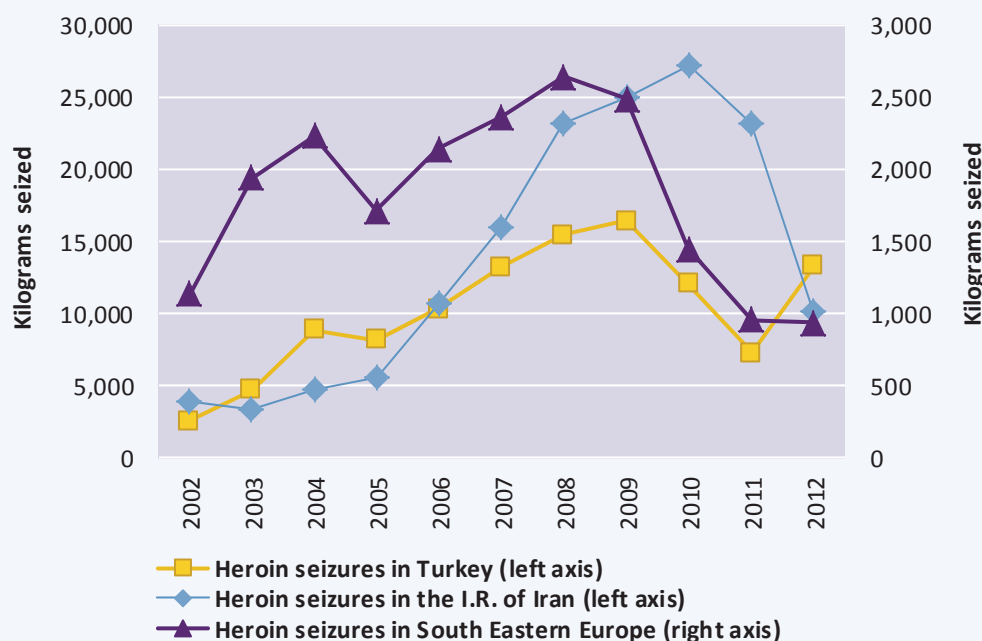
Traditionally, seizure volumes have been significant at the start of the Balkan route (Turkey and the Islamic Republic of Iran) and have subsequently declined, notably in South-Eastern Europe.<sup>121</sup> In 2012, the 10 countries and territories that comprise South-Eastern Europe seized less than 1 ton of heroin. This contrasts the 13.3 tons seized upstream in Turkey that year. For every kilogram seized in South-Eastern Europe in 2012, approximately 13 were seized in Turkey.

Collective seizures in South-Eastern Europe began declining in 2009 and, as of 2012, they appear to have reached a 10-year low at 930 kg (rounded). Patterns upstream in Turkey and the Islamic Republic of Iran are less clear. The decline in Iranian seizures occurred after the decline in South-Eastern Europe. Patterns in South-Eastern Europe and Turkey are generally consistent with one another but the sharp increase in Turkey in 2012 is a clear exception to this rule. Interestingly, this increase is not matched in the Islamic Republic of Iran either, despite the fact that Turkey is located further along the trafficking route.

<sup>120</sup> UNODC, *World Drug Report 2012*, p.78

<sup>121</sup> UNODC, *Crime and its Impact on the Balkans*, March 2008, p.13

**Figure 16: Heroin seizures in Turkey, the Islamic Republic of Iran and South-Eastern Europe, 2002-2012**






Source: Delta database 2002-2011; SELEC questionnaires and ARQ 2012

Getting a full picture of the flows through South-Eastern Europe is difficult because Turkey seizes such large amounts in its role as a geographical and law enforcement bottleneck. In 2012, Turkish authorities prevented a record 850-kg shipment of heroin from proceeding into Germany/the Netherlands along the Balkan route. This single seizure almost equals the total seizure volume for South-Eastern Europe for 2012. Another massive seizure of 718 kg was made by Turkish Customs in July 2013 on the Turkish-Bulgarian border.<sup>122</sup>

**Table 3: Historic heroin seizure in Turkey, 2012**

Date	Amount	Method	Route	Remarks
2012	850 kg	Truck	Turkey – Germany – the Netherlands	The syndicate had connections to the Islamic Republic of Iran, Iraq, Germany and the Netherlands

Source: Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012, p.31

<sup>122</sup> “Drug Trafficking Situation in South-Eastern Europe”, presentation by SELEC delegate, third meeting of UNODC informal working group on heroin and acetic anhydride trafficking to/from Europe, 9 September 2013, Lisbon, Portugal.



The latest UNODC estimates suggest that up to 65 tons of heroin flow into South-Eastern Europe annually, mostly directly overland from Turkey.<sup>123</sup> In South-Eastern Europe, Greece and Bulgaria are two countries that have made consistently high seizures in the last decade both in absolute terms and relative to the region or countries in Western and Central Europe. They accounted for 67 per cent of all heroin seized in 2011-2012.<sup>124</sup> Once these two frontline countries are breached, however, large-scale trafficking becomes somewhat less visible relative to its importance (see map below).

**Map 11: Heroin seizures in South-Eastern Europe and Turkey (2012)**



Source: ARQ 2012 (Romania, Bosnia and Herzegovina); Annual SELEC Questionnaire on Drug Trafficking for 2012 (Serbia); Anti-Drug Unit of Kosovo Police; Ministry of Interior of the former Yugoslav Republic of Macedonia.

No single seizure of more than 100 kg was reported in South-Eastern Europe in 2011-2012,<sup>125</sup> despite evidence that Balkan route trajectories downstream, such as in Germany and Austria, were carrying larger shipments (see table below for comparison).<sup>126</sup> Taken together, large seizures before and after South-Eastern Europe appear to indicate that the Balkan route remains a major conduit for heroin and that logistics for large shipments are exceedingly well organized.

<sup>123</sup> UNODC, *The Global Afghan Opium Trade: A Threat Assessment*, July 2011.

<sup>124</sup> ARQ 2012 Romania, Bosnia and Herzegovina, Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece, Albania, Bulgaria, Serbia; Anti-Drug Unit of Kosovo Police; Ministry of Interior of Montenegro; Ministry of Interior of the former Yugoslav Republic of Macedonia

<sup>125</sup> SELEC, *Report on Drug Seizures in South Eastern Europe, 2011, 2012*

<sup>126</sup> WCO, *Customs and Drugs Report*, 2011, p.20

**Table 4: Largest annual single seizure in South-Eastern Europe (SEE) and selected Balkan route heroin seizures in Turkey, Austria and Germany, 2011-2013 (kilograms)**

Seizure country	Date	Transportation method	Route	Amount
Turkey	2012	Truck	Turkey – South-Eastern Europe – Germany – the Netherlands	850
Turkey	July 2013	Truck	Turkey – Bulgaria – Serbia – Bosnia and Herzegovina	700
Turkey	August 2013	Truck	Turkey – Bulgaria – Serbia – Croatia – Slovenia – Austria – Germany – Belgium	393
Germany	2011	Truck	Turkey – Bulgaria – Hungary – Austria – Germany – the Netherlands	150
Austria	January 2012	Truck	Bulgaria – Romania – Hungary – Slovakia Austria – Germany – Luxemburg – the Netherlands	130
Bulgaria (largest seizures in SEE 2011, SELEC Report 2011)	March 2011	Truck	Turkey – Bulgaria	96
Romania (largest seizures in SEE 2012, SELEC Report 2012)	June 2012	Car	Turkey – Bulgaria – Romania	40

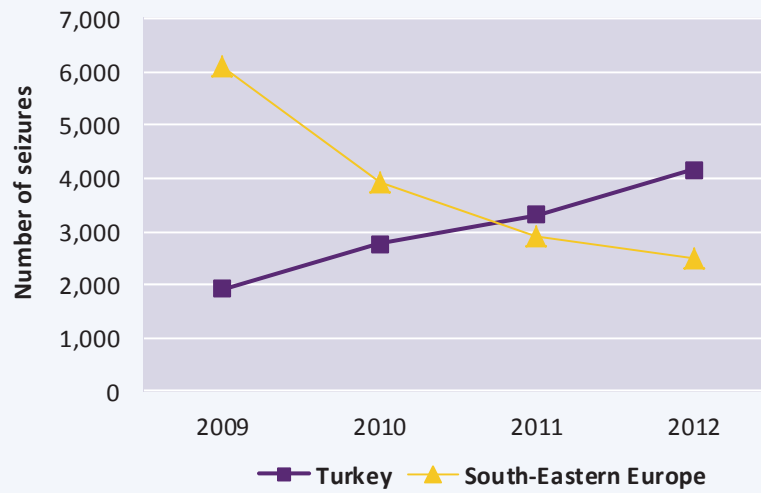
Source: Austrian BKA; WCO; SELEC; Turkish National Police. Note: Figures are rounded

There are two possible explanations as to why large seizures of heroin are being made outside South-Eastern Europe but not within the region itself. As a large number of seizures of small quantities are actually being made in South-Eastern Europe (see figure 17), large quantities may simply be going undetected as they transit the region. On the other hand, traffickers may be splitting large shipments into far smaller quantities, which are subsequently reassembled beyond the borders of South-Eastern Europe, closer to the principal markets in Western and Central Europe.





**Figure 17:** Number of heroin seizures in South-Eastern Europe and Turkey reported to SELEC, 2009-2012



Source: SELEC, *Report on drug seizures in South-Eastern Europe*, 2010, p.8; 2012, p.11

## The northern branch

### *(Turkey – Bulgaria – Romania – Western and Central Europe)*

The “northern branch” refers to a route from Turkey into the EU through Bulgaria, Romania and Central Europe and onward to Germany,<sup>127</sup> the United Kingdom and France (among other countries), generally by way of the Netherlands.

**Map 12: Northern branch of the Balkan route**



Source: ARQ data, supplemented by national government reports and other official reports

### **Bulgaria**

The overwhelming majority of heroin shipments enter Bulgaria via overland routes.<sup>128</sup> The border between Bulgaria and Turkey was reinforced in 2008-2009,<sup>129</sup> when scanners

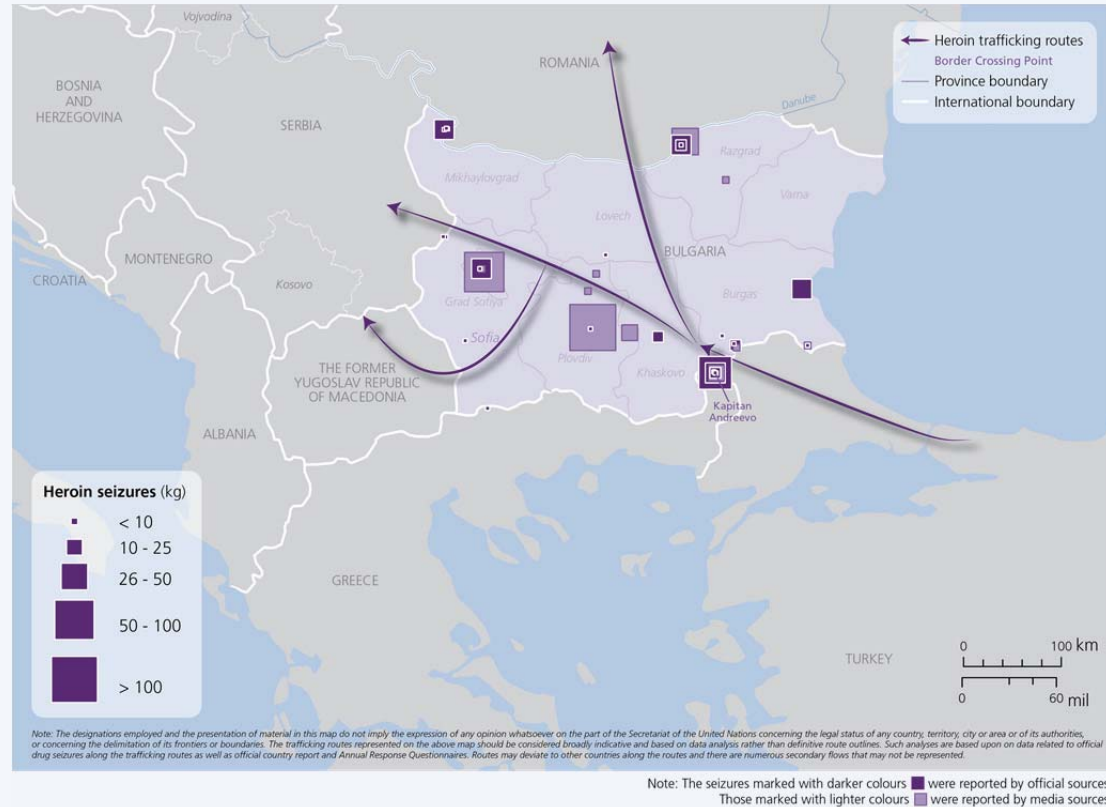
<sup>127</sup> German BKA, *Narcotic Drugs Annual Report 2010*, Abridged Version, p.7

<sup>128</sup> Bulgarian Black Sea ports have in the past been used for heroin trafficking, as illustrated by a huge, 400-kg heroin seizure in 2008. Since then, no heroin seizures have been reported at Bulgaria's seaports. See US Department of State, *INCSR*, 2009



were installed and the capacity of border officials was increased. Further improvements were made in 2011.<sup>130</sup>

**Map 13: General trafficking routes and locations of heroin seizures in Bulgaria as reported to UNODC, presented in government reports or in the media, 2010-2012**



Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

Bulgaria tends to seize the majority of heroin in South-Eastern Europe, with over 383 kg seized in 2011<sup>131</sup> (some 40 per cent of the regional total). The single largest seizure in the region in 2011 occurred in Bulgaria. It consisted of 96 kg and occurred at the Kapitan Andreevo border crossing.<sup>132</sup> When looking at annual seizures in Bulgaria over the last decade, a sharp drop is noted in 2010. This appears consistent with the strengthening of the Bulgaria-Turkey border the previous year. The overall trend is one of continuously declining seizures.

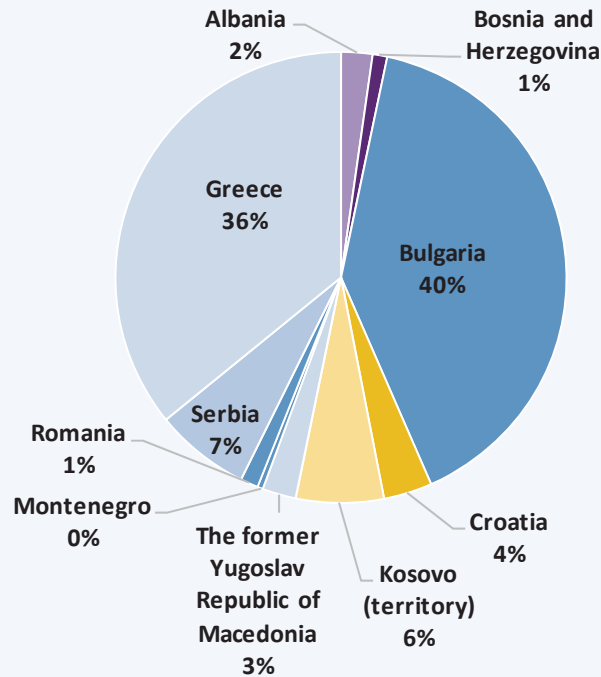
<sup>129</sup> The border crossing was fully renovated between November 2008 and June 2009 and fitted with state-of-the-art detection equipment including x-ray and gamma ray scanners. See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2009, p.11 and *Balkan Info Situation Report*, 2011, p.7

<sup>130</sup> According to Bulgaria's official report to EMCDDA in 2013, "In connection with optimising the customs control for counteraction to illegal drug and precursor trafficking, in 2011 the Customs Agency signed contracts for the purchase of 8 x-ray systems (two stationary and six mobile ones), to check trucks and containers for carrying drugs, with the aim to increase the border points control capacity". See EMCDDA, *2012 National Report, Bulgaria*, p.116

<sup>131</sup> ARQ Bulgaria, 2011

<sup>132</sup> EMCDDA, *2012 National Report, Bulgaria*, p.117

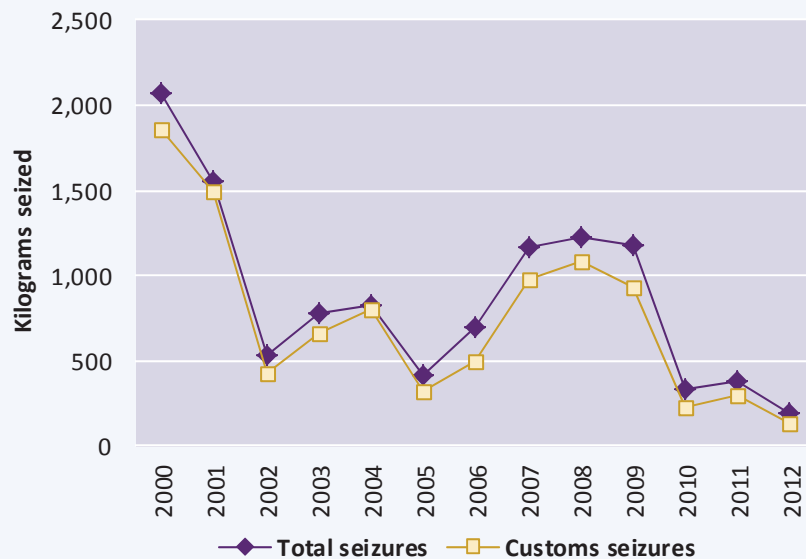
**Figure 18: Regional breakdown of heroin seizures in South-Eastern Europe, 2011**



Source: Delta database

Bulgaria seized 195 kg in 2012, a low volume not seen since the mid-1990s.<sup>133</sup> That same year, Greece overtook Bulgaria as the main seizing country in South-Eastern Europe (see section on the southern branch). Bulgaria’s total 2012 seizures (195 kg) represent 45 seizure cases (compared with 384 kg and 55 cases for 2011).<sup>134</sup>

**Figure 19: Heroin seizures by Bulgarian Customs and total national seizures, 2000-2012**



Source: UNODC DELTA database; ARQ 2012; Bulgarian Customs

<sup>133</sup> The previous all-time low was 199 kg seized in 1995. See UNODC, *World Drug Report 2000*

<sup>134</sup> Annual SELEC Questionnaire on Drug Trafficking for 2011, 2012, Bulgaria



Individual heroin consignments appear to be shrinking in size. Looking strictly at Customs seizures, for example, the total number of cases remained steady between 2011 and 2012 (18 cases each year) but the total volume dropped by more than half (298 kg in 2011 to 129 kg in 2012).<sup>135</sup> As of 2011-2012, it appears that heroin seizures at the border typically consist of small 15-25-kg shipments, perhaps suggesting that some shipments are broken down into increasingly smaller components before they reach the border with Bulgaria. This reduces losses for traffickers and also increases the demands on detection capacity.

**Table 5: Average volume of heroin per Customs seizure case in Bulgaria, 2009-2012 (kilograms)**

Year	Average volume
2009	37
2010	17
2011	18
2012	8

Source: “Bulgarian law enforcement authorities in combating drug smuggling in 2012”, presentation by Bulgarian Customs for the regional conference entitled “19th anti drug trafficking task force meeting”, Bucharest, Romania, May 2013

Based on seizure data in Bulgaria, transportation methods appear to have evolved, with decreased use of lorries and more shipment by private vehicles.<sup>136</sup> Only one lorry was stopped in connection with heroin trafficking in 2011; no seizures on lorries were reported in 2012.<sup>137</sup> Trucks are still used for trafficking large loads through Bulgaria, as indicated by seizure data in Turkey and Western and Central Europe, but they are less likely to be caught in South-Eastern Europe.

Although some northern branch shipments have been known to travel through Serbia,<sup>138</sup> the northern branch generally refers to a pathway through Romania (i.e. within the EU).<sup>139</sup> Most interdictions have occurred on the Danube Bridge cross-border checkpoint with Romania and the ferry travelling from Bulgaria to Romania.<sup>140</sup> To Bulgarian authorities, such seizures “confirm the tendency observed over recent years in Bulgaria that large quantities of heroin are imported and kept in stock in Bulgaria; then they are reloaded and carried by other means of transport across the European Union internal borders toward end users in Western Europe”.<sup>141</sup>

Those investigated in transnational opiate trafficking cases in Bulgaria are overwhelmingly Bulgarian nationals, followed by Romanians. The remainder include

<sup>135</sup> “Bulgarian law enforcement authorities in combating drug smuggling in 2012”, presentation by Bulgarian Customs for the regional conference entitled “19th anti drug trafficking task force meeting”, Bucharest, Romania, May 2013

<sup>136</sup> EMCDDA, *2012 National Report, Bulgaria*, p.117

<sup>137</sup> “Bulgarian law enforcement in combating drug smuggling in 2012”, presentation for SELEC 19th Meeting of Anti-Drug Trafficking Task Force, 21-22 May 2013, Bucharest, Romania

<sup>138</sup> Hungary, which borders both Romania and Serbia, reports receiving half of its heroin from Romania and the other half from Serbia. It should be noted, however, that Hungary only seized 3.1kg of heroin in 2011. See Hungary ARQ, 2011

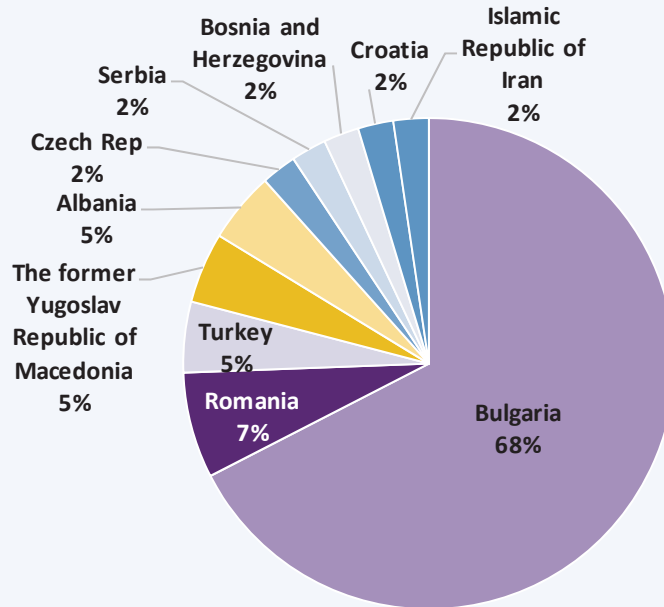
<sup>139</sup> United States Department of State, *INCSR*, 2009. See also EMCDDA, *Monitoring the supply of heroin to Europe*, 2008, p.10

<sup>140</sup> EMCDDA, *2012 National Report, Bulgaria*, p.117

<sup>141</sup> EMCDDA, *2012 National Report, Bulgaria*, p.117

almost every other nationality in South-Eastern Europe, perhaps indicating trajectories reaching into those countries as well.

**Figure 20: Citizenship of suspects investigated in transnational opiate trafficking cases in Bulgaria, 2012**

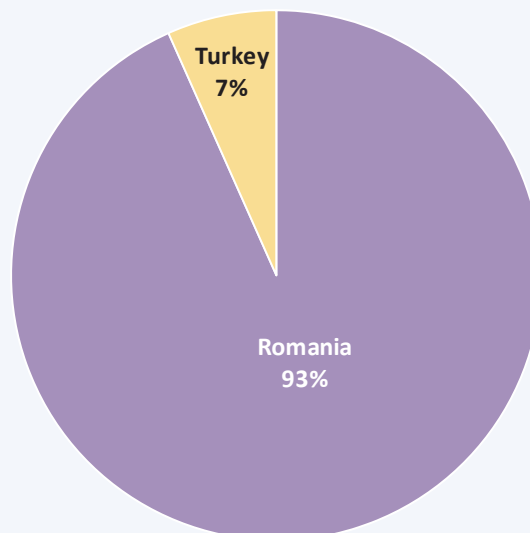


Source: Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria

### Romania

In contrast to Bulgaria’s arrest figures, those involved in trafficking heroin in Romania appear to be largely Romanian nationals.

**Figure 21: Citizenship of the suspects investigated in transnational opiate trafficking in Romania, 2012**



Source: Annual SELEC Questionnaire on Drug Trafficking for 2012, Romania

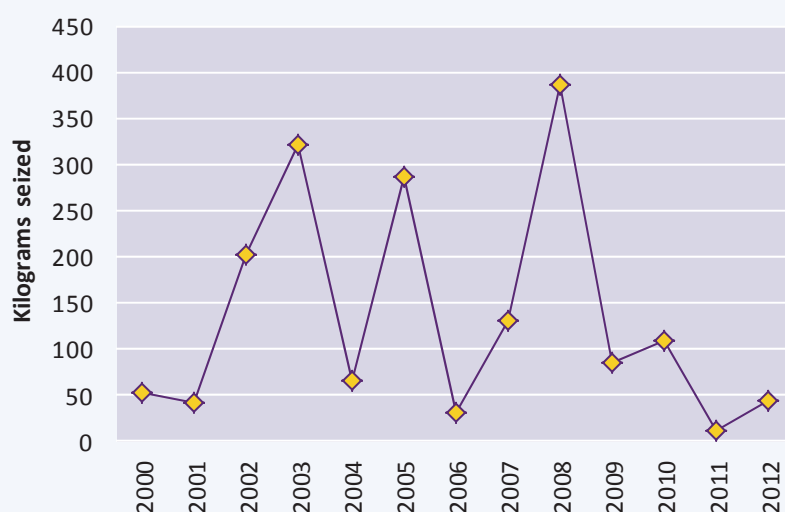
Heroin seizures in Romania have not shown a clear trend over the last decade and are not fully consistent with seizure trends upstream in Bulgaria and Turkey. This variability is most likely due to fluctuations in the rate of interdiction, rather than being indicative of



any significant changes in the volumes flowing through the country. The exception to this is the overall decline since 2008, which is roughly in line with the regional trend.

Romania is further along the trafficking route and its heroin seizures have been less significant than Bulgarian seizures, but in 2011 they declined nine-fold, amounting to just 12 kg (down from 108 kg in 2010). In 2012, seizures increased to 45 kg on the strength of one joint operation with SELEC. This occurred in June 2012 when the Romanian Anti-Drug Directorate seized 39.65 kg of heroin travelling the northern route to the Netherlands.<sup>142</sup> According to SELEC data, this was the largest single shipment seized in South-Eastern Europe in 2012.<sup>143</sup>

**Figure 22: Heroin seizures in Romania, 2000-2012**



Source: Delta database; ARQ data 2012

Heroin does not appear to be trafficked from Romania into Serbia (or the Ukraine).<sup>144</sup> Available data indicates that the northern branch continues into Hungary and onwards, including to Austria, Germany and the Netherlands.

Traffickers usually make use of private cars to transport drugs into and through Romania, which is in line with trends reported in Bulgaria and Turkey.<sup>145</sup> According to Romanian authorities, transnational networks also transport significant amounts of heroin from Turkey using public buses. Once in Romania, it is stored and transported out of the country in private vehicles.<sup>146</sup>

Romanian law enforcement have acknowledged that, in parallel to this, larger consignments of heroin continue to transit their territory handled by “international criminal networks trafficking hundreds of kilos of heroin on specified routes by trucks, which have special built compartments to conceal the trafficked drugs”.<sup>147</sup>

<sup>142</sup> Romania ARQ, 2012; SELEC, *Annual Report 2012*, p.27, available at [www.secicenter.org/doc/Annual%20Report%202012.pdf](http://www.secicenter.org/doc/Annual%20Report%202012.pdf)

<sup>143</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012, p. 12

<sup>144</sup> Romania ARQ, Q24: “Romania still remains mainly located on the traditional “Balkan route”, especially on its northern variant, involving the territory of the following states: Afghanistan – Iran – Turkey – Bulgaria – Romania – Slovakia – Czech Republic – Germany and the Netherlands.”


<sup>145</sup> Romania ARQ, 2011, Q. 9-10

<sup>146</sup> See ARQ Romania, 2011

<sup>147</sup> Romania ARQ, 2011, Q. 9-10

This assessment is supported by seizures reported downstream in Western and Central Europe. For example, Germany's single largest seizure in 2011 consisted of 150 kg of heroin transported by truck along the northern branch of the Balkan route (Bulgaria-Romania-Hungary-Austria) towards Belgium and the Netherlands.<sup>148</sup> Furthermore, a historic seizure of 130 kg of heroin was reported by Austrian law enforcement in 2012 on the Austria-Germany border. The drugs were seized from a Bulgarian truck travelling on the northern branch that was destined for the Netherlands.

**Table 6: Historic heroin seizure in Austria, 2012**

Date	Amount	Method	Route	Remarks
11-01-2012	130 kg	Truck registered in Bulgaria	Bulgaria – Romania – Hungary – Slovakia – Austria – Germany – Luxemburg – the Netherlands	Seized at Suben German-Austrian border crossing point
				

Source: Austrian BKA, 2013

<sup>148</sup> WCO, *Customs and Drugs Report*, 2011, p.20





## The southern branch

(Turkey – Greece - Italy/Western Europe)

**Map 14: Southern branch - Greek seaports and general heroin trafficking route**



Source: ARQ data, supplemented by national government reports and other official reports. See [www.searates.com/maritime/greece.htm](http://www.searates.com/maritime/greece.htm)

The “southern branch” essentially refers to a route leading from Turkey into the Schengen area<sup>149</sup> of the EU through Greece.<sup>150</sup> It usually continues to the main destination market of Italy, but in some cases the heroin may be destined for further afield (for example, the United Kingdom or the Netherlands).<sup>151</sup>

### Greece

Some observers believe that certain routes have shifted towards the Greece-Turkey border (Kepio/Evros-Ippsala) as a result of increasingly stringent procedures on both sides of the Bulgaria-Turkey border (notably at Kapitan Andreevo).<sup>152</sup> This appears to strengthen reports from Bulgarian officials that “some of the organised crime groups actively use the Bulgarian-Greek borders for heroin import from Turkey in order to avoid customs control at the three frontier posts with Turkey”.<sup>153</sup> It should be noted

<sup>149</sup> The Schengen Agreement permits people to travel freely within the Schengen area (consisting of 26 European countries)

<sup>150</sup> EMCDDA, *2012 National Report (2011 data) to the EMCDDA by the Reitox National Focal Point, Greece, New Development, Trends and in-depth information on selected issues*, p. 140

<sup>151</sup> Greece ARQ, 2009, p.III, Q. 3-5

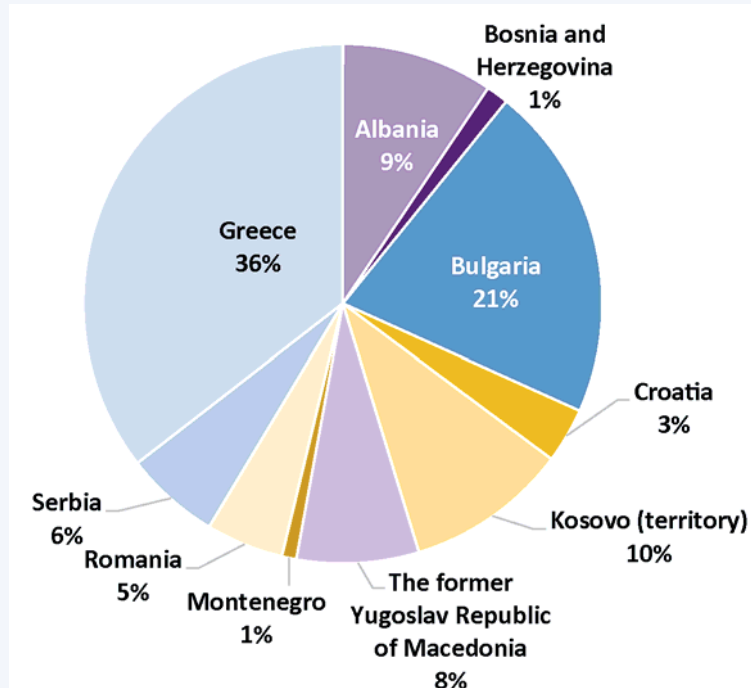
<sup>152</sup> Report by the Bulgaria-based centre for the study of democracy, *Bulgaria: Serious and Organized Crime Threat Assessment 2010–2011*, p.27: “the tightened cross-border control at the Bulgarian-Turkish border in the last years has also diverted the trafficking channels through the Turkish-Greek border and the Caucasus.”

<sup>153</sup> EMCDDA, *2012 National Report, Bulgaria*, p.117

however that, along with the Bulgaria-Turkey border, Turkey also strengthened its borders with Greece.<sup>154</sup>

There is a stark contrast between Bulgarian Customs seizure totals on the Turkish border in 2011 (108 kg)<sup>155</sup> and those of Greece (11 kg at all border crossings).<sup>156</sup> At the same time, in 2012 Greece seized the largest amount of heroin in South-Eastern Europe - 40 per cent more than Bulgaria. Some shipments may travel untouched through Greece towards destination markets but others are being cut and repackaged. Greece reported six cutting “laboratories” in 2011<sup>157</sup> and 14 in 2012.<sup>158</sup>

**Figure 23: Regional breakdown of heroin seizures in South-Eastern Europe, 2012**



Source: Annual SELEC Questionnaire on Drug Trafficking for 2012 (Greece, Albania, Serbia); ARQ (Bosnia and Herzegovina, Romania, Bulgaria, Croatia); Kosovo Division against Organized Crime, *Annual Report*, 2012

Overall, Greece seized some 331 kg of heroin in 2012, down from the previous peak of 2009 but almost identical to its 2011 seizure total. Most of these seizures are unlikely to have been voluminous. Greece reported 2,045 seizure cases in 2012 (compared with 2,445 in 2011).<sup>159</sup> By contrast, Bulgaria’s total 2012 seizures (195 kg) represent only 45 seizure cases.<sup>160</sup>

<sup>154</sup> EU, Directorate General for Internal Policies, Policy Department D, “Background note: delegation to Bulgaria border with Greece and Turkey in the context of EU external border”, CONT Delegation to Bulgaria, 18-20 September 2013

<sup>155</sup> Annual SELEC Questionnaire on Drug Trafficking for 2011, Bulgaria

<sup>156</sup> Annual SELEC Questionnaire on Drug Trafficking for 2011, Greece

<sup>157</sup> ARQ, Greece, part iv

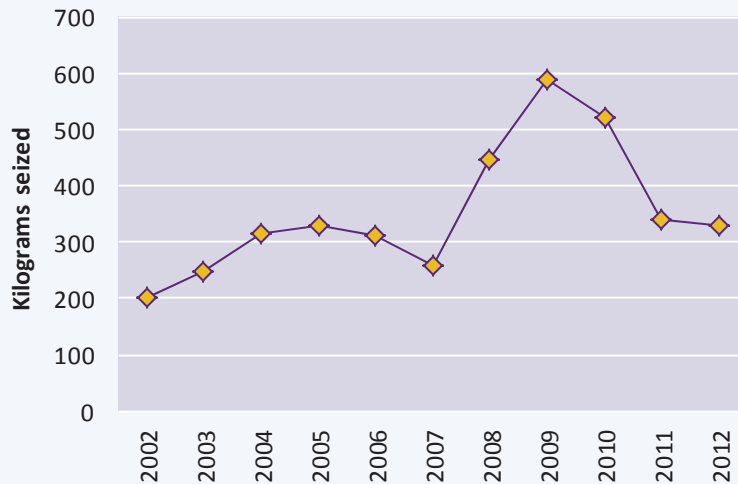
<sup>158</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

<sup>159</sup> Annual SELEC Questionnaire on Drug Trafficking for 2011, Greece; Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

<sup>160</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria



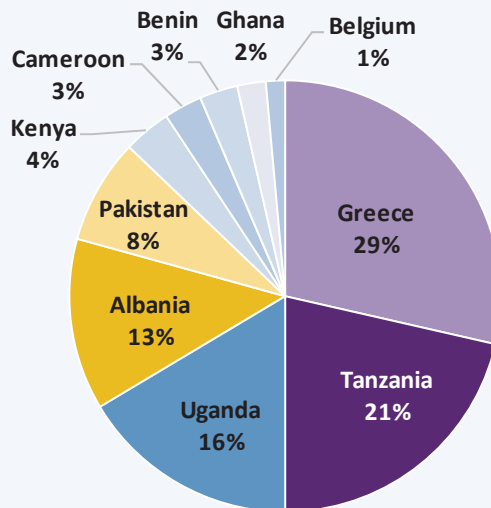
**Figure 24: Heroin seizures in Greece, 2002-2012**



Source: ARQ 2011; Delta database; Greek Customs; Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

Italy was the only heroin destination country identified in Greek official reports for 2010-2011.<sup>161</sup> Moreover, Italy was the final destination in the two largest 2011 seizures on the Greece-Turkey border that UNODC is aware of, which were carried out by Turkish Customs at Ipsala and consisted of 73 kg and 62 kg<sup>162</sup> respectively. Similarly, Greece was officially reported as the first identifiable departure country for Italy’s heroin in 2011 and 2012.<sup>163</sup>

**Figure 25: Departure countries for heroin seized in Italy, 2011**

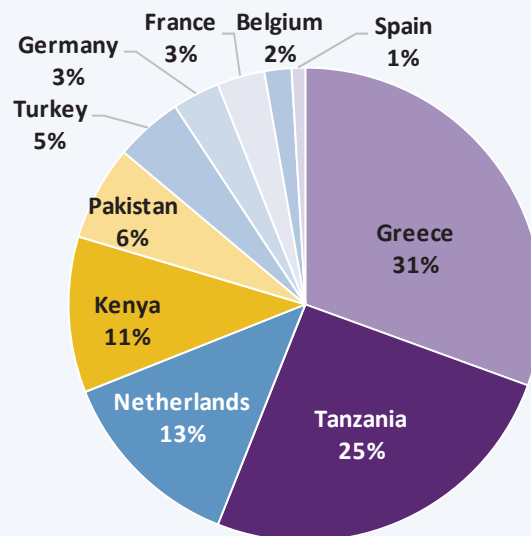


Source: Adapted from DCSA, *Annual Report*, 2011

<sup>161</sup> ARQ Greece, 2010, 2011 (with the caveat that Greece’s 2010 ARQ only mentions Italy as a destination country for 25 per cent of cases and most of the heroin seized in Greece in 2010-2011 had no identifiable destination)

<sup>162</sup> The heroin was hidden, respectively, in sport bags between toolboxes under the trailer and in a specially prepared hiding place under the upholstery of the left wall of the truck. See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011, p. 12

<sup>163</sup> DCSA, *Annual Report 2011*

**Figure 26: Departure countries for heroin seized in Italy, 2012**

Source: Adapted from DCSA, *Annual Report*, 2012

If past seizures are anything to go by, the Greek port of Igoumenitsa, which connects to Italy, is an important heroin transit point for large shipments.<sup>164</sup> It should be noted that not all heroin arriving from Greece to Italy remains in the country for consumption. For example, in November 2012 Italian authorities at the port of Bari seized a mixed load of heroin (41 kg) and cannabis (105 kg) transported from Greece whose final destination was Scotland.<sup>165</sup>

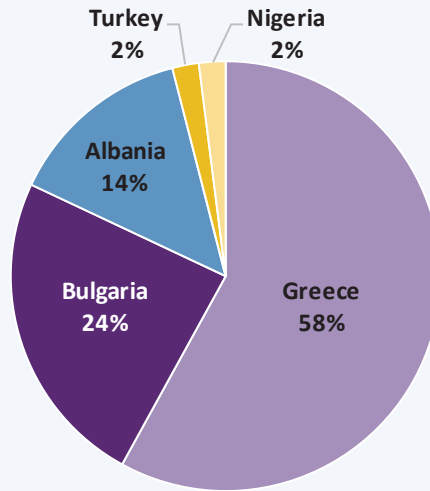
Greek nationals dominated transnational opiate trafficking investigations in 2011, followed by citizens of other South-Eastern European countries, notably Albania and Bulgaria. Figures in 2012 appear to reflect a greater number of nationalities but Albanians and Bulgarians continue to dominate among foreign citizens.

<sup>164</sup> For example, in 2010 a Serbian national driving a truck with Croatian license plates that was headed for Italy was arrested with 120 kg of heroin at the port. See “Belgrade - Greek police have seized 120 kilograms of heroin hidden inside a truck in the Igoumenitsa port”. Available at [http://www.b92.net/eng/news/in\\_focus.php?id=228&start=0&nav\\_id=69378](http://www.b92.net/eng/news/in_focus.php?id=228&start=0&nav_id=69378)

<sup>165</sup> BBC website, “Five held in Glasgow over Italy heroin and cannabis haul”, 30 November 2012, available at [http://www.bbc.co.uk/news/uk-scotland-glasgow-west-20557562#story\\_continues\\_2](http://www.bbc.co.uk/news/uk-scotland-glasgow-west-20557562#story_continues_2)

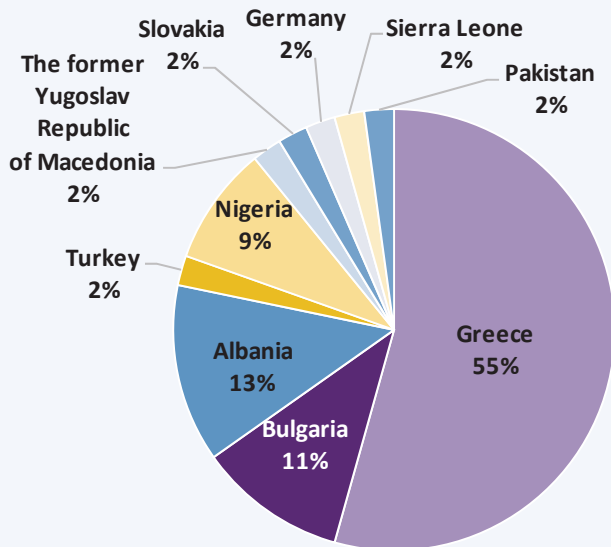


**Figure 27: Citizenship of suspects investigated in transnational opiate trafficking cases in Greece, 2011**



Source: Annual SELEC Questionnaire on Drug Trafficking for 2011, Greece

**Figure 28: Citizenship of suspects investigated in transnational opiate trafficking cases in Greece, 2012**



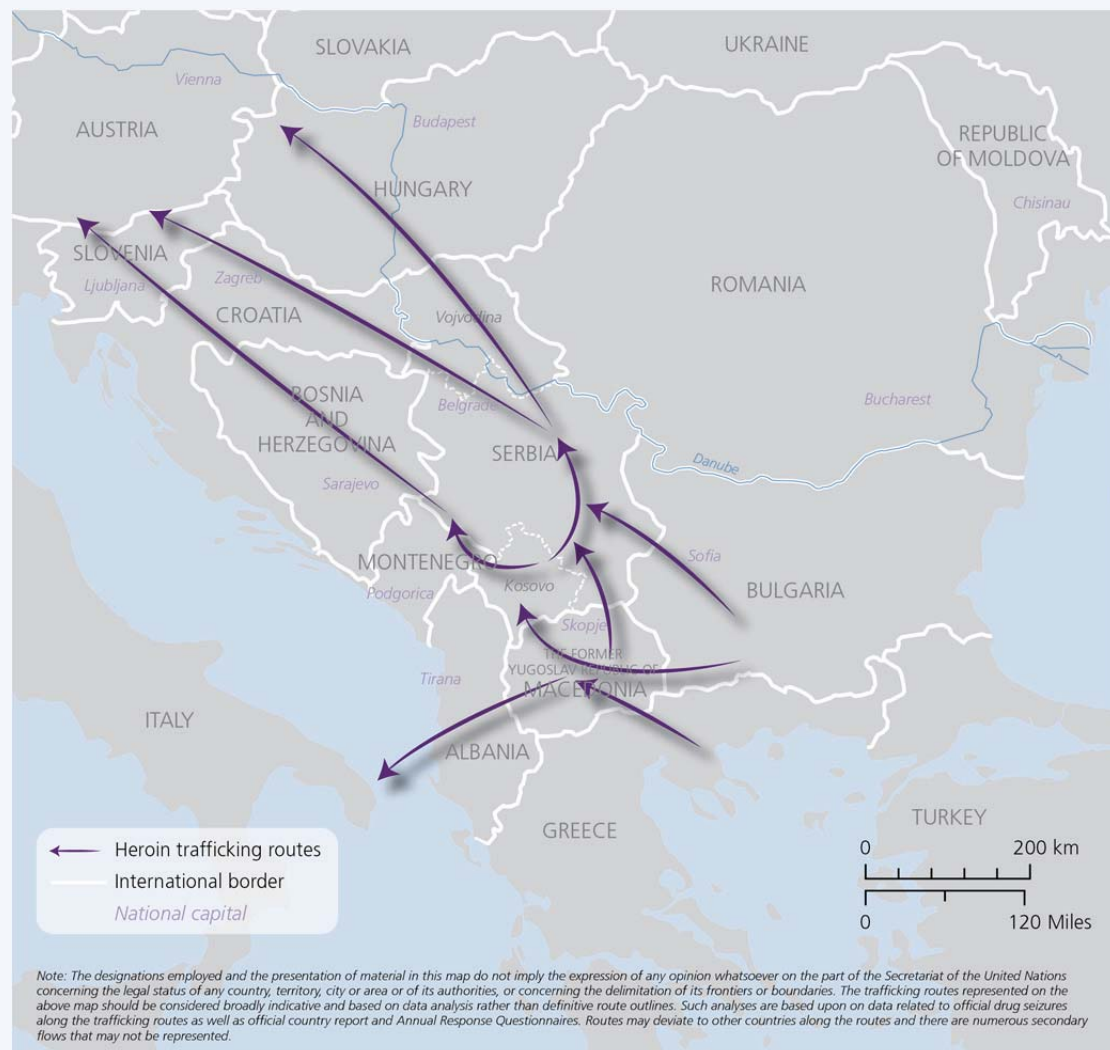
Source: Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

## The western branch

*(The former Yugoslav Republic of Macedonia – Albania - Western Europe or the former Yugoslav Republic of Macedonia - Kosovo/Serbia - Bosnia and Herzegovina – Croatia - Western Europe or Bulgaria – Serbia - Bosnia and Herzegovina – Croatia - Western Europe)*

Trafficking on the western branch involves all the Western Balkans and occurs on two main axes. The first is a westward trajectory through Albania. The second sends heroin northward. Unlike the other branches of the Balkan route, traffickers must exit the EU (Bulgaria/Greece) and re-enter at a later stage along the route.

**Map 15: General trafficking routes on the western branch**



Source: Data from the ARQ, supplemented by national government reports and other official reports

### *The former Yugoslav Republic of Macedonia*

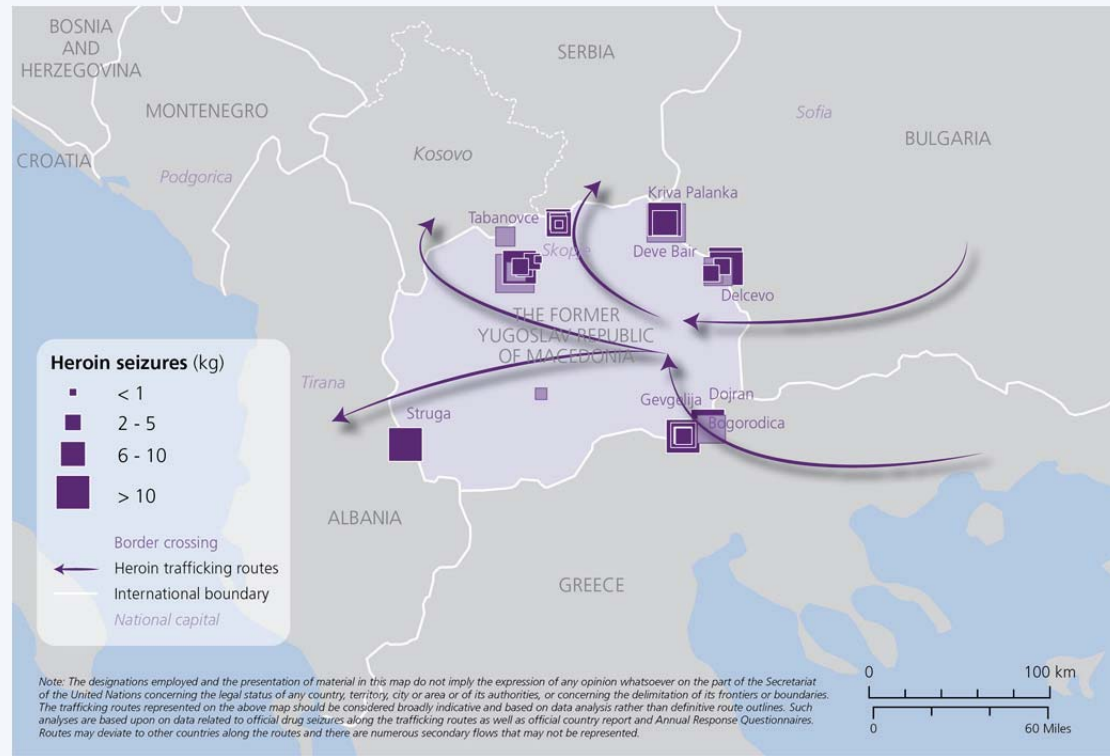
The former Yugoslav Republic of Macedonia is unique in South-Eastern Europe in that it borders the two main entry points of the Balkan route into the EU - Bulgaria and Greece.

Reported shipments travelling from Bulgaria and Greece towards the former Yugoslav Republic of Macedonia range in size from 10 to 60 kg. For example, in 2012, two separate seizures totalling 105 kg of heroin were reported by Turkish authorities at the



Ipsala crossing on the Turkey-Greece border. The drugs were being transported by truck to the former Yugoslav Republic of Macedonia.<sup>166</sup> Further downstream, an additional 62 kg were seized in August 2012 on the border between Greece and the former Yugoslav Republic of Macedonia. Several smaller seizures (e.g. 10-16 kg) occurred in 2012 at the Deve Bair and Delchevo border crossing points between Bulgaria and former Yugoslav Republic of Macedonia.<sup>167</sup> These seizures seem to indicate incoming traffic on both borders.

**Map 16: General trafficking routes and locations of heroin seizures in the former Yugoslav Republic of Macedonia as reported to UNODC, presented in government reports or in the media, 2010-2012**



Note: The seizures marked with darker colours ■ were reported by official sources. Those marked with lighter colours ■ were reported by media sources.

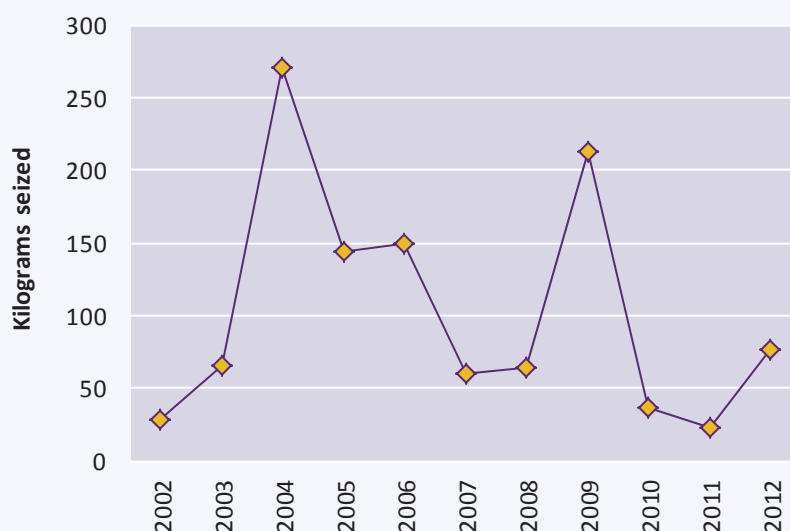
Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database; data from the ARQ, supplemented by national government reports and other official reports

<sup>166</sup> The first seizure consisted of 59 kg and occurred in February 2012; the second consisted of 46.3 kg and occurred on 29 April 2012. In addition, a controlled delivery through Turkey, Greece and the former Yugoslav Republic of Macedonia resulted in a seizure of 20 kg. See Balkan Info Database, June-July 2012. Turkey has also made smaller seizures at Ipsala of heroin destined for Bulgaria - for example the seizure by Turkish Customs on April 13 of 11 kg of heroin transported by car. See Annual SELEC Questionnaire of Drug Trafficking for 2012, p.7. Also, in November 2012, 10 kg of heroin were seized on the border between Greece and the former Yugoslav Republic of Macedonia. See "Drug Situation in Macedonia", presentation by the delegation of the former Yugoslav Republic of Macedonia, 19th Meeting of Anti-Drug Trafficking Task Force, 21-22 May 2013, Bucharest, Romania

<sup>167</sup> According to the Ministry of the Interior of the former Yugoslav Republic of Macedonia, on 19 May 2012 16 kg of heroin were seized at Deve Bair. According to Customs, 9.4 kg of heroin were seized in October 2012 at Deve Bair. In addition, 13.2 kg were seized at the Delcevo crossing in October 2012. See "Drug Situation in Macedonia", Presentation by the delegation of the former Yugoslav Republic of Macedonia, 19th Meeting of Anti-Drug Trafficking Task Force, 21-22 May 2013, Bucharest, Romania. See also *2012 Annual Report of the Customs Administration of the Republic of Macedonia*, April 2013

The last seizure peak occurred in 2009 and was the result of several joint operations in cooperation with Turkish and Bulgarian law enforcement.<sup>168</sup> Since then, the overall trend is one of decline, although an increase was observed in 2012.

**Figure 29: Heroin seizures in the former Yugoslav Republic of Macedonia, 2002-2012**



Source: Delta database; Ministry of Interior and Customs of the former Yugoslav Republic of Macedonia; Mini-Dublin Group report, 2013. Note: 2012 figures are preliminary and will be updated when information becomes available

The former Yugoslav Republic of Macedonia is a major transit point for the western branch of the Balkan route. Essentially, its geographic location enables a connection to Kosovo,<sup>169</sup> Serbia<sup>170</sup> or Albania (and further to Italy).<sup>171</sup> The Europol 2011 OCTA notes that the former Yugoslav Republic of Macedonia is an important location for heroin storage and repackaging.<sup>172</sup>

Traffickers from the former Yugoslav Republic of Macedonia may be increasingly active in transit and in destination markets.<sup>173</sup> One organization reportedly dismantled in May 2013 was trafficking large quantities of heroin from Turkey to Western and Central Europe, notably the Netherlands and Switzerland<sup>174</sup> According to Frontex, the organization was “composed of decentralized cells with different roles assigned, ranging

<sup>168</sup> This, combined with the use of new special investigative techniques by police supported by changes in the criminal code (previously, the use of the special investigative techniques had not been legal), is thought to have resulted in the spike seen in 2009. See 2009 ARQ of the former Yugoslav Republic of Macedonia; see SELEC, *Report on Drug Seizures in South Eastern Europe*, 2009, p.25

<sup>169</sup> United States Department of State, International Narcotics Control Strategy Report, 2012, <http://www.state.gov/documents/organization/184314.pdf>

<sup>170</sup> EMCDDA Country Overview: Serbia, <http://www.emcdda.europa.eu/publications/country-overviews/rs>

<sup>171</sup> The 2011 Albania ARQ mentions that the former Yugoslav Republic of Macedonia is the departure country for 80 per cent of the heroin seized in Albania.

<sup>172</sup> Europol, *OCTA*, 2011, p.12. This is echoed in a 2011 report to the Mini-Dublin group, which states that an “increase of trafficking could further enhance the position of the country as an attractive route for the transit and “warehousing base” for trans-shipments towards Western Europe and within the Balkan region” See Council of the European Union, Report to the Mini-Dublin Group by the Hungarian Regional Chair of the Dublin Group, *Regional report on Western Balkans*, 2011, <http://register.consilium.europa.eu/pdf/en/11/st11/st11791.en11.pdf>.

<sup>173</sup> Europol notes, “a notable increase in the involvement in heroin and cocaine trafficking of citizens of the former Yugoslav Republic of Macedonia”. See Europol, *OCTA*, 2011, p.19. See also INTERPOL, *SEETAC Drug Trafficking Report*, January-August 2010, p. 24

<sup>174</sup> See Austrian BKA, *Drug Policing in the Balkans*, December 2012, p.27





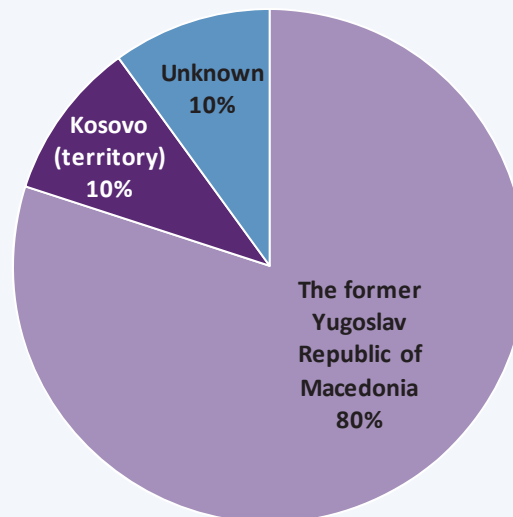
from transporting, receiving and selling the drug to laundering the proceeds which was done by fast money transfers to the former Yugoslav Republic of Macedonia”.<sup>175</sup>

The links of some traffickers from the former Yugoslav Republic of Macedonia may extend to early stages of the Balkan route. In 2010, the office that combats money laundering and the financing of terrorism of the former Yugoslav Republic of Macedonia reported suspicious transactions made with Afghanistan, some of which may have been linked to drug trafficking.<sup>176</sup>

### *Albania*

Albania borders the former Yugoslav Republic of Macedonia and reported receiving the majority of its heroin from that direction in 2011 and 2012.<sup>177</sup> Kosovo plays a minor role in supplying heroin to Albania - about 10 per cent of shipments as identified by Albanian authorities. Once in Albania, shipments may get stored, cut with adulterants and/or repackaged.<sup>178</sup>

**Figure 30: Departure country/territory for heroin seized in Albania, 2011 and 2012**



Source: ARQ, 2011, 2012

According to Albanian authorities, the majority of heroin seems to continue across the Adriatic to Italy.<sup>179</sup> The Albanian ports of Vlora and Durres,<sup>180</sup> which connect by ferry to the seaports of Bari and Ancona in Italy, were the sites of over 50 per cent of heroin seizures in 2012 and are important targets for traffickers.<sup>181</sup> Italy is also on the receiving

<sup>175</sup> Frontex, *Fran Quarterly*, Quarter 2 April-June 2013, p.43.

<sup>176</sup> According to information provided by the office for combating money laundering and financing terrorism of the former Yugoslav Republic of Macedonia, there were six cases of suspected links with drug trafficking where transactions were made with other South-Eastern Europe countries, Western and Central Europe, South America, Afghanistan and Pakistan. The results of these investigations are pending. See UNODC, *Drug Situation Analysis Report South Eastern Europe*, 2011, p.33

<sup>177</sup> Albania ARQ iv, 2011/2012, Q.4-6

<sup>178</sup> Europol, *OCTA*, 2011, p.12.

<sup>179</sup> ARQ Albania, 2012. There are no reports of heroin travelling onward from Albania to Kosovo and trafficking flows to Montenegro and Greece appear negligible. Only 2 per cent of seized heroin was identified as travelling from Albania to Greece; Greece is not identified as a departure country for heroin found in Albania. See ARQ Greece, 2012.

<sup>180</sup> The port itself has recently undergone several upgrades, including the establishment of a joint unit as part of the UNODC-WCO Container Control Programme.

<sup>181</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Albania

end of large-scale cannabis trafficking from the same seaports (see also section on other drugs; cannabis).<sup>182</sup>

As of 2012, the heroin trail to Italy seems to partially end in Albania. Italian reports currently indicate Greece as the main departure country<sup>183</sup> and in 2012, Italian law enforcement were not able to identify seizures of heroin that could be traced to Albania.<sup>184</sup> This trend, which is reported to have been taking place for a number of years,<sup>185</sup> may indicate that Albanian law enforcement are increasingly seizing heroin before it can be shipped onward to Italy.<sup>186</sup> It should be noted that this data must be treated carefully, since it may not distinguish between transit countries and countries of origin. In other words, Italy may receive heroin from Albania through the Western Balkans by way of Slovenia without being able to identify the exact trajectory from beginning to end. A recent example concerns an organized crime group trafficking to Italy via Albania, Kosovo and Bosnia and Herzegovina. According to Europol, the investigation resulted in evidence that the criminal group had trafficked over 600 kg of heroin and 500 kg of marijuana in total.<sup>187</sup>

**Figure 31: Italy-bound ferries docked at the port of Durres, Albania**



Source: UNODC

As of 2012, national seizure volumes have risen on the strength of several medium-sized seizures of heroin (45 kg in total).<sup>188</sup> A record low occurred in 2010, which Albanian authorities explained as the result of a shift in routes towards new EU members (Bulgaria, Romania), a moratorium on speedboats along its coast<sup>189</sup> and increasing law enforcement capacity.<sup>190</sup> It should be noted that these factors have not had the same

<sup>182</sup> DCSA, *Annual Report 2012*, Marijuana section

<sup>183</sup> Italy ARQ 2009, 2010, 2011

<sup>184</sup> DCSA, *Annual Report 2012*; DCSA, *Droga Sequestrata in Italia Proveniente o Transitante D'all'Albanian*, 2012

<sup>185</sup> "Drug Trafficking situation in Albania", presentation by Albanian Delegation at SELEC, 19th Meeting of Anti-Drug Trafficking Task Force, 21-22 May 2013, Bucharest, Romania

<sup>186</sup> Seizures upstream suggest that this remains an important flow. For example, in September 2012 Turkey reported a single large seizure of 113 kg of heroin destined for Albania at the Kapikule (Kapitaan Andreevo) crossing with Bulgaria. Balkan Info seizure database, 2012

<sup>187</sup> Europol, "71 arrested as police smash heroin trafficking ring in Italy", 21 October 2013, available at <https://www.europol.europa.eu/content/71-arrested-police-smash-heroin-trafficking-ring-italy>

<sup>188</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Albania

<sup>189</sup> The moratorium came to an end in April 2013.

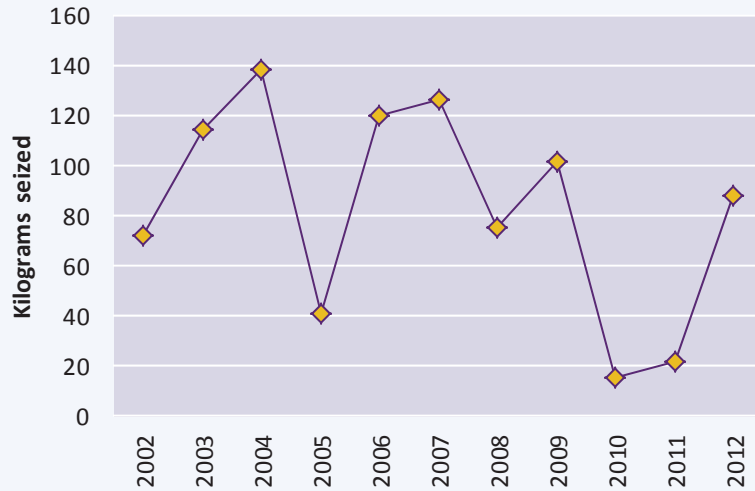
<sup>190</sup> Albanian officials reported it as follows: "[the] joining [of] the European Union by Bulgaria and Romania is one reason.

Traffickers do not risk to enter and exit the European Union borders. Another reason is the moratorium of small vessels, kept in force in Albania by our government. Strengthening of capacity of Albanian law enforcement structures is another reason." See Albania ARQ, 2010



effect on the trafficking of cannabis, which is exported to all of Albania’s neighbours and is reportedly increasing (see other drugs; cannabis).

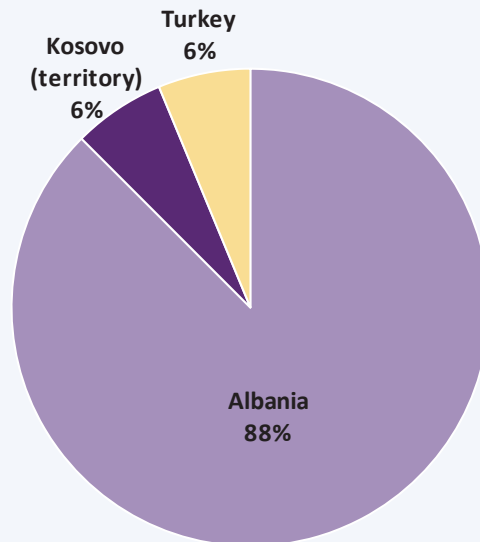
**Figure 32: Heroin seizures in Albania, 2002-2012**



Source: Delta database; ARQ, 2012 data

Few foreigners are investigated for heroin trafficking in Albania (see figure below). The groups involved in trafficking heroin into and through Albania appear increasingly to traffic other drugs as well.<sup>191</sup> This is most obvious in mixed seizures of cannabis and heroin at Albanian seaports.

**Figure 33: Citizenship/habital residence of persons investigated in transnational opiate trafficking, Albania, 2012**



Source: Annual SELEC Questionnaire on Drug Trafficking for 2012 (Albania)

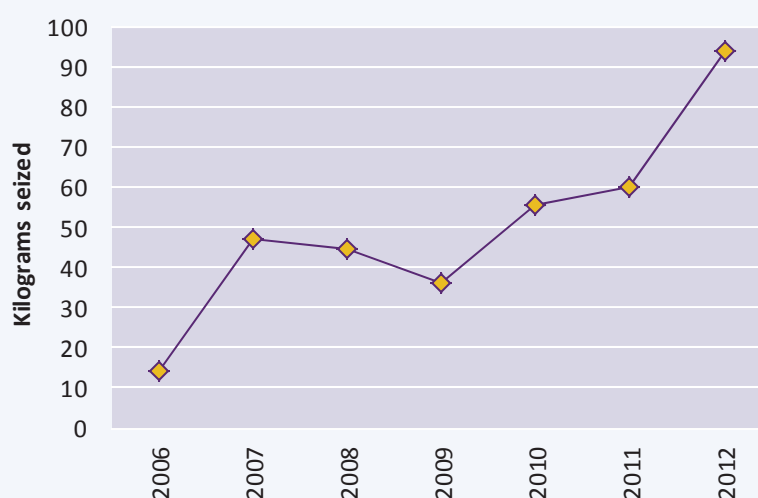
<sup>191</sup> According to information provided by Albania in 2011, “Some groups are dedicated to trafficking of one type of drug and some others to different types of drugs, but the tendency is that the groups are now more flexible and they are trafficking different types of drugs”. See Albania ARQ, 2011, Q. 31

## Kosovo

Most heroin appears to enter Kosovo from the former Yugoslav Republic of Macedonia.<sup>192</sup> Once in Kosovo, part of this heroin is reportedly stocked and repackaged.<sup>193</sup> There are then various options for onward transportation. Flows may continue to Montenegro<sup>194</sup> and onward to Bosnia and Herzegovina, Croatia and beyond; another trajectory appears to lead towards the northeast via the Merdare border crossing.

Heroin seizures in Kosovo are increasing. In 2009-2012 it reported the only instance of a continuous increase in heroin seizures in South-Eastern Europe, contrasting the regional trend.

**Figure 34: Heroin seizures in Kosovo, 2006-2012**



Source: ARQ; Delta database; EMCDDA, Kosovo Division against Organized Crime, *Annual Report*, 2012

It could be argued that this surge is not necessarily linked to increased trafficking, given that some countries in the vicinity are reporting lulls in trafficking from Kosovo. For example, while Slovenian law enforcement reported in 2010 that 50 per cent of all heroin in Slovenia came from Kosovo,<sup>195</sup> as of 2011-2012, little activity was reported on this route.<sup>196</sup> Instead, some have put it down to increases in police resources,<sup>197</sup> which, combined with a recent high-level arrest,<sup>198</sup> may be putting pressure on trafficking activity in Kosovo and beyond.

<sup>192</sup> United States Department of State, *INCSR*, 2012; [www.emcdda.europa.eu/publications/country-overviews/xk](http://www.emcdda.europa.eu/publications/country-overviews/xk)

<sup>193</sup> Europol, *OCTA*, 2011, p.12.

<sup>194</sup> [www.emcdda.europa.eu/publications/country-overviews/xk](http://www.emcdda.europa.eu/publications/country-overviews/xk); see also Council of the European Union, report to the Mini-Dublin Group by the Austria Regional Chair of the Dublin Group, Regional report on Western Balkans, November 2013, [www.parlament.gv.at/PAKT/EU/XXV/EU/00/12/EU\\_01215/imfname\\_10421943.pdf](http://www.parlament.gv.at/PAKT/EU/XXV/EU/00/12/EU_01215/imfname_10421943.pdf)

<sup>195</sup> ARQ Slovenia, 2010, Q. 4-6

<sup>196</sup> ARQ Slovenia, 2011

<sup>197</sup> European Commission, *Kosovo 2013 Progress Report*, available at <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=SWD:2013:0416:FIN:EN:PDF>

<sup>198</sup> In May 2013, the Kosovo police arrested the head of a transnational criminal organization that had been involved in drug trafficking and distribution for many years. The arrest was based on an international warrant issued by Bosnia and Herzegovina. The suspect was involved in the trafficking of heroin and cocaine to Turkey, Albania, Kosovo, Montenegro, Serbia and Bosnia and Herzegovina. His family owns numerous companies in these countries, through which the proceeds of crime were allegedly laundered. See Frontex, *Fran Quarterly*, Quarter 2 April-June 2013, p.43. See also EULEX press release, "Clarification on procedures regarding the arrest of Naser Kelmendi", 8 May 2013, available at [www.eulex-kosovo.eu/en/pressreleases/0440.php](http://www.eulex-kosovo.eu/en/pressreleases/0440.php)



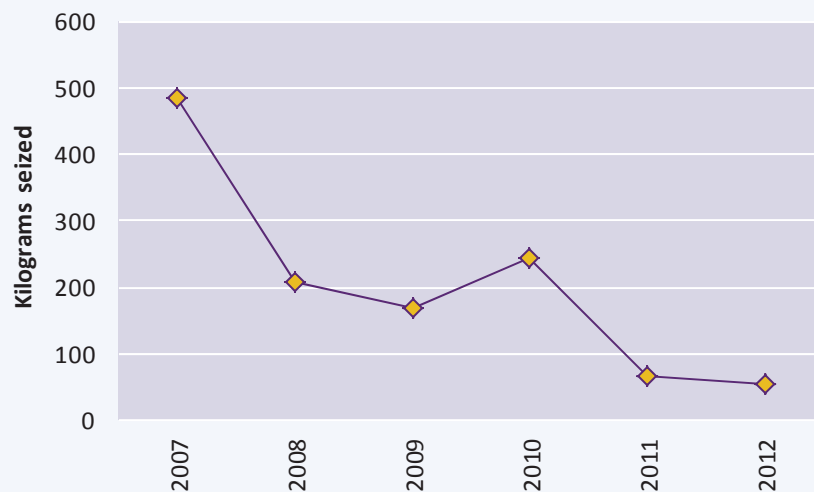
This does not mean that transnational heroin trafficking through Kosovo has ceased altogether, but there may have been a shift towards smaller sized shipments, a trend also reported elsewhere in South-Eastern Europe. The last example of a large shipment destined for Kosovo that UNODC is aware of is a 2009 seizure of 332 kg of liquid heroin on the Turkish-Iranian border from a Bulgaria-registered truck that was to transit the former Yugoslav Republic of Macedonia.<sup>199</sup> Since then, most shipments appear to be small to medium-sized, the largest seizure of 2011 being a 25-kg package.<sup>200</sup> In aggregate, such seizures can amount to sizeable quantities - indeed, the group involved in the above-mentioned seizure admitted to having already trafficked similar amounts into Kosovo eight times using the same route and modus operandi.<sup>201</sup>

Moreover, recent seizures downstream testify to the continuing importance of Kosovo in trafficking to Western and Central Europe. An organized criminal group trafficking to Italy via Albania, Kosovo and Bosnia and Herzegovina was dismantled in 2013. According to Europol, the investigation resulted in evidence that the criminal group had trafficked over 600 kg of heroin and 500 kg of marijuana in total.<sup>202</sup>

### Serbia

In 2011, heroin seizures in Serbia dropped by three quarters and 2012 saw further declines to 55 kg. This development is assessed by local authorities as indicating a shift towards the Bulgaria-Romania route.<sup>203</sup> In the last five years, heroin seizures in Serbia have dropped by nearly 90 per cent.

**Figure 35: Heroin seizures in Serbia, 2007-2012**



Source: Delta database 2007-2011; Annual SELEC Questionnaire on Drug Trafficking for 2012, Serbia (2012 seizure data)

<sup>199</sup> See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2009, p.11. See also Turkish National Police, *Annual Report 2010*, p.12

<sup>200</sup> See EULEX Press Release, "EULEX praises Kosovo Customs and Police for drugs seizure", 1 December 2011. Available at [www.eulex-kosovo.eu/en/pressreleases/0210.php](http://www.eulex-kosovo.eu/en/pressreleases/0210.php)

<sup>201</sup> Information provided by the Head of the Anti-Drug Unit of Kosovo Police and the Head of the Border Police of Kosovo, Pristina, April 2013

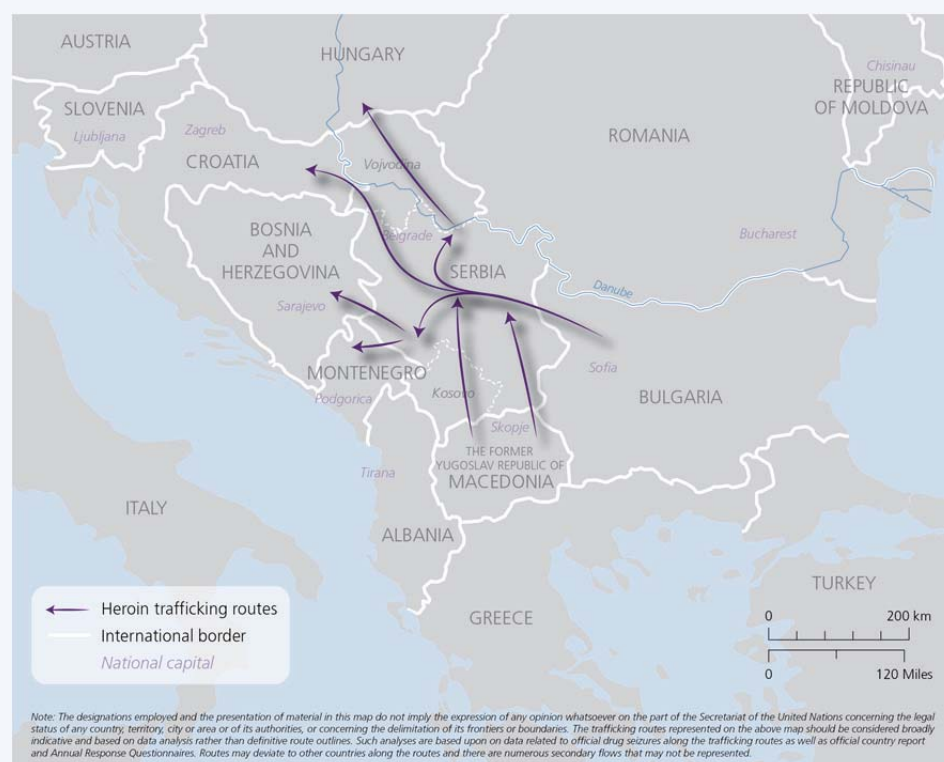
<sup>202</sup> Europol, "71 arrested as police smash heroin trafficking ring in Italy", 21 October 2013

<sup>203</sup> For example, Serbia's report to the 2013 mini-Dublin group indicates that low seizures are likely "due to a diversion of the main smuggling route since 2009. Routes have changed so that heroin is increasingly smuggled from Turkey via Bulgaria and Romania to Western European countries". See Council of the European Union, report to the Mini-Dublin Group by the Hungarian Regional Chair of the Dublin Group, *Regional report on Western Balkans*, June 2013. See also EMCDDA Country Overview: Serbia, <http://www.emcdda.europa.eu/publications/country-overviews/rs>

Within Serbia, most seizures seem to point to routes that do not include Kosovo and Serbia's reports to EMCDDA seem to indicate that trafficking from Kosovo heads in other directions.<sup>204</sup> With regard to the main entry points into Serbia, Serbian police have reported to EMCDDA a direct trajectory from the former Yugoslav Republic of Macedonia.<sup>205</sup> The region of Bujanovac and Presevo straddles a major transportation corridor and two seizures of heroin totalling some 31 kg were reported in 2013 at the Presevo border crossing point on the border between Serbia and the former Yugoslav Republic of Macedonia.<sup>206</sup>

Serbia continues to be a target for shipments entering from Bulgaria,<sup>207</sup> particularly via the Kalotina/Gradinje crossing, one of the main trade arteries to and from Serbia. In the past, very large single seizures were reported on the Bulgaria-Serbia border, including a 163 kg<sup>208</sup> shipment in 2007. In 2012, Serbian officials found 22 kg of heroin in a car entering from Bulgaria at this crossing.<sup>209</sup> Although relatively small, this seizure accounted for nearly half of all the heroin seized in the country in 2012. This appears to echo the trend towards smaller shipments seen elsewhere on the Balkan route, although there are some notable counter-examples to this based on recent seizures in Turkey.

### Map 17: General heroin trafficking routes through Serbia



Source: Data from the ARQ, supplemented by national government reports and other official reports.

<sup>204</sup> EMCDDA Country Overview: Serbia

<sup>205</sup> EMCDDA Country Overview: Serbia

<sup>206</sup> With regard to the first seizure, the driver was a Turkish national residing in Germany and travelling from Turkey to Germany. See "Current trends in Serbia", presentation by the Serbian Delegation at the Expert Dialogue Meeting on Drugs between the European Union and Western Balkans, SELEC, May 2013. With regard to the second seizure, see "Customs officers prevent trafficking of 17 kilograms of various narcotics", official website of the Serbian Ministry of Finance of Serbia, Customs Administration section: <http://www.upravarina.rs/en/Pages/SingleNews.aspx?ListItemID=369>

<sup>207</sup> UNODC is not aware of any shipments of heroin from Romania to Serbia.

<sup>208</sup> US Department of State, *The EXBS Program: Export Control and Related Border Security*, available at <http://www.state.gov/documents/organization/113710.pdf>

<sup>209</sup> According to the Serbian police, the passengers were a Dutch national and a Turkish national.



Serbian counter-narcotics officials have noted that larger Serbian trafficking groups have moved away from heroin towards cocaine smuggling<sup>210</sup> from South America to Europe, a phenomenon also reported by EMCDDA in its annual report.<sup>211</sup> It now appears that smaller groups, which are not linked to organized crime within Serbia,<sup>212</sup> have “inherited” heroin trafficking routes through the country.

At the same time, recent seizures in Turkey make it clear that there are still groups capable of using the country to transit very large shipments of heroin. While these events fall outside the date range generally considered in the present analysis (2010-2012), their significance merits inclusion as by themselves (1,100 kg) they surpass total 2012 seizures in South Eastern Europe (930 kg rounded).

**Table 7: Selected seizures on the Turkey-Bulgaria border travelling through the Western Branch to Western and Central Europe, 2013**

Date	Amount	Method	Route	Remarks
30-07-2013	718 kg	Truck	Turkey – Bulgaria – Serbia – Bosnia and Herzegovina.	Seized at Turkey-Bulgaria border by Turkish Customs. Concealed inside 10 dishwashers.
August 2013	393 kg	Truck	Turkey – Bulgaria – Serbia – Croatia – Slovenia – Austria – Germany – Belgium	Seized at Turkey-Bulgaria border by Turkish Customs.





Source: “Drug Trafficking Situation in South-Eastern Europe”, presentation by SELEC delegate, third meeting of UNODC informal working group on heroin and acetic anhydride trafficking to/from Europe, 9 September 2013, Lisbon, Portugal

Based on seizure data available to UNODC, it appears that most flows from Bulgaria into Serbia veer westward towards other Western Balkan countries, rather than northward through Central Serbia and on to Hungary.<sup>213</sup> As an example, in September 2012, Bulgarian Customs at the Kalotina/Gradinje crossing seized 32 kg of heroin from

<sup>210</sup> Council of the European Union, report to the Mini-Dublin Group by the Hungarian Regional Chair of the Dublin Group, Regional report on Western Balkans, November 2012, [www.parlament.gv.at/PAKT/EU/XXIV/EU/09/66/EU\\_96652/imfname\\_10381512.pdf](http://www.parlament.gv.at/PAKT/EU/XXIV/EU/09/66/EU_96652/imfname_10381512.pdf)

<sup>211</sup> EMCDDA, *EU Drug Markets Report*, January 2013, p.47

<sup>212</sup> According to Serbian officials, “the drug [is] usually smuggled in by either smaller groups or individuals. From the security point of view these people are first time offenders and have no possibility to set up an organized criminal group. Their motivation usually is their poor financial conditions. They know neither the market nor the people who were involved in this illegal activity earlier. What creates an opportunity for them is that more serious organised criminal groups have reoriented toward cocaine smuggling.” See Council of the European Union, report to the Mini-Dublin Group by the Hungarian Regional Chair of the Dublin Group, *Regional report on Western Balkans*, June 2013

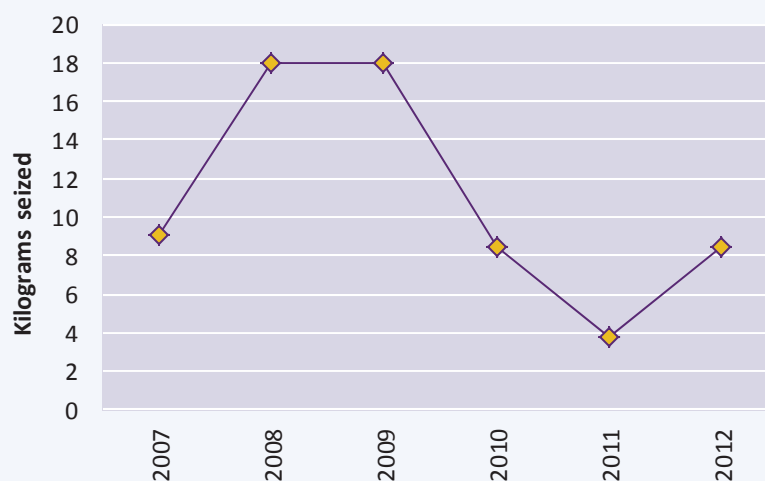
<sup>213</sup> The last large heroin seizure in Central Serbia consisted of 120 kg seized in Belgrade in 2010. See official website of the Ministry of Finance, Customs Administration section, <http://www.carina.rs/lat/Stranice/Vest.aspx?ListItemID=151>.

a car travelling to south-western Serbia.<sup>214</sup> In addition, the seizures on the Turkish border (see above figure) provide examples of large-scale heroin trajectories travelling towards the Western Balkans rather than the closest EU border (Hungary-Serbia).

### Montenegro

Montenegro has major seaports and remote mountainous borders with Albania, Kosovo, Serbia and Bosnia and Herzegovina. Despite this, it is difficult to find evidence of large-scale heroin trafficking in the country. The small volumes seized have declined since 2009 and average less than 10 kg per year.

**Figure 36: Heroin seizures in Montenegro, 2007-2012**



Source: Delta database 2007-2011; Police Directorate of Montenegro (2012 seizures)

Apart from a handful of exceptions, neighbours of Montenegro have not reported receiving even medium-sized shipments of heroin for further trafficking in recent years.<sup>215</sup> This is supported by Montenegrin law enforcement, which reports that, “a decline in heroin business is observable” and adds that, “In the case of heroin it is quite characteristic to smuggle it in smaller packages ranging from 2 to 5 kilos.”<sup>216</sup> In contrast, cannabis shipments transported through the country and continuing northward are on the increase (see other drugs; cannabis).

### Bosnia and Herzegovina

According to Bosnia and Herzegovina officials, the main heroin routes to Bosnia and Herzegovina lead from Bulgaria to the former Yugoslav Republic of Macedonia, Kosovo, southern Serbia and Montenegro.<sup>217</sup> Heroin seizures in Bosnia and Herzegovina are barely higher than those in Montenegro and lower than those in countries downstream. Low seizures are not necessary indicative of low rates of trafficking; a 2013 seizure of 718 kg of heroin in Turkey that was intended for Bosnia and Herzegovina (via Bulgaria-

<sup>214</sup> A smaller seizure was reported in 2011 by Bulgarian Customs on the Serbia-Bulgaria border. It consisted of 8 kg of heroin destined for Montenegro. Information from the 2012 seizure database of the Bulgarian Customs Service

<sup>215</sup> An exception may be 25 kg of heroin seized at Karasovici on the Croatian side of the border crossing with Montenegro (Debeli brijeg) on 15 August 2012, when Albanian citizens were caught in a vehicle with Italian license plates.

<sup>216</sup> Council of the European Union, report to the Mini-Dublin Group by the Hungarian Regional Chair of the Dublin Group, *Regional report on Western Balkans*, November 2012, [www.parlament.gv.at/PAKT/EU/XXIV/EU/09/66/EU\\_96652/imfname\\_10381512.pdf](http://www.parlament.gv.at/PAKT/EU/XXIV/EU/09/66/EU_96652/imfname_10381512.pdf)

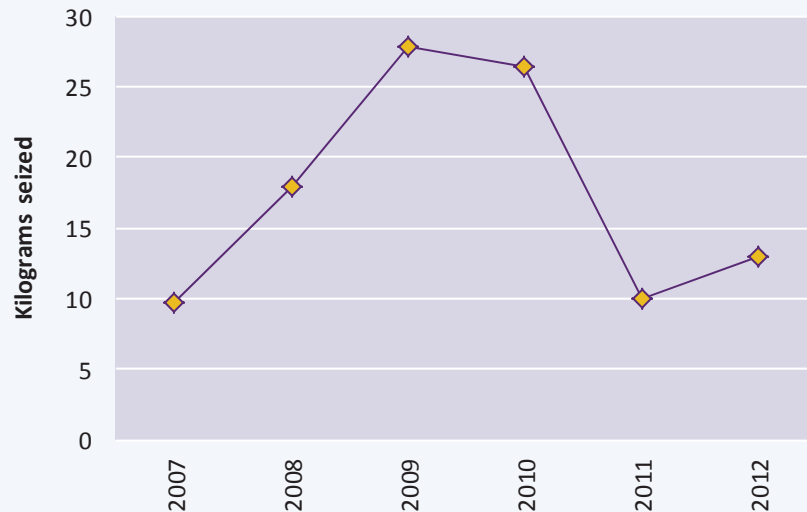
<sup>217</sup> Information provided by SIPA, Sarajevo, Bosnia and Herzegovina, December 2010. See also Bosnia and Herzegovina ARQ, 2012, p. iv





Serbia) indicates that attempts are being made to move large amounts of heroin into the country.<sup>218</sup> One example of successful attempts appears in a recent Europol investigation, which found that one particular organized crime group had already trafficked over 600 kg of heroin and 500 kg of marijuana to Italy via Albania, Kosovo and Bosnia and Herzegovina.<sup>219</sup>

**Figure 37: Heroin seizures in Bosnia and Herzegovina, 2007-2012**



Source: DELTA database; Ministry of Security of Bosnia and Herzegovina (2012 seizures)

Bosnia and Herzegovina has a 1,001 km<sup>220</sup> border with Croatia that is crossed by 150 roads.<sup>221</sup> There are few reports of heroin trafficking across this border; most observers tend to note the movement of other drugs, notably cannabis herb. Given the small scale of heroin seizures in Bosnia and Herzegovina, it may be that most criminal groups active in the country are involved in trafficking cannabis rather than heroin, as reports from Bosnia and Herzegovina seem to indicate.<sup>222</sup> Alternatively, it could be concluded that there are well-organized and sophisticated trafficking groups that are able to move heroin through Bosnia and Herzegovina without being intercepted.

### Croatia

Croatia sits at the crossroads of Central Europe and South-Eastern Europe. The country also has several features that could be exploited by traffickers, including a coastline of 1,778 km and 1,185 islands. However, Italy, which is the main destination market in the Adriatic region and also shares a maritime border with Croatia, does not report seizures linked to heroin trafficking from the Croatian coast.<sup>223</sup> Moreover, there is no recent evidence that other drugs are trafficked in large amounts through Croatian ports (or indeed via any of the coastlines of Croatia, Montenegro or Slovenia). Heroin smugglers

<sup>218</sup> Information provided by Turkish Customs, July 2013

<sup>219</sup> Europol, "71 arrested as police smash heroin trafficking ring in Italy", 21 October 2013

<sup>220</sup> Frontex, *Western Balkans Annual Risk Assessment*, 2013, p.40

<sup>221</sup> United States Department of State, *INCSR*, March 2004

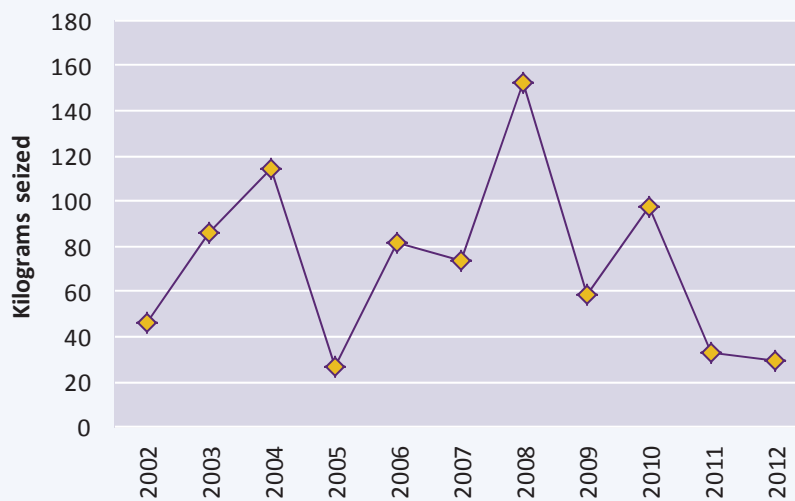
<sup>222</sup> The Bosnia and Herzegovina 2011 ARQ refers to criminal groups transferring "large amounts of cannabis from Albania through Montenegro, Serbia, Bosnia and Herzegovina to Croatia" but makes no mention of criminal groups transferring heroin onward.

<sup>223</sup> Information provided by DCSA, Rome, Italy, January 2013

and drug traffickers in general appear to avoid much of the Western Balkan Adriatic coast (with the exception of Albania).

Since 2008, seizures have been declining. A 2010 total of 97 kg stands out, thanks to an 89 kg seizure of heroin transported in a Dutch car from Turkey to the Netherlands.<sup>224</sup> Although single seizures in Croatia generally tend to concern smaller volumes, this does not mean that larger amounts do not transit the country. Indeed, this possibility is reflected in official reports, one of which states that the “smuggling of larger quantities of heroin through Croatian territory is usually performed without the participation of Croatian citizens, that is shipments are only transited through Croatia on their way to the West”.<sup>225</sup> An indication of this kind of trafficking is an August 2013 seizure in Turkey of 393 kg of heroin that was being transported through Bulgaria, Serbia and Croatia for onward transportation into Slovenia, Austria, Germany and Belgium.<sup>226</sup>

**Figure 38: Heroin seizures in Croatia, 2002-2012**



Source: DELTA database (2002-2011); ARQ Croatia (2012 seizures)

Heroin seizures declined in 2011-2012 and are at their lowest point since 2005. In 2011, Croatia reported seizing only 33 kg, a large portion of which resulted from a single seizure of 27.5 kg. In this case, the heroin was seized along with 40 kg of adulterants (paracetamol).<sup>227</sup> It may be noteworthy that an Albanian group was involved since, according to Croatian official reports, Albanian groups dominate heroin trafficking in Croatia.<sup>228</sup>

No or very little heroin was seized transiting Croatia towards Western and Central Europe in 2011-2012 and most shipments were apparently intended for local consumption. In contrast, increasingly large shipments of cannabis are being reported, transiting towards Western and Central Europe.<sup>229</sup>

<sup>224</sup> Country Report by Croatia, Ninth Meeting of Heads of National Drug Law Enforcement Agencies, Europe, Vienna, 28 June-1 July 2011

<sup>225</sup> EMCDDA, *2012 National Report, Croatia*, p.150

<sup>226</sup> “Drug Trafficking Situation in South Eastern Europe”, presentation by SELEC delegate to UNODC, 2013

<sup>227</sup> EMCDDA, *2012 National Report, Croatia*, p.157

<sup>228</sup> See *2012 National Report, Croatia*, p.150

<sup>229</sup> For example, in 2012 Croatia seized over one ton of cannabis herb, more than doubling the previous year’s total. See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012. See also Croatia ARQ, 2011, p. iv



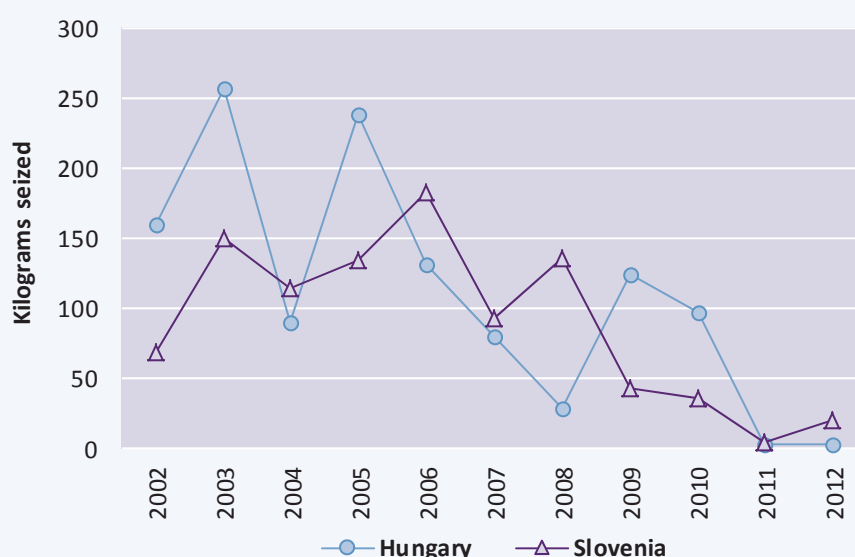
Croatian official reports partially explain the drop in trafficking activity as the result of a shift towards the northern branch of the Balkan route: “In recent years, when new member states joined the European Union, primarily Romania and Hungary, the “Balkan route” has partially been modified (...) and its way has shifted more to the North (Serbia –Hungary or Romania).”<sup>230</sup>

### Overview of the three branches of the Balkan route

Overall, a decrease in heroin seizures is apparent in South-Eastern Europe but whether this translates into lower volumes of heroin transiting the region is unclear. It should first be noted that this decrease is not uniform across the region. For example, Albania and Kosovo<sup>231</sup> registered seizure increases in 2012 but there is no apparent indication of increased trafficking. Conversely, Bulgaria and Romania have both reported important declines since 2010, but law enforcement information and seizures downstream indicate that large shipments continue to get through. This may indicate that large-scale trafficking is currently more likely to be interdicted at other stages of the Balkan route.

A decline is also observable at the outer edges of Central Europe. Seizures in Slovenia and Hungary are notable for their absence, particularly given that both countries are the obligatory convergence points for the overland portion of the Balkan route.

**Figure 39: Heroin seizures in Hungary and Slovenia, 2002-2012**



Source: Slovenia ARQ (2012 seizures); Delta database

Seizures made by Slovenia and Hungary in 2011-2012 are probably at their lowest point since the early 1990s, with the countries at times reporting even lower volumes than South-Eastern Europe. There are indications that this may not necessarily reflect low rates of trafficking. Large heroin seizures made in neighbouring Austria and Germany in 2011-2012 indicated that the shipments had transited Hungary and in August 2013 there was seizure in Turkey of 393 kg of heroin that was intended to transit Slovenia.<sup>232</sup>

<sup>230</sup> EMCDDA, *2012 National Report, Croatia*, p.151

<sup>231</sup> See Slovenia ARQ, 2010, Q. 4-6; Slovenia ARQ 2011, 2012; DCSA, *Annual Report 2012*; DCSA, *Droga Sequestrata in Italy Proveniente o Transitante D'all'Albanian*, 2012

<sup>232</sup> The shipment was to be trafficked along the route Bulgaria-Serbia-Croatia-Slovenia-Austria-Germany-Belgium. See “Drug Trafficking Situation in South Eastern Europe”, presentation by SELEC delegate to UNODC, 2013

*Borders and trafficking*

While reductions in seizure volumes may indicate decreased trafficking, they could also reflect recent changes in law enforcement resources, priorities and strategies along the Balkan route. Border enhancements, notably on the Turkish-Iranian and Turkish-Bulgarian borders,<sup>233</sup> appear to have impacted traffickers' decisions and modus operandi, notably when it comes to shipment size. However, smaller shipments do not necessarily indicate smaller overall volumes; they may equate to a similar sized flow of heroin in the aggregate but simply put added pressure on detection capacity.

The impact of EU integration and the gradual removal of internal borders on regional trafficking trajectories are also difficult to assess. The accession of Bulgaria and Romania resulted in a single entry point into the EU on the northern branch. In contrast, the western branch crosses multiple EU borders. Law enforcement assessments in South-Eastern Europe and beyond tend to favour the view that routes have shifted from the Western Balkans towards the Eastern Balkans accordingly.<sup>234</sup>

There is some evidence to counter this view, however. Seizures in Turkey totalling more than 1 ton are an indication that for some networks, the strength of local partners in the Western Balkans may well compensate for any additional risk associated with trying to enter the EU twice. Referring to heroin trafficking in the Western Balkans, the 2011 Organised Crime Threat Assessment (OCTA) by Europol notes that this "points to the existence of substantial criminal logistics in the region".<sup>235</sup> General heroin trajectories seem to reflect network orientations and international connections as much as risk analysis on the part of traffickers.

The hypothesis that the removal of borders facilitates trafficking appears logical and may be empirically justified. There are of course additional factors to consider, however, and Greece provides an interesting example in this regard - while the country has been part of the EU since the 1980s (and joined Schengen in 2000), it has not witnessed increased flows. It may be that other variables have mitigated the risk of trafficking, such as weaker networks linking Greece with earlier stages of the Balkan route, compared to the established connections with various areas of South-Eastern Europe. This example could be useful in predicting the impact of disappearing borders on new EU members, such as Croatia.

*The groups*

The profits for criminals managing trafficking along the Balkan route, while difficult to measure accurately, are substantial. At regional level, the domestic retail heroin market in

<sup>233</sup> For example, the Turkish Police report that, "drug networks have reduced the amount of heroin per shipment in order to minimize the shipment-related risk factors. The traditional large quantity shipments have been replaced by smaller but more frequent consignments". See Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2012, p.30

<sup>234</sup> Council of the European Union, report to the Dublin Group by the Austrian Regional Chair for the Western Balkans, *Regional Report on the Western Balkans*, Brussels, 20 June 2011. Slovenia's 2011 ARQ to UNODC also concludes that, "Slovenian police recognise the change of heroin trafficking route, not across the Balkan route through the Balkan countries (Serbia, Croatia, Slovenia) but northern where there is no border anymore (Bulgaria, Romania, Hungary, Austria.). We did not seize heroin on the border during the past year". Bulgaria has also reported that larger shipments tend to stay in the EU: "large quantities of heroin are imported and kept in stock in Bulgaria, then they are reloaded and carried by other means of transport across the European Union internal borders toward end users in Western Europe". See EMCDDA, *2012 National Report, Bulgaria*, p.117. See also Albania ARQ 2010 and DCSA *Annual Report 2012*

<sup>235</sup> Europol, *OCTA*, 2011, p.19



South-Eastern Europe alone was estimated at around US\$ 500 million in 2009, most of which likely went to indigenous criminal groups.<sup>236</sup>

The continued importance of Albanian organized criminal groups in some key Balkan route transit and destination countries<sup>237</sup> makes these groups relatively important beneficiaries. Most other groups indigenous to South-Eastern Europe, with the possible exception of nationals of the former Yugoslav Republic of Macedonia,<sup>238</sup> do not appear to be major players in heroin retail sales in Western and Central Europe and appear to act mainly as facilitators and middlemen on the Balkan route. It would be misleading, however, to equate heroin trafficking with certain nationalities, particularly since South-Eastern Europe,<sup>239</sup> and indeed the entire Balkan route,<sup>240</sup> provides numerous examples of cross-national cooperation in criminal ventures.

The successful arrest and conviction of individuals involved at a high level in the importation and distribution of heroin from Turkey to Western and Central Europe may have impacted trafficking along the Balkan route.<sup>241</sup> Such developments have usually occurred outside South-Eastern Europe, but high-level players have also allegedly been targeted in the Western Balkans, in some cases leading to reported impacts on trafficking flows.<sup>242</sup> There have also been reports of heroin traffickers diversifying into other drugs, although it is unclear whether this is due to law enforcement pressure or other factors.<sup>243</sup>

#### *Prices and purity*

While some trajectories appear direct, others involve the manipulation of shipments en route to consumption markets. Heroin storage and repackaging can occur on all branches of the Balkan route,<sup>244</sup> but large-scale adulteration for the export market appears to be more confined to the western and southern branches. There are reports that heroin transiting Albania and Kosovo is heavily adulterated<sup>245</sup> before continuing onward. This also appears to be the case for Greece – the country reported six cutting “laboratories” in 2011<sup>246</sup> and

<sup>236</sup> UNODC, *The Global Afghan Opium Trade*, 2011

<sup>237</sup> Europol, *OCTA*, 2011, p. 20; EMCDDA, *EU Drug Markets Report*, 2013, p.33

<sup>238</sup> See UNODC, *World Drug Report 2012*, p.84. See also Austrian BKA, *Drug Policing in the Balkans*, December 2012, p.27

<sup>239</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.32; Bulgaria ARQ, 2012, Q. 31; Albania ARQ 2012, Q. 31

<sup>240</sup> Europol, *Serious Organised Crime Threat Assessment (SOCTA)*, 2013, p. 20

<sup>241</sup> See SOCA, *Annual Report and Accounts 2011/12*, p.11, which states that, “sustained SOCA activity carried out in conjunction with the Turkish National Police led to significant successes against organised crime groups trafficking heroin overland”.

Similarly, the Netherlands reports that, “the smuggling route from Afghanistan via Iran, Turkey and the Balkan countries still seems to be the main routes (mentioned in two investigations from 2009), although it is noticed that this route might be less attractive because of the intensified enforcement efforts in Turkey”. See also EMCDDA, *Report to EMCDDA by the Reitox National Focal Point, The Netherlands Drug Situation 2012*, p.148

<sup>242</sup> For example, Croatian officials reported that in 2010 “in cooperation with police forces from other European countries, 5 criminal groups were disbanded and most of them did not directly operate in Croatia. The mentioned has potentially contributed to the reduction of drug availability in the Croatian drug market, which is particularly evident in reduced availability of heroin.” See EMCDDA, *2011 National Report, Croatia*, August 2011, p.106. More recently an allegedly important heroin trafficker was arrested in Kosovo. See EULEX Press Release, “Clarification on procedures regarding the arrest of Naser Kelmendi”, 8 May 2013, available at <http://www.eulex-kosovo.eu/en/pressreleases/0440.php>

<sup>243</sup> UNODC, *World Drug Report 2013*, p.45

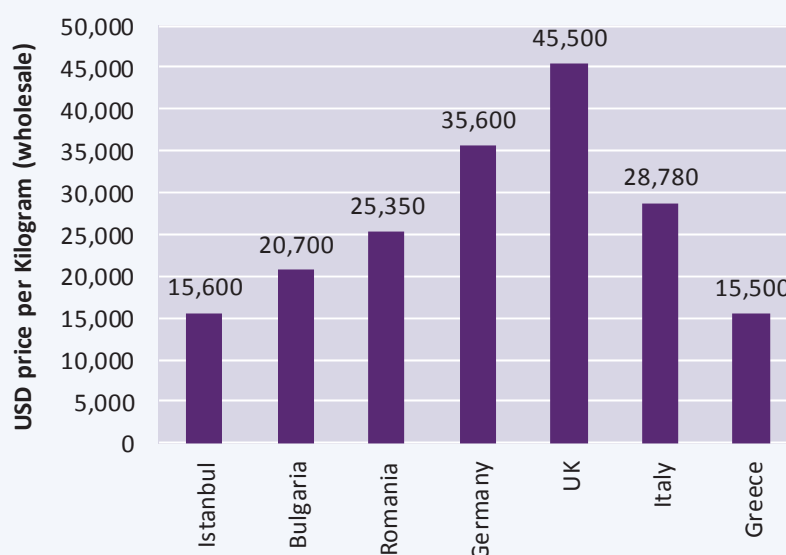
<sup>244</sup> Bulgarian authorities reported in 2012 “that that large quantities of heroin are imported and kept in stock in Bulgaria, then they are reloaded and carried by other means of transport across the European Union internal borders toward end users in Western Europe”. See EMCDDA, *2012 National Report, Bulgaria*, p.117. This is also noted by Europol in its 2011 report, which mentions Albania, the former Yugoslav Republic of Macedonia and the Kosovo region, in particular. See Europol, *OCTA*, 2011, p.12

<sup>245</sup> See Council of the European Union, report to the Mini-Dublin Group by the Hungarian Regional Chair for the Western Balkans, *Regional Report on Western Balkans*, January 2011, Brussels.

<sup>246</sup> See Greece ARQ, part iv

14 in 2012.<sup>247</sup> Greece also reports the lowest – albeit rising - heroin prices in South-Eastern Europe. It is unclear whether this is due to low purity, high supply or a combination of these and other factors. It is also the shortest and most profitable overland route to a main destination market - once the heroin reaches Italy, its wholesale price almost doubles. In general, the price of heroin increases with the proximity of the drug to destination markets in Western and Central Europe (see figure below)

**Figure 40: Wholesale heroin prices in US\$ per kilogram in Istanbul and selected countries on the Balkan route, 2012**



Source: ARQ and SELEC questionnaires 2012; Turkish National Police, KOM. Note: Prices are not purity adjusted.

Trends in heroin prices are assumed to be inversely proportional to supply (as supply increases, prices fall, while a decrease in supply would cause a rise in prices). Prices have generally risen in the last two years in South-Eastern Europe, perhaps indicating decreased supply, which appears consistent with the decrease in the amount of heroin seized across much of the region.<sup>248</sup> Another indicator might be falling purity; in the annual reports submitted to the EMCDDA, Romania,<sup>249</sup> Bulgaria<sup>250</sup> and Greece<sup>251</sup> have all reported declining purity in the last few years. It should be noted here that there are important caveats regarding the accuracy of both price and purity data which limits any definitive conclusions.

<sup>247</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

<sup>248</sup> Reports of heroin shortages in Albania in 2011-2012 may support this hypothesis. Albania ARQ, 2011, Q. 24

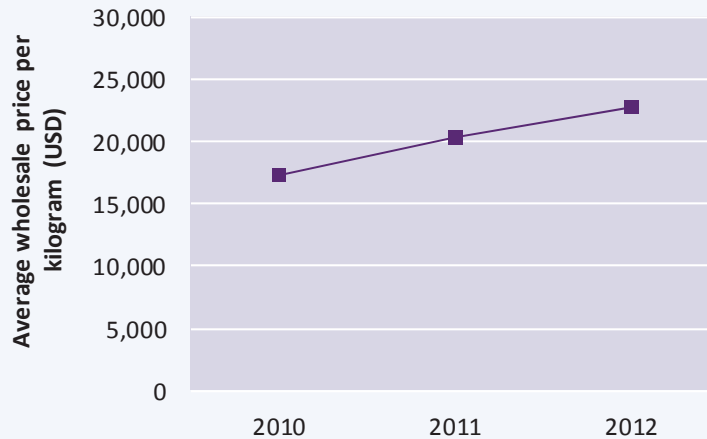
<sup>249</sup> EMCDDA, 2012 National Report (2011 data) to the EMCDDA by the Reitox National Focal Point, Romania, Trends and in-depth information on selected issues, p.7 “preservation of the heroin retail price, by contrast to the increasing wholesale price, is explained by the decrease of drug purity at street level.”

<sup>250</sup> EMCDDA, 2012 National Report, Bulgaria p.125

<sup>251</sup> EMCDDA, 2012 National Report, Greece, p.13: “In 2011, the average purity of heroin samples in active ingredients was 12.8%, when in 2008 the levels were 19.3%.”



**Figure 41: Average price in US\$ for 1 kilogram of heroin wholesale in South Eastern Europe, 2010-2012**

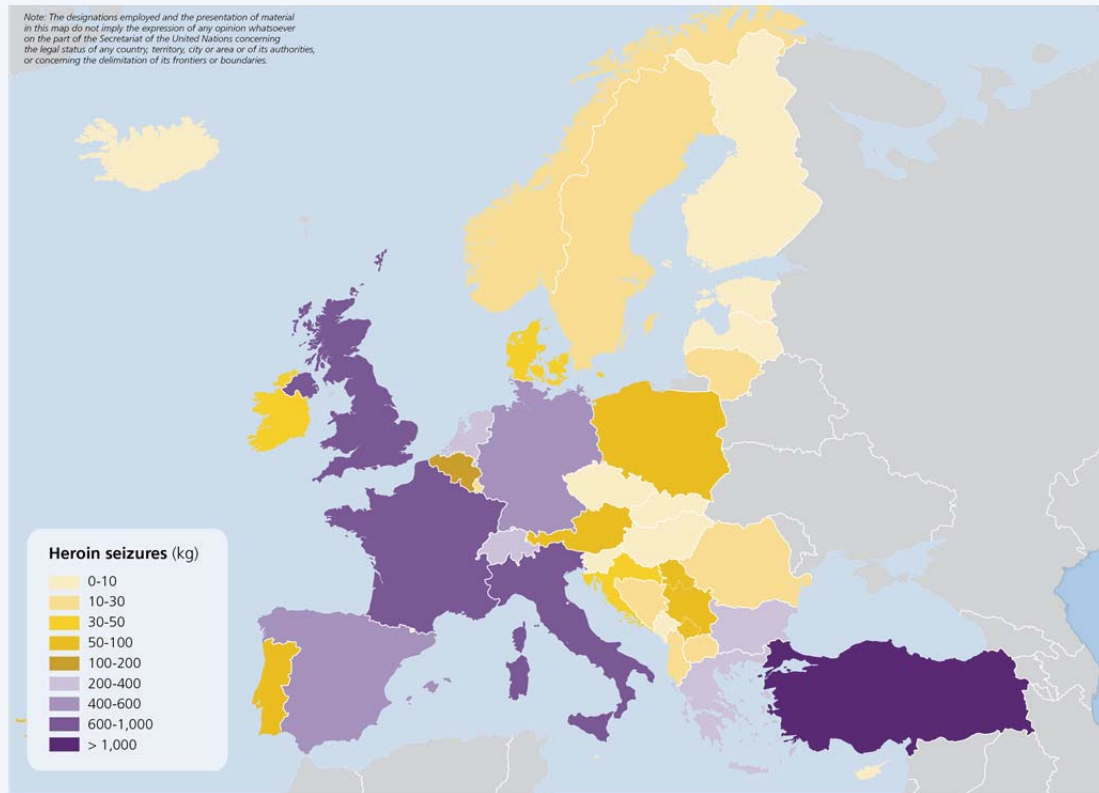


Source: ARQ data 2011-2012, SELEC data 2012 (see Annex 2 for price table country/year)

Overall, the review and analysis of available data indicate that while there appears to be a decrease in the amount of heroin trafficked, the Balkan route remains an important transit route for heroin. Moreover, the “invisible” trafficking of large shipments through parts of South-Eastern Europe may also suggest a vulnerable environment for drug trafficking at that stage of the Balkan route. The fact that there is less interdiction of heroin-trafficking in the region itself than either upstream or downstream may also imply that other drug-trafficking routes are affecting the flow of the Balkan route. In order to form a more complete picture of the importance of the Balkan route, an analysis of the demand and supply dynamics of its final destination markets is warranted.

## Getting to markets in Western and Central Europe

**Map 18: Heroin seizures in South-Eastern Europe, Turkey and Western and Central Europe, 2011**



Source: ARQ 2011, Annual SELEC Questionnaire on Drug Trafficking for 2011 (Serbia); Anti-Drug Unit of Kosovo Police, Ministry of Interior of the former Yugoslav Republic of Macedonia

The purpose of the Balkan route is to reach the large and lucrative consumer markets of Western and Central Europe. In Western and Central Europe, heroin is the most deadly of all dependence-inducing drugs<sup>252</sup> and also one of the most profitable. The latest UNODC estimates indicate a heroin market value of some US\$ 13 billion, but this value is not distributed evenly among the various countries.<sup>253</sup> As shown in the graph below, the heroin market in Western and Central Europe is perhaps most concentrated in four main consuming countries: the United Kingdom, Italy, France and Germany. These countries have traditionally referenced the Balkan route as the main transit route for heroin consumed within their borders.

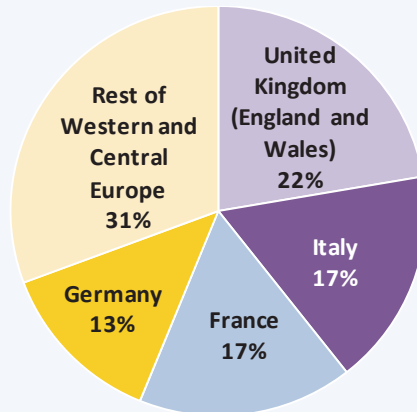
<sup>252</sup> EMCDDA, *Annual Report 2012: The State of the Drugs Problem in Europe*, 2012, p.70

<sup>253</sup> UNODC, *The Global Afghan Opium Trade*, 2011, p.57





**Figure 42: Distribution of opiate users in the main markets of Western and Central Europe, 2011 or latest year available**

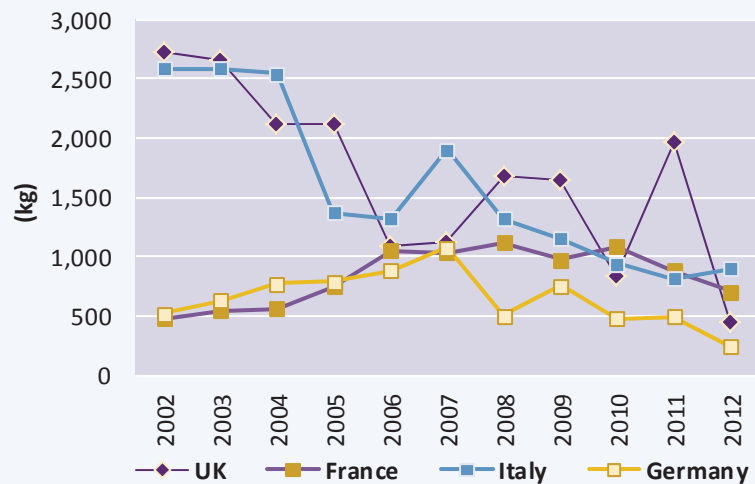


Source: ARQs; United Kingdom Government data ; UNODC, *World Drug Report 2013* (see Annex 3 for full table)

There appear to have been structural changes in the market landscape of Western and Central Europe,<sup>254</sup> with aging heroin populations and a decreasing number of new users in a number of countries. The implications of this development on the Balkan route remain unclear, but structural changes in consumer markets would likely have an impact on trafficking flows through South-Eastern Europe.

As seen in the graph below, there has been an almost continuous decline in heroin seizures in both Italy and the United Kingdom since the beginning of the 2000s, while declines in France and Germany began later in the 2000s and continued into 2012. The United Kingdom saw an important but temporary increase in 2011, followed by a significant decline in 2012, and a slight increase was noted in Italy in 2012. To a certain extent, this overall declining pattern is repeated across the rest of Western and Central Europe. The total quantity of heroin seized in Western and Central Europe decreased to around 5.6 tons in 2011 (compared to some 9 tons in 2002), which was attributed to changes in trafficking flows and law enforcement activity, among other factors.<sup>255</sup>

**Figure 43: Heroin seizures in the UK, France, Italy and Germany, 2002-2012**



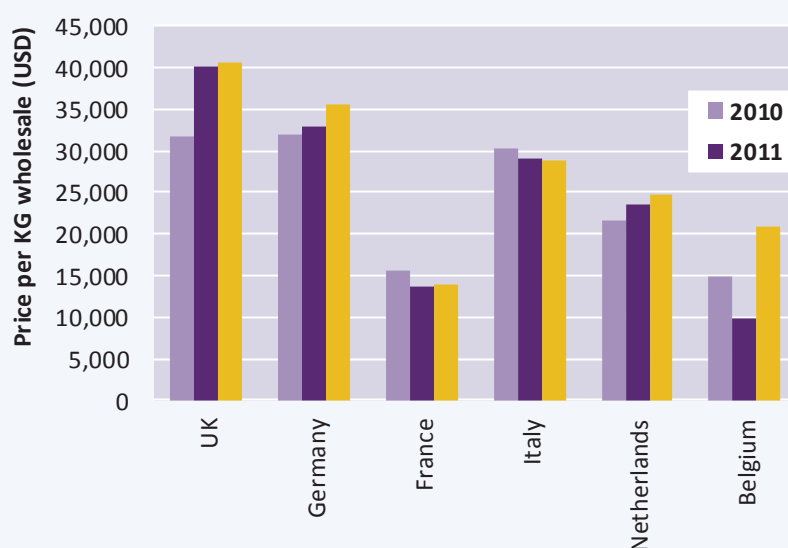
Source: Delta database 2002-2011; ARQ 2012 (Germany, Italy, France); UK Home Office 2012

<sup>254</sup> UNODC, *World Drug Report 2013*, pp. 31-32

<sup>255</sup> UNODC, *World Drug Report 2013*, p.32

As illustrated in the table below, there are striking disparities in wholesale heroin prices. The United Kingdom, Italy and Germany report relatively high wholesale prices, while the price in France is less than half that in the United Kingdom and lower than prices in South-Eastern-Europe. Among other factors, relatively lower purity<sup>256</sup> can account for this low price. Interestingly, this is inverse to France's prevalence trend, which has increased<sup>257</sup> along with the general availability of heroin in the country.<sup>258</sup> Prices in countries where heroin is likely to be stockpiled and/or redistributed, such as the Netherlands or Belgium (US\$ 24,700 and 20,800 respectively in 2012), are similar to or in some cases lower than prices in South-Eastern Europe.

**Figure 44: Average wholesale price in US\$ per kg of heroin in 2010, 2011 and 2012 in selected countries of Western and Central Europe**



Source: See Annex 2. Note: Prices are not purity adjusted.

Purity figures for the same markets are also worth examining. In Germany<sup>259</sup> and France, destination markets for the Balkan route, clear declines in retail heroin purity have been reported.<sup>260</sup> While such drops in purity are often associated with the diminished availability of the drug,<sup>261</sup> this does not appear to be the case in France.<sup>262</sup>

<sup>256</sup> French law enforcement reports "a spectacular drop" in average heroin purity since from 2009 (14 per cent) to 2011 (7.4 per cent). See OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 27.

<sup>257</sup> According to the French data submission to the EMCDDA, the annual prevalence of heroin use doubled between 2005 and 2010 from 0.1 to 0.2 per cent. Furthermore, first-time user prevalence also increased from 0.8 in 2005 to 1.2 per cent in 2010. See EMCDDA, *Rapport national 2012 (données 2011) à l'OEDT par le point focal français du réseau Reitox, France: Nouveaux développements, tendances et information détaillées sur des thèmes spécifiques*.

<sup>258</sup> OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 26; EMCDDA, *2012 National Report (2011 data) to EMCDDA by the Reitox National Focal Point, France, New Development, trends and in-depth information on selected issues*, p.170

<sup>259</sup> At retail level, purity fell from 25 per cent in 2010 to only 11 per cent in 2011. It is interesting that wholesale purity almost doubled between 2005 (36.5 per cent) and 2009 (60.3 per cent), before falling sharply to 34.1 per cent in 2009 and rising again to 42.2 per cent in 2011. See EMCDDA, *2012 National Report to the EMCDDA by the Reitox National Focal Point: Germany – New Developments, Trends and In-Depth Information on Selected Issues* (Deutsche Beobachtungsstelle für Drogen und Drogensucht, 2012), p. XXXIV

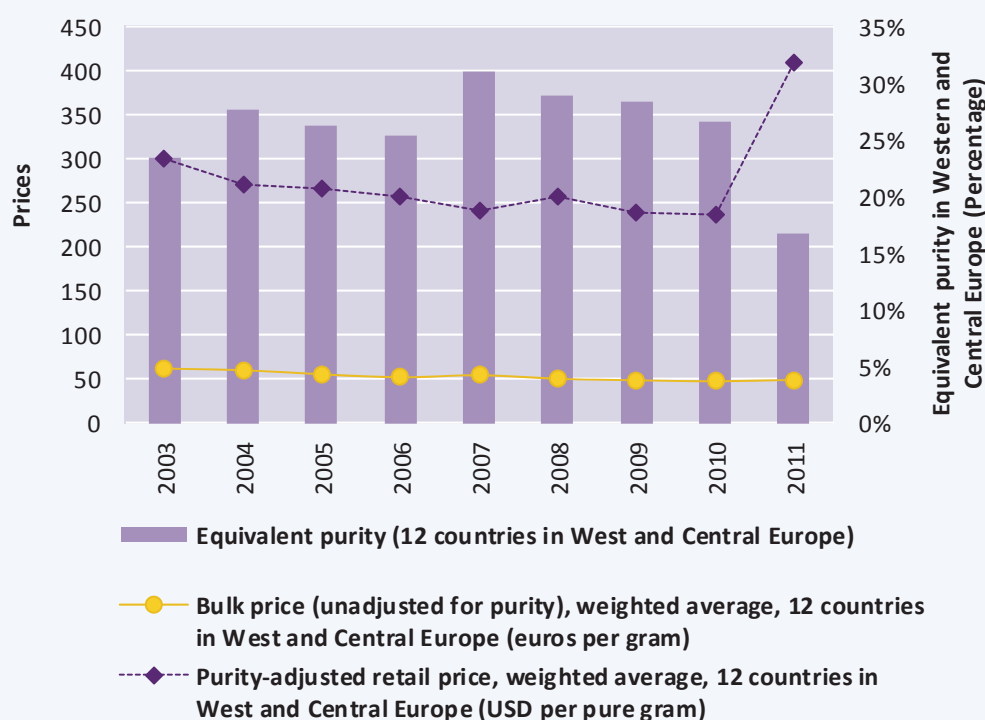
<sup>260</sup> French law enforcement reports "a spectacular drop" in average heroin purity since from 2009 (14 per cent) to 2011 (7.4 per cent). See OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 27.

<sup>261</sup> In such cases, traffickers usually cut the drug with more adulterants or cutting agents to maintain their previous sales volumes. See UNODC, *World Drug Report 2013*, p.32

<sup>262</sup> OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 26. See also EMCDDA, *2012 National Report, France*, p.170



**Figure 45: Heroin purity and prices in Western and Central Europe, 2003-2011**



Source: UNODC; Europol

### *Diversification of routes?*

In recent years, some European markets, notably the United Kingdom and to a lesser extent Italy, have reported the emergence of new heroin routes. These routes begin their journey in a southward direction from Afghanistan, either through Pakistan or the Islamic Republic of Iran, and are known collectively as the “southern route”.<sup>263</sup> The southern route comprises direct routes and indirect routes. Regarding the latter, Africa and the Middle East<sup>264</sup> are emerging as transit regions for maritime shipments of heroin, which may then continue by air or sea to destination markets, notably in Western and Central Europe (see Annex 1 and 7 for seizure tables).

It is worth examining each of the main heroin markets in Western and Central Europe in order to get a clearer picture of the dynamics and trends in heroin trafficking, particularly in relation to the interaction between these potentially emerging trajectories and the Balkan route.

### *Germany*

In 2011, Germany received most of its heroin after it had transited South-Eastern Europe. In 2011, Germany reported Turkey and Bulgaria as the main departure countries (in over 80 per cent of cases) followed by the Netherlands.<sup>265</sup> Germany’s single largest seizure in 2011 consisted of 150 kg of heroin transported by truck along the northern branch of the Balkan route (Bulgaria-Romania) and continuing to the Netherlands via

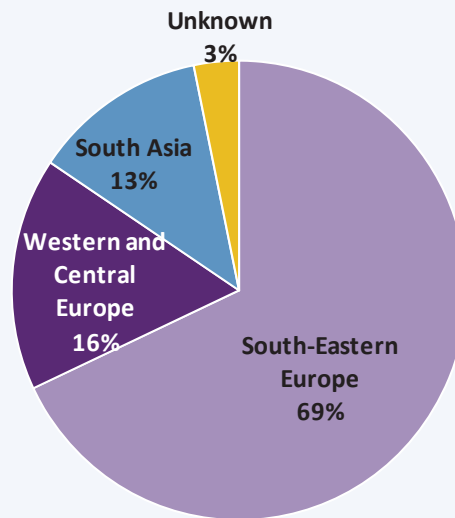
<sup>263</sup> UNODC, *World Drug Report 2013*, p. 30

<sup>264</sup> UNODC, *World Drug Report 2013*

<sup>265</sup> ARQ Germany 2011, Q.4-6

Belgium.<sup>266</sup> It appears that large shipments of heroin seized in Germany frequently continue on to the Netherlands, only to return subsequently to the German market.<sup>267</sup>

**Figure 46: Main departure region for the largest heroin seizures in Germany, 2011**



Source: Adapted from German BKA, *Largest Seizures of Heroin in Germany, 2011*

The situation is slightly less clear with regard to 2012, when Germany seized some 242 kg of heroin, a substantial drop from the previous year and a 10-year low. In contrast with 2011, Germany reported the Netherlands as the main departure country, followed by Pakistan and India.<sup>268</sup> It is interesting to note that, since 2009, Germany has reported increases in heroin trafficking activity by sea.<sup>269</sup> Although not a German seizure, a 255-kg seizure of heroin travelling by sea from Turkey to Germany's Bremerhaven Port (destined for the Netherlands)<sup>270</sup> in 2012 indicates both the continued importance of Turkey as a departure country and also the use of sea routes. In 2011, Turkish officials seized 53 kg of heroin destined for Germany at Mersin International Port on the North-Eastern coast of the Mediterranean Sea.<sup>271</sup>

In the area of organized heroin trafficking, Turkish nationals, after German nationals, are most arrested for heroin smuggling in Germany.<sup>272</sup> Greek citizens are the only nationals from South Eastern Europe that are recorded for opiate trafficking in Germany.<sup>273</sup>

### Italy

Italy remains one key heroin consumer market where Albanian groups play a relatively important role; whereas Turkish citizens do not figure at all in Italian official reports. It should however be added that Albanian citizens were actually more likely to be caught dealing cocaine, cannabis or ATS than heroin in Italy. For heroin and other drugs,

<sup>266</sup> WCO, *Customs and Drugs Report 2011*, p.20

<sup>267</sup> German BKA, *Annual Report 2010*, p.2. See also ARQ Germany 2011, Q.4-6

<sup>268</sup> Germany ARQ 2012, Q 4-6. South Asia also features in 2011 statistics with shipments travelling primarily by air from Pakistan and through the Middle East.

<sup>269</sup> German BKA, *Annual Report 2010*, p.2

<sup>270</sup> Presentation by Dr. Fazli GÖKÇEGÖZ, Director of Central Narcotics Division, Subcommittee on Illicit Drug Traffic and Related Matters in the Near and Middle East in its forty-seventh session, Antalya, Turkey, 19-23 November 2012; Balkan Info seizure database

<sup>271</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011, p. 12

<sup>272</sup> BKA, *Narcotics Situation Report 2010*, p.7; ARQ Germany, 2012, Q. 25-30

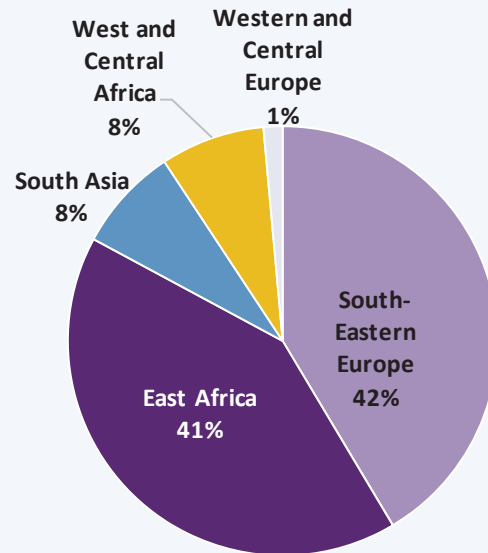
<sup>273</sup> ARQ Germany, 2012, Q. 25-30



Albanian traffickers cooperate with Italian criminal organizations. Romanian citizens are the only other nationals from South-Eastern Europe that are recorded for opiate trafficking in Italy.<sup>274</sup>

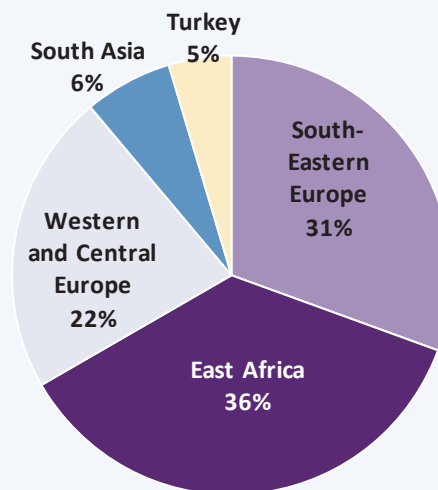
Italy reported a slight increase in heroin seizures in 2012.<sup>275</sup> In previous years, the main transit areas for Italy-bound heroin tended to be located almost exclusively in South-Eastern Europe.<sup>276</sup> In 2011, Italy reported an increase in heroin travelling from East Africa by air,<sup>277</sup> a trend that was further confirmed in 2012.<sup>278</sup>

**Figure 47: Departure regions for heroin seized in Italy, 2011**



Source: Adapted from DCSA *Annual Report*, 2011

**Figure 48: Departure regions for heroin seized in Italy, 2012**



Source: Adapted from DCSA, *Annual Report*, 2012

<sup>274</sup> Italy ARQ, 2012, Q. 25-30

<sup>275</sup> ARQ Italy 2012

<sup>276</sup> See DCSA, *Annual Report 2010*, p. 31; *Annual Report 2009*, p. 35; *Annual Report 2008*, p. 76; *Annual Report 2007*, p. 71. See also Italy ARQ, 2009, 2010, 2011

<sup>277</sup> DCSA, *Annual Report 2011*

<sup>278</sup> Italy ARQ, 2012, Q. 4-6

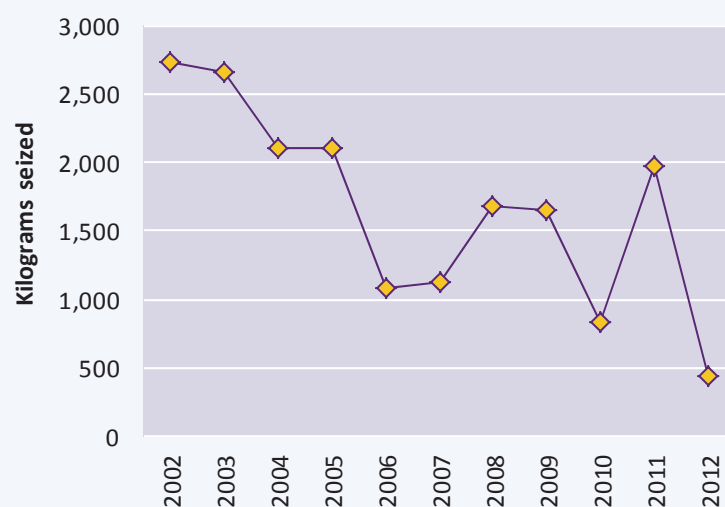
Traffickers seeking to reach Italy (and other major European markets) have also targeted lesser-known airports in the immediate region, such as in neighbouring Slovenia, which linked half all its seizures to East Africa in 2012.<sup>279</sup> Air shipments appear to be handled by couriers, and while single passengers cannot hope to carry volumes comparable to those transported by sea or overland routes, cumulative volumes can be significant. In 2011, for example, more than 23 kg of heroin travelling from Mali were seized at Italy's Malpensa Airport.<sup>280</sup>

The 2012 Annual Report by Italy's national anti-drug service, the Direzione Centrale per i Servizi Antidroga (DCSA), assesses the growing number of heroin seizures linked to the region as confirming, "the consolidation of the so-called African route: heroin, leaving producing areas, mainly from airports and ports (especially the one in Karachi) in Pakistan, reaches Western markets through the Eastern part of the African continent".<sup>281</sup> This does not mean, however, that the Balkan route to Italy has fallen into disuse; Greece remains the main departure country for heroin seized in Italy.<sup>282</sup> As a region however, East Africa appears to be emerging and encroaching as a heroin route to Italy.

### United Kingdom

The United Kingdom is thought to be one of the larger European opiate markets. Unique among the major markets, the United Kingdom reported a 136 per cent increase in seizures in 2011 compared to the previous year, followed by a sharp decline in 2012.

**Figure 49: Heroin seizures in the UK, 2002-2012**



Source: ARQ; UK Home Office 2012

<sup>279</sup> There were three seizures (11 kg in total) at Ljubljana's Joze Pucnik Airport in October 2012 of heroin transiting Slovenia to Italy. Information provided by the General Police Directorate, Criminal Police Directorate of the Ministry of the Interior of Slovenia, February 2013. An additional 2.6 kg of heroin travelling from Nairobi and destined for Slovenia were seized in Brussels on 25 June 2012. Information provided by the Central Drug Service of Belgium, July 2013

<sup>280</sup> The courier travelled from Bamako, Mali, via Brussels to Italy (the drug, concealed in woven baskets, was checked in as luggage). See Azienda Delle Dogane Press Release, Rome, 26 October 2011, available at <http://www.agenziadogane.it/wps/wcm/connect/ff2a998048d5554ca16aeb780682f008/cre-s-20111026-126268-MPX-eroina.pdf?MOD=AJPERES&amp;CACHEID=ff2a998048d5554ca16aeb780682f008>

<sup>281</sup> DCSA, *Annual Report 2012*

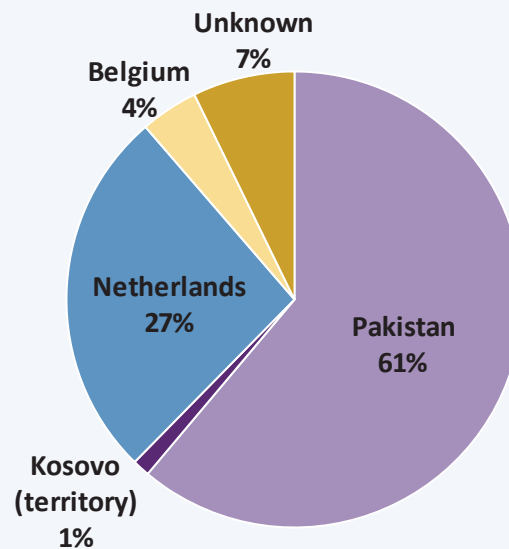
<sup>282</sup> Italy ARQ 2009, 2010, 2011



The British market has for some years been supplied by the Balkan route via Turkey.<sup>283</sup> In 2011, the United Kingdom reported a “reduction in heroin entering the UK via Turkey and an increase in heroin UK directly from Pakistan (air freight/containers)” and added that, “in 2011, nearly two thirds of heroin seized at UK borders had been trafficked directly from Pakistan”.<sup>284</sup> Official reports from Pakistan also appear to indicate that the United Kingdom is a main destination.<sup>285</sup>

Pakistan has long been used to traffic heroin by air to the United Kingdom,<sup>286</sup> but the increasing use of large container shipping appears to be a new phenomenon. In 2011-2012, most of the country’s heroin seemed to arrive in containers from Pakistan, either directly or through Belgium/the Netherlands.<sup>287</sup>

**Figure 50: Departure country for UK border seizures, 2011 (10 kg or more)**



Source: SOCA

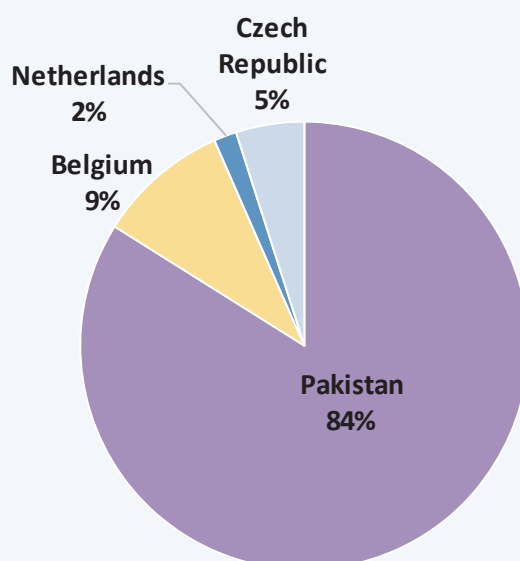
<sup>283</sup> As stated by SOCA, “Until the beginning of 2010, forensic comparisons of heroin samples showed that approximately 75 per cent of heroin seized in the United Kingdom was likely to have been trafficked via Turkey, reflecting the extent of the influence of Turkish organised crime groups over the UK heroin market. The past year saw a reduction in the amount of heroin available in Turkey and in the number of UK-based criminals able to import heroin using this route”. See SOCA, *Annual Report and Accounts 2011/12*, p.11.

<sup>284</sup> United Kingdom ARQ, 2011, iv

<sup>285</sup> Pakistan, ARQ, 2011, iv

<sup>286</sup> SOCA, *United Kingdom Threat Assessment of Serious Organized Crime 2006/7*, Chapter 5

<sup>287</sup> According to the 2012 United Kingdom ARQ, “The Netherlands and Belgium still remain prominent as transit points for heroin trafficking to the UK via large goods vehicles and Ro-Ro ferries”. SOCA also states that, “Seven members of a prolific Birmingham-based heroin smuggling organized crime group were sentenced in July and August to a total of 125 years’ imprisonment for drug supply and money laundering offences following joint activity between SOCA and the Dutch authorities. The group was responsible for smuggling heroin to the UK from Pakistan via the Netherlands”. See SOCA, *Annual Report and Accounts 2011/12*, p.11

**Figure 51: Departure country for UK border seizures, 2012 (10 kg or more)**

Source: SOCA

Official British reports indicate that this apparent route shift may have been due to the strengthening of border controls in Turkey and the arrests in Turkey of key figures in heroin trafficking to Europe.<sup>288</sup>

In the past, the British heroin market was dominated by Kurdish/Turkish groups, who began targeting the United Kingdom in the early 1990s, displacing or competing with South Asian groups for market shares.<sup>289</sup> As late as 2009, SOCA stated that Kurdish/Turkish traffickers continued to dominate the heroin supply to Europe, particularly the United Kingdom.<sup>290</sup> Between 2010 and 2012, concurrent with high-level arrests in Turkey and a loss of market shares for Turkish groups in the United Kingdom,<sup>291</sup> SOCA noted the rise of Pakistani organized criminal groups targeting the British market.<sup>292</sup> In addition to law enforcement efforts in Turkey and the United Kingdom, this shift may also be due to traffickers' decisions: "heroin traffickers trying to avoid Turkish groups now also traffic via East and South Africa or ship their product directly to the EU via Pakistan or the United Arab Emirates".<sup>293</sup>

Whatever the case, the financial incentives for trafficking are clear - 1 kg of heroin costs around US\$ 4,068<sup>294</sup> in Pakistan, and this jumps to US\$ 45,500 in the United Kingdom.<sup>295</sup>

<sup>288</sup> For example, the United Kingdom ARQ for 2012 states that, "The heroin route via Turkey has been squeezed by multi-agency international activity against the main traffickers, which has resulted in an increase in the direct trafficking of heroin via Pakistan"; SOCA, "SOCA comments on reported United Kingdom heroin shortages", 31 January 2011, available at [www.soca.gov.uk/news/309-soca-comments-on-reported-uk-heroin-shortages](http://www.soca.gov.uk/news/309-soca-comments-on-reported-uk-heroin-shortages)

<sup>289</sup> Jann Van Doorn, "Drug trafficking networks in Europe", *European Journal of Criminal Policy and Research*, 1993, p.98

<sup>290</sup> SOCA's 2009 threat assessment states "London-based Turkish and Kurdish criminals control much of the heroin trade in the UK, with criminals from Pakistan and other south Asian countries exploiting family connections to supply and distribute heroin particularly in north of England and the Midlands". See SOCA, *The United Kingdom Threat Assessment of Organised Crime*, October 2009, p.26

<sup>291</sup> The British ARQ 2012 states that, "The prominence of Turkish organised crime groups, within the heroin supply chain has diminished in the last eighteen months. However, the threat from these crime groups remains."

<sup>292</sup> Information provided by SOCA, March 2013.

<sup>293</sup> Europol, *SOCTA*, March 2013, p.8

<sup>294</sup> Typical price, 2011. See UNODC, *World Drug Report 2013*

<sup>295</sup> ARQ data, 2012. Mean GBP 30,000 (range: 25,000-35,000)





This means that mark-ups may be considerable for those bypassing the Balkan route and trafficking via direct southern route trajectories to the United Kingdom.<sup>296</sup>

**Figure 52: Price in US\$ for 1 kilogram of heroin wholesale in Istanbul and selected countries on the Balkan and southern routes, 2012 unless otherwise indicated**



Source: ARQ 2012 (Germany, Romania, Bulgaria, United Kingdom); ARQ 2011 (Pakistan); KLPD, Central Unit, Central Intelligence Division; Belgian Federal Police; Turkish National Police, KOM. Note: Figures are rounded; prices are not purity adjusted. See Annex 2 for full table of wholesale prices

While the Islamic Republic of Iran straddles both the Balkan route and the southern route,<sup>297</sup> it is rarely identified as a departure country for southern route trajectories to the United Kingdom. An interesting exception relates to Turkish organized crime, indicating the extent of its reach upstream. In 2010, cooperation between SOCA and the Turkish National Police resulted in the arrests of criminal group members and the seizure of 150 kg of heroin following a controlled delivery to the United Kingdom. Rather than using maritime routes, the Turkey-based group was responsible for transporting large quantities of heroin by airfreight from the Islamic Republic of Iran directly to the United Kingdom.<sup>298</sup> This may indicate that Turkish groups are not solely dependent on the Balkan route.

### *Netherlands*

According to SOCA, a portion of southern route heroin also transits the Netherlands before reaching British shores.<sup>299</sup> A recent example can be seen in the August 2013 seizure of 202 kg of heroin travelling from Pakistan and destined for the United Kingdom.<sup>300</sup> The seizure occurred at Rotterdam seaport.

<sup>296</sup> ARQ United Kingdom, 2012. Mean GBP 30,000 (range: 25,000-35,000)

<sup>297</sup> UNODC, *World Drug Report 2013*, p.30

<sup>298</sup> British Parliament, "Home Affairs Committee - Drugs: Breaking the Cycle: Written evidence submitted by the Serious Organized Crime Agency (DP065)", January 2012, available at [www.publications.parliament.uk/pa/cm201213/cmselect/cmhaff/184/184wea12.htm](http://www.publications.parliament.uk/pa/cm201213/cmselect/cmhaff/184/184wea12.htm). See also KOM, *Annual Report 2010*, p.10, available at [http://www.tadoc.gov.tr/Dosyalar/2010\\_En\(1\).pdf](http://www.tadoc.gov.tr/Dosyalar/2010_En(1).pdf)

<sup>299</sup> SOCA, *Annual Report and Accounts 2011/12*, p.12

<sup>300</sup> Drug seizures, KLPD, November 2013

While not a main market, the Netherlands is a key redistribution point for Balkan route heroin. The country appears to serve as a convergence point for flows from both the southern route<sup>301</sup> and the Balkan route and then as a secondary distribution centre to other European countries.<sup>302</sup> A 2011 report by the Netherlands to EMCDDA suggested that the Balkan route was the main conduit for heroin into the Netherlands, although it added that, “this route might be less attractive because of the intensified enforcement efforts in Turkey.”<sup>303</sup> Seizures in the Netherlands have been declining since 2008 but this could be related as much to law enforcement priorities as to actual declines in flows.<sup>304</sup> An increase is noted in 2012.

**Figure 53: Heroin seizures in the Netherlands, 2002-2012**



Source: Delta database, KLPD Central Unit, Central Intelligence Division (2012), *Note*: 2012 Figures are preliminary and will be updated when information becomes available

Turkish citizens are reported as dominant in heroin trafficking to the Netherlands,<sup>305</sup> followed by citizens of the Netherlands and Pakistan. They are followed by Serb, Albanian and Romanian groups who are reported to traffic in small quantities.<sup>306</sup> It remains unclear which organizations organize southern route shipments from Pakistan to the Netherlands but given the important role of Pakistani traffickers in heroin trajectories

<sup>301</sup> Other southern route destinations include Canada. See WCO, *Illicit Trade Report 2012*: "The first was an interception made by Netherlands Customs on 17 November 2012 at Amsterdam airport in the air freight sector. Netherlands Customs officers seized 451 kg of heroin from a shipment consigned in South Africa, transiting via the Netherlands and bound for Canada (CEN No. 115028)".

<sup>302</sup> *World Drug Report 2012*, p.82. The Netherlands receives heroin from other directions as well, notably the Caucasus. In 2013, 27 kg of heroin were seized from a truck in Azerbaijan that was destined for the Netherlands. See CARICC, *Information Bulletin n. 122*. Also, in 2011 Armenian law enforcement reported an attempt to traffic 90 kg through Yerevan Airport, which was destined for the Netherlands and Denmark. See United States Department of State, Overseas Security Advisory Council (OSAC), *Armenia 2012 Crime and Safety Report*, available at <https://www.osac.gov/Pages/ContentReportDetails.aspx?cid=12263>

<sup>303</sup> EMCDDA, *Report to EMCDDA by Reitox National Focal Point, The Netherlands Drug Situation 2012*, p.148

<sup>304</sup> As stated in the *Report to EMCDDA by Reitox National Focal Point, The Netherlands Drug Situation 2012*, p.148, "The information about heroin trafficking in the Netherlands is limited, because there is almost no (further) investigation into suppliers, buyers, smuggling routes or criminal organisations".

<sup>305</sup> KLPD, *Heroïne: criminaliteitsbeeldanalyse 2010*, p. 13, <http://www.politie.nl/binaries/content/assets/politie/documenten-algemeen/nationaal-dreigingsbeeld-2012/cba-heroïne-2012.pdf>

<sup>306</sup> *Ibid.*, p. 13.



to the United Kingdom, it cannot be excluded that this extends to other countries along the southern route.<sup>307</sup>

### Belgium

While not a major market, Belgium acts as a forwarding point for heroin destined for the Netherlands (usually for further distribution within Europe) and the United Kingdom.<sup>308</sup> The Balkan route is the traditional supplier of heroin to Belgium.<sup>309</sup> The route consists of overland trajectories but a sea route directly from Turkey can also carry shipments.<sup>310</sup> The latest incident that is indicative of this occurred in 2010, when Belgian Customs seized 130 kg at Antwerp seaport that was intended for further transportation to the Netherlands.<sup>311</sup> In the latest example of the classic overland trajectory, a large shipment of 393 kg of heroin destined for Belgium was stopped on the Turkey-Bulgaria border in August 2013.<sup>312</sup>

**Table 8: Heroin seizures by Belgian Customs at Antwerp seaport, 2010-2013 (kilograms)**

Date	Location	Amount	Route	Method
Mar-13	Belgium (Antwerp port)	863	Mozambique – Belgium – the Netherlands	Container
Feb-13	Belgium (Antwerp port)	230	Pakistan – Belgium – the Netherlands	Container
Apr-11	Belgium (Antwerp port)	60	Pakistan – India – Belgium – the Netherlands	Container
Aug-10	Belgium (Antwerp port)	130	Turkey (Bursa) – Belgium – the Netherlands	Container
Dec-10	Belgium (Antwerp port)	127	Islamic Republic of Iran – UAE – Belgium – the Netherlands	Container

Source: Belgian Customs

There have been several shipments linked to the southern route seized in Belgium. In 2013, a container carrying 230 kg of heroin from Karachi, Pakistan, was seized at the port of Antwerp. This was not a first - at least two other large heroin seizures linked to the southern route occurred at the port in 2010-2011, including one shipment from the Islamic Republic of Iran.<sup>313</sup> Heroin shipments can be quite high in volume, both relatively and in absolute terms. A single southern route seizure of 863 kg at Antwerp in 2013 was almost equivalent to total heroin seizures in South-Eastern Europe in 2012 (930 kg). This last case did not simply involve shipments being sent to a container port in the hope that they would blend into licit trade flows. Traffickers had recruited hackers to break

<sup>307</sup> For an example of this see the SOCA annual report for 2011-2012, which states that, “Seven members of a prolific Birmingham-based heroin smuggling organized crime group were sentenced in July and August to a total of 125 years’ imprisonment for drug supply and money laundering offences following joint activity between SOCA and the Dutch authorities. The group was responsible for smuggling heroin to the UK from Pakistan via the Netherlands”. See SOCA, *Annual Report and Accounts 2011/12*, p.11

<sup>308</sup> ARQ, United Kingdom, 2012. See also ARQ 2013, p. iv. See also United States Department of State, *INCSR*, 2011, p.133

<sup>309</sup> EMCDDA, *2012 National Report (2011 date) to the EMCDDA by the Reitox National Focal Point, Belgium, New Development, Trends and in-depth information on selected issues*, 2012, p165

<sup>310</sup> Before 2011, Belgium reported at least two maritime heroin shipments, both of which were travelling from Turkey.

<sup>311</sup> Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2010, p.30, p.11. The other seizure concerned 97 kg of heroin seized in March 2007 at Antwerp seaport en route from Turkey.

<sup>312</sup> “Drug Trafficking Situation in South Eastern Europe”, presentation by SELEC delegate to UNODC, 2013

<sup>313</sup> Such shipments can be quite high in volume, both relatively and in absolute terms. A single southern route seizure at Antwerp in 2011 was equivalent to more than 40 per cent of total heroin seizures in Belgium that year.

into computers that tracked and controlled the movement and location of shipping containers arriving at Antwerp seaport.<sup>314</sup>

**Table 9: Record seizure of heroin at Antwerp, March 2013**

Date	Amount	Method	Route	Remarks
2013	863 kg	Container	Mozambique – Belgium – the Netherlands	
				

Source: Belgium Customs

All maritime heroin shipments were seized in Antwerp and all were reportedly destined to the Netherlands. The port of Antwerp is one of the largest container ports in the world, and is considered pivotal in international drug trafficking.<sup>315</sup> This could mean that heroin flows are larger than indicated by seizure data.

In addition, Pakistan has reported seizing large shipments of heroin en route to Belgium (see Annex 5-6). The latest case that UNODC is aware of involved a mixed shipment of 100 kg of heroin and 6,888 kg of hashish seized in Karachi in June 2012.<sup>316</sup> As with the Netherlands, it cannot be excluded that Pakistani groups are involved in southern route shipments in Belgium. At the same time, heroin trafficking in Belgium is thought to be controlled by Turkish groups<sup>317</sup> and they have been linked to at least one southern route shipment in 2010 involving heroin travelling from the Islamic Republic of Iran (see table 8).

## France

France continues to report that it receives its heroin overland via South-Eastern Europe.<sup>318</sup> In 2011-2012, France listed the Netherlands and Belgium (notably Antwerp)<sup>319</sup> as the main transit countries for the heroin arriving on its market.<sup>320</sup> French officials further assess both countries as “traditional stock areas for the Balkan route”.<sup>321</sup> Taking into account that the Netherlands and Belgium also receive heroin via the southern route, it cannot be ruled out that some of the heroin received by France also follows that trajectory.

<sup>314</sup> Information provided by Federal Politie, Centrale Dienst Drugs (Belgian Federal Police), July 2013

<sup>315</sup> EMCDDA Country Overview, Belgium: [www.emcdda.europa.eu/publications/country-overviews/be](http://www.emcdda.europa.eu/publications/country-overviews/be)

<sup>316</sup> Anti-Narcotics Force/Ministry of Narcotics Control of Pakistan, *Quarterly Bulletin* (2nd quarter of 2012), p.5. Available at <http://www.anf.gov.pk/content/Qtly%20Bltn%202nd%20Qtr%202012.pdf>

<sup>317</sup> United States Department of State, *INCSR*, 2011, p.133

<sup>318</sup> EMCDDA, *Rapport national 2012, France*, p.10 and p.176

<sup>319</sup> OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 26

<sup>320</sup> ARQ 2011-2012, France; EMCDDA, *Rapport national 2012, France*, p.170

<sup>321</sup> EMCDDA, *Rapport national 2012, France*, p.10 and p.176



It appears that many of those managing the wholesale heroin trade in France belong to Turkish or Albanian trafficking organizations,<sup>322</sup> the latter described by French officials as “semi-wholesalers”.<sup>323</sup> Such groups are involved in supplying the French market but also in organizing the transiting of heroin through French territory towards the United Kingdom, and to a lesser extent to Spain and Portugal.<sup>324</sup>

French officials note a clear tendency towards smaller shipments<sup>325</sup> since 2010. They also report a general increase in the availability of heroin since 2006<sup>326</sup> coupled with a “spectacular” drop in purity since 2009.<sup>327</sup> In parallel, they describe the growth of an adulterant market for wholesale heroin: “sold for as much as 800 Euros a kg, these substances called “mix” are added to heroin at a ratio of 1 to 3”. This is likely linked to the low wholesale price reported by France, which stood at US\$ 13,975 in 2012,<sup>328</sup> lower than prices in South-Eastern-Europe.

When compared with most other markets in Western and Central Europe, France is something of an outlier. According to the French data submission to EMCDDA, the prevalence of heroin lifetime use increased from 0.8 per cent in 2005 to 1.2 per cent in 2010 among 15-64-year-olds.<sup>329</sup>

### Spain

Spain is not a major heroin market<sup>330</sup> but it merits inclusion based on recent evidence of southern route trafficking. A coastal country, Spain has traditionally reported flows from the Balkan route,<sup>331</sup> including at least one large shipment from Turkey by sea.<sup>332</sup> This appeared to partially change as of 2012; the main departure countries for heroin mentioned in official Spanish reports to UNODC are Pakistan, Belgium and Uganda,<sup>333</sup> the latter of which is mentioned as both a destination and a departure point.

According to data available to UNODC, Spain began to be targeted by southern route traffickers in 2010, when Pakistan reported seizing 90 kg of heroin destined for Barcelona.<sup>334</sup> Since 2011, at least two shipments of heroin seized in Spain have been

<sup>322</sup> OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, pp.31-32

<sup>323</sup> EMCDDA, *Rapport national 2012, France*, p.176. See also Police Nationale website (France), “Sirasco passe au crible la criminalité organisée”, available at [www.policenationale-france.fr/article-sirasco-passe-au-crible-la-criminalite-organisee-69291082.html](http://www.policenationale-france.fr/article-sirasco-passe-au-crible-la-criminalite-organisee-69291082.html)

<sup>324</sup> OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 28 ; ARQ 2012

<sup>325</sup> OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 30

<sup>326</sup> EMCDDA, *2012 National Report, France*, p.170

<sup>327</sup> From 14 per cent in 2009 to 7.4 per cent in 2010. OCRTIS, *Tendances du trafic de stupéfiants en France en 2012*, p. 27

<sup>328</sup> ARQ France 2012

<sup>329</sup> EMCDDA, *Rapport national 2012, France*, p.39

<sup>330</sup> United States Department of State, *INCSR*, 2012

<sup>331</sup> That year, Spain reported that most heroin seized in the country had travelled the Balkan route and that, “The main means of transporting the heroin seized in Spain is customarily overland, by road”. See EMCDDA, *2011 National Report (2010 data) to the EMCDDA by the Reitox National Focal Point, Spain, New Developments, Trends and In-Depth Information on Selected Issues*, p.212

<sup>332</sup> UNODC is aware of a 2008 seizure consisting of 300 kg of travelling from Turkey by sailboat. The seizure occurred in Stiges near Barcelona. The case reportedly involved Dutch nationals of Turkish origin at organizer level, as well as Turkish and Romanian operatives. See website of the Ministry of the Interior, Spain, *Anuario estadístico del Ministro del Interior*, 2008, available at [www.interior.gob.es/file/53/53108/53108.pdf](http://www.interior.gob.es/file/53/53108/53108.pdf). See also “La Policía Nacional interviene el mayor alijo de heroína efectuado en España y uno de los más importantes de Europa”, Madrid, 1 August 2008, available at [http://www.interior.gob.es/press/la-policia-nacional-interviene-el-mayor-alijo-de-heroina-efectuado-en-espana-y-uno-de-los-mas-importantes-de-europa-8056?set\\_locale=ca](http://www.interior.gob.es/press/la-policia-nacional-interviene-el-mayor-alijo-de-heroina-efectuado-en-espana-y-uno-de-los-mas-importantes-de-europa-8056?set_locale=ca)

<sup>333</sup> Spain, 2011-2012 ARQ, part iv

<sup>334</sup> UNODC, *Container Control in Pakistan: Seizures*, May 2013

linked to Pakistan.<sup>335</sup> According to Europol, this is an indication that, “in Spain, Pakistani traffickers exploit the transport and commercial links of diaspora communities, in effect shortening trafficking routes by bypassing the traditionally dominant Turkish groups”.<sup>336</sup> In 2013, another seizure of 58 kg of heroin travelling by sea from Pakistan seemed to indicate continued southern route trafficking to Spain.

**Table 10: Southern route seizures in Spain, 2011-2013**

Country of seizure	Date	Transportation method	Departure country	Destination	Amount
Spain	May-11	Container	Pakistan	n/a	23
Spain <sup>337</sup>	Sep-11	Container	Pakistan	n/a	150
Spain	Jan-13	Container	Pakistan	n/a	58

Source: Ministry of Interior of Spain official website

### *What is the reason for the emergence of the southern route?*

While the rise of the southern route appears to be supported by evidence from at least two major markets (the United Kingdom and Italy), it is difficult to establish with any degree of certainty the reasons for this apparent emergence.

One reason could be that certain trajectories and methods were affected when Turkey and Bulgaria strengthened border and Customs control measures starting in 2009. Another could be the successful arrest and conviction of several high-level traffickers involved in managing the Balkan route to the United Kingdom notably.<sup>338</sup> The resulting gap may have been filled by Pakistani groups, which are increasingly active in the United Kingdom<sup>339</sup> and other European countries such as Spain.<sup>340</sup> Moreover, as Europol has reported, some networks appear to be trying to avoid Turkish groups by sending shipments by sea directly to consumer markets.<sup>341</sup> At the same time, there is evidence that Turkish groups can organize southern route trafficking in the Islamic Republic of Iran,<sup>342</sup> which may indicate that Turkish groups are not solely dependent on the Balkan route.

It is likely that a combination of these (and other) factors has played a role in shifting some traditionally overland routes to maritime trajectories, although more research is

<sup>335</sup> A seizure of 150 kg in September 2011 and a seizure of 23 kg in May 2011, 2011. In addition to maritime routes, courier services from traffickers based in Afghanistan/Pakistan directly to Spain (and the Netherlands) were used for small shipments in 2013. See Ministry of Interior, Spain, [www.interior.gob.es/press/incautados-en-barcelona-64-kilos-de-heroina-procedente-de-afganistan-14659?locale=es](http://www.interior.gob.es/press/incautados-en-barcelona-64-kilos-de-heroina-procedente-de-afganistan-14659?locale=es)

<sup>336</sup> Europol, *OCTA*, 2011, p.12

<sup>337</sup> It should be noted that, according to Spanish authorities, this shipment was in fact destined for Côte d'Ivoire and made an unscheduled stop in Spain. Information provided by Spanish Customs, April 2013

<sup>338</sup> See United Kingdom ARQ 2012, which states that, “The prominence of Turkish organised crime groups, within the heroin supply chain has diminished in the last eighteen months. However, the threat from these crime groups remains.”

<sup>339</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.32

<sup>340</sup> Europol, *OCTA*, 2011, p.12

<sup>341</sup> Europol, *SOCTA*, March 2013, p.8

<sup>342</sup> Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2010, p.10, available at [http://www.tadoc.gov.tr/Dosyalar/2010\\_En\(1\).pdf](http://www.tadoc.gov.tr/Dosyalar/2010_En(1).pdf); KLPD (Korps landelijke politiediensten), *Heroïne: criminaliteitsbeeldanalyse* 2010, p. 15.



needed to understand the drivers behind this displacement. Nevertheless, the apparent growth of this alternate route may mean that the actual amount of heroin reaching Western and Central Europe is largely unaffected.

Based on the available data, the picture that emerges suggests that while the Balkan route is still the main supply route to Western and Central Europe, other (perhaps more efficient) trajectories are encroaching. Whether this is a temporary or lasting trend remains to be seen.

## Other drugs

### *Cocaine*

Most indicators and research suggest that cocaine is the second most problematic drug worldwide after heroin in terms of negative health impacts, and probably the most problematic in terms of trafficking-related violence.<sup>343</sup> Worldwide, it is thought that between 788 and 1,060 tons of cocaine are produced annually.<sup>344</sup> In comparison to heroin, cocaine is more widely accepted in society and has a correspondingly higher level of prevalence and consumption. However, latest trends in coca bush cultivation, cocaine seizures and prevalence suggest that, globally, cocaine markets are declining.

#### *Demand markets*

Along with North America, Western Europe remains a prime market for cocaine, with an estimated 4.2 million users and a total consumption of an estimated 124 tons.<sup>345</sup> Italy, Spain and the United Kingdom remain the largest consuming countries, representing over 60 per cent of all consumption in Western Europe.

Recent trends in coca bush cultivation, cocaine seizures and prevalence suggest that, globally, cocaine markets are declining. In Western and Central Europe, the latest UNODC estimate suggests an annual prevalence of 1.2 per cent or about 4 million users.<sup>346</sup> Trends since 2009 seem to indicate a levelling off or decline in the top three consuming countries – the United Kingdom, Italy and Spain. Since these three countries account for over two thirds of all consumption in Europe,<sup>347</sup> this could bring down the consumption average for all of Western and Central Europe.<sup>348</sup>

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<sup>343</sup> UNODC, *World Drug Report 2011*

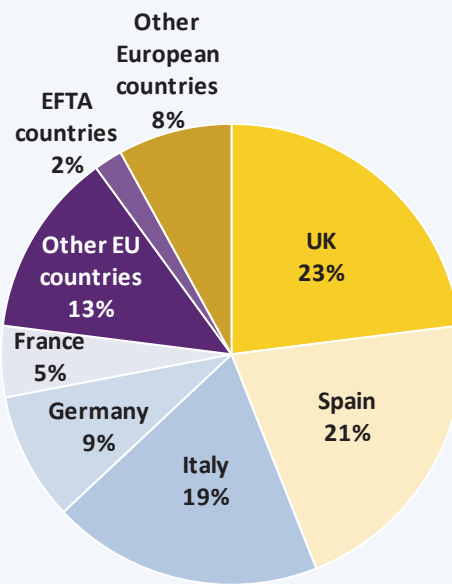
<sup>344</sup> UNODC, *World Drug Report 2012*, p.36

<sup>345</sup> UNODC, *World Drug Report 2012*

<sup>346</sup> UNODC, *World Drug Report 2013*, p.37

<sup>347</sup> UNODC, *World Drug Report 2012*.

<sup>348</sup> EMCDDA, *EU Drug Markets Report: a strategic analysis*, 2013, p.42; *World Drug Report 2013*, p.4

**Figure 54: National shares of the cocaine user population in Europe, 2008**

Source: UNODC, *Transatlantic Cocaine Market*, 2011

While long-term trends indicate a surge in cocaine use, more recent indicators suggest a slight decline in consumption. According to the World Drug Report of 2013, cocaine prevalence in Western and Central Europe declined between 2010 and 2011 from 1.3 per cent to 1.2 per cent.<sup>349</sup>

Cocaine prevalence data for South-Eastern Europe remains very limited, but it appears that annual prevalence lower than the global average (see “Challenges and Responses” section).

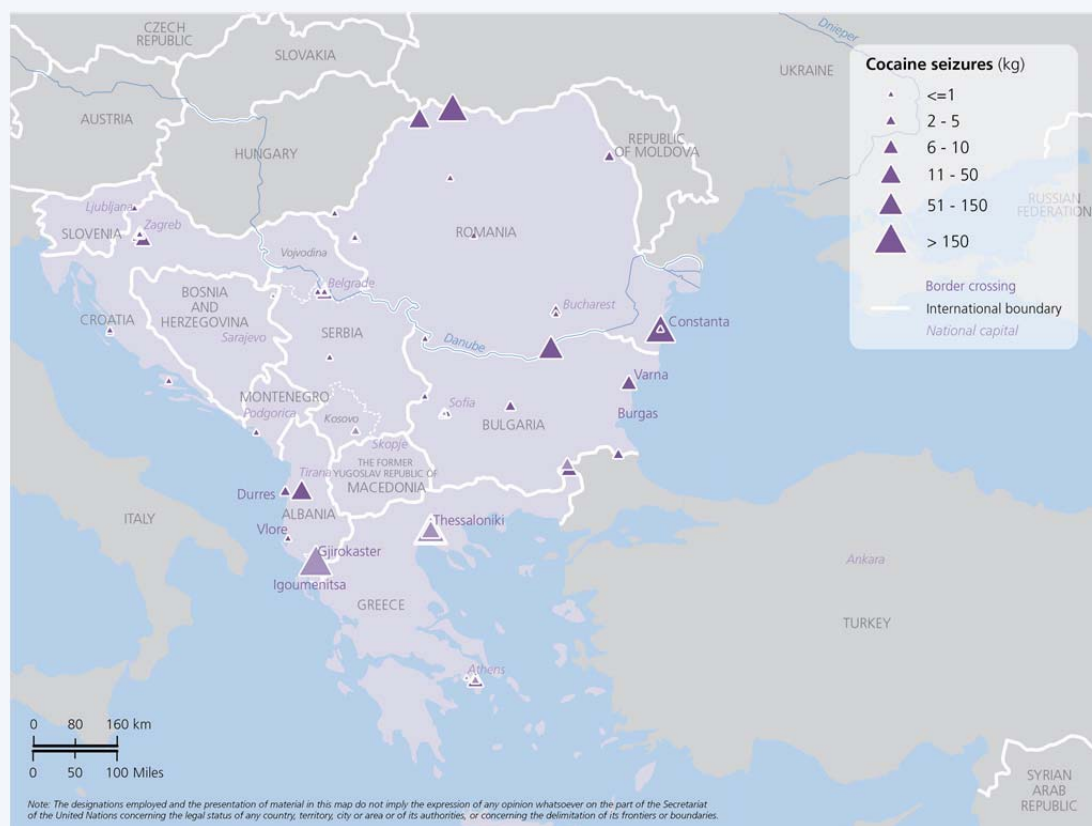
<sup>349</sup> UNODC, *World Drug Report 2013* p. 2





## Seizures

**Map 19: Locations of cocaine seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, 2010-2012**



Note: The designations employed and the presentation of material in this map do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Note: The seizures marked with darker colours ▲ were reported by official sources. Those marked with lighter colours ▲ were reported by media sources.

Source: UNODC AOTIP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

While cocaine seizures in Western and Central Europe practically halved between 2005-2006 and 2009-2010, seizures in Eastern Europe and South-Eastern Europe tripled.<sup>350</sup> Based on available data, cocaine seizures in South-Eastern Europe seem to be rather sporadic, with different countries reporting large seizures in different years.

The figure below gives a general indication of where most seizures in South-Eastern Europe occur. Thessaloniki, Greece, has seen regular cocaine seizures. In May 2011, 291 kg of cocaine shipped from Uruguay via Spain were seized in Thessaloniki, hidden in wooden boards.<sup>351</sup> One month earlier, in April 2011, 169 kg of cocaine originating in Bolivia had been found in Thessaloniki hidden inside machine tools. In 2012, Thessaloniki continued to see large but less frequent seizures. In July 2012, a seizure of 167 kg occurred.<sup>352</sup> There appears to be some overlap between cocaine and heroin trafficking routes that link back to Turkey.<sup>353</sup> This overlap can also be seen in reports from Turkish authorities that certain large organizations in Turkey known to have been

<sup>350</sup> UNODC, *World Drug Report 2012*, p.40

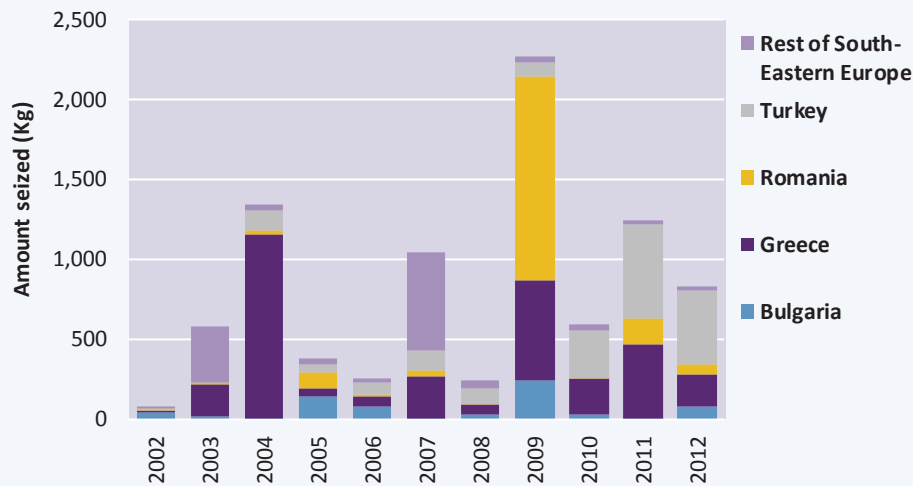
<sup>351</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011 p. 36

<sup>352</sup> *Ibid.*, 2012 p. 22

<sup>353</sup> UNODC, *World Drug Report 2013*, p.44

involved in heroin trafficking in the past have shifted their operations in part to cocaine smuggling.<sup>354</sup>

**Figure 55: Reported cocaine seizures in South-Eastern Europe including Turkey, 2002-2012**



Source: ARQ; UNODC, *World Drug Report*; SELEC data 2012

Greece seems to be a particular hotspot for the entry of cocaine into South-Eastern Europe. Of all the countries in South-Eastern Europe, Greece has consistently reported some of the largest seizures, particularly at ports. That said, Greek seizures have been declining, dropping from over 1 ton in 2004 to less than 500 kg in 2011 and 200 kg in 2012.<sup>355</sup> It should be noted that such a decline does not necessarily indicate less trafficking, particularly considering the detection of secondary cocaine extraction labs<sup>356</sup> and the impact of the financial crisis.

Cocaine also enters Black Sea ports directly for transshipment to Western Europe. In 2011, a shipment of 159 kg travelling by container was seized in Constanza, Romania. Further investigation revealed that the shipment was to be taken by land to the Netherlands,<sup>357</sup> where it might have been repackaged and distributed throughout Europe. In Bulgaria, cocaine seizures have been made in Varna and Burgas, and also at inland ports. In July 2012 a seizure of 66 kg of cocaine occurred at Ruse, a Bulgarian port on the Danube River.

Some seizures indicate counter-intuitive routes. For example, the 66 kg of cocaine seized in Bulgaria in July 2012 had initially transited Antwerp before travelling to Bulgaria and then being transported back to Europe.<sup>358</sup> It is possible that the decline of heroin trafficking in South-Eastern Europe is motivating organized criminal groups in the region to become more versatile and expand into cocaine.<sup>359</sup> However, based on available data, all that can be inferred from the size and regularity of seizures is that this axis of

<sup>354</sup> Ibid., p.44

<sup>355</sup> ARQ Greece, 2004-2011; Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece. In 2013, there was an individual seizure of over 500 kg of cocaine in Rhodes and Athens; Information provided by the United States Drug Enforcement Administration (DEA) in Greece, August 2013

<sup>356</sup> Europol, *SOCTA*, 2013 p.16: "Secondary extraction labs have been identified in Spain, the Netherlands, Greece and Moldova"

<sup>357</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011, p.26

<sup>358</sup> Ibid, 2012, p.31

<sup>359</sup> Europol, *OCTA*, 2011



Greece, Bulgaria and Romania is used by traffickers for the intermittent transportation of medium-size shipments of cocaine to Western Europe.

Little mention has been made of the South-Eastern European countries on the Adriatic coast. While international bodies and Italian law enforcement maintain that the ports of Montenegro, Croatia and Slovenia are hubs for cocaine trafficking to Western Europe, there is little evidence of this in recent seizure data.<sup>360</sup> Croatian seizures for 2011 and 2012 were 4.3 kg and 5.7 kg respectively,<sup>361</sup> while Montenegro seized only 0.4 kg over the two years.<sup>362</sup>

#### *Routes and trends*

Cocaine is sourced from a small number of countries in South America, principally Colombia, Peru and Bolivia.<sup>363</sup> Traditional trajectories ran from South America towards North American markets, with a small sub-route towards Europe. However, owing to increased consumption in Western and Central Europe since 2000,<sup>364</sup> newer routes to European markets, particularly via West Africa, have become more commonplace.

Owing to a lack of data, accurate mapping of common routes is difficult. According to SELEC, the main departure countries for cocaine transiting South-Eastern Europe are Bolivia and Paraguay,<sup>365</sup> but some countries also report Brazil, the Bolivarian Republic of Venezuela, Uruguay and Argentina as departure points.<sup>366</sup>

From source countries in South America, cocaine is transported to South-Eastern Europe primarily by ship, either directly or via Spain or West Africa.<sup>367</sup> According to SELEC, almost 98 per cent of cocaine seizures in South-Eastern Europe in 2011 related to maritime trafficking; the remaining 2 per cent of seizures were made at airports.<sup>368</sup> Owing to practicality, large seaports in the region seem to be the first point of contact for shipments, with ports such as Thessaloniki, Constanza and Varna highlighted as important seizure locations.<sup>369</sup>

<sup>360</sup> INCB, *Annual Report 2012*; Europol, *OCTA*, 2011; DCSA, *Annual Report 2011*

<sup>361</sup> ARQ Croatia, 2011 2012

<sup>362</sup> Information provided by Montenegrin law enforcement, March 2013

<sup>363</sup> UNODC, *World Drug Report 2013*, p. 37

<sup>364</sup> After the late 1990s the annual prevalence of cocaine consumption among 15-64-year-olds in the EU doubled, from 0.6 per cent in 1998 to 1.2 per cent in 2009. See UNODC, *The Transatlantic Cocaine Market*, 2011, p.10

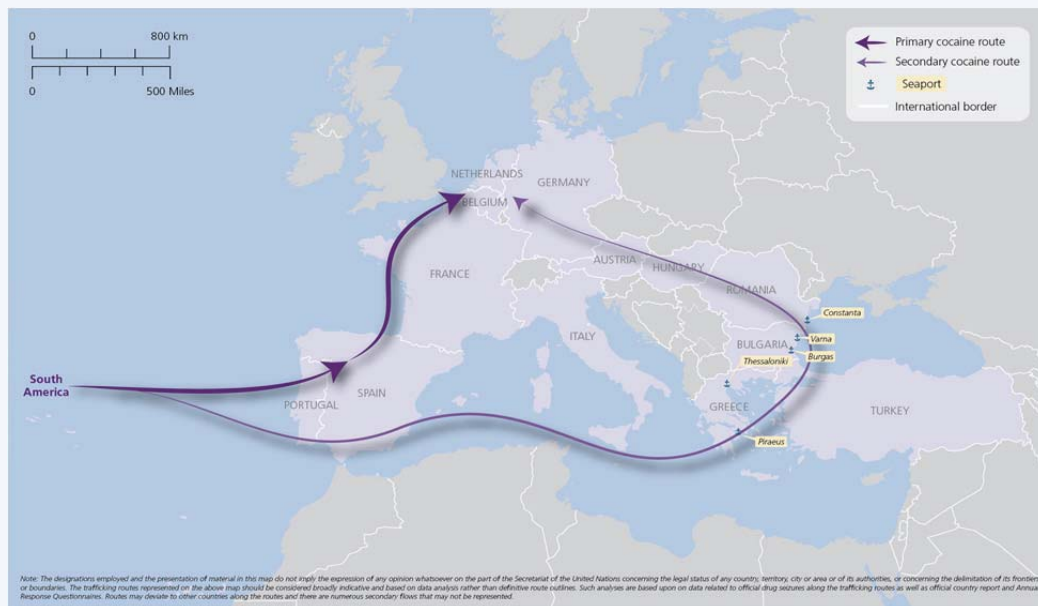
<sup>365</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011, p.25

<sup>366</sup> ARQ Greece, Bulgaria and Montenegro 2011,

<sup>367</sup> Europol, *OCTA*, 2011, p.13

<sup>368</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011, p.27

<sup>369</sup> *Ibid.*, p.26

**Map 20: General cocaine trafficking routes in Western and Central Europe**

Source: Data from the ARQ, supplemented by national government reports and other official reports

From Greece onward traffickers have several options, but according to official data they tend to follow a northward trajectory through the former Yugoslav Republic of Macedonia and Bulgaria.<sup>370</sup> From Bulgaria, cocaine reportedly continues into Romania and Hungary and further to Western and Central Europe. Trucks and personal cars carrying cocaine from Thessaloniki reportedly cross into Bulgaria with logistical support from Bulgarian organized crime.<sup>371</sup> Routes through the former Yugoslav Republic of Macedonia are less clear, but a seizure in July 2011 of 169 kg at Thessaloniki port that noted Serbia as the destination country may be indicative of such trajectories.<sup>372</sup>

Another potential trajectory for cocaine leads to Turkey, which has a small but growing cocaine market and also plays an increasing role as a transit country. Trafficking to Turkey through South-Eastern Europe may well be occurring, as indicated by a seizure of 48 kg of cocaine in Satu Mare, Romania, in 2012. Turkey saw an increase in seizures to 475 kg in 2012 and Turkish law enforcement has reported that cocaine smuggling to Turkey will become a greater threat to the country in the near future.

Another route used by traffickers is the so-called “airport route” - traffickers smuggle small amounts through regional airports, including those of Sofia and Bucharest, and on to Western European airports. Developments in air transport infrastructure continue to shorten routes, enabling cocaine to be brought directly to airports close to destination markets.<sup>373</sup> Small individual seizures of up to 5 kg of cocaine have occurred on the airport route. In comparison to heroin, cocaine shipments trafficked by air through South-Eastern Europe can be quite large.<sup>374</sup> If these routes are used regularly by traffickers,

<sup>370</sup> ARQ Greece 2011

<sup>371</sup> Information provided by Bulgarian law enforcement, February 2013

<sup>372</sup> SELEC *Report on Drug Seizures in South Eastern Europe*, 2011, p. 26

<sup>373</sup> Europol, *OCTA*, 2011, p.14

<sup>374</sup> In 2012 4.56 kg of cocaine were seized at Sofia international airport, Bulgaria. The drugs had come directly from Brazil via Qatar. A second seizure of 4.55 kg at Athens International Airport in Greece in 2012 was also traced back to Brazil. In both cases, South-Eastern European nationals were used as couriers. See SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012, p.30



relatively substantial amounts of cocaine could be trafficked each year through the region.

**Table 11: Reported cocaine seizures at international airports in South-Eastern Europe and Turkey (kilograms)**

	2010	2011	2012
Amount seized	53	9.5	16

Source: SELEC drug seizure reports 2011, 2012; ARQ data, Turkey 2012 *Note:* Seizures included are only those above 1 kg

The Balkan route remains a relatively minor and fluctuating route for cocaine trafficking to Western European markets. By way of comparison, Spain was historically a major seizure country in Europe, seizing between 40 and 50 per cent of all cocaine in the region between 2000 and 2010.<sup>375</sup> However, other countries in Western and Central Europe are reporting increased seizures. The role of the Netherlands should be highlighted - large seizures in the Netherlands, amounting to over 10 tons in 2012,<sup>376</sup> indicate that it is also a major entry point for cocaine heading to Western European markets. While traditionally not a prominent cocaine seizure country, France seized just over 10 tons in 2011,<sup>377</sup> over twice that seized in 2010 thus placing France second only to Spain in Europe.<sup>378</sup> Belgium should also be mentioned as it seized a staggering 17.5 tons in 2012 (most of it at Antwerp seaport).<sup>379</sup>

### *Indirect role of South-Eastern Europe in cocaine trafficking*

At a higher level, organized criminal groups from the Western Balkans have established operational bases in Latin America, maximizing their profits by sourcing cocaine directly from producers.<sup>380</sup> Groups from Serbia and Montenegro in particular have been involved in such trafficking activities, exploiting links and associations with Southern Cone countries in South America.<sup>381</sup> Often, these groups do not traffic cocaine though South-Eastern Europe, but the proceeds may be laundered in the region.<sup>382</sup>

In recent years, Bulgarian, Serbian and Montenegrin sailors have often been implicated in cocaine trafficking from Latin America to the ports of Antwerp and Hamburg. In 2011 a group consisting of Bulgarian, Columbian and Spanish nationals was intercepted on a Bulgarian boat in Cape Verde in a combined operation by Frontex and the Italian law enforcement agency Guardia di Finanza. Three tons of cocaine were discovered. More recently, in March 2013 Spanish authorities arrested a Bulgarian and a Serbian national on a private vessel with 590 kg of cocaine in the port of Sotogrande, Spain. Albanian groups have also recently been linked to transatlantic cocaine trafficking; Italy reports that, “the foreign nationals mostly involved in cocaine-related offences came from

<sup>375</sup> EMCDDA, *Drug Markets Report: A Strategic Analysis*, 2013, p.45

<sup>376</sup> EMCDDA, *Drug Markets Report: A Strategic Analysis*, 2013 p.46. It should also be noted that Portugal, which is seen as a major entry point for cocaine into Europe only seized 3,678 Kg of cocaine in 2011 (latest data available). Placing it sixth for annual seizures in Europe behind Spain, France, Netherlands, Belgium, Italy. Drug seizures, KLPD, November 2012

<sup>377</sup> ARQ data 2011 France

<sup>378</sup> ARQ data 2010 France

<sup>379</sup> Information provided by Belgian Customs, March 2013

<sup>380</sup> Europol, *OCTA*, 2011 p.14

<sup>381</sup> UNODC, *The Transatlantic Cocaine Market*, 2011

<sup>382</sup> According some reports, a Serbia-based group allegedly laundered US\$ 1.7 billion from cocaine trafficking through various privatization schemes in Serbia. See <https://reportingproject.net/PeopleOfInterest/profil.php?profil=54>;

Albania and Nigeria". Moreover, some groups from Serbia and Bulgaria allegedly launder billions of Euros in cocaine proceeds in South-Eastern Europe.

There is evidence that nationals of most countries in the region are being recruited into organized crime to act as couriers. Both Romania and Bulgaria report that their citizens are actively recruited by West African organized criminal groups to be used as couriers in cocaine smuggling through airports, as they have access to EU passports.<sup>383</sup> The groups target poorer nationalities in particular, promising payment of several thousands of dollars per shipment.<sup>384</sup>

## *Cannabis*

### *Demand markets*

When considering cannabis in South-Eastern Europe and Europe in general, there is the need to differentiate between markets for cannabis herb and markets for cannabis resin (hashish). While cannabis herb tends to be produced locally for local consumption, often in large quantities with comparatively little cross-border trafficking,<sup>385</sup> cannabis resin is sourced externally and trafficked across multiple borders and is therefore more susceptible to interception. That said, both forms of cannabis originate from the same plant and can be treated as one overall market.

As the drug with the highest level of social acceptability, cannabis is by far the most used drug in demand countries. It has been conservatively estimated that some 78 million Europeans have taken cannabis at some point in their lives, with the highest lifetime prevalence among those aged between 15 and 24.<sup>386</sup>

In recent years, the European picture has become increasingly complex. Many countries have reported that cannabis use is stabilizing or even decreasing,<sup>387</sup> although a small number of countries may be witnessing an increase. Still, in comparison to other illicit drugs, consumption of cannabis both in the South-Eastern European region and in Western and Central Europe remains high.<sup>388</sup>

Of particular interest is the shift towards cannabis herb consumption, to the detriment of hashish. This trend has been occurring for several years and may correlate with the increasing local production of cannabis herb in demand countries. Italy, one of the more significant hashish consuming countries, saw a stabilization in 2011, but cannabis herb seizures almost doubled and cannabis plant seizures increased by 1,289 per cent in 2012 (albeit from a low base).<sup>389</sup> Within South-Eastern Europe there is little indication of any considerable cannabis resin consumption.

### *Cultivation*

Cannabis production has become more widespread. From the latest information provided to EMCDDA, 29 European countries reported they had seen some degree of cannabis cultivation within their borders, the Netherlands and Albania being important

<sup>383</sup> ARQ data, 2011; Information provided by Bulgarian Law enforcement

<sup>384</sup> Information provided by Montenegrin Police Directorate, Ministry of Security, February 2013

<sup>385</sup> EMCDDA, *EU Drug Markets Report*, 2013

<sup>386</sup> UNODC, *World Drug Report 2012*

<sup>387</sup> Among the five countries recording the highest prevalence levels over the past decade, the United Kingdom and, to a lesser extent, France have reported a decrease in annual cannabis use in their most recent surveys, and Spain has reported a relatively stable situation since 2003. See EMCDDA, *EU Drug Markets Report*, 2013. See also UNODC, *World Drug Report 2012*

<sup>388</sup> UNODC, *World Drug Report 2012*

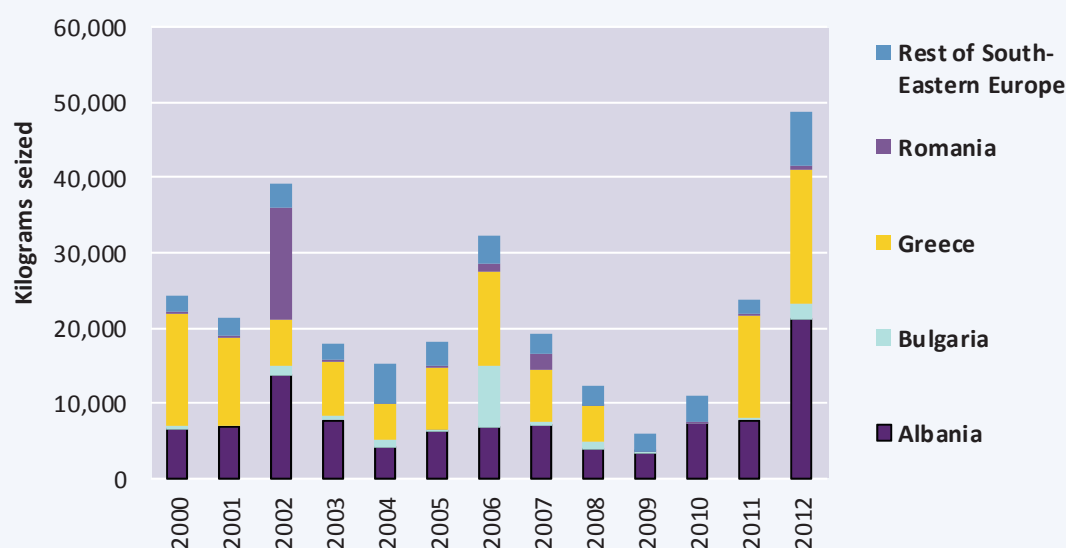
<sup>389</sup> ARQ Italy, 2009-2011



producers.<sup>390</sup> Some countries in South-Eastern Europe, including Romania, Bulgaria, Albania and Bosnia and Herzegovina,<sup>391</sup> also report the increasing use of greenhouses for indoor cultivation.<sup>392</sup> This may be preferable to outdoor cultivation, since “crops can be harvested several times per year and the quality of cannabis is better (e.g. higher levels of THC)”.<sup>393</sup> A clear distinction must be made between cultivation for local, often personal, consumption and industrial production linked to trafficking. Every country in South-Eastern Europe reports some level of local production geared primarily towards meeting local demand.<sup>394</sup>

Also of note is the important role of international trafficking in cannabis herb cultivation in the region.<sup>395</sup> Serbia, Bulgaria and Romania report that seeds or saplings are often grown in the Netherlands or Belgium and then shipped to South-Eastern Europe for cultivation.<sup>396</sup> Within the region, the main large-scale exporter of cannabis herb remains Albania. Despite recent declines in cannabis plant seizures in Albania in the past few years, many neighbouring countries, including Greece, report that Albania remains the source of over 90 per cent of cannabis herb trafficked internationally over their borders.<sup>397</sup> Large-scale cultivation occurs mainly in the south of Albania, cannabis cultivation also occurs to a significant degree in the northern parts of Albania around Skoder and Tirana (see map 21).

**Figure 56: Cannabis seizures in South-Eastern Europe, 2000-2012**



Source: ARQ; UNODC, *World Drug Report*

Note: “Rest of the SEE” includes Bosnia and Herzegovina, Croatia, Kosovo, the former Yugoslav Republic of Macedonia, Montenegro and Serbia

<sup>390</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.58

<sup>391</sup> Official country report to Mini Dublin Group May 3, 2012, p.14

<sup>392</sup> Annual SELEC Questionnaire on Drug Trafficking for 2011, Albania; ARQ data for Bulgaria and Romania, 2011, 2012

<sup>393</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012, p. 39

<sup>394</sup> *Ibid*, 2011, p. 34

<sup>395</sup> *Ibid*

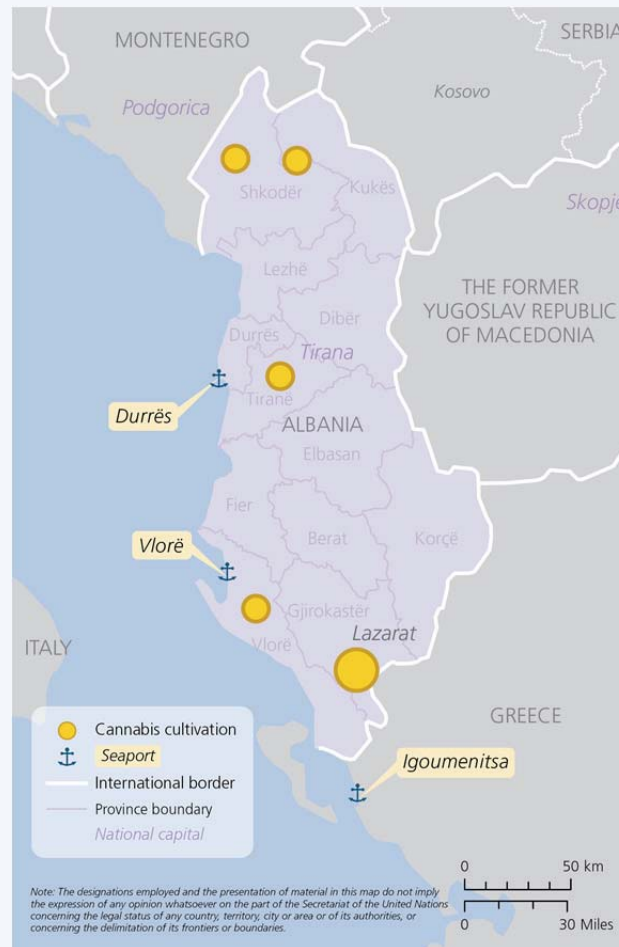
<sup>396</sup> Information provided by Bulgarian police directorate, Sofia, Bulgaria February 2013; SELEC data 2012; Official country report to Mini-Dublin Group, 25 September 2012

<sup>397</sup> ARQ Italy, Greece., 2010-2011

*Albanian cannabis herb*

Current evidence suggests that large-scale cultivation for export<sup>398</sup> occurs primarily in Albania,<sup>399</sup> with the former Yugoslav Republic of Macedonia recently reporting some large-scale cultivation. Meanwhile, Greece, Bulgaria<sup>400</sup> and the former Yugoslav Republic of Macedonia reported seizing the largest amounts of cultivated cannabis in South-Eastern Europe in 2012.<sup>401</sup> However, the disparity between Albania and other countries is best indicated by the fact that it was mentioned by SELEC Member States as the departure country in 80 seizure cases totalling over 13 tons of seizures in 2012. The second departure country was the former Yugoslav Republic of Macedonia, which accounted for three seizure cases and 315 kg.<sup>402</sup>

**Map 21: Reported cannabis cultivation areas in Albania (highlighted in yellow)**



Source: Adapted from Anti-drug Section, Anti-Organized Crime Department, Albania, May 2013

<sup>398</sup> Cultivation of large outdoor plantations. The THC content of this cannabis is usually quite low, as indicated by the 4 per cent average reported by Albania in 2012.

<sup>399</sup> EMCDDA, *EU Drug Markets Report*, 2013 p.58: “Europol (2011a) has noted that Albania has emerged as an important outdoor producer and exporter (of cannabis herb)”. Known cultivation areas within Albania include the southern region of Gjirokastër, bordering Greece, Shkodër and the North Albanian Alps, bordering Kosovo and Montenegro, and the countryside east of the port of Vlorë. The largest area under cultivation is most likely located in Gjirokastër, and the village of Lazarat in particular.

<sup>400</sup> The scale of production in Bulgaria is indicated by the seizure of over 22 tons of plants in August 2013. Information provided by the Bulgarian Ministry of Interior 2013

<sup>401</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012, p. 38

<sup>402</sup> *Ibid.*, p. 40

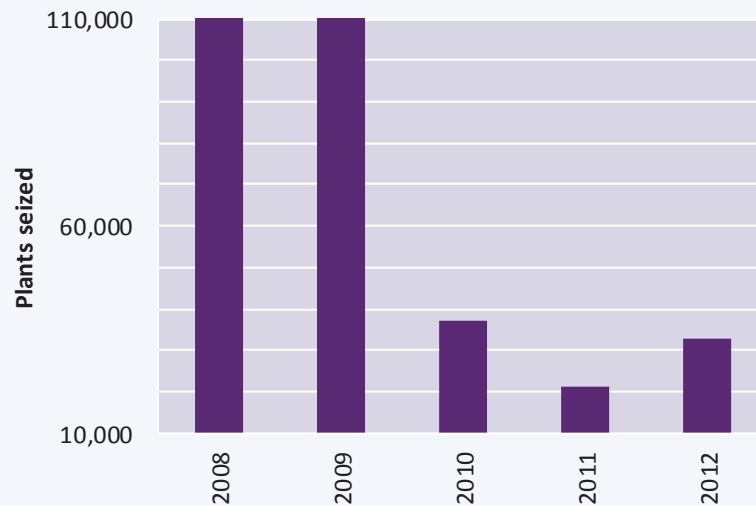




There are also strong economic incentives to growing cannabis in Albania. The wholesale price of 1 kg of cannabis herb is US\$ 300 within Albania and can reach US\$ 2,600 in Western European destination markets such as the United Kingdom.<sup>403</sup>

Interestingly, while seizures of cannabis herb more than tripled from 2011 to 2012, seizures of cannabis plants increased only slightly to 33,000. This is well below the peak level of 145,000 that occurred in 2008.

**Figure 57: Albanian cannabis plant seizures, 2008-2012**



Source: Official country report to Mini Dublin Group, 3 May 2012; Annual SELEC Questionnaire on Drug Trafficking for 2012, Albania.

#### *Southern and western trajectories for Albanian cannabis*

Albanian cannabis herb is trafficked across every border of the country, with two main routes taking precedence. In 2012, the Albanian authorities reported that cannabis herb trafficked from Albania was destined mainly for Greece and Italy.<sup>404</sup> Cannabis herb is often hidden in trucks or vans (shipments can amount to up to 3 tons)<sup>405</sup> and taken to the ports of Durres and Vlore (seizure data indicates that Durres is the preferred transfer point).<sup>406</sup> Ferries from Albania land in Bari and Brindisi and the drugs are then transported for further distribution in Western Europe. While there was previously a moratorium on the use of speedboats on the Adriatic Sea between Albania and Italy, this ended in 2013 and may impact modus operandi and trafficking routes in the future.

The Greek ports of Igoumenitsa and Patras are frequented by Albanian cannabis herb traffickers. The size of shipments can be in excess of 1 ton, as evidenced by a recent seizure of 1,200 kg in Patras in 2012 headed for Italy.<sup>407</sup> Major seizures continue to occur in Albania, particularly at the ports of Durres and Vlore. In 2011, SELEC reported 15 cases of attempts to transport cannabis into Italy from Durres, which amounted to 1,272 kg.<sup>408</sup> In 2012 the total had increased to over 3,000 kg.<sup>409</sup>

<sup>403</sup> ARQ 2012, United Kingdom

<sup>404</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Albania

<sup>405</sup> SELEC, *Report on Drug Seizures in South Eastern Europe, 2012*

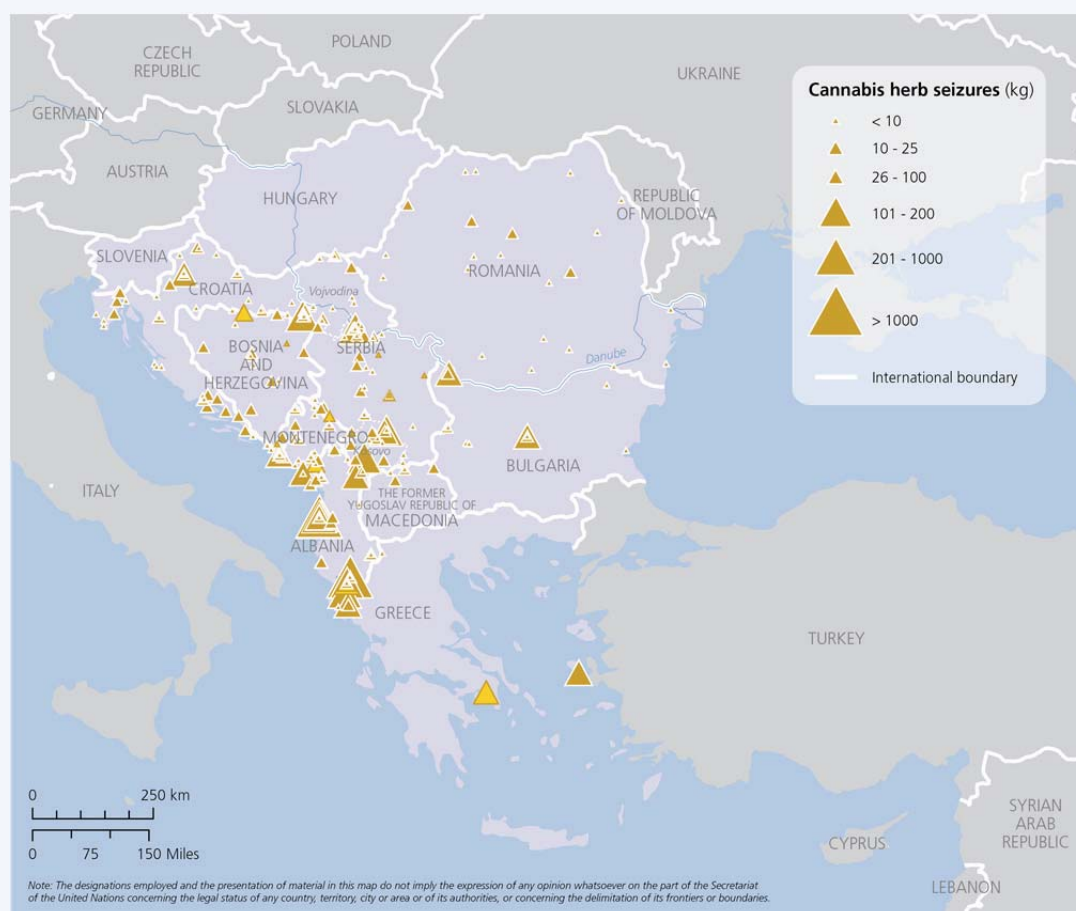
<sup>406</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Albania

<sup>407</sup> Information provided by Greek law enforcement, January 2013

<sup>408</sup> SELEC, *Report on Drug Seizures in South Eastern Europe, 2011*, p.37

<sup>409</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Albania

**Map 22: Locations of cannabis herb seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, 2010-2012**



Note: The seizures marked with darker colours ▲ were reported by official sources. Those marked with lighter colours ▲ were reported by media sources.

Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

Albania seized 3,590 kg of cannabis herb destined for Italy in 22 seizures at Durres port.<sup>410</sup> The only other border point in South-Eastern Europe where cannabis herb seizure volumes were higher was Kakavije on the border of Greece and Albania, where a similar volume of 3,678 kg was seized in 2012.<sup>411</sup> It could be argued that these are the two most important points from which cannabis leaves Albania.

#### *Northern trajectory for Albanian cannabis*

Overland routes are equally relevant. Albanian cannabis is trafficked through Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Montenegro, Kosovo and Serbia. The routes then continue westward to destination markets in Western Europe. The various forms of transportation used are diverse but drugs tend to be transported in hidden compartments in either trucks or cars.<sup>412</sup> A prime example of the use of this trajectory is the seizure of almost 300 kg in Slovenia in 2011. The drugs had travelled from Albania into Serbia and then Croatia, with a destination of Western Europe.<sup>413</sup>

<sup>410</sup> Ibid

<sup>411</sup> Ibid

<sup>412</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2011

<sup>413</sup> Ibid, p.37



Although a fairly large seizure, this is smaller than the seizures reported by Italian law enforcement<sup>414</sup> relating to cannabis transported by sea from Greece. However, as indicated in the table below, the northern trajectory may be growing in importance. For example, Serbia reported a doubling of seizures in 2012 and in April 2013 reported a 900-kg seizure on the border with Croatia.<sup>415</sup> The final destination of this cannabis was Switzerland.

With very few exceptions,<sup>416</sup> there is no evidence of sea trajectories for cannabis along the rest of the Adriatic coast. It is interesting to note that, despite the reportedly low THC content of Albanian cannabis herb in comparison to the European average,<sup>417</sup> Albanian cannabis has been able to penetrate well-entrenched European markets including in a few cases the Netherlands (see Annex 8).

The other route for Albanian cannabis herb appears to run north through Montenegro, Bosnia and Herzegovina, Croatia and Slovenia to Western Europe. The drugs are usually transported in private vehicles or rental cars, although shipments of several hundred kilograms necessitate trucks. Most of this trafficking is assumed to target Italy,<sup>418</sup> although the Netherlands may also be seeing attempts at market penetration by Albanian cannabis herb. For example, there was a seizure of a 300-kg<sup>419</sup> shipment of Albanian cannabis herb in Slovenia in 2011 and a more recent seizure in November 2013 in Germany of 698 kg<sup>420</sup> bound for the Netherlands.

The former Yugoslav Republic of Macedonia may be playing an increasingly important role in trafficking - a 900-kg seizure by Serbian authorities on the border with Croatia in 2013 indicated that the shipment had transited the former Yugoslav Republic of Macedonia on its way to destination markets in Western and Central Europe from Albania.<sup>421</sup> The table below shows that seizures in the Western Balkans have increased considerably year on year, suggesting that this overland route may be of increasing importance to traffickers.

<sup>414</sup> Information provided by Italian law enforcement, Rome, Italy, February 2013

<sup>415</sup> See official website for the Republic of Serbia Ministry of Finance, Customs Administration, available at <http://www.carina.rs/lat/Stranice/Vest.aspx?ListItemID=544>

<sup>416</sup> One exception concerns a seizure in Bari, Italy, in February 2012. The report indicated that over 300 kg of Albanian cannabis herb had been trafficked from the port of Bar in Montenegro. See Azienda Dele Dogane Press Release, 22 February 2012, available at <http://www.agenziadogane.gov.it/wps/wcm/connect/3cf770804a426cbd86becf947a709800/cre-s-20120222-23601-BA-marijuana.pdf?MOD=AJPERES&CACHEID=3cf770804a426cbd86becf947a709800>

<sup>417</sup> EMCDDA, *European Drug Report*, 2013, p.17. Range of THC potency in Europe is 5-10 per cent

<sup>418</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.64

<sup>419</sup> Information provided by Slovenian law enforcement, May 2013. See Annex 6 for further selected seizures of cannabis destined for the Netherlands.

<sup>420</sup> Information provided by SELEC Nov 2013

<sup>421</sup> Serbian Presentation at SELEC Anti-Drug Trafficking Task Force meeting, May 2013

**Table 12: Reported cannabis herb seizures in the Western Balkans and Slovenia (kilograms)**

Country/territory	2011	2012
Bosnia and Herzegovina	87	164
Croatia	395	1,043
Montenegro	804	1,022
Serbia	1,022	2,221
Slovenia	600	706
Kosovo	219	1,200

Source: SELEC data, 2012; ARQ, 2011; Kosovo Division against Organized Crime, Annual Report, 2012

Interestingly there is little indication that cannabis herb sourced in Albania is trafficked into Bulgaria or Romania. Bulgaria seized only 300 kg of cannabis herb in 2012 and Romania only 269 kg.<sup>422</sup> Neither country reported that their seizures were related to Albanian cannabis.<sup>423</sup>

**Map 23: General cannabis trafficking routes for cannabis herb sourced in Albania**



Source: Data from the ARQ, supplemented by national government reports and other official reports

<sup>422</sup> ARQ Bulgaria and Romania, 2012

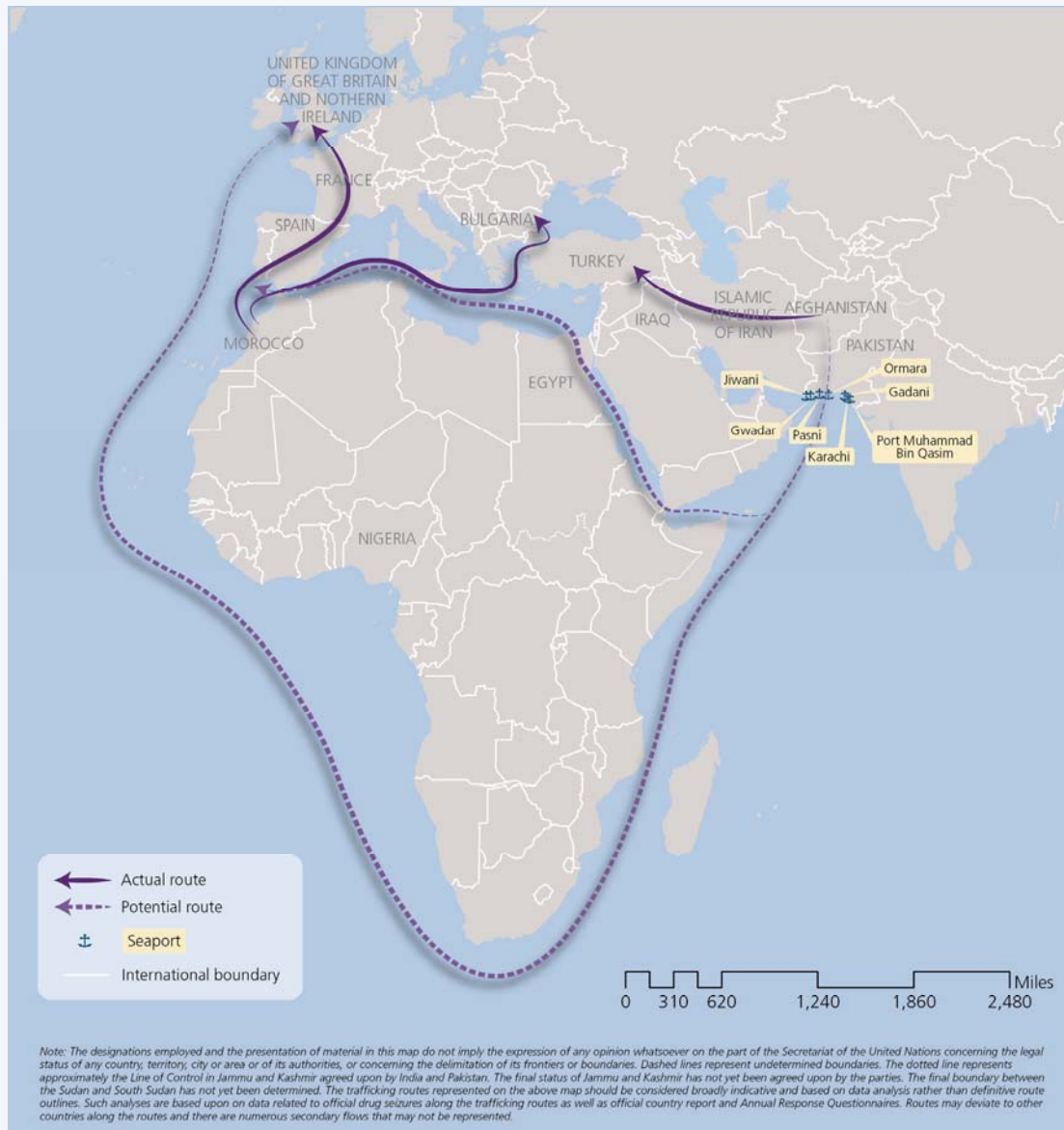
<sup>423</sup> Information provided by General Customs Directorate, Sofia, Bulgaria 2013; Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria



### *Cannabis resin routes and trends*

In 2011, just over 20 per cent of United Nations Member States reported Morocco as their main supplier of cannabis resin, while around 17 per cent named Afghanistan.<sup>424</sup> In Europe, Morocco remains the largest supplier of cannabis resin, with 302 tons or 85 per cent of all seizures in Spain linked to Morocco.<sup>425</sup> The main points of entry to Europe are Spain, Portugal, Italy and France, which corresponds to the relative geographical proximity of these countries to Morocco and the significance of their hashish markets.

**Map 24: General cannabis resin routes into Europe**



Source: Data from the ARQ, supplemented by national government reports and other official reports

The primary route for hashish entering Europe begins in Morocco, leads into the Iberian peninsula and from there proceeds to other destination markets in Western and Central

<sup>424</sup> UNODC, *World Drug Report 2013*, p. 25

<sup>425</sup> EMCDDA, *EU Drug Markets Report*, 2013

Europe. However, large seizures of Moroccan hashish do occur occasionally in South-Eastern Europe. In May 2012, Bulgarian law enforcement seized 16 tons of Moroccan hashish in a single operation. The initial 4 tons were seized on the Vidin ferry crossing at the border with Romania, and further intelligence pointed to a warehouse in a nearby village that was holding the remaining 11 tons.<sup>426</sup>

**Table 13: 16-ton cannabis resin seizure, Bulgaria, 2012**

Date	Amount	Method	Route	Remarks
01-07-2012	16 tons	First seizure: Transported in specially prepared hollowed-out wallboards and superglass multiroles. Second seizure: Stored in warehouse	Morocco – Burgas, Bulgaria – Viddin Ferry, Bulgaria – Romania – Hungary – Austria/Germany – Belgium/the Netherlands	Seized on Vidin Ferry crossing between Romania and Bulgaria. Seizure was the result of risk analysis




Source: Information and pictures provide by Bulgarian Customs, January, 2013

The transportation of such large quantities of cannabis resin requires a considerable amount of logistical support and well developed networks. The drugs were being trafficked by ship into the Bulgarian port of Burgas and then overland through Romania and Hungary, destined for Western Europe (Belgium). Correspondingly few seizures of hashish occur in the western half of the Balkan Peninsula. One exception is the 2011 seizure in Greece of 113 kg of cannabis resin that was destined for the Netherlands with no clear route.<sup>427</sup>

There are recent indications that Afghanistan may be encroaching on Morocco in the global cannabis resin trade,<sup>428</sup> and more specifically in Europe.<sup>429</sup> Recent multi-ton seizures indicate that Afghan hashish could be reaching the United Kingdom and Belgium by ship from Pakistan, either round Africa or via the Suez Canal.<sup>430</sup> Pakistan reports that all of its hashish is sourced in Afghanistan.<sup>431</sup> It is interesting that these

<sup>426</sup> Information provided by Bulgarian Central Customs Directorate, Ministry of the Interior, Feb 2013

<sup>427</sup> ARQ Greece, 2011 q 1-6

<sup>428</sup> UNODC, *World Drug Report 2012*

<sup>429</sup> Europol, *SOCTA*, 2013, p.19

<sup>430</sup> Information provided by the Anti-Narcotics Force Pakistan, July 2013; UNODC Pakistan Country Office, Balkan Info seizure database

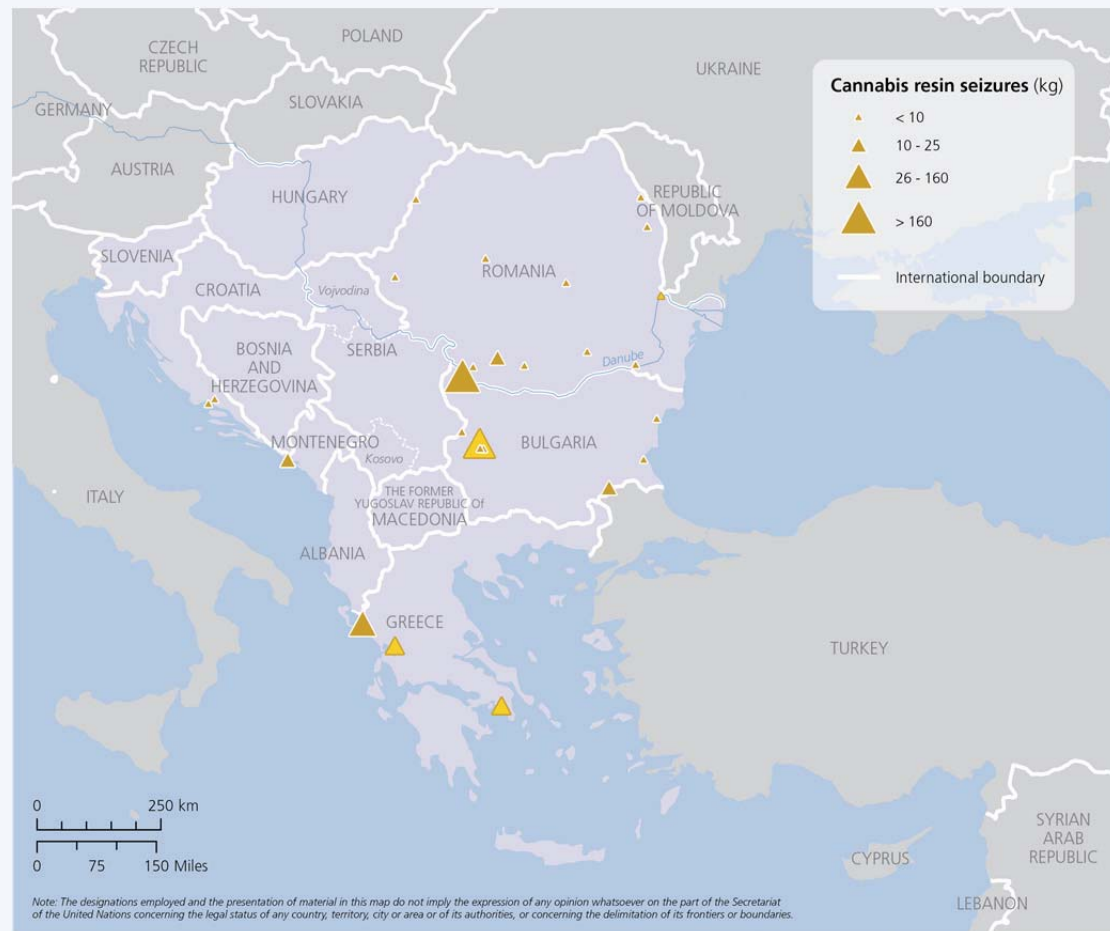
<sup>431</sup> ARQ Pakistan, 2011



trajectories use the southern route rather than the well-worn Balkan route to carry Afghan hashish into Western and Central Europe.

In fact, a segment of the Balkan route does carry Afghan hashish, but this flow appears to stop in Turkey. Turkey reported seizing a total of 21 tons of hashish in 2011 - though lower than the amount seized in 2010, this represents a marked increase on 2008.<sup>432</sup> With the European market for heroin potentially declining, Turkish officials believe that some heroin trafficking groups are making up their profits by moving into Afghan cannabis resin.<sup>433</sup> Unlike heroin, however, there has been no indication that Afghan hashish is being trafficked any further along the Balkan route than Turkey.<sup>434</sup>

**Map 25: Locations of cannabis resin seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, 2010-2012**



Note: The seizures marked with darker colours ▲ were reported by official sources. Those marked with lighter colours ▲ were reported by media sources.

Source: UNODC AOTP Paris Pact Drugs Monitoring Platform online seizure database; ARQ data, supplemented by national government reports and other official reports

<sup>432</sup> EMCDDA, *2012 National Report (2011 data) to the EMCDDA by the Reitox National Focal Point, Turkey, New Development, Trends and in-depth information on selected issues*, p.170

<sup>433</sup> Ibid

<sup>434</sup> None of the countries in South-Eastern Europe have reported seizing Afghan cannabis resin. The only other country in the region reporting considerable seizures of cannabis resin is Greece, which reported a 700 per cent increase in seizures in 2011, 121 kg of which consisted of cannabis resin. However, over 90 per cent of this had departed Lebanon. See Greece 2010 and 2011 ARQ. Furthermore, Turkey reports that no seizures have occurred along its western borders and that the increase in seizures, and potentially trafficking, simply reflect a growing domestic market. See Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2011

## Amphetamine-type stimulants

### Demand markets

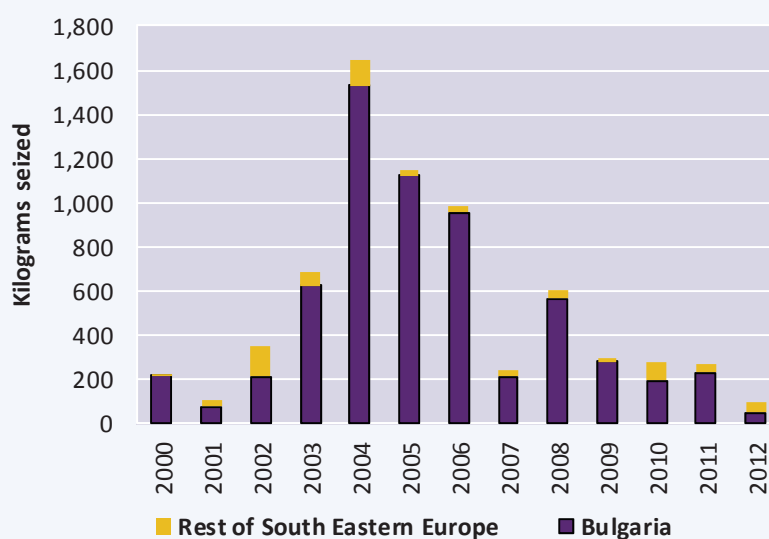
Europe - notably Western and Central Europe - continues to be an important market for amphetamine in terms of both use and manufacture. All illicit amphetamine laboratory seizures reported to UNODC in 2009 and over 80 per cent of laboratory seizures reported in 2008 occurred in Europe.<sup>435</sup>

The ATS market in South Eastern Europe does not appear to be very active, and when comparing prevalence figures and amphetamine seizures noted in the area, local production seems to exceed local demand. Based on data extracted from ARQs, lifetime and annual prevalence rates are relatively low. The highest lifetime prevalence rate for amphetamine was 2.6 per cent, seen in Croatia in 2011,<sup>436</sup> while the highest annual prevalence rate for amphetamine was 0.95 per cent, seen in Bulgaria in 2008 (0.1 per cent for methamphetamine).<sup>437</sup> In fact, ATS that are trafficked through the region seems to be consumed mainly in markets outside South-Eastern Europe, in particular the Syrian Arab Republic and Turkey.<sup>438</sup>

### Seizures and production

Judging by seizure data and information provided by EMCDDA and Europol, the highest levels of ATS production were, until recently, found in Bulgaria.<sup>439</sup> From 2000 onwards, Bulgaria almost always reported larger amphetamine seizures than any other country in South-Eastern Europe excluding Turkey.

**Figure 58: ATS seizures in South-Eastern Europe,<sup>440</sup> 2000-2012**



Source: Delta database; SELEC data, 2012

An operation coordinated by Europol in January 2012 led to the arrest by local authorities of three members of an organized crime network and the dismantling of three

<sup>435</sup> UNODC, *Amphetamines and Ecstasy*, 2011

<sup>436</sup> ARQ Croatia 2011

<sup>437</sup> UNODC, *World Drug Report 2013*

<sup>438</sup> ARQ Turkey 2012 Q 24

<sup>439</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.69

<sup>440</sup> "Rest of the SEE" includes Albania, Bosnia and Herzegovina, Croatia, Greece, Kosovo, the former Yugoslav Republic of Macedonia, Montenegro, Romania and Serbia





illegal synthetic drug production facilities in Bulgaria. The Bulgarian authorities seized approximately 75 litres of amphetamine base (enough to produce around 120 kg of pure amphetamine), 15 kg of amphetamine substance and over 1,400 litres of various chemicals used to produce synthetic drugs.<sup>441</sup>

However, this seizure seems to be the last indication of ATS production in Bulgaria. As shown in the seizure graph above, ATS seizures in Bulgaria have been on the decline since reaching a peak in 2004. Moreover, since the above-mentioned seizure in January 2012, Bulgarian police officials have reported no further ATS production in the country and have dismantled all the remaining major ATS labs that they know of.<sup>442</sup> This does not mean that small-scale “kitchen labs” do not continue to operate in Bulgaria (and indeed in many other countries in South-Eastern Europe), but these predominantly target the local market and have little capacity to export.<sup>443</sup>

Of note is the growth in seizures in Turkey. From 2002 onwards, ATS seizures increased steadily until 2006, after which they saw a considerable decline. However, Turkey continues to be an important seizing country. Of the 1.3 million amphetamine tablets seized across the whole of Europe in 2011, more than three quarters were seized in Turkey.<sup>444</sup>

#### *Routes and trends*

According to ARQ data, South-Eastern Europe is a transit point for the smuggling of ecstasy and other ATS from the Netherlands into Turkey and further into the Middle East.<sup>445</sup> The Netherlands is the primary source country for ecstasy, which is trafficked back down the Balkan route through Romania and Bulgaria and into Turkey either for local consumption or for further transit to the Arabian Peninsula.<sup>446</sup>

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<sup>441</sup> Europol Press Release, “Synthetic Drugs Network Broken Up”, 12 January 2012, available at: <https://www.europol.europa.eu/content/press/synthetic-drugs-network-broken-1233>

<sup>442</sup> Information provided by Bulgarian law enforcement, February 2013; Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria

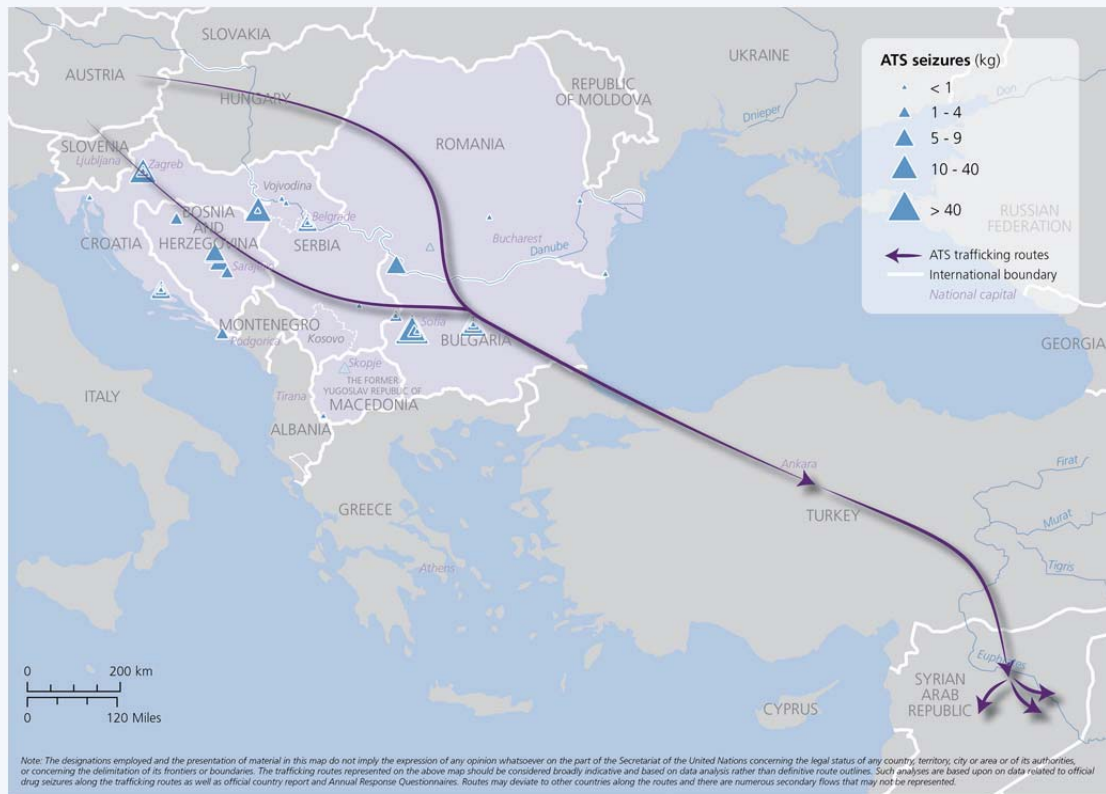
<sup>443</sup> Information provided by Bulgarian law enforcement, February 2013

<sup>444</sup> EMCDDA, *EU Drug Markets Report*, 2013, p.76

<sup>445</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012; ARQ Bulgaria, Serbia, Croatia 2011; Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2011, p. 51: “It should be highlighted that captagon trafficking from South Eastern Europe into Turkey and the middle east has declined, but not stopped, sharply in recent years, due to increased production of captagon within the middle east- Ecstasy trafficking continues.”

<sup>446</sup> Europol, *OCTA*, 2011; UNODC, *Amphetamines and Ecstasy*, 2011, p.65

**Map 26: General trafficking routes and locations of ATS seizures in South-Eastern Europe as reported to UNODC, presented in government reports or in the media, 2010-2012**



Note: The seizures marked with darker colours ▲ were reported by official sources. Those marked with lighter colours ▲ were reported by media sources.

Source: Data from the ARQ, supplemented by national government reports and other official reports

Although large-scale labs in Bulgaria have been dismantled, there is some evidence that their personnel have simply moved to other parts of South-Eastern Europe to help set up new labs, or are working even further afield in Turkey and the Middle East.<sup>447</sup> Two large amphetamine labs were seized in Serbia in 2010 and Bulgarian nationals were arrested for their role in production. Moreover, Turkey reports that almost a quarter of all foreign-born individuals arrested for ATS-related crimes in 2011 held Bulgarian citizenship.<sup>448</sup>

Lastly, Europol has pointed to the reported manufacture of crystal methamphetamine in the Czech Republic by an organized criminal group from the Western Balkans – while it is possible that this was an isolated incident, there is a need to monitor this development.<sup>449</sup>

<sup>447</sup> Europol, *OCTA*, 2011, p. 16

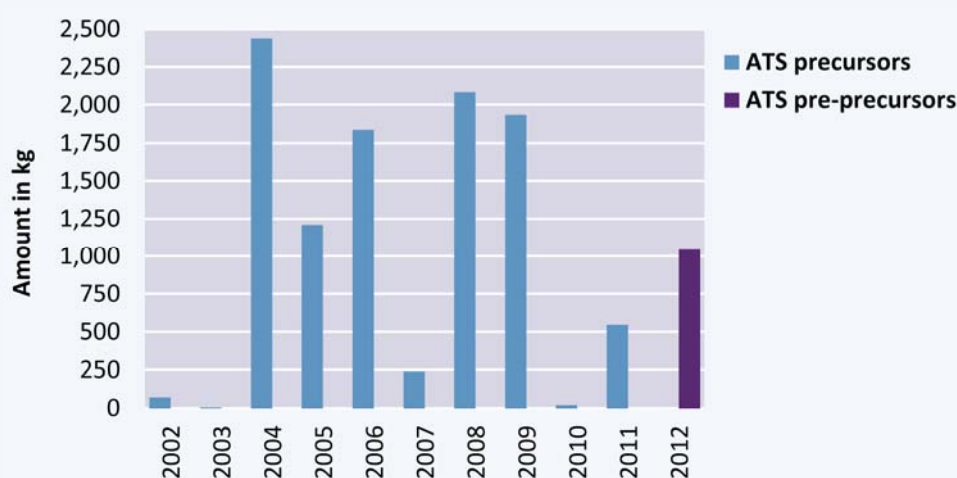
<sup>448</sup> Turkish National Police, KOM, *Turkish Report of Anti-Smuggling and Organized Crime*, 2011, p. 29

<sup>449</sup> Europol, *OCTA*, 2011, p.16



*The Balkan route of ATS precursor chemicals*

**Figure 59: ATS precursor and pre-precursor<sup>450</sup> seizures in South Eastern Europe, 2002-2012**



Source: INCB, *Precursors and chemicals frequently used in the illicit manufacture of narcotic drugs and psychotropic substances*, 2010; 2012 country data provided by SELEC

Note: ATS precursors include ephedrine, phenylacetic acid, piperonal, isosafrole, 3,4-MDP-2-P, P2P and safrole. ATS pre-precursors include APAAN. Countries reporting to INCB include Croatia, Bulgaria, Greece and Romania.

While there have been no large seizures of the heroin precursor AA in South-Eastern Europe since 2010, the same cannot be said for ATS precursors. Ephedrine, pseudoephedrine and benzyl methyl ketone (BMK) are still seized in considerable, albeit declining, quantities. Most of these precursors are produced in China<sup>451</sup> and destined for the Netherlands, the Czech Republic or Poland.<sup>452</sup>

1-phenyl-2-propanone, also known as P2P and a precursor chemical used in the manufacture of methamphetamine, was identified in 2011 as the most frequently smuggled precursor chemical in Bulgaria.<sup>453</sup> Hungarian officials have also reported recent seizures of locally produced ephedrine for regional use.<sup>454</sup> Ephedrine and other ATS precursors used to be diverted and transported into South-Eastern Europe for local production of ATS.<sup>455</sup> In Turkey, increasing quantities of ATS precursors may be being shipped onward into the Near East and the Islamic Republic of Iran.<sup>456</sup>

The Balkan route may also be used to traffic pre-precursors to Europe. Seizures of APAAN, a pre-precursor for the production of BMK, itself a precursor for amphetamine

<sup>450</sup> Illicit drug manufacture, i.e. synthesis of narcotic drugs and psychotropic substances, requires precursor and other chemicals. The key chemicals used in illicit drug manufacture are controlled under the 1988 United Nations Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances (1988 Convention). They may be, for instance, precursors (starting materials), acetylating agents, or oxidizing agents solvents, reagents and catalysts, etc., which traffickers require in clandestine drug manufacture. Those substances are “diverted” from licit channels (either from international trade or from domestic distribution channels) into illicit traffic, or they may be themselves manufactured in illicit operations from other, non-controlled substances (so-called ‘pre-precursors’).

<sup>451</sup> India and Thailand also provide substances used in the conversion process, albeit to a lesser extent. See Europol *SOCTA*, 2013, p. 20

<sup>452</sup> EMCDDA, *EU Drug Markets Report*, 2013

<sup>453</sup> INCB, *Precursors*, 2012, p.75

<sup>454</sup> ARQ Hungary 2011

<sup>455</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Bulgaria

<sup>456</sup> UNODC, *Amphetamines and Ecstasy*, 2011 p.3: “Several countries in the region also have unusually high requirements for ATS precursors such as ephedrine, pseudoephedrine or P-2-P. However, aside from the Islamic Republic of Iran, no reports of illicit manufacture have been received from the region to date”.

synthesis, were reported in Bulgaria and Romania in 2012.<sup>457</sup> Seizures of common precursors, while still quantifiable in 2011, seem to have been completely replaced by APAAN seizures in 2012. This suggests that traffickers are either using new routes to transport precursors or have switched to APAAN.

**Table 14: APAAN seizure in Sofia, Bulgaria, 2012**

Date	Amount	Method	Route	Remarks
22-09-2012	600 kg	Air freight	Nanjing, China – Frankfurt, Germany – Sofia, Bulgaria – the Netherlands	Seized at Sofia International Airport, Bulgaria



Source: Bulgarian Customs

The major challenge posed by such chemicals is that they are not controlled. For example, APAAN is not listed in Council Regulation (EC) No 111/2005, which establishes rules for the monitoring of trade between the European Community and third countries in drug precursors. Furthermore, it is cheaper to use APAAN to make P2P than to purchase equal amounts of commercially made P2P.<sup>458</sup> Combined, these two factors form a convincing argument for traffickers attempting to avoid law enforcement and maintain profitability. In general, precursor trafficking is perceived by organized criminal groups as relatively “low-risk/high-reward”. Good profits can be made, with the prospect of limited penalties if caught.

<sup>457</sup> ARQ Bulgaria, Romania, 2012

<sup>458</sup> INCB, *Precursors*, 2012, p.19

**Table 15: Selected APAAN seizures in South-Eastern Europe, 2012 (kilograms)**

Date	Location	Destination	Amount
01-Apr-2012	Bulgaria	Netherlands	330
28-Jul-2012	Bulgaria	Netherlands	500
27-Aug-2012	Romania	Netherlands	104

Source: INCB

South Eastern Europe is an important but ultimately secondary route for APAAN. Larger seizures have been reported in Western and Central Europe, especially in the Netherlands, where over 4 tons were intercepted in 2011. Large quantities of APAAN have also been intercepted in Belgium (23 individual seizures in 2012).<sup>459</sup> China remains the main source of APAAN for Europe.<sup>460</sup>

<sup>459</sup> <http://www.emcdda.europa.eu/topics/pods/synthetic-drug-production>

<sup>460</sup> <http://www.emcdda.europa.eu/topics/pods/synthetic-drug-production>





## 2. CHALLENGES AND RESPONSES

In order to respond to the challenges of the Balkan route, it is important to look beyond organized crime and trafficking trends for heroin and the other drugs and chemicals that currently flow through South-Eastern Europe. All of the various drug types have an important impact on South-Eastern Europe in the form of drug use, threats to the rule of law and threats to efforts to counteract these effects through cooperation and capacity building.

Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Montenegro, the former Yugoslav Republic of Macedonia, Romania and Serbia are all parties to the United Nations Single Convention on Narcotic Drugs of 1961 as amended by the 1972 Protocol, the Convention on Psychotropic Substances of 1971 and the Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances of 1988.

Many countries in the region are in the process of moving towards EU membership, while some are already members (Bulgaria and Romania joined in 2007 and Croatia in June 2013). Chapters 23 and 24 of the EU aquis focus specifically on law enforcement and criminal justice legislation and their implementation.

### The domestic drug market

Since 2011, almost no general population surveys have been conducted in the region with the exception of Croatia. Lack of capacity precludes a complete understanding of the health impacts of illicit drugs on the region. Moreover, information about the type of data available is not regularly updated and statistics are often reused over several years.

Some drug research is conducted in South-Eastern Europe. Of particular note is that of the European School Survey Project on Alcohol and Other Drugs (ESPAD). This study uses targeted surveys of schoolchildren between the ages of 15 and 16 to collect comparable data on substance abuse, and is able to highlight new and evolving trends. This was the case in Bulgaria, where a 2011 ESPAD survey highlighted the relatively high level ATS use and ease of access to them<sup>461</sup> for schoolchildren.<sup>462</sup>

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<sup>461</sup> ESPAD report 2011, p.85

<sup>462</sup> Information provided by Bulgarian National Focal point for drugs and drug addictions, Sofia, Bulgaria, February 2013

With these caveats in mind, available data shows most opiate prevalence rates in South-Eastern Europe to be below the global average of 0.4 per cent.<sup>463</sup> There are two exceptions: the former Yugoslav Republic of Macedonia, which is in line with the global average, and Albania, which has a higher rate. It is perhaps interesting to note that Turkey's opiate prevalence is at a very low 0.03 per cent (not included in the below table), despite the country's location at the geographical bottleneck of the Balkan route.

In absolute terms, the entire South-Eastern European heroin market is comparable with the four largest heroin consuming markets in Western and Central Europe. Given that, the region should not be viewed solely as a transit route or hub, but also as a region that faces consumption challenges in its own right.

**Table 16: Reported prevalence of opiate use in percentage; estimated numbers of opiate users in South-Eastern Europe, 2011 or latest year available**

Country/territory	Prevalence of opiate use <sup>464</sup>	Estimated number of opiate users (unless stated otherwise)
Albania	0.45	9 755
Bosnia and Herzegovina	0.3	8 000
Bulgaria	0.29	14 945
Croatia	0.4	11 945
Greece	0.32	24 310
The former Yugoslav Republic of Macedonia	0.4	5,820
Montenegro	N/A <sup>465</sup>	1 283 (heroin users) <sup>466</sup>
Romania	0.11	16 520
Serbia	0.28	18 780
Kosovo	N/A	4 000 (heroin users) <sup>467</sup>
<b>Estimated total opiate users for the region</b>		117 000 (rounded)
<b>Western and Central Europe</b>	0.3 <sup>468</sup>	1,100,000
<b>Global</b>	0.4	N/A

Source: UNODC, *World Drug Report 2013*; EMCDDA; Ministry of Health of Montenegro<sup>469</sup> and other official sources.

The heroin market in South-Eastern Europe remains a primary focus for health workers in the region, and there are also other health-related impacts that need to be monitored.

<sup>463</sup> UNODC, *World Drug Report 2013*

<sup>464</sup> Annual prevalence is given as a percentage of the population aged 15-64 (UNODC best estimate). See UNODC, *World Drug Report 2012*. These figures include all forms of drug administration (injecting and smoking).

<sup>465</sup> No recent reliable estimate. See UNODC, *World Drug Report 2012*

<sup>466</sup> Ministry of Health of Montenegro, *Strategy of Montenegro for the Prevention of Drug Abuse 2013-2020*. Estimated number of heroin users in 2011. This figure is from this report and is a rough estimate for Podgorica and the surrounding area.

<sup>467</sup> EMCDDA. Estimated number of heroin users, 2010. Range: 3,000-5,000. See <http://www.emcdda.europa.eu/publications/country-overviews/xk#pdu>

<sup>468</sup> UNODC best estimate for opiate users. See UNODC, *World Drug Report 2013*

<sup>469</sup> In order to establish clear orders of magnitude, the number of users for each South-Eastern European country was estimated by multiplying the prevalence (WDR 2013) by the total population of 15-64-year-olds. Finally, it is important to take into account that no general population-based survey on illicit drug use has been carried out in recent years





For example, in 2011 there were HIV outbreaks related to drug injection in Greece and Romania.

ATS consumption prevalence for South-Eastern Europe is lower than the global average (0.7 per cent), with the exception of Croatia, Bulgaria and Montenegro. Bulgaria reported recent declines in heroin consumption among problem drug users and indicated that there had been a clear move toward other drugs, particularly ATS, by new users. Cocaine use remains relatively low in South-Eastern Europe, with prevalence rates averaging less than 1 per cent among 15-64-year-olds.<sup>470</sup>

**Table 17: Reported cannabis, cocaine and ATS (excluding ecstasy-type stimulants), annual prevalence as a percentage of population aged 15-64, 2011 or latest year available**

Country/territory	Cannabis	Cocaine	ATS
Albania	1.8	0.78	0.02
Bosnia and Herzegovina	1.6	0.63	0.5
Bulgaria	2.5	0.60	0.95
Croatia	5	0.5	0.8
Greece	1.7	0.1	0.20
The former Yugoslav Republic of Macedonia	0.63	0.08	N/A
Montenegro	1.9	0.52	0.72
Romania	0.30	0.1	0.03
Serbia	4.07	0.54	0.24
Kosovo	N/A	N/A	N/A
Western and Central Europe	7.6	1.2	0.7
<b>Global</b>	<b>3.9</b>	<b>0.4</b>	<b>0.7</b>

Source: UNODC, *World Drug Report 2013*

As indicated in the table above, cannabis has a high prevalence in certain countries in South-Eastern Europe. Global average prevalence stands at 3.9 per cent,<sup>471</sup> which is surpassed by prevalence rates in both Croatia and Serbia.

Heroin is seeing declining street purity levels in countries such as Albania, Bulgaria, Montenegro and Serbia. From the point of view of traffickers, while heroin commands a reasonably high price in South-Eastern Europe, more profits can be made in Western European destination markets. For example, Germany and the United Kingdom maintain retail prices of US\$ 55 and 52 per gram respectively (see table 18), whereas in Bulgaria the price is only US\$ 32. Information on cocaine prevalence trends in South-Eastern Europe is limited. Bulgarian officials report there “is no change in the distribution of cocaine, because of its high price. There is information received on

<sup>470</sup> The exception is Montenegro where estimated cocaine prevalence was considered higher than cannabis by UNODC despite regional or global patterns of consumption.

<sup>471</sup> UNODC, *World Drug Report 2013*

distribution of a very pure cocaine with a high price – US\$ 160 Euro (200 BGN) per dose”.<sup>472</sup>

**Table 18: Heroin/cocaine prices in South-Eastern Europe/selected countries in Western and Central Europe and average monthly incomes in US\$, 2011**

Country/territory	Reported retail price per gram of heroin	Reported retail price per gram of cocaine	Average monthly income (2011 PPP)
Bulgaria	32	100	597
Kosovo	26-33	100	300
Montenegro	30	100	593
Bosnia and Herzegovina	35	100	402
Serbia	26	104	526
Albania	33	90	336
The former Yugoslav Republic of Macedonia	26	80	410
Romania	35-47	130 <sup>473</sup>	700
Greece	18	90	2,135
United Kingdom	52	50	3,253
Germany	55 <sup>474</sup>	85 <sup>475</sup>	3, 671
Italy	53	65	3, 008

Source: World Bank Online Database, available at [databank.worldbank.org/data/home.aspx](http://databank.worldbank.org/data/home.aspx); EMCDDA; ARQ; Albanian State Police; Ministry of Security of Bosnia and Herzegovina; Ministry of Interior of the former Yugoslav Republic of Macedonia; Police Directorate of Montenegro; Ministry of Interior of Serbia; National Focal Point on Drugs and Drug Addiction of Bulgaria (2012 Bulletin).

*Note:* Figures have been rounded

At retail level, the heroin consumed in South-Eastern Europe appears to be of slightly lower quality than that consumed in destination markets. Moreover, in the annual reports submitted to the EMCDDA, Romania,<sup>476</sup> Bulgaria<sup>477</sup> and Greece<sup>478</sup>, key countries for the trafficking of heroin along the Balkan route (see the Balkan route of heroin), have reported declining purity in the last few years. There are obvious caveats with regard to the accuracy of purity data. There are also discrepancies as to what classifies as street heroin and information on retail purity levels is sometimes patchy, highlighting the need for further study in this area.

<sup>472</sup> ARQ Bulgaria q. 24 2012

<sup>473</sup> €80-120 per gram of cocaine. ARQ, 2011

<sup>474</sup> €42 per gram of heroin. Information provided by Permanent Mission of the Federal Republic of Germany to the United Nations in Vienna, August 2013

<sup>475</sup> €66 per gram of cocaine. Information provided by Permanent Mission of the Federal Republic of Germany to the United Nations in Vienna, August 2013

<sup>476</sup> EMCDDA, 2012 National Report (2011 data) to the EMCDDA by the Reitox National Focal Point, Romania, Trends and in-depth information on selected issues, p.7 “preservation of the heroin retail price, by contrast to the increasing wholesale price, is explained by the decrease of drug purity at street level.”

<sup>477</sup> EMCDDA, 2012 National Report, Bulgaria, p.125

<sup>478</sup> EMCDDA, 2012 National Report, Greece, p.13 “In 2011, the average purity of heroin samples in active ingredients was 12.8%, when in 2008 the levels were 19.3%.”



**Table 19: Reported average retail heroin purity in South-Eastern Europe and selected countries in Western and Central Europe, 2012 unless stated otherwise**

Country/territory	Heroin purity at street level (percentage)
Albania	4 <sup>479</sup>
Bosnia and Herzegovina	4 <sup>480</sup>
Bulgaria	6 <sup>481</sup>
Croatia	9 <sup>482</sup>
Greece	4 <sup>483</sup>
The former Yugoslav Republic of Macedonia	N/A
Montenegro	4 (2011) <sup>484</sup>
Romania	0.22- 46 <sup>485</sup>
Serbia	5 <sup>486</sup>
Kosovo	1 <sup>487</sup>
France	7 <sup>488</sup>
Germany	11 <sup>489</sup>
UK	20 <sup>490</sup>
Italy	22 (2011) <sup>491</sup>

Source: ARQ; SELEC; EMCDDA; SIPA; Ministry of Interior of Serbia

Note: Figures have been rounded

Problems with forensic data relate not only to heroin but also to other drugs. Though progress is being made in that respect, data on drug purity and composition is often unavailable or contradictory. One issue is that some countries do not make a clear distinction between wholesale and retail (street) seizures. The ability to assess drug purity accurately also depends on the capacity of a country's forensic laboratories.

<sup>479</sup> ARQ 2012, Q. 15-20

<sup>480</sup> Information provided by SIPA, Sarajevo, Bosnia and Herzegovina, April 2013

<sup>481</sup> ARQ 2012, Q. 15-20

<sup>482</sup> ARQ 2012, Q. 15-20

<sup>483</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

<sup>484</sup> EMCDDA Country Overviews, Montenegro, 2011

<sup>485</sup> ARQ Romania, 2012.

<sup>486</sup> Ministry of Interior of Serbia, 2013. Range: 1.74-8.15

<sup>487</sup> <http://www.emcdda.europa.eu/publications/country-overviews/xk>

<sup>488</sup> ARQ 2012, Q. 15-20

<sup>489</sup> ARQ 2012, Q.15-20

<sup>490</sup> ARQ 2012, Q. 15-20

<sup>491</sup> Range 2-78; see "Forensic analyses: purity of illicit drugs", presentation by Forensic Science Service, Police Anticrime Central Directorate, Rome, January 24 2013. See also EMCDDA, *2012 National Report (2011 data) to the EMCDDA by the Reitox National Focal Point, Italy, New Development, Trends and in-depth information on selected issues*, p.16

Unfortunately, few countries in the region<sup>492</sup> have the resources and capacity to regularly and properly collect price and purity data, making this level of assessment challenging.

There is also a lack of detailed information about the prevalence of New Psychoactive Substances (NPS) in South-Eastern Europe. While some countries, such as Bulgaria, report some penetration of their markets by NPS,<sup>493</sup> others such as Montenegro<sup>494</sup> and Serbia<sup>495</sup> indicate little to no presence of the drugs. However, the impact of NPS on local markets can be significant. Romania consistently reported seizures of over 1 kg in 2010, 2011 and 2012.<sup>496</sup> More dramatic still is the change in lifetime prevalence in Romania. While lifetime prevalence for cocaine, heroin and amphetamines stood below 0.7 per cent in 2010, that for NPS was 2 per cent - higher than cannabis.<sup>497</sup>

Despite such evidence, a clear regional picture for NPS is not currently available. However, as indicated by Romanian situation, there is clearly a need to fully assess the threat to local markets in South-Eastern Europe.

## Corruption

In order to facilitate the transportation of illicit drugs across borders and their sale on local markets, traffickers will often identify weaknesses in law enforcement systems. This may involve the paying of bribes or other forms of corruption.

Corruption can occur at different levels, both in the public and the private sectors. A distinction is usually drawn between grand and administrative (petty) corruption, with the former referring to corrupt practices affecting legislative process and policymakers and the latter referring to dealings between individual civil servants and the public.<sup>498</sup> In both of its manifestations, corruption has a devastating impact on the rule of law, hinders equal access to public services, affects public trust in State institutions and is an obstacle to economic and social development, especially in young democracies.<sup>499</sup>

Few cases of corruption related to drug trafficking have been documented in the region. Examples are the arrest of a Greek Customs officer as part of a major cocaine trafficking case in 2011.<sup>500</sup> A more recent example is the 2012 arrests of five police officials related to drug trafficking corruption in Albania.<sup>501</sup>

In Serbia, corruption is being addressed forcefully, in particular as it relates to organized crime. According to a European Commission report,<sup>502</sup> the Serbian Special Prosecutor for corruption and organized crime launched investigations into 115 corruption cases in 2011.<sup>503</sup> Moreover, internal checks by the Customs administration and the police have continued to result in a sizeable number of cases being investigated and penalties

<sup>492</sup> Croatia and Bosnia and Herzegovina appear to be exceptions in terms of capacity but, like the others, they do not analyze heroin composition.

<sup>493</sup> Information provided by Bulgarian law enforcement, January 2013

<sup>494</sup> Information provided by Montenegrin law enforcement, January, 2013

<sup>495</sup> ARQ Serbia, 2011

<sup>496</sup> UNODC *The Challenge of New Psychoactive Substances*, 2013, p.45

<sup>497</sup> EMCDDA, Country Overview: Romania, <http://www.emcdda.europa.eu/publications/country-overviews/ro>

<sup>498</sup> UNODC, *Corruption in the Western Balkans*, 2011, p.7

<sup>499</sup> Ibid

<sup>500</sup> Information provided by the Financial and Economic Crime Unit, Regional Directorate of Attica, Drugs and Weapons enforcement department, Athens, Greece, January 2013.

<sup>501</sup> Internal Control Service of the Ministry of the Interior of Albania, *Report on the Activity of the Internal Control Service (ICS) for 2012*

<sup>502</sup> European Commission, *Commission Staff Working Document, Serbia, 2012 Progress Report*, Brussels, 10 October 2012, p.22

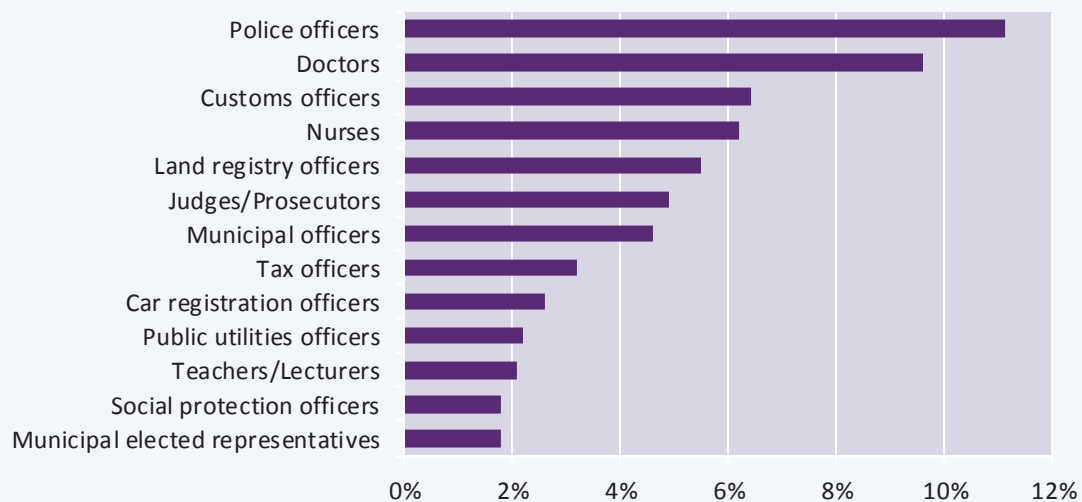
<sup>503</sup> It should be noted that this included several medium- to high-level cases.



imposed. The recent<sup>504</sup> review of the implementation of the United Nations Convention against Corruption in the country resulted in the recognition of the need to ensure coherence and efficiency of existing legislation on the protection of reporting persons and avoid fragmentation in implementing related measures in practice; and to continue efforts to address problems and delays encountered in the cooperation of the Financial Intelligence Unit with other state authorities, particularly with regard to the timely exchange of information between them.

Though corruption surveys should be used with caution when linking bribery to the illicit drug trade, the below figure indicates that Customs and police officers are among those who receive the largest number of bribes in the Western Balkans. Admittedly this petty corruption may be unrelated to transnational drug trafficking, but it is indicative of an environment that is relatively conducive to such activity.

**Figure 60: Prevalence of bribery among selected types of public officials, Western Balkans, 2010**



Source: UNODC, *Corruption in the Western Balkans 2011*, p.27

While the above examples suggest that corruption continues to be a challenge, this is not limited to any specific subregion or area of South-Eastern Europe. The EU, in its biannual Cooperation and Verification Mechanism for Bulgaria and Romania, highlights the need to address more cases of grand corruption, especially those relating to organized crime.<sup>505</sup> In doing so, the reviewers of the implementation of UNCAC in Romania, for example, recommended, *inter alia*, the adoption of measures geared towards the creation of a body with explicit powers to administer seized and confiscated assets and the initiation of pertinent legal reforms to allow for the lifting of bank secrecy from the earliest stage of investigation.<sup>506</sup> In Bulgaria, it was also recommended that national

<sup>504</sup> At the time of releasing the present study, the executive summary of the review of implementation of UNCAC in Serbia was to be made publicly available on the UNODC website.

<sup>505</sup> European Commission, *Report from the Commission to the European Parliament and the Council On Progress in Bulgaria under the Cooperation and Verification Mechanism*, Brussels, 18 July 2012, available at [http://ec.europa.eu/cvm/docs/com\\_2012\\_411\\_en.pdf](http://ec.europa.eu/cvm/docs/com_2012_411_en.pdf) and *Report from the Commission to the European Parliament and the Council On Progress in Romania under the Cooperation and Verification Mechanism*, Brussels, 30 January 2013, available at [http://ec.europa.eu/cvm/docs/com\\_2013\\_47\\_en.pdf](http://ec.europa.eu/cvm/docs/com_2013_47_en.pdf). It should be noted that these reports do not specifically mention drug trafficking, only organized crime and high-profile corruption cases.

<sup>506</sup> See the executive summary of the review of the implementation of UNCAC in Romania at <http://www.unodc.org/documents/treaties/UNCAC/WorkingGroups/ImplementationReviewGroup/ExecutiveSummaries/V1387398e.pdf>

authorities continue efforts to combat corruption through independent law enforcement bodies focusing, in particular, on addressing implementation challenges in this field, as well as strengthening the accountability of the judiciary through a consistent and strict application of all legal and disciplinary means to sanction corruption. As further highlighted in the review of Bulgaria, the main challenge for the coming years will be to ensure that legal reforms are accompanied by administrative reforms geared towards enhancing inter-agency coordination and promoting effective implementation of relevant domestic laws. A core element for successful anti-corruption action will also be the identification of ways and means to address delays in investigations and judicial proceedings that may frustrate efforts to efficiently curb corruption-related offences. At the policy level, anti-corruption work will further benefit from more streamlined and coordinated mechanisms for the collection of relevant data and statistics, which are necessary for the design of ad hoc crime prevention and criminal justice strategies.<sup>507</sup>

Elsewhere, a Serbia-based criminal group known for smuggling cocaine was recently implicated in an attempt to launder money in Serbia through buying companies that were to be denationalized.<sup>508</sup> An example from Kosovo involves the arrest and conviction of the head of the Anti-corruption Taskforce within Kosovo's Special Prosecution Office in May 2012. The individual was convicted of corruption.<sup>509</sup>

One possible recent catalyst for corruption is the effect of the 2008 financial crisis. As Frontex points out in its Annual Risk Analysis, "Budget cuts could also exacerbate the problem of corruption, increasing the vulnerability to illegal activities across the external borders. Austerity measures will inevitably impact on the efficacy of border-control authorities in detecting and preventing a wide array of illegal activities at the borders, ranging from illegal border-crossing through smuggling of excise goods to the trafficking in human beings".<sup>510</sup> Such financial pressures could mean that corruption is all the more difficult for some officials to resist.

The problem of corruption is not one of legislation but rather of implementation. As pointed out by the Regional Anti-Corruption Initiative, "Despite the positive efforts of establishing regulatory and institutional base for fighting corruption, including specialised anti-corruption agencies, which are being introduced in the majority of the countries in the region, significant problems persists, especially with regard to the practical implementation of the existing legal framework and institutional enforcement."<sup>511</sup> Similar findings and conclusions, to a greater or lesser extent, have been drawn from the UNCAC reviews in the countries concerned. Focusing, for example, on the case of Montenegro, where a comprehensive legal framework to address corruption is in place, the UNCAC reviewers recommended, among others, the continuation of efforts to pursue further clarity in the interpretation and scope of application of the money-laundering provisions; and to ensure that the domestic legislation and/or its interpretation on the confiscation, seizure and freezing of criminal assets and instrumentalities provides a clear, consistent and less fragmented framework to assist

<sup>507</sup> See the executive summary of the review of the implementation of UNCAC in Bulgaria at <http://www.unodc.org/documents/treaties/UNCAC/WorkingGroups/ImplementationReviewGroup/ExecutiveSummaries/V1187232eCorr1Corr2.pdf>

<sup>508</sup> Mladenovic, Nemanja, "Transnational Organised Crime: The Failed Divorce of Serbia's Government and Organised Crime", *Journal of International Affairs*, vol. 66, No. 1, Fall/Winter 2012

<sup>509</sup> EULEX, "Summary of Justice Proceedings in May", 11 June 2012, available at <http://www.eulex-kosovo.eu/en/executive/00014.php>

<sup>510</sup> Frontex, *Annual Risk Analysis 2012*, p.42

<sup>511</sup> See Regional Anti-Corruption Initiative website: <http://www.rai-see.org/news/south-eastern-europe/3571-current-environment-and-major-corruption-challenges-in-south-east-europe.html>



police and prosecutors in tackling corruption.<sup>512</sup> In the case of Croatia, it was recommended that efforts continue to facilitate the best possible coordination among agencies with a law enforcement mandate in the fight against corruption.<sup>513</sup>

While some cases of petty corruption have been prosecuted, there is no evidence of reported cases of grand corruption. In order to make progress in the prevention of corruption, greater transparency in public administration is required and specific anti-corruption strategies need to be developed, targeting vulnerable areas of the public sector.<sup>514</sup>

## Regional and international cooperation

Since political tensions and turbulence in South-Eastern Europe came to an end, regional cooperation initiatives have flourished, often with international support. At the level of judicial cooperation in criminal matters, most countries in the region have established comprehensive and, to a greater or lesser extent, robust frameworks of international cooperation. This can be attributed to their status as parties to regional instruments on different forms of international cooperation per se, as well as multilateral instruments on corruption, money-laundering and organized crime, containing provisions on international cooperation in criminal matters. It can also be explained by the readiness of countries already Member States of the EU to implement domestically innovative legal instruments on international cooperation in criminal matters such as the European Arrest Warrant.

Of particular note for law enforcement cooperation, on the other hand, are the Southeast Europe Police Chiefs Association (SEPCA) and the Secretariat of the Police Cooperation Convention (PCC) for South-Eastern Europe. Prosecutors from around the region meet under the Southeast European Prosecutors Advisory Group (SEPAG). Moreover, regional cooperation also includes other areas, including multilateral political and economic initiatives such as the Black Sea Economic Cooperation (BSEC) and security-related initiatives with the Centre for Security Cooperation (RACVIAC).

A partnership of more than 70 countries and international organizations, the Paris Pact Initiative is one of the most important frameworks and coordination bodies aimed at responding to the threat of Afghan opiates.<sup>515</sup> This includes the placing of information focal points and linking strategic analysis along the entire length of the Balkan route, including in South-Eastern Europe.

At regional level, the establishment of SELEC (previously SECI Centre) is seen as a positive step towards increasing regional cooperation and producing tangible results. In 2011, SELEC helped facilitate 21 joint investigations, including “Operation SOYA”. This involved the law enforcement agencies of Serbia, Greece and the former Yugoslav Republic of Macedonia, with assistance from the DEA and SOCA, and resulted in the seizure of 169 kg of cocaine and 19 arrests. The trend for increased cooperation with SELEC continued into 2012, with 27 joint operations including 5 trans-border controlled deliveries.<sup>516</sup>

<sup>512</sup> See the executive summary of the review of the implementation of UNCAC in Montenegro at <http://www.unodc.org/documents/treaties/UNCAC/WorkingGroups/ImplementationReviewGroup/ExecutiveSummaries/V1380892e.pdf>.

<sup>513</sup> See the executive summary of the review of the implementation of UNCAC in Croatia at <http://www.unodc.org/documents/treaties/UNCAC/WorkingGroups/ImplementationReviewGroup/ExecutiveSummaries/V1253076e.pdf>.

<sup>514</sup> UNODC, *Corruption in the Western Balkans*, 2011, p.12

<sup>515</sup> See [https://www.paris-pact.net/index.php?action=cms\\_render&section=85&menu\\_loc=main&mm=mm2](https://www.paris-pact.net/index.php?action=cms_render&section=85&menu_loc=main&mm=mm2)

<sup>516</sup> SELEC, *Report on Drug Seizures in South Eastern Europe*, 2012, p. 58

Cooperation with international law enforcement is not limited to SELEC. Most countries in the region also report good cooperation and links with DEA and SOCA, as well as myriad Departmental Liaison Officers from European and Central Asian countries. DEA and SOCA provide not only operational assistance but also technical assistance and capacity building.

Countries in South-Eastern Europe are also pro-active in improving cooperation within the region. In 2010, Bulgaria initiated the establishment of a trilateral Contact Centre for Police and Customs Cooperation between Bulgaria, Greece and Turkey. Albania has also strengthened its links with neighbouring States, agreeing to the establishment of a new joint border control point with Montenegro and signing an agreement on exchange of information with the former Yugoslav Republic of Macedonia.<sup>517</sup> Lastly, a technical protocol for the implementation of Integrated Border Management, which includes the exchange of information,<sup>518</sup> was signed by Serbia and Kosovo.<sup>519</sup>

Additionally, in September 2012 an agreement for the creation of Joint Investigation Teams was signed by the former Yugoslav Republic of Macedonia, Germany, Austria and the Netherlands. The continued importance of cooperation has been grasped by countries at both the beginning and the end of the Balkan route. As stated in the Dutch report to EMCDDA, “Renewed operational co-operation [between] Turkey [and the Netherlands] was initiated in 2010 and implemented in 2012, after some years of less intense collaboration”.<sup>520</sup>

The International Law Enforcement Cooperation Unit (ILECU) is a European Commission-funded project carried out by the Ministry of Interior of Austria. Its objective is to enhance cooperation and networking among beneficiaries and EU Member States through the establishment of cooperation mechanisms and/or agreements with national and international law enforcement partners, particularly with regard to South-Eastern Europe. The beneficiary countries are Albania, Bosnia and Herzegovina, Montenegro, Croatia, the former Yugoslav Republic of Macedonia and Serbia, with cooperation from Romania, Slovenia, the International Criminal Police Organization (INTERPOL) and Europol.

EMCDDA is helping the countries and territories covered in this report to strengthen their capacities for data collection and information exchange and, eventually, to establish drug information systems that are compatible with its own.

International technical cooperation is also strong in the region. The Container Control Programme (CCP) was developed jointly by UNODC and the World Customs Organization (WCO) and assists countries in creating sustainable law enforcement structures at selected sea and dry ports in order to minimize the exploitation of maritime containers for drug trafficking and other transnational organized criminal activities. The programme has recently been established in the ports of Bar in Montenegro and Durres in Albania and has already produced results - a seizure of 8 kg of heroin hidden in the floorboards of a car was made in Durres on 21 May 2013. As with the strengthening of borders elsewhere in the region, this may also impact trafficker logistics.

<sup>517</sup> European Commission, *Commission Staff Working Document, Albania, 2012 Progress Report*, accompanying the *Communication from the Commission to the European Parliament and the Council, Enlargement Strategy and Main Challenges 2012-2013*, Brussels, 10 October 2012, p.56

<sup>518</sup> Serbia and Kosovo reached an agreement aimed at normalizing relations in April 2013.

<sup>519</sup> EULEX, *2012 Programme Report*, July 2012, p.34

<sup>520</sup> EMCDDA, *Report to EMCDDA by the Reitox National Focal Point, The Netherlands Drug Situation 2012*, p.148





There are challenges relating to operational cooperation, such as the complexities involved in controlled deliveries, which can vary from country to country. In a recent case of a controlled delivery from Germany to Montenegro, the delivery did not make it past German borders owing to a legal requirement of 24-hour surveillance, which was beyond the capacity of Montenegrin law enforcement.<sup>521</sup> Another common problem relating to controlled deliveries is that officers on the ground are not always aware of whom they can speak to. The reasons for this vary, from different law enforcement and criminal justice structures to a simple lack of capacity.

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<sup>521</sup> Information provided by Montenegrin police directorate, Ministry of the Interior, Podgorica, Montenegro, February 2013



## THE WAY FORWARD

The trafficking of Afghan heroin constitutes a threat to both the public health and the security of its source, transit and destination countries. Heroin market restructuring in Western and Central Europe may be occurring,<sup>522</sup> but Afghan heroin continues to flow almost uninterrupted to these lucrative markets. The large amounts of heroin seized in Turkey in 2012, which included record-breaking seizures that were destined to transit South-Eastern Europe,<sup>523</sup> testify to the continued importance of the Balkan route.

There is also evidence that drug trafficking activity along the Balkan route is being increasingly matched by similar activity along the southern route. Yet while competition from the southern route may be negatively impacting the total volumes of heroin flowing through South-Eastern Europe, the amount reaching Western and Central Europe remains zero-sum. With the prospect of 2013 being a record year for opium cultivation in Afghanistan,<sup>524</sup> a continuation in the supply of heroin trafficked via the Balkan route, as well as the southern and northern routes, is to be expected.

Both the location and institutional development of South-Eastern Europe have been enabling factors for substantial amounts of drug trafficking for more than two decades. But while the Balkan route supports a number of drug flows, most of them appear to be declining. For example, the number of heroin, ATS and cocaine seizures within South-Eastern Europe has continued to decline since 2009, and only cannabis has grown both in volume and the number of cases investigated. Of all these drug flows, however, only heroin is strategically significant to Western and Central European markets.

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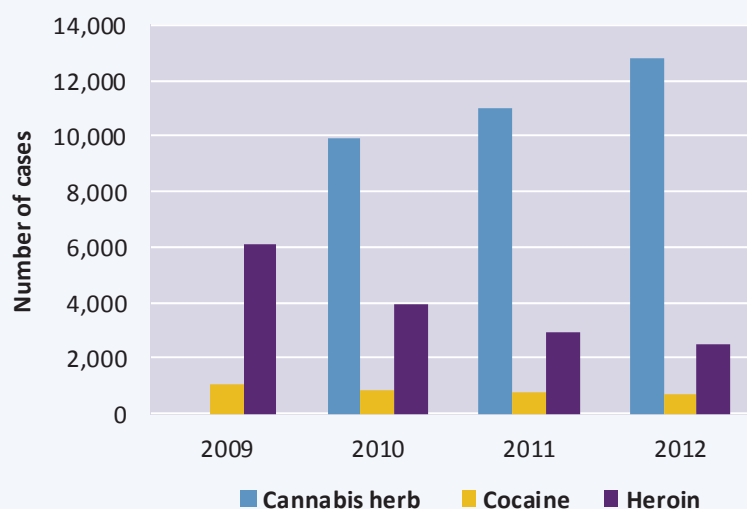
<sup>522</sup> See also the section of this report entitled “Getting to markets in Western and Central Europe” and the heroin section of the executive summary.

<sup>523</sup> See heroin section of the executive summary

<sup>524</sup> UNODC, Afghan Opium poppy survey, 2013 p.4



**Figure 61: Total cases for heroin, cannabis herb and cocaine in South-Eastern Europe, reported to SELEC**



Source: SELEC

South-Eastern Europe is not only a passive heroin transit zone to Western and Central Europe, as there are active warehousing and repackaging locations controlled by organized criminal groups located along all three branches of the Balkan route. However, the rise of the southern route is likely to have led to a change in the volumes of heroin flowing through South-Eastern Europe.

Bulgaria, Greece, Romania and now Croatia have all joined the EU, bringing much of their legislation regarding law enforcement and criminal justice in line with that of the rest of the EU. The other countries of South-Eastern Europe are at various stages of implementing the reforms requisite to EU accession,<sup>525</sup> which include a specific focus on “judicial reform and the fight against organized crime and corruption”.<sup>526</sup> With the removal of border controls for freight goods, particularly between Bulgaria, Romania, and Hungary,<sup>527</sup> interdiction of drug trafficking may involve new challenges. Moreover, Croatia’s accession to the EU has opened up a 1,377-km border between countries of the western Balkans and the EU.

The nature of drug trafficking groups operating in South-Eastern Europe continues to evolve. In the last decade, several major drug trafficking groups focusing exclusively on one particular market, such as heroin, cocaine or heroin precursors, have been effectively dismantled. But this monolithic approach to drug trafficking has increasingly given way to polydrug trafficking that is more sensitive to changes in the market.<sup>528</sup> Groups are also using more effective forms of communication and more sophisticated modus operandi, and are expanding into new markets as well as building networks at all stages of the supply chain.

The routes taken by traffickers have varied over the years, but the reasons for this are not always self-evident. Traffickers make decisions that may initially seem counter-intuitive,

<sup>525</sup> European Commission, *Enlargement Strategy and Main Challenges 2013-2014* p.1-3

<sup>526</sup> European Commission, *Enlargement Strategy and Main Challenges 2013-2014* p.14

<sup>527</sup> Entrance into Schengen primarily effects the illegal immigration, whereas standard Customs checks on transport goods have already been reduced for traffic passing between EU states

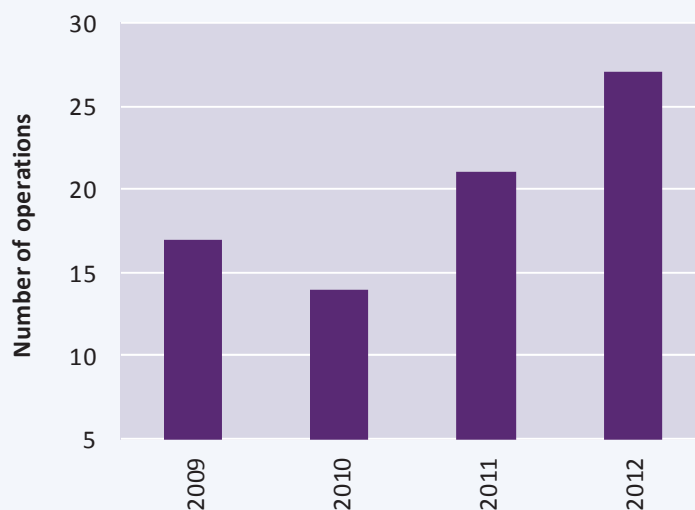
<sup>528</sup> See heroin and cannabis sections of executive summary

but it is likely that observers simply do not have a full picture of the options available to traffickers. Aggregated national seizure figures are not sufficient to understand the nature of such trafficking, and there are large information gaps linked to issues of data quality, data sharing and the secretive nature of the subject itself.

From its production in Afghanistan to its consumption in Western and Central Europe, the flow of heroin has undeniable corruptive influence along the length of the Balkan route. With opiate prevalence rates comparable to those in the destination markets of Western and Central Europe, the Balkan route also leaves its mark on local markets in South-Eastern Europe.

The countries of South-Eastern Europe have been quick to recognize both the regional and international nature of drug trafficking. SELEC provides an operational platform for coordination and cooperation of law enforcement agencies in South-Eastern Europe. By helping to bridge gaps between countries, SELEC has contributed to several successful joint operations as well as a general willingness among law enforcement counterparts with regard to information sharing and tactical cooperation. Indeed, the number of joint operations (all drugs) has peaked in the last four years, reaching 27 in 2012.

**Figure 62: Joint operations by SELEC Member States, 2009-2012**



Source: SELEC

Though sometimes difficult to implement, moves towards both bilateral and multilateral cooperation are occurring with ever-greater frequency and should be encouraged. The recent strengthening of Turkey's borders with the Islamic Republic of Iran, Greece and Bulgaria appears to have led to record seizures and shifts in routes, and provides good examples of the impact of intra-regional cooperation.

In 2013, UNODC initiated the Inter-regional Drug Control Approach (IRDC). The IRDC forms an innovative drug-control platform for integrated regional programme coordination and for increased impact on the illicit trafficking of opiates and on transnational organized crime. It connects ongoing UNODC programmes and initiatives for West and Central Asia, South-Eastern Europe, the Persian Gulf and East Africa, regions that are affected by the illicit trafficking of drugs originating in Afghanistan. The IRDC aims to foster the enhanced exchange of intelligence, upgraded training capacities, more effective action against drug-related financial flows and money laundering, increased maritime cooperation and enhanced regional cooperation in criminal matters.



Cooperation, especially in the law enforcement area, should not be limited to purely bilateral connections. Regional bodies such as SELEC, the Joint Planning Cell (JPC), the Central Asian Regional Information and Coordination Centre (CARICC) and the Gulf Criminal Intelligence Centre (GCIC) should all be interconnected in order to, inter alia, improve capacity to pre-empt traffickers and routes.

Within the IRDC, UNODC coordinated a law enforcement inter-agency meeting in Istanbul, Turkey, in December 2013 to explore options for collaboration and identify opportunities for coordinated operational activities among the above criminal intelligence agencies. International organizations such as CSTO, ECO, Egmont Group, the EU, Europol, INCB, INTERPOL, OSCE and WCO also participated. Among the operational outcomes, a follow-up meeting of the regional information centres will be convened in Qatar early in 2014 to review and facilitate joint investigations and operations.

Other returns on investments, such as the enhancement of forensics knowledge, are likely to be higher if such actions are integrated into current cooperation initiatives/platforms. Moreover, improved exploitation of forensic information in South-Eastern Europe would support investigation and analysis in other countries and help enhance how heroin trafficking connections are traced. This realistic goal has the added value of bringing countries together on a subject of mutual interest, which is valid both for strategic analysis and tactical planning.

With links to Afghan and South American drug production, as well as to the lucrative markets for those drugs in Europe, South-Eastern Europe is not isolated. Based on the principle of shared responsibility, it is important to expand communication and collaboration further afield, especially to cocaine source countries in South America, as well as to Afghanistan, the source of heroin. For example, the Paris Pact Initiative and the UNODC Regional Programme for South-Eastern Europe have been a focal point for advocating improvements in cooperation, particularly in the form of joint operations and controlled deliveries focused on the trafficking of Afghan opiates.<sup>529</sup>

This combination of raised awareness, increased use and development of cooperation mechanisms, and forensic capacity building are concrete measures that would place law enforcement and policymakers in a better position to evaluate the drug trafficking situation in South-Eastern Europe and make informed decisions on responses to the threat posed by illicit trafficking on the Balkan route. Demand, supply and transit are geographically and thematically linked in the reality of the drug trade, but in practice the responses to this reality need to be further interconnected, particularly with regard to drug control.

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<sup>529</sup> See UNODC Paris Pact Initiative “Expert working group on legal frameworks and cross-border cooperation: recommendations” <https://www.paris-pact.net/> In cooperation with duly mandated international and regional organizations and agencies a technical working group to prepare standard operating procedures, templates for documentation, model requests and debriefing procedures to facilitate the cross border cooperation for controlled deliveries and to assess technical assistance needs as required.



## METHODOLOGY

The study provides a snapshot analysis of the illicit drug distribution system to Western and Central Europe via South-Eastern Europe. The information used to map trafficking routes in and through South-Eastern Europe, including Turkey, was derived from UNODC Annual Response Questionnaires, UNODC World Drug Reports, the UNODC Delta database, the UNODC Drug Monitoring Platform, SELEC annual drug seizure reports and SELEC annual questionnaires on drug seizures. With the aim to obtain background information on seizures and routes and to identify the types and sources of available data, the researchers exchanged information with headquarters officials of the law enforcement agencies and public health departments of the following countries and territories: Albania, Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, France, Greece, Germany, Kosovo, Italy, the Netherlands, Romania, Serbia, Slovakia, Slovenia, Spain, the former Yugoslav Republic of Macedonia and the United Kingdom. Data was also exchanged with the following organizations: the World Customs Organization, Europol, INTERPOL, the Turkish National Police Department of Anti-Smuggling and Organized Crime, the United States Drug Enforcement Administration and the United Kingdom Serious Organised Crime Agency, among others.

The flow calculation reported in the latest Afghan Opium Trade Project report (The Global Afghan Opium Trade: A Threat Assessment, 2011), estimates that approximately 60-65 tons of heroin flow through South Eastern Europe. These estimates will be assumed valid for 2011-2012 until additional data becomes available. The robustness of demand data is subject to revision and changes. Some of the countries and territories discussed in this report still lack structured or organized data collection and dissemination systems. Accordingly, the statistical estimates provided on heroin/opiate demand and flows should be viewed as a work in progress and the best current approximations given the data available. There is no simple research practice that could satisfy these concerns, but it is hoped that this effort will serve to contribute to a stronger evidence base to inform drug control efforts.



## ANNEX 1

**Table 20: Selected southern route heroin seizures in Spain, Belgium and the Netherlands, 2010-2013 (kilograms)**

Country of	Date	Transportatio	Departure	Destination	Amount
Belgium	Dec-10	Container	I.R. of Iran	Netherlands	127
Belgium	Apr-11	Container	Pakistan	Netherlands	60
Belgium	Feb-13	Container	Pakistan	Netherlands	230
Belgium	Mar-13	Container	Mozambique	Netherlands	863
Netherlands	Aug-13	Container	Pakistan	UK	202
Spain <sup>530</sup>	Sep-11	Container	Pakistan	n/a	150
Spain	Jan-13	Container	Pakistan	n/a	58

Source: SOCA; Belgian Customs; WCO-UNODC CCP, *Year End Report 2011*, p.11; Official website of the Ministry of Interior of Spain; KLPD, Central Unit, Central Intelligence Division

## ANNEX 2

**Table 21: Average wholesale price in US\$ per kilogram of heroin, 2010-2012<sup>531</sup>**

Country/Territory	2010	2011	2012
United Kingdom	31 800 <sup>532</sup>	40 000 <sup>533</sup>	45 500 <sup>534</sup>
Germany	31 900 <sup>535</sup>	33 000 <sup>536</sup>	35 600 <sup>537</sup>
France	15 600 <sup>538</sup>	13 650 <sup>539</sup>	13 975 <sup>540</sup>
Italy	30 160 <sup>541</sup>	29 000 <sup>542</sup>	28 784 <sup>543</sup>
Belgium	14 820 <sup>544</sup>	9 880 <sup>545</sup>	20 800 <sup>546</sup>
Netherlands	21 600 <sup>547</sup>	23 400	24 700 <sup>548</sup>

<sup>530</sup> It should be noted that, according to Spanish authorities, this shipment was in fact destined for Côte d'Ivoire and made an unscheduled stop in Spain. Information provided by Spanish Customs, April 2013

<sup>531</sup> Other currencies converted into US\$ using United Nations exchange rates valid as of 30 June 2013

<sup>532</sup> ARQ data 2010, mean GBP 21,000 (range: 17,000- 25,000)

<sup>533</sup> ARQ data 2011 mean GBP 25,000 range: 18,000-33,000

<sup>534</sup> ARQ data 2012, mean GBP 30,000 (range: 25,000-35,000)

<sup>535</sup> ARQ data 2010, €24,548

<sup>536</sup> ARQ data 2011 €25,429

<sup>537</sup> Information provided by BKA, July 2013. €27,444. It should be noted that this price is for shipments of up to 1.5 kg. Heroin wholesale price per kg for amounts between 1.5 and 10 kg is €21,000. For 10-100 kg it is €12,000

<sup>538</sup> ARQ data, €12,000

<sup>539</sup> Information provided by French Permanent Mission August 2013, €10,500

<sup>540</sup> ARQ 2012, Q 15-20

<sup>541</sup> ARQ data 2010, €23,243

<sup>542</sup> ARQ data 2011 €22,372

<sup>543</sup> ARQ data 2012, €22,142

<sup>544</sup> ARQ data 2010, €11,400

<sup>545</sup> ARQ data 2011 €7,679

<sup>546</sup> €16,000 mean (range: 7,000- 20,000). Information provided by Belgian Federal Police, Central Drug Service

Albania	15 600 <sup>549</sup>	20 800 <sup>550</sup>	25 900 <sup>551</sup>
Bosnia and Herzegovina	14 300 <sup>552</sup>	20 400 <sup>553</sup>	21 000 <sup>554</sup>
Bulgaria	14 300 <sup>555</sup>	N/A	20 700 <sup>556</sup>
Croatia	22 100 <sup>557</sup>	N/A	n/a
Greece	13 000 <sup>558</sup>	15 600 <sup>559</sup>	15 500 <sup>560</sup>
The former Yugoslav Republic of Macedonia	13 600 <sup>561</sup>	14 900 <sup>562</sup>	21 450 <sup>563</sup>
Montenegro	21 000 <sup>564</sup>	21 350 <sup>565</sup>	21 000 <sup>566</sup>
Romania	20 800 <sup>567</sup>	30 500 <sup>568</sup>	25 350 <sup>569</sup>
Serbia	20 800 <sup>570</sup>	19 500 <sup>571</sup>	28 600 <sup>572</sup>
Kosovo	N/A	19 500 <sup>573</sup>	25 300 <sup>574</sup>
Turkey	7 900 <sup>575</sup>	25 500 <sup>576</sup>	N/A <sup>577</sup>
Slovenia	N/A	N/A	N/A
Pakistan	2000 <sup>578</sup>	3 300 <sup>579</sup>	N/A

Note: Figures are preliminary and will be updated when information becomes available. Figures have been rounded.

<sup>547</sup> €16,666. Information provided by the KLPD, Central Unit, Central Intelligence Division, July 2013

<sup>548</sup> €19,000 mean (range: 18,000-20,000). Information provided by KLPD, Central Unit, Central Intelligence Division, July 2013

<sup>549</sup> ARQ data 2010, €12,000 mean (range: 11,000-14,000)

<sup>550</sup> ARQ data 2011 €16,000

<sup>551</sup> SELEC data 2012 €20,000 mean (range: 18,000- 22,000)

<sup>552</sup> ARQ data 2010, €mean (range: 10,000- 12,000)

<sup>553</sup> ARQ data 2011 BAM mean; range 24,000-35,000

<sup>554</sup> Information provided by SIPA, Sarajevo, Bosnia and Herzegovina, April 2013. €16,500 mean (range 15,000- 18,000)

<sup>555</sup> ARQ data 2010, €11,000 mean. Range: 10,000-20,000

<sup>556</sup> SELEC data 2012, €16,000 mean. Range 15,000- 17,000

<sup>557</sup> ARQ data 2010, €17,000 mean (range: 14,000-20,000)

<sup>558</sup> ARQ data 2010, €10,000 mean (range: 7,000- 13,000)

<sup>559</sup> ARQ data 2011 €12,000

<sup>560</sup> SELEC data 2012, €12,000

<sup>561</sup> €10,500. Information provided by the Ministry of the Interior of the former Yugoslav Republic of Macedonia, July, 2013

<sup>562</sup> Paris Pact Situational Report 2013 p.116 mean range: 13,900-15,900

<sup>563</sup> €16,500. Information provided by the Ministry of the Interior of the former Yugoslav Republic of Macedonia, July, 2013

<sup>564</sup> Information provided by Montenegrin law enforcement, June 2013

<sup>565</sup> Paris Pact Situational Report 2013 p. 120 mean; range 19,000-23,200

<sup>566</sup> Information provided by Montenegrin law enforcement, June 2013

<sup>567</sup> ARQ data 2010, €16,000 mean

<sup>568</sup> ARQ data 2011 €23,500 mean; range: 20,000-27,000

<sup>569</sup> ARQ data 2012, €19,500 mean (range: 17,000-22,000)

<sup>570</sup> ARQ data 2010, €16,000

<sup>571</sup> ARQ data 2011 €15,000 mean; range: 13,000-19,000

<sup>572</sup> Mini-Dublin Group Report, 27 May 2013, p.42

<sup>573</sup> ARQ data 2011 €15,000

<sup>574</sup> €19,500 mean (range 17,000- 22,000). Information provided by Kosovo Narcotic Investigation Directory, 2013

<sup>575</sup> ARQ data, 2010 €6,140 mean

<sup>576</sup> Paris Pact Situational Report 2012 mid point

<sup>577</sup> ARQ 2012, (range too broad: €1,277 – 25,532)

<sup>578</sup> ARQ data 2010 PKR 213,000

<sup>579</sup> ARQ data 2011 PKR 347,530





## ANNEX 3

**Table 22: Estimated numbers of opiate users in the main markets of Western and Central Europe, 2011 or latest year available**

Country	Estimated number of users (thousands)	Remarks	Source
United Kingdom (England and Wales)	261 <sup>580</sup>	Opiates, 2011/2012 (may include methadone users)	National Health Service (NHS) (Estimated prevalence rates per 1,000 of the population aged 15-64, with 95 per cent confidence intervals) <sup>581</sup>
Italy	200	Opiates (PDU)	ARQ 2011, Italy
France	196 <sup>582</sup>	Opiates	ARQ 2011, France; UNODC best estimate, World Drug Report 2012 <sup>583</sup>
Germany	154 <sup>584</sup>	Opiates	ARQ 2011, Germany, estimated number of heroin users (2009)
<b>Total</b>	<b>805</b>		
Western and Central Europe	1,100	UNODC World Drug Report 2013 (2011 estimates)	UNODC best estimate, World Drug Report 2013 (annex 1)

Source: ARQs; United Kingdom Government data; UNODC *World Drug Report 2013*

*Note:* The table above is based upon opiate user data in the four main heroin markets as officially reported to UNODC.<sup>585</sup> References to “opiates” should be understood as referring mainly to heroin, since opium use in the four markets is likely to be minimal.

<sup>580</sup> 2011/2012 Crime Survey for England and Wales (CSEW). May also include methadone users. United Kingdom estimate for 2005/2006 = 286,566

<sup>581</sup> NHS, *National and regional estimates of the prevalence of opiate and/or crack cocaine use 2010-11: A summary of key findings*. Available at <http://www.nta.nhs.uk/uploads/prevalencesummary2013v1.pdf>

<sup>582</sup> EMCDDA offers a range of 275,000- 376,000 for PDU. A 2006 survey gives an IDU estimate of 130,000, or 0.2 per cent (82,000) of population aged 15-64. See EMCDDA, *Rapport national 2012, France*

<sup>583</sup> The number of users for France was estimated by multiplying the opiate prevalence (World Drug Report 2012) by the total population aged between 15 and 64 (42,000,000 according to France ARQ).

<sup>584</sup> Information provided by Permanent Mission of the Federal Republic of Germany to the United Nations in Vienna, August 2013

<sup>585</sup> UNODC, *World Drug Report 2012*, p.1

## ANNEX 4

**Table 23: Reported retail heroin purity in South-Eastern Europe and selected countries in Western and Central Europe, 2012 unless stated otherwise**

Country/territory	Heroin purity at street level (percentage)
Albania	4 <sup>586</sup>
Bosnia and Herzegovina	4 <sup>587</sup>
Bulgaria	6 <sup>588</sup>
Croatia	9 <sup>589</sup>
Greece	4 <sup>590</sup>
The former Yugoslav Republic of Macedonia	N/A
Montenegro	4 (2011) <sup>591</sup>
Romania	N/A <sup>592</sup>
Serbia	5 <sup>593</sup>
Kosovo	1 <sup>594</sup>
France	7 <sup>595</sup>
Germany	11 <sup>596</sup>
UK	20 <sup>597</sup>
Italy	22 (2011) <sup>598</sup>

Source: ARQ; SELEC; EMCDDA; SIPA; Ministry of Interior of Serbia

Note: Figures have been rounded

<sup>586</sup> ARQ 2012, Q. 15-20

<sup>587</sup> Information provided by SIPA, Sarajevo, Bosnia and Herzegovina, April 2013

<sup>588</sup> ARQ 2012, Q. 15-20

<sup>589</sup> ARQ 2012, Q. 15-20

<sup>590</sup> Annual SELEC Questionnaire on Drug Trafficking for 2012, Greece

<sup>591</sup> EMCDDA Country Overviews, Montenegro, 2011

<sup>592</sup> ARQ 2012, Romania. Data range too broad (0.22- 46)

<sup>593</sup> Ministry of the Interior of Serbia, 2013. Range: 1.74-8.15

<sup>594</sup> <http://www.emcdda.europa.eu/publications/country-overviews/xk>

<sup>595</sup> ARQ 2012, Q. 15-20

<sup>596</sup> ARQ 2012, Q.15-20

<sup>597</sup> ARQ 2012, Q. 15-20

<sup>598</sup> Range 2-78; see "Forensic analyses: purity of illicit drugs", presentation by Forensic Science Service, Police Anticrime Central Directorate, Rome, January 24 2013. See also EMCDDA, *2012 National Report, Italy*, p.16



## ANNEX 5

**Table 24: Selected southern route hashish seizures 2009-2013 (kilograms)**

Date	Transportation method	Origin	Destination	Seizing country	Amount
March 2013	Container	Pakistan	Belgium	Pakistan	3,185
September 2009	Container	Pakistan	n/a	Belgium	1,500
June 2009	Container	Pakistan	n/a	Belgium	5,100
May 2009	Container	Pakistan	Netherlands	Netherlands	3,750

Source: WCO/UNODC, Container Control in Pakistan: seizures, 2013; ANF

## ANNEX 6

**Table 25: Selected southern route heroin seizures in Pakistan 2009-2013 kilograms)**

Date	Transportation method	Origin	Destination	Seizing country	Amount
March 2013	Container	Pakistan	Belgium	Pakistan	246
July 2012	Container	Pakistan	Belgium	Pakistan	100 (along with hashish)
April 2013	Container	Pakistan	Belgium	Pakistan	38

Source: ANF Pakistan

## ANNEX 7

**Table 26: UK border seizures, 2011-2012 (10 kg of more)**

Date of Seizure	Country	Mode of Transport	Departure country	Weight (grams)
22/01/2011	UK	Air - Passenger	Pakistan	13,000
25/01/2011	UK	Sea - RoRo - (Commercial)	Not recorded	15,000
22/02/2011	UK	Air - Passenger	Pakistan	24,000
27/02/2011	UK	Sea - RoRo - (Car)	Kosovo (territory)	10,000
23/03/2011	UK	Air - Passenger	Pakistan	20,000
22/04/2011	UK	Commercial Shipping - Cargo	Pakistan	70,000
24/04/2011	UK	Air - Freight	Pakistan	10,000
28/04/2011	UK	Commercial Shipping - Cargo	Pakistan	128,000

04/05/2011	UK	Parcel post / Courier package / Letter post	Pakistan	11,500
11/05/2011	UK	Commercial Shipping - Cargo	Pakistan	90,000
12/05/2011	UK	Air - Freight	Pakistan	10,000
15/05/2011	UK	Commercial Shipping - Cargo	Pakistan	87,400
25/05/2011	UK	Sea - RoRo - (Commercial)	Netherlands	10,000
09/06/2011	UK	Air - Freight	Pakistan	20,000
28/06/2011	UK	Sea - RoRo - (Car)	Belgium	21,500
30/06/2011	UK	Sea - RoRo - (Commercial)	Netherlands	100,000
01/08/2011	UK	Sea - RoRo - (Bus/Coach)	Netherlands	64,000
02/08/2011	UK	Sea - RoRo - (Commercial)	Netherlands	24,500
27/08/2011	UK	Air - Freight	Pakistan	15,000
17/11/2011	UK	Sea - RoRo - (Commercial)	Netherlands	16,150
11/12/2011	UK	Sea - RoRo - (Bus/Coach)	Belgium	12,000
14/12/2011	UK	Sea - RoRo - (Commercial)	Not recorded	44,000
01/02/2012	UK	Commercial Shipping - Cargo	Pakistan	255,000
08/02/2012	UK	Commercial Shipping - Cargo	Pakistan	266,600
30/03/2012	UK	Sea - RoRo - (Commercial)	Belgium	59,390
17/05/2012	UK	Sea - RoRo - (Commercial)	Czech Republic	36,000
09/06/2012	UK	Air - Freight	Pakistan	20,000
12/06/2012	UK	Sea - RoRo - (Commercial)	Belgium	10,100
16/07/2012	UK	Air - Freight	Pakistan	46,000
27/07/2012	UK	Air - Passenger	Pakistan	25,750
04/11/2012	UK	Land - Rail - (Freight)	Netherlands	12,000

Source: SOCA



## ANNEX 8

**Table 27: Selected cannabis and cocaine seizures destined for the Netherlands from South-Eastern Europe, 2010-2012 (kilograms)**

Country of seizure	Date	Drug type	Transportation method	Origin	Destination	Amount (Kg)
Romania	2010	Cannabis herb	Van	Albania	Netherlands	46
Slovenia/ Croatia	2011	Cannabis herb	Lorry	Albania	Netherlands	298
Romania	Mar-11	Cocaine	Container	South	Netherlands	159
Romania	2012	Cannabis herb	Lorry	Bulgaria	Netherlands	171
Bulgaria	May-12	Cocaine	Combine harvester/lorry	South America	Netherlands	66
Bulgaria	Jul-12	Cannabis resin	Lorry	Morocco	Netherlands	11,756
Germany	Nov-13	Cannabis herb	Lorry	Albania	Netherlands	698

Source: SELEC

## ANNEX 9

**Table 28: Prevalence of opiate use in South-Eastern Europe (percentage)**

Country/territory	Prevalence of opiate use <sup>599</sup>
Albania	0.45
Bosnia and Herzegovina	0.3
Bulgaria	0.29
Croatia	0.4
Greece	0.32
The former Yugoslav Republic of	0.4
Montenegro	N/A <sup>600</sup>
Romania	0.11
Serbia	0.28
Kosovo	N/A
Western and Central Europe	0.3
Global average	0.4

Source: UNODC *World Drug Report 2013*; EMCDDA

<sup>599</sup> Annual prevalence is given as a percentage of the population aged 15-64 (UNODC best estimate). See *World Drug Report 2013*. These figures include all forms of drug administration (injecting and smoking).

<sup>600</sup> No recent reliable estimate. See *World Drug Report 2012*

## ANNEX 10

### Regional groupings

This report uses a number of regional and subregional designations. These are not official designations. They are defined as follows:

East Africa: Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Mauritius, Rwanda, Seychelles, Somalia, Uganda and United Republic of Tanzania

North Africa: Algeria, Egypt, Libya, Morocco, South Sudan, Sudan and Tunisia.

Central Africa: Cameroon, Central African Republic, Chad, Congo, Gabon, Guinea and Malabo

West Africa: Benin, Burkina Faso, Cape Verde, , Chad, Congo, Côte d'Ivoire, Equatorial Guinea, Gambia, Ghana, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Sao Tome and Principe, Senegal, Sierra Leone and Togo

Southern Africa: Angola, Botswana, Democratic Republic of the Congo, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe

South America: Argentina, Plurinational State of Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay and the Bolivarian Republic of Venezuela

Central Asia and Transcaucasia: Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan

Near and Middle East/South-West Asia: Afghanistan, Bahrain, Iran (Islamic Republic of), Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Pakistan, Qatar, Saudi Arabia, Syrian Arab Republic, United Arab Emirates and Yemen. The Near and Middle East refers to a subregion that includes Bahrain, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, the Syrian Arab Republic, the United Arab Emirates and Yemen.

South-Eastern Europe: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Kosovo under United Nations Security Council Resolution 1244, Montenegro, Romania, Serbia, the former Yugoslav Republic of Macedonia and Greece

Western and Central Europe: Andorra, Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Monaco, the Netherlands, Norway, Poland, Portugal, San Marino, Slovakia, Slovenia, Spain, Sweden, Switzerland and the United Kingdom of Great Britain and Northern Ireland