

ILLEGAL DRUG MARKETS IN EUROPE: THE NEGATIVE CONSEQUENCES OF GLOBALIZATION

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Abstract: *Globalizing processes have profoundly shaped the European drugs situation. The illegal drug markets have reached to evolve and to transform all the advantages of this phenomenon, in their favor. Based on globalization aspects, the paper purpose is to present the main characteristics of illicit drugs market within European countries, from the last years. Furthermore the article is focused on the analysis of theoretical and empirical drugs literature, especially on the current reports and studies of EMCDDA and UNODC, which indicated certain drug sectors. Due to its richness, position and high demand of illegal drugs, Europe is viewed by criminal organizations as a transit area for heroin, cocaine, cannabis and synthetic drugs, and a big customer which continued to sustain this profitable enterprise, over the last decades. Regarding the drug problem, the governance needs to be reframed and to take account of economical, social and moral character. The simple connection of illegal drug markets with globalization, gives the originality note of the paper, which leads to some important new insights for future research and policy.*

Keywords: illegal drug markets, cannabis, cocaine, heroin, synthetic drugs, drug prices

JEL Classification: E26, O17

INTRODUCTION

Globalization, known as a refreshing wave of our times and a process of society transformation, turned out into a serious phenomenon that brought in the past decades, new dimensions to this world, which caused at the same level, real challenges for this current "global village". Due to this buzzword, the entire image of our world has changed into a big system, where the economies are being increasingly integrated, and where the new technology and communication demonstrated that humankind has reached for sure a new stage of evolution.

A developed world is not a safe world at all, therefore a global evolution means also a global society that poses new dangerous threats. Following this phrase, the heart of globalization is reflected by the idea that humans, food, products, technology can be allowed to travel freely across borders, a drop of freedom which has led unfortunately to evil intentions and also to great opportunities that helped on the other side terrorists and criminals.

The sweet feeling of freedom has destroyed the conventional barriers of justice, making possible to develop within the society many powerful illegal markets, which are helped in a huge dose by the international transportation, the movement of persons, the bank facilities, and also by

the fast communication around the globe, a set of globalization benefits which undoubtedly paved the path to success for many criminal groups in the last years. The ugly truth is given by the fact that globalization hit organized crime and terrorist groups over the last period, and today is known to be one of those pillars that are responsible to its most profitable business - the international narcotics traffic.

Before money laundering system, the illegal drug industry is considered today to be a worldwide enterprise with a customer base of millions of hard core consumers of cocaine, marijuana, opiates as well as other drugs, and also with a huge profit estimated at hundreds of billions of dollars. The most important customer today and the largest marketplace for illegal drugs continue to be United States, followed closely by Europe. A global black market dedicated primarily to cultivation, manufacturing, distribution and sale, has deep roots in the old continent of the world, Europe. Being a part of shadow economy, the illegal drug industry has found in the economic potential and in the cradle of European tourism, a vital source of financing. Considered as a destination of choice for international drug traffickers, both U.S.A. and EU members are economically affected by the increasing of their citizens addiction, the rising of crime and violence, and by the black money circulation.

Situated at the crossroads of drugs routes, Europe is a particular target of drugs trafficking from the East (opium-Afghanistan), from the West (cocaine-Colombia, Peru, Bolivia), and from the South (cannabis-Morocco, North Africa). According with UNODC World Drug Report, 2008, Europe absorbed about one fifth of the global heroin, cocaine and cannabis supply, as well as one third of ecstasy production over the last years. Definitely a hot spot for illicit drugs consumers, with a variety of entry points, the European countries are identified as a financing link between criminal activities, governmental corruption and the low income of hundreds of poor families originated from Asia, Latin America and Africa, who basically are the first suppliers, that are dealing in general with cultivation of cannabis or heroin. However, there are many Europeans that never tried illicit substance thanks to the general popular perception, that drugs represent alien cultures, encouraging on the other hand the consumption of alcoholic beverages. Considered an evil in itself and regarded as a serious transgression of social norms, in most European countries the illegal drug trade and consumption is hardly penalized.

As described above, the international illicit drug market is to be considered an underground commercial system of communicating vessels (van Duyne and Levi, 2005, p.42), political or economical changes being reflected in the market stability. The crucial issue, is that this trade will

never be ended, and this system interconnected on various levels, will be always linked to terrorism financing and the spread of AIDS. Furthermore Milton Friedman, Tullock and other economists are in favor of free market. They argue for a full legalization of the market of drugs stating : "So long as large sums of money are involved-and they are bound to be if drugs are illegal-it is literally hopeless to expect to end the traffic or even to reduce seriously its scope. In drugs, as in other areas, persuasion and example are likely to be far more effective than the use of force to shape others in our image" (Sarrica, 2002, p. 8).

1. THE CANNABIS MARKET IN EUROPE

Cannabis is the illicit drug most widely available in Europe, which can be cultivated in a wide range of environments and grows wild in many parts of the world. It has been estimated that cannabis is cultivated in 172 countries and territories (EMCDDA, 2011a, p. n40). Also cannabis production in Europe is believed to be increasing mostly in indoor settings. Twenty-nine European countries reported domestic cultivation of cannabis herb in 2008 (UNODC, 2011, p. 38).

Divided in resins and herbs, this kind of drug is usually available in the forms hash, marijuana, weed or grass, products that are considered to be the peak of drugs. Although marijuana is gaining in popularity, hash is still predominant in Europe. A substantial part of hash on the European market originates from Morocco (Boekhout van Solinge, 1998, p. 2). Roughly the most cannabis herb trafficking is intra-regional, is locally produced and locally consumed while the cannabis resin produced in Morocco, is typically smuggled into Europe primarily through the Iberian Peninsula, with the Netherlands and Belgium having a role as a secondary distribution and storage centre (Europol, 2011a).

According with EMCDDA 2011, the International Narcotics Control Board mentioned Albania, Bulgaria, the former Yugoslav Republic of Macedonia, Moldova, Montenegro, Serbia and Ukraine as sources of the cannabis used in central and eastern Europe. Although Morocco is an important supplier, herbal cannabis continues to be imported mostly from Africa (Ghana, South Africa, Egypt) then from the Americas (Caribbean Islands) Middle East (Lebanon) and Asia (Thailand). Considering these aspects, a recent market trend has displaced Morocco as the largest producer of cannabis resin, Afghanistan being identified as a strong supplier even in European countries.

1.1. Production, consumption and trafficking

Roughly equivalent to the global trade in coffee or tea, the illegal drugs production is very difficult to estimate, but in this same context the prices are substantially more expensive than coffee or tea, and are based in general by the prosperity of geographic location. Some economists researchers have noted that prices vary because of changes in the relationship between supply and demand. Over time it has been demonstrated that prices are high because most of this drugs are scarce, but not in sense that diamonds are, and also because the market presented a considerably high demand. Despite the fact that most of them can easily be cultivated in many different regions of the world, they are still scarce because they are legally prohibited.

Labeled as the most popular illicit drug, cannabis is consumed almost daily by at least 4 million Europeans. According with European Parliament, 2010, a total of 23 million Europeans used cannabis in 2009. Seizures of cannabis resin in Europe continued to exceed herbal cannabis seizures, both in number and amount seized (EMCDDA, 2011a). The available data, pointed out that in the period 2004-2009, the mean retail price of both, cannabis resin and herb increased in several countries with the exceptions of Latvia, Hungary and Poland, where the price of resin decreased. In the case of cannabis resin, in 2009, the mean retail price, ranged from 3€ to 19€ per gram, but at the same time several countries reported prices between 7€ and 10€, while the mean retail price of herbal cannabis ranged between 2€ and 70€ per gram (see Table 1).

Furthermore the major cities of the Europe, crossed and marked by cannabis transportation and consumption are Spain (a bridge to Morocco), the Netherlands, the United Kingdom, Greece, Portugal, the Czech Republic, Estonia, Slovakia, Denmark, Sweden, Latvia and so on. As a gateway to Europe, Spain continued to report the annual seizures of cannabis resin worldwide, followed by France, Portugal, Italy and Belgium.

Table 1 - Seizures, price and potency of herbal cannabis and resin during 2009

	Cannabis resin	Herbal cannabis	Cannabis plants
Global quantity seized	1 261 tonnes	6 022 tonnes	-
Quantity seized EU and Norway	584 tonnes	57 tonnes	1.4 million plants and 42 tonnes
Number of seizures EU and Norway	400 000	324 000	25 000
Mean retail price (EUR per gram) Range	3-19	2-70	-

Source: Table adapted from EMCDDA 2011, www.emcdda.europa.eu

Along with Spain, the Netherlands is also recognized as a hot spot of entry for cannabis. Since there is no surprise at all that Spain is the main port of entry for hash, where boats, cars and lorries are used to cross the Strait of Gibraltar, the Netherlands is reflected especially through the image of Amsterdam, the Venice of North. Helped by the biggest and busiest port, Rotterdam, cannabis is easily moved by ships and distributed further in Amsterdam and then in the European countries. Despite these two major entry points, Turkey is considered to be another important cannabis supplier of Europe, linked with the Middle East and Asia production.

In Barcelona, both hashish and marijuana are usually sold on the street, particularly in those areas close to clubs, pubs and other meeting places. In Amsterdam cannabis is predominantly sold in "coffee shops" (Massari, 2005, p. 3) that are considered semi-tolerated retail outlets, which are permitted to operate if they comply with a number of strict conditions (van Duyn and Levi, 2005, p. 45).

Regarding the total income generated by illegal production of cannabis for commercial purposes, the current literature exposed the general difficulty to obtain such a number. Although the European authorities suggest that the cannabis production would have generated profits of millions of Euros, funds that definitely helped organized criminals to carry on with their criminal activities.

2. THE IMPACT OF OPIUM/HEROIN ON THE EUROPEAN ILLEGAL MARKETS

One of the most commonly abused illicit drug in European society is heroin, recognized as "the white death" due to the white powder that presents dangerous effects. Associated with public health and social problems since the 1970s, this powerful and multifaceted drug is related with the greatest share of morbidity and mortality in the European Union.

Two forms of imported heroin have historically been offered on the illicit drugs market in Europe: the commonly available brown heroin, which comes mainly from Afghanistan; and white heroin (a salt form), which typically originates from south-east Asia, though this form is considerably less common (EMCDDA, 2011a, p. 72). Made on the basis of opium poppies, heroin is produced mainly in the Golden Triangle (Burma, Laos and Thailand) and in the Golden Crescent (Afghanistan, Iran, Pakistan). Reported as a stable market, Western Europe is the single biggest market, in general supplied by the Golden Crescent. Arrived mainly by two trafficking routes, roughly 37% of the heroin produced in Afghanistan takes the "Balkan Route" through Iran, Turkey, and then towards the final destination, the western and southern Europe. Despite this popular path,

heroin is also trafficked via the "Silk route" through central Asia and then smuggled through Belarus, Poland, Ukraine, Lithuania and so on.

In European Union the key consumption is clearly defined by the United Kingdom, Ireland, Italy, France, Germany, and Sweden. With an estimated 59 000 seizures resulted in the interception of 24 tonnes of heroin in 2009, two thirds of which (16.1 tones) was reported by Turkey, United Kingdom and Spain being situated on the second place, regarding the highest number of seizures (EMCDDA, 2011a). Overall, some experts started in their recent studies, the highest opioid use prevalence rates presented in West and Central Europe, with the 350 000 users of United Kingdom, 216 000 users of Italy and 190 000 users of France.

Table 2 - Production, seizures, price and purity of heroin

Production and seizures	Heroin
Global production estimate (tonnes)	396
Global quantity sized (tonnes)	76
Quantity seized (tonnes) EU and Norway (Including Croatia and Turkey)	8 (24)
Number of seizures EU and Norway (Including Croatia and Turkey)	56 000 (59 000)
Price and purity in Europe	Heroin base ("brown")
Mean retail price (EUR per gram) Range (Interquartile range)	23-135 (37.5-67.9)
Mean purity (%) Range (Interquartile range)	13-37 (16.8-33.2)

Source: EMCDDA (2011) adapted from UNODC (2011)

The price of heroin continued to be considerably higher on the European streets, especially in the Nordic countries than in the rest of Europe. Over time, Sweden presented a price of 135 € per gram (see Table 2) while Denmark reported a price of 95€ per gram, regarding 2009. Thus, this complex price picture is situated between 40€ and 62€ per gram, although over the period 2004-2009, the retail price of brown heroin decreased in some European countries (EMCDDA, 2011a).

There is a limited literature available which provides some insight into factors that may have had a part to play in the 2010/2011 heroin shortage in some European countries. Firstly, it has been suggested that reduced production of opium in Afghanistan, due to poppy blight in the spring 2010, may be responsible (EMCDDA, 2011b, p. 6). Another argument that influenced the European drugs

market, pointed out that the quantities of heroin destined for Western Europe were diverted to the Russian market. Finally, other developments in Afghanistan, such as heavy fighting in the south of country, and law enforcement actions against heroin laboratories and opium stockpiles, may also be influencing heroin supply to Europe (Mansfield, 2011).

In addition, heroin has tended to be replaced by substances that were in the past home-made, such as methylamphetamine (methamphetamine) in the Czech Republic, and "kompot" in Poland, which has obliged local producers and traffickers to seek alternative outlets in neighbouring countries. At the same time, heroin use has gradually spread from urban to rural areas (Estievenart, 2005, p. 55). Given two examples, of two major cities of Europe (Amsterdam and Barcelona), it may be considered that heroin is predominantly associated with the street market. In Amsterdam is usually sold without any concern in the streets (Zeedijk and Bijlmermeer area) or apartments of lower class, by ethnic minorities dealers, particularly Moroccans and Surinamese, while in Barcelona is sold in the city centre and periphery.

3. COCAINE SITUATION ON THE EUROPEAN ILLEGAL MARKET

Reported as the second most problematic drug after heroin, in terms of negative health consequences and high violence, cocaine is known as one of the most consumed illicit drug in Europe. It is estimated that about 14.5 million Europeans have used cocaine at least once in their life (EMCDDA, 2011a). The volume of cocaine consumed in Europe, however, has doubled in the last decade, even though data for the last few years show signs of stabilization at the higher levels (UNODC, 2011).

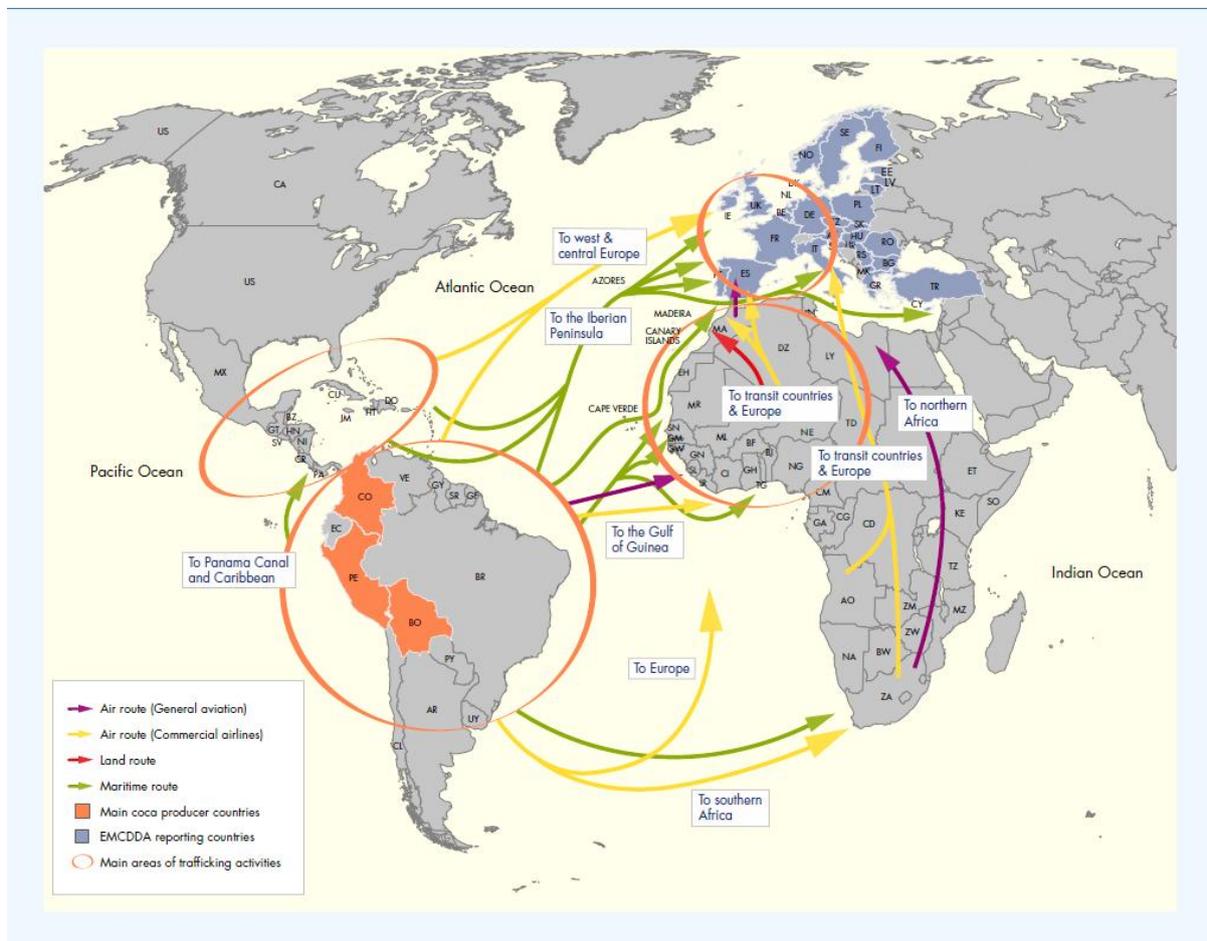
Cocaine is almost exclusively produced in the Andean-Amazonian region of South America and it is believed that during the 1980s and early 1990s the vast majority of the production remained on the American continent (EMCDDA, 2008, p. 3). With the United States as the biggest customer of cocaine (157 tonnes in 2009), Western and Central Europe, were second in terms of market share (123 tonnes in 2009). Recent surveys highlighted the increased consumption of Europe over the past decade, the total profit being estimated at \$36 billion a year.

Europol has identified three dominant sea routes (see figure 1) over which cocaine is trafficked to Europe, along which numerous variations in route and mode of transportation are possible:

- The Northern Route: Caribbean-Azores-Portugal/Spain;

- The Central Route: South America-Cape Verde/Madeira/Canary Islands-Europe;
- The African Route: South America-West Africa-Portugal/Spain (Brombacher and Maihold, 2009, p.9).

Figure 1 - Main cocaine trafficking flows from Central and South America and Africa to Europe



Source: EMCDDA, 2008

As described above, the most important gateways that are linked with Europe are Spain, Portugal and the Netherlands, followed closely by Germany, Belgium, France and Great Britain. Currently the Southwest Region, the Iberian Peninsula and offshore islands represent the hot spots of action and entry points for cocaine. With all transportation advantages in their hands, mulas, the human couriers from Latin American countries, have succeeded to move forward cocaine especially

through their luggage and clothing on flights to Europe, and also with the help of fisher boats, speedboats or even submarines especially to evade detection*.

Along with the Colombian cocaine, that is well-known on the Old Continent, the total number of cocaine seizures in Europe was estimated at 49 tonnes in 2009. Also, in the same year, Spain continued to be the country reporting both the highest number of seizures of cocaine and the largest quantity of the drug seized in Europe, about half the total in both cases (EMCDDA, 2011a, p. 63).

Regarding the wholesale and retail cocaine prices, some recent data collected by the EMCDDA, show that 1 kg of cocaine can be estimated at between 31 000€ and 58 000€ while the mean retail price, ranged between 50€ and 80€. Overall United Kingdom reported the lowest mean price, 45 €, while Luxembourg reported the highest, 104€. Spain, together with Italy and the United Kingdom are considered to be the ring of Europe, regarding the highest cocaine consumption. Although is a strong transit point, Spain was found guilty in January 2011 by "a large cocaine processing laboratory", a really smart way that produced 300 kilograms of the drug and 33 tonnes of chemical precursors†. Despite the Spanish drug environment, the general view is quite concerning, because too many Europeans still consider cocaine use as a relatively harmless accompaniment to successful lifestyle, and a easy way of escape.

4. SYNTHETIC DRUGS - A NEW WAVE OF MODERN DRUGS WITHIN EUROPE

Amphetamine, methamphetamine, ecstasy or LSD, are synthetic drugs with various effects, manufactured illegally in Europe from imported precursor chemicals, who continued to pose a significant worldwide problem. Born practically in the heart of Western and Central Europe, amphetamines were synthesized in 1887 in U.K and Sweden for the first time, LSD was launched in 1943 by Switzerland, while the MDA was synthesized in Germany‡. Based on medical experiments and purposes, this kind of modern drugs has evolved surprisingly over time.

Europol suggested through a recent report, that amphetamine can be termed a "European drug", followed by the idea that Europe is consider to be the world number one producer of the substance and a major consumer market. Manufactured in small "kitchen" laboratories, the vast

* see „Drug Traffickers "using submarines" to ship cocaine to Europe" 2011 - www.thejournal.ie/drug-traffickers-using-submarines-to-ship-cocaine-to-europe-160384-Jun2011/

† see „Spain one of countries with the highest cocaine use", February 2012 - www.thinkspain.com/news-spain/20846/spain-one-of-countries-with-highest-cocaine-use

‡ see Delprat T. - „Synthetic drugs in Europe: A standardized and widespread phenomenon", online publication www.ofdt.fr/BDD/publications/docs/tend3gb.pdf, accessed on May 2012.

majority is still produced in middle to large or "industrial size" facilities run by criminals operating across Europe and beyond (EUROPOL, 2011b). More than that, 16 clandestine drug laboratories were dismantled in Poland 2010, 14 of them being used for the illicit manufacture of amphetamine (INCB, 2011).

Most amphetamine seized in Europe is produced, in order of importance, in the Netherlands, Poland, Belgium, Bulgaria and Turkey (EMCDDA, 2011a, p. 52). For example in 2009, over 34.000 seizures resulted in the interception of an estimated 8 tones of amphetamine powder and 3 million amphetamine tablets (EUROPOL, 2011b).

On the other side, the development showed by ecstasy was reflected in the image of Italian seaside resorts as Rimini, and in the image of Spanish destinations like Ibiza in the Balears, both characterized by a massive tourism. Referred to as a European drug and associated with clubs, fun, techno music and young people, ecstasy registered a huge success, especially in the United Kingdom, Netherlands, Belgium, France and Germany.

Labeled as the "dance drugs" for the recreational market, ecstasy, amphetamines and other synthetic drugs are not so expensive like heroin or cocaine. The mean retail price of amphetamine ranged between 10€ and 23€ in 2009, while for ecstasy the price situation has changed very much, now being considered much cheaper than it was in the 1990s, the price being situated between 4€ and 9€ per tablet (see Table 3). In Amsterdam, in particular, the ecstasy market has recently become more "reliable" (at beginning of the 2000s pills contained an average of 90 mg of MDMA), while the retail price has dropped very significantly (one pill currently costs from around 4-5€ to 2.5€) (Massari, 2005, p. 7).

Table 3 - Seizures, price and purity of amphetamine, methamphetamine, ecstasy and LSD (2009)

	Amphetamine	Methamphetamine	Ecstasy	LSD
Global quantity seized (tonnes)	33	31	5.4	0.1
Quantity seized EU and Norway (Including Croatia and Turkey)	5.3 tonnes (6.5 tonnes)	500 kg (600 kg)	Tablets 1.9 million (2.4 million)	Units 59 700 (59 700)
Number of seizures EU and Norway (Including Croatia and Turkey)	34 000 (34 200)	7 400 (7 400)	10 300 (11 000)	960 (970)
Mean retail price (EUR) Range	Gram 8-42	Gram 9-71	Tablets 3-16	Dose 4-29
Mean purity or MDMA content Range	1-29%	10-76%	3-108 mg	-

Source: EMCDDA, 2011 - *The State of the Drugs Problem in Europe*

Over the last few years, the ecstasy market has suffered a change in the context of quantities seized. The available data from 2009 showed that about 11 000 ecstasy seizures were reported in Europe, as a result after the interception of over 2.4 million ecstasy tablets (EMCDDA, 2011a). Commonly consumed by young people, the trafficking problem it is not major at all, because ecstasy is found very easily among young groups, fact that suggests a reasonable demand regarding this synthetic drug.

Overall, both amphetamine and ecstasy, are consumed in a high quantity by the population from West and Central Europe, compared with the other part of Europe, the East and South-East. At least 4 million of annual users with age between 15 and 64 (UNODC, 2011) fall into the arms of synthetic drugs, especially from the desire to find relaxation.

CONCLUSIONS

A black market, with no particular national identity and no frontiers, has become over time a truly global business and a source of billions of dollars per year, which is exceeded at the first sight by the arms industry. Metamorphosed into a big profitable "multinational", this "awful" and vast enterprise is supported from behind by a huge capital, smart employees, influence, power, technology and transportation. With all the necessary resources provided also by the influence of globalization, this trafficking organizations turned out into the ugly face of the modern era, with many deep roots all over the world, from the cocaine cartels from Colombia and Mexico to the organized crime groups such as Yakuza from Japan.

Thus, despite its illegality, drug production and distribution has become a major source of revenue for many countries: revenue which can be used to round out national budget deficits, or to make individuals groups, businesses and even whole countries richer through the financing of "legitimate" industries and enterprises (UNESCO, 1999, p. 4). The tentacles of the drug industry have reached in the end all sectors of society, from those peasants producers to state institutions, being connected very often with corruption, human trafficking and smuggling. Although this topic has economical and political consequences, above all is placed the moral consequence, which is hard to cover or to solve it.

Situated at the drug trafficking crossroad, the Old Continent has become an important customer of this enterprise, being caught in the addiction system. In the past decades, Europe presented a high consumption level regarding cannabis, synthetic drugs, heroin or cocaine, facing in

this way, real difficulties in the health sector. Viewed as the second market of illegal drugs, behind United States, Europe has become a bridge between West and East, shifting from one place to another, large quantities of drugs. Despite this, the major concern within European countries remains the drug consumption among young people that increased considerably in the last years, the problem of drug entry points, the security in the airports and ports and the wave of immigrants, suspects in drug transportation.

Perhaps the archetypal contemporary social problem, the narcotics trade is helped in a serious way by the richness of European countries reflected in the flourishing tourism or in the business area, which influenced at the same time, the price position on the market. More than that, being a current challenge of the entire world, the European authorities' efforts are placed between law enforcement, and specialized organizations in reducing the drug flow. Finally the whole big picture regarding Europe covers a simple truth, the constant position of international drug trade that perhaps will never know the end.

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