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EU Drug Market: Cocaine



'EU Drug Market: Cocaine' describes the European cocaine market from production and trafficking, to distribution and use. It details the processes, materials and players involved at different stages and levels of the market. The module takes a threat assessment approach, identifying key issues and defining recommendations for action at EU and Member State level.



This resource is a module of [EU Drug Markets: In-depth analysis](#), the fourth comprehensive overview of illicit drug markets in the European Union by the EMCDDA and [Europol](#).

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Explore topics in this module:



[Introduction](#)



[Key findings and threat assessment](#)



[Global context](#)



[Coca and cocaine production](#)



[Global cocaine trade](#)



[Criminal networks](#)



[Retail markets](#)



[Implications for action](#)

Introduction



Cocaine is Europe's most commonly used illicit stimulant drug. Levels of cocaine use vary between countries, being most prevalent in the south and west of Europe. It is estimated that about 14.0 million adults in the European Union (aged 15-64), or close to 5 % of this age group, have tried cocaine during their lives. Among these are about 3.5 million who have used the drug in the last year. Cocaine has traditionally been used in two main forms in Europe (see Box [Cocaine](#)). The hydrochloride salt, often referred to as 'cocaine powder' is usually sniffed or snorted, and to a much lesser extent injected, while a freebase and smokeable form of the drug, often referred to as 'crack', is usually smoked or sometimes injected. Frequent cocaine users may experience more serious problems, and about 60 % of cocaine users entering treatment report using the drug between 2 and 7 days a week (EMCDDA, 2021). Cocaine smoking is associated with more use, more frequent and harmful patterns of use. In some countries, more marginalised groups of drug users exist that may smoke or inject cocaine, often in conjunction with heroin. There is some evidence to suggest that cocaine smoking may be increasing as a route of administration, and this behaviour is observed now in more countries than in the past.

Recently, data from a range of sources have suggested that cocaine use and associated harms may be increasing in Europe. For instance, out of 15 countries reporting sufficient information on prevalence of cocaine use since 2019, 8 reported higher estimates of last year use than their previous comparable survey, 5 had stable estimates and 2 reported lower estimates (EMCDDA, 2022a). These patterns are also reflected in data on people entering treatment as first-time entrants for cocaine problems increased in 14 countries between 2014 and 2020. The health harms associated with regular cocaine use include dependence, heart and mental health problems, and an increased risk of accidents. Harms may be exacerbated when cocaine is used in conjunction with alcohol. Cocaine injection and the use of crack cocaine are associated with the greatest health risks. Based on data from 20 countries there were an estimated 473 cocaine-related deaths in 2020, or about 13.5 % of all drug-induced deaths with reported post mortem toxicology in these countries. It should be noted that this is likely to be an underestimate because 2020 data from some key countries is not available. Most of these deaths were attributed to drug overdose, with other substances also being detected in most cases, primarily opioids.

Cocaine is trafficked to Europe from the producer countries of South America by both air and sea using a range of methods and routes. In 2020, for the fourth consecutive year, the highest ever amount of cocaine, 214.6 tonnes, was seized in the EU, Norway and Turkey. Belgium, the Netherlands and Spain together account for approximately 73 % of the total. Early seizure figures from a limited number of countries in 2021 suggest that the quantity seized across Europe increased yet again. The largest amounts of cocaine found in seizures are smuggled into Europe hidden in cargo ships, mainly in maritime shipping containers. These typically depart from South America, particularly from Brazil, Colombia, and Ecuador, and are destined for large European ports, especially Antwerp and Rotterdam. Another frequently used route, involving other forms of sea and air transport, appears to involve transit through the Caribbean, North Africa and West Africa, including the islands off the coast of West Africa. Seizure data suggest that cocaine enters Europe mainly through western and southern countries. Recently, however, large seizures have also been made elsewhere in Europe, possibly indicative of trafficking groups extending their activities to ports where cocaine interdiction measures may be perceived as less intensive.

The restrictions adopted to address the COVID-19 pandemic during 2020 have had some impact on the cocaine

trade, as seen in a large decrease in seizures at the retail-level and a dramatic decrease in cocaine trafficking by couriers using commercial flights during 2020. Nevertheless, overall the cultivation of coca, production and trafficking of cocaine into Europe have continued during this period and may even have further increased.

Cocaine processing is taking place in Europe. Large seizures of chemicals, particularly ethyl acetate, and adulterants associated with cocaine production have taken place in Europe. Such seizures and intelligence on collaboration between criminal networks based in the EU and Latin America have shed further light on these developments. Cocaine hydrochloride is processed in Europe from carrier materials in dedicated extraction facilities, on a much larger scale and in a more sophisticated way than was previously understood. There are also indications that cocaine hydrochloride is being produced in Europe from intermediary products in the chemical extraction from coca leaf to cocaine hydrochloride (coca paste and cocaine base). This is a worrying development, and the potential smuggling of large amounts of such intermediary products into Europe constitutes both an intelligence gap and a threat that needs urgently to be better understood and documented.

Cocaine

Cocaine is a natural product extracted from the leaves of *Erythroxylum coca* and *Erythroxylum novogranatense*. These tropical shrubs are cultivated widely in the Andean-Amazonian region, and are the only known natural source of cocaine ⁽¹⁾, most of which is produced in Bolivia, Colombia and Peru. Cocaine has been used as a central nervous system stimulant since the early years of the 20th century.

In Europe, cocaine is available in two forms. The more common is a hydrochloride salt, sometimes referred to as powder cocaine. Less commonly available is a smokeable freebase form of the drug, widely known as crack cocaine. The crack cocaine available in Europe is typically manufactured from cocaine hydrochloride, a process known as basification, near to where it is retailed and used.

In South America, other smokeable cocaine products manufactured from the intermediary products of the cocaine manufacturing process, coca paste and cocaine base, are available to consumers and sold under different names such as 'basuco', 'paco', 'PBC'. It should be noted that the product sold under the name 'crack' in Brazil is manufactured from coca paste or cocaine base and is therefore different from the product called 'crack' in Europe, which is made from cocaine hydrochloride (UNODC, 2021e).

In this report, the term 'crack', when used in reference to Europe, refers exclusively to the smokeable freebase form manufactured from cocaine hydrochloride.

⁽¹⁾ It is possible to obtain synthetic cocaine by various methods, but this is rare and is less economical than the extraction of the natural product.

Key findings and threat assessment



- The European consumer market for cocaine continues to grow and there are indications that Europe's role in the international cocaine trade may be changing.
- Cocaine availability in Europe is probably at an all-time high and the drug is more affordable for consumers than in the past.
- The EMCDDA estimates that the EU cocaine retail market was worth at least EUR 10.5 billion (range EUR 7.7 billion to 12.8 billion) in 2020. This represents about a third of the illicit market in all drugs and makes cocaine the second-largest market, after cannabis. While this estimate is the best that can be achieved given current data availability, the method used is likely to underestimate the true size of the market, and this figure should be viewed as a minimum estimate.
- High-risk criminal networks dominate the trafficking and trade of cocaine in the EU and generate billions of euro of profit. Their activities are enabled by high-value targets, such as contact or money brokers, who enable the cocaine trade to take place in a highly fluid and networked environment.
- Record quantities of cocaine have been seized in Europe every year since 2017, particularly in sea ports. In 2020, the largest quantity ever reported, 214.6 tonnes, was intercepted. Preliminary data show that the 2021 total will be even higher, as seizures amounting to 240 tonnes have already been reported.
- The largest quantities of cocaine continue to be seized in Belgian, Dutch and Spanish ports. However, increasing amounts are also now seized in ports elsewhere in Europe, suggesting that trafficking groups are extending their activities to ports where cocaine interdiction measures may be perceived as less intensive.
- Corruption and intimidation of port workers, both in the private sector and the government, is a key enabler of cocaine smuggling through ports. In addition, there are indications that corruption related to the cocaine market is present in other sectors of European society.
- Although it is difficult to monitor systematically, serious violence related to the cocaine market seems to be increasing. Some recent high-profile cases now also suggest that it affects sectors outside of the drug trafficking sphere including journalists and government officials.
- Coca and cocaine production is reported to have become more efficient. It continues to increase in South America and appears to have become more internationalised and also includes efficient production in Europe.
- Chemical profiling of samples of cocaine seized in Europe suggests that Colombia continues to be the main source country, although the number of samples of Peruvian origin has increased noticeably in recent years.
- Data on precursor chemicals and detected illicit production facilities indicate that large (multi-tonne) amounts of cocaine base and unknown amounts of coca paste are now being processed into cocaine hydrochloride within Europe every year.
- The importation of large amounts of cocaine base to Europe for processing creates a potential risk that more smokeable cocaine products may be available on European consumer markets in future.
- More generally, the high availability of cocaine also contributes to this risk. Demand-side data also suggest that problems associated with the smoking or injection of cocaine among more marginalised groups appears to be both increasing and present in more countries.
- A worrying development is that information exists to suggest that some Latin American and European criminal networks are partnering in cocaine production activities in Europe, and perhaps also in South America. This phenomenon has also been observed for other drugs, particularly methamphetamine.

- There is now more evidence that Mexican criminal networks are involved in supplying cocaine to the European market.
- There is evidence that the EU is increasingly being used as a transit point for cocaine shipments intended for non-EU countries, particularly in eastern Europe, Oceania and possibly Asia.
- Cocaine trafficking to Europe by air couriers appears to have resumed in 2021 following its near disappearance in 2020 due to COVID-related restrictive measures on passenger air travel.

Cocaine in the global context



Western and central Europe is reported to constitute the second-largest cocaine consumer market in the world, after North America. Globally and in Europe, those in treatment for problems related to cocaine use tend to be older than those in treatment for synthetic stimulants. In the three countries in which coca cultivation is concentrated, Bolivia, Colombia and Peru, coca leaves play a significant cultural role. The extraction of cocaine from the coca leaves takes place mostly in these three countries, which together are estimated to account for the majority of the global production of cocaine hydrochloride. However, cocaine-processing laboratories continue to be detected in other South American countries and elsewhere, including Europe. Global seizures of cocaine totalled 1 436 tonnes in 2019, the highest quantity ever reported. The largest amounts were seized in Colombia, followed by the United States, Brazil, Panama and Belgium.

Coca and cocaine production



Estimated global cocaine hydrochloride production reached an all-time high in 2019. The ensuing COVID-19 pandemic seems to have had only a temporary and limited impact on coca cultivation and cocaine production in South America.

Data suggests that Europe is a significant source for chemicals associated with cocaine manufacturing. Information on dismantled cocaine production facilities, and recent evidence highlighting a new trend in cocaine production related to ethyl acetate, confirm that cocaine manufacturing is taking place in Europe, especially in the Netherlands, Spain and Belgium. Cocaine hydrochloride production in Europe appears to be larger and more sophisticated than previously thought.

The environmental harms caused by coca cultivation, cocaine production and trafficking are multifaceted. For example, the link between coca cultivation and deforestation is influenced by a number of factors, such as conflict, poverty and insecurity. Cocaine production is associated with the use of a range of chemicals, which may cause serious environmental harms when disposed of inappropriately.

Europe and the global cocaine trade



Cocaine trafficking activities targeting the EU continue to intensify and diversify. Record levels of global cocaine production have been matched by record quantities of cocaine seized in Europe, reaching 214.6 tonnes in 2020. Belgium, the Netherlands and Spain account for over 70 % of this figure. Partial data show that the 2021 total will be even higher, with seizures amounting to 240 tonnes already reported by four European countries.

Most of the cocaine seized in the EU or in transit to Europe is transported by sea, primarily in containers. Cocaine is shipped directly from the main countries of production but also from neighbouring countries in South and Central America as well as the Caribbean. Brazil, Ecuador and Colombia were the main departure points in 2020 for cocaine seized in or destined for European ports.

Corruption is a significant facilitator of drug trafficking, particularly when it exploits maritime trade routes, and has been identified as a key threat in the EU.

Cocaine: increasingly attractive for a wider range of criminal networks



A large variety of individuals and crime networks shape the complex supply of cocaine to the EU. Crime networks involved in cocaine trafficking are highly resilient, and some have global reach. They cooperate to expand their activities and reach new markets, for example by sharing and outsourcing information and services. Analysis of encrypted criminal communications through recent high-profile operations has shown that brokers play a key role within cocaine trafficking networks. They link crime networks with different expertise, acting as intermediaries between the field operators, other brokers, service providers and high-level criminals.

Information suggests a change in the nature of the growing number of violent incidents linked to the EU cocaine market, with criminal networks using violence in a more offensive way than in the past. Competition between suppliers has intensified, resulting in an apparent increase in the number of violent clashes, particularly in seaports and directed at port workers and officials. In some Member States, cocaine-related violence has also targeted lawyers, government officials and journalists.

Cocaine retail markets: multiple indicators suggest continued growth and diversification



A demand-based estimate of the European cocaine retail market places its value at EUR 10.5 billion in 2020. This represents about a third of the total illicit market in drugs, making cocaine the second-largest market (after cannabis), and suggests a large increase since the previous estimate for 2017.

Indicators suggest that cocaine availability on consumer markets remains at historically high levels, with continued market expansion across Europe. While smaller markets for more harmful forms of cocaine, often referred to as 'crack', remain concentrated in western Europe, there are indications that these are growing and appearing in new countries. The market expansion is driven, in part, by a growing range of purchase and delivery methods, including darknet markets, social media platforms and encrypted communication tools.

Data indicate that cocaine on EU consumer markets became on average almost 40 % more affordable between 2015 and 2020, based on the cost of 1 gram of a pure, 'uncut', cocaine to buyers in the context of their national standard of living. In 2020, cocaine purity reached its highest level in a decade, although adulteration with various substances continues to take place.

Implications for action to address current threats and increase preparedness



The data available strongly supports a number of overall conclusions.

- Cocaine availability and use is very high by historical standards and we are observing more health and social problems associated with this drug. If current trends persist these problems are likely to increase further in the future.
- Against a background of high availability, we are seeing cocaine use spreading geographically to new markets and socially to new groups. We are also seeing some evidence that more harmful patterns of use, such as smoking or injection, are becoming more common.
- Despite an increase in interdiction efforts, the cocaine market appears both resilient to control efforts and innovative in developing new methods to avoid detection and increase profits.
- The amount of money generated by this market creates a number of important security threats that are currently insufficiently recognised but have the potential to grow further in the future. These include a) corruption, violence and the undermining of legitimate business activities; and b) the alliances increasingly forming between European-based crime groups and those operating from outside of the EU.

To respond to the current situation and to be better prepared to meet the challenge of potential future threats, the following actions are needed.

Improve the intelligence picture: detection, monitoring and analysis

- **Systematically monitor cocaine-processing laboratories.** There is a need to better understand the

strategic and tactical implications of secondary extraction and cocaine hydrochloride production laboratories in the EU. This includes the need to understand the processes and assess their extent and scale. Attention should also be paid to the facilitators providing expertise, equipment and chemicals and the involvement of criminal networks or individual high-value targets.

- **Increase efforts to identify, map and profile criminal networks active in cocaine production, trafficking and distribution.** This will improve the tactical intelligence picture, facilitate the identification of high-risk criminal networks and high-value targets and support the prioritisation of operational resources.
- **Monitor cooperation between EU and non-EU criminal networks involved in the cocaine market.** Partnerships between EU-based criminal networks and those outside the EU represent a significant security threat, which may extend beyond the cocaine market to other drugs and criminal enterprises. In particular, a priority is to document and analyse how EU and Latin American criminal networks work together. Attention must also be paid to alliances linked to cocaine trafficking to the EU via transit areas, such as Africa, and trafficking to global markets where Europe is used as a transit area.
- **Improve national and EU-level analysis through better integration of operational and strategic information.** Resources should be allocated for the strategic analysis of operational information collected during large-scale encrypted communications investigations. In addition, information collected during operations involving large seizures, both in and destined to the EU, could be better utilised to inform strategic analysis. A secure platform for information exchange and joint analysis would enable monitoring and research data to be combined with law enforcement information. The resulting intelligence would inform policy responses, operational prioritisation and planning, and research priorities.
- **Strengthen the capacity to rapidly identify and follow up on existing and emerging health and security threats.** There is a need to improve the surveillance of cocaine use and the associated health and social consequences. Despite some signs of increased cocaine availability and use in eastern and northern European countries, overall, considerable heterogeneity still exists between Member States. A proactive approach is needed to rapidly identify and follow up on signals of increased cocaine use. This will require a multi-indicator approach incorporating both established statistical data, such as seizures, price and purity, and new, more innovative monitoring methods, such as wastewater analysis, hospital emergencies, syringe residue analysis, drug checking and monitoring of darknet markets and other online supply channels.
- **Systematically monitor cocaine market-related violence and corruption.** The cocaine market is a significant driver of corruption and violence within the EU. To improve operational and strategic responses, it is important to understand better the scale and impact of this, as well as how criminal networks use corruption and violence to facilitate cocaine production, trafficking and distribution in the EU.
- **Better understand drug flows through cocaine profiling.** Europe lacks the capability to chemically profile cocaine. Currently, this information is available to a limited extent through the US DEA Cocaine Signature Programme. Generating this information at European level would provide a greater understanding of drug flows involving the EU, which has value for both policy and operational responses.

Strengthen responses to reduce supply and enhance security

- **Strengthen operational responses through priority actions against criminal networks.** Enhance cooperation and coordinated efforts by making full use of EMPACT and other European instruments that support cooperation, such as operational task forces and joint investigation teams, pooling the resources

of national authorities, EU agencies and participating strategic partners.

- **Strengthen capabilities for cross-border investigations and support maritime surveillance**, including controlled delivery operations, by enhancing cooperation between border guards, customs, police and other law enforcement agencies across the EU and internationally. Support for existing mechanisms of maritime surveillance should be continued.
- **Target the brokers, key facilitators and enablers**. These high-value targets play a key role in the current operating model of the cocaine market by facilitating the production, large-scale trafficking and distribution of the drug in Europe. Operational actions specifically focused on these groups and individuals may prove to have high impact in disrupting the cocaine market.
- **Target the chemical supply chain enabling cocaine processing in the EU**. It is essential to effectively prevent and disrupt the diversion or production of precursor chemicals used for the extraction and conversion of cocaine base and coca paste into cocaine hydrochloride. This implies increased focus on the criminal facilitators that supply these chemicals and proactive engagement with legitimate industry.
- **Disrupt the online distribution of cocaine**. Digital channels for sourcing cocaine appear to play an increasingly important role. While the darknet market ecosystem has been substantially disrupted, sustained effort is needed. More emphasis is now required to target supply on instant messaging and social media platforms.
- **Invest in screening technologies**. The most effective screening technologies for the detection of cocaine in containers, vehicles and ships should be deployed at key ports and airports as well as in post and parcel services. Further investment in research and development has the potential to improve the efficiency of screening processes.
- **Strengthen public-private partnerships**. Cocaine traffickers exploit companies in the legitimate logistics sector, the chemicals industry and other commercial infrastructure. Public-private partnerships therefore represent a valuable resource, and companies should be enabled and encouraged to report suspicious activities.
- **Improve the targeting of illicit revenues**. The cocaine market is highly lucrative, estimated at EUR 10.5 billion in 2020, but this presents the challenge of laundering revenue. Financial investigations into money laundering conducted in parallel with cocaine trafficking and distribution investigations provide opportunities to effectively disrupt criminal networks. Continued efforts are needed to implement in full the revised European regulatory framework to target illicit financial flows.

Strengthen international cooperation

- **Further enhance international cooperation between the Member States, the EU, and key international stakeholders** working to reduce the supply of cocaine. The cooperation should be based on active engagement combined with an intensified exchange of operational and strategic information. This requires the strengthening and further operationalisation of the existing coordination mechanisms involving the EU, the Member States, relevant EU agencies and key international partners including Bolivia, Brazil, Colombia, Ecuador, Peru as well as Mexico and the US. Further synergies with the UN system should also be pursued.
- **Make full use of existing EU-funded operational coordination platforms and programmes**. The EU finances a number of important international initiatives specifically focused on cocaine. Information gathered in these projects should be collated and used to inform EU analyses and responses. Investment in operational initiatives that capitalise on the capabilities of Member States and have proven successful, such as MAOC-N should be continued. In parallel, it is important to continue supporting other projects

with a wider focus on health and social problems.

Invest in capacity-building

- **Improve forensic testing capabilities at European and Member State level.** Greater efforts are needed to harmonise the routine forensic analysis of cocaine seizures in Europe to support the collection and reporting of comparable data on the cocaine market. This should include the possibility to distinguish between different forms of the drug (cocaine hydrochloride, cocaine base and coca paste). In addition, a European system of chemical profiling of cocaine seizures should be established to improve strategic analysis, determine production methods and the origin of the coca used to produce the drug.
- **Invest in awareness-raising and training.** Raise awareness and provide training at EU and Member State level to border guards, customs, police and other law enforcement agencies focused on cocaine trafficking routes, *modi operandi* and the emergence of cocaine-processing laboratories within the EU. Frontline services should be alerted to the links between the cocaine market and violence and corruption.
- **Support capacity development at key entry points.** Significant risk profiling expertise has been developed in major European ports for the detection of cocaine at EU borders. The knowledge, expertise and good practices should be transferred to smaller ports and other secondary entry points such as provincial airports. In particular, information about concealment methods and *modi operandi* should be disseminated rapidly using existing mechanisms. The risk of infiltration by criminal networks using intimidation, corruption and digital intrusion requires specific attention.

Strengthen policy, public health and safety responses

- **Increase awareness of cocaine threats at policy level.** Awareness-raising is needed to increase the preparedness of Member States to respond to threats posed by the cocaine market. Support to policy at Member State level could be provided through threat assessments, targeted rapid alerts and risk communications in order to implement multi-disciplinary national and local action plans.
- **Take a future-oriented approach.** There is a risk that the success of efforts on known key locations may result in displacement of trafficking routes and other criminal activities. A future-oriented approach to planning and risk assessment is therefore required to identify potential vulnerabilities and put in place preventive measures, where merited.
- **Strengthen prevention efforts related to involvement in the cocaine market.** Significant numbers of Europeans may now be involved in the operation of the cocaine market, and there is a need to develop and implement crime prevention programmes targeting young people at risk. In addition, efforts are also needed to reduce the risk of other vulnerable individuals being recruited into high-risk roles in the cocaine market, such as couriers and street-level dealers.
- **Strengthen targeted prevention, treatment and harm reduction interventions.** Many people who use cocaine do not sufficiently recognise the harm it causes, especially when injected or smoked. There is a need to strengthen prevention strategies, treatment provision and emergency services. Harm reduction measures should aim at preventing overdose and infectious diseases, and be tailored to preventing harms linked to the use of crack cocaine.
- **Respond to the environmental risks associated with cocaine production in Europe.** There is a need to develop and deliver prevention messages in relevant countries alerting professionals and the public to the inherent dangers of cocaine processing, including fire hazards, water and soil contamination and poisoning caused by the presence of harmful chemicals.

Methodology and references

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Methodology: Read more about the [methodology](#) used to collect data in this analysis.

References: Consult the [list of references](#) used in this resource.

Abbreviations: Consult the list of [acronyms and other abbreviations](#) used in this resource.

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