



European Monitoring Centre
for Drugs and Drug Addiction

EN

Overview of drug markets in the European Neighbourhood Policy-East countries

Regional report

2022

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Introduction

Background

This report presents an analysis of the drug markets in the European Neighbourhood Policy-East (ENP-East) countries: Armenia, Azerbaijan, Belarus ⁽¹⁾, Georgia, Moldova and Ukraine. It provides a top-level overview of the information available on drug production, trafficking, sale, use and harms, as well as exploring what is known about the drivers and facilitators of drug markets across the ENP-East region. It highlights drug-related threats and their potential implications for security and health. Due to its proximity as well as economic and social ties, developments in this region have potentially important implications for the EU. The analysis presented here focuses on the drug situation over the period 2018-2021, and specifically on key developments prior to the COVID-19 pandemic through to the end of 2021. However, Russia's invasion of Ukraine in February 2022 and its potentially significant implications for the drug situation

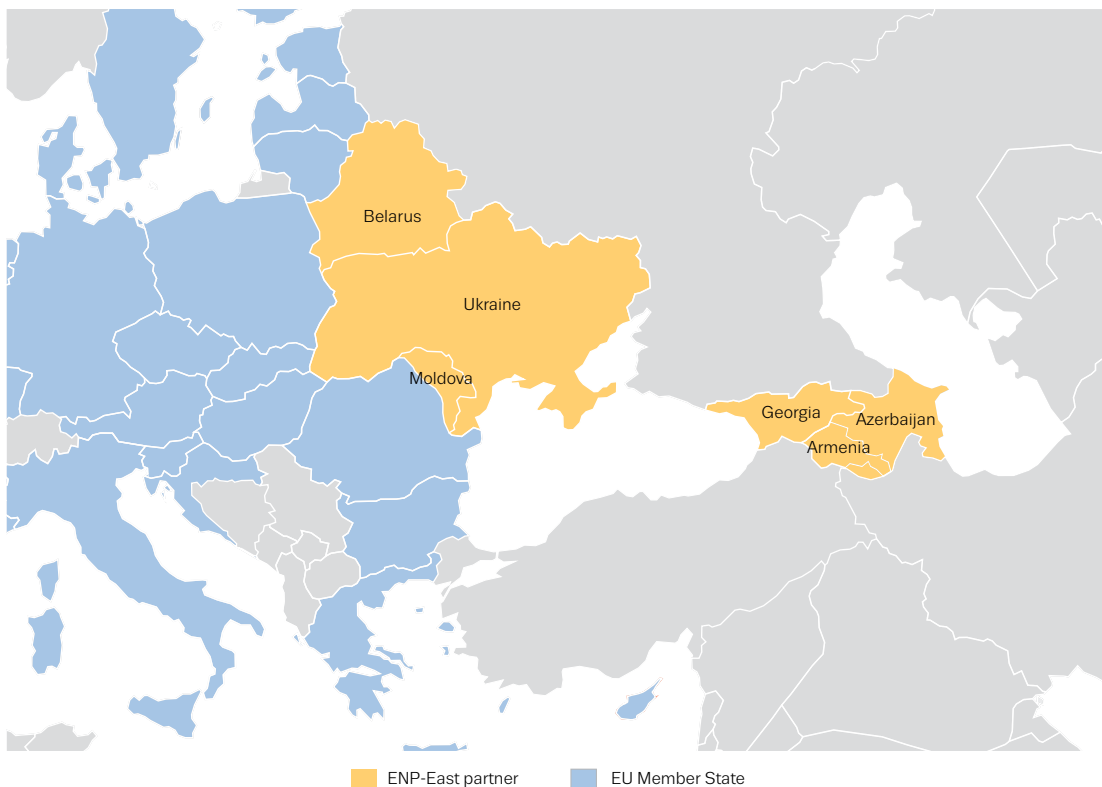
are also considered, although solid information to inform the analysis is lacking.

The ENP-East region comprises two geographically distinct groups of countries separated by the Black Sea and Russia (Figure 1). While there are similarities in the drug markets across these countries, their geographical location has influenced their domestic drug situations, including production, trafficking, sales and use. In the north-western part of the ENP-East region lie Belarus, Moldova and Ukraine. These countries share borders with EU Member States, Russia and the Black Sea. In the south-eastern part of the region lie the Southern Caucasus countries, namely Armenia, Azerbaijan and Georgia. The Southern Caucasus borders Iran, Russia, Türkiye and the Black Sea.

The drug markets in the region continues to undergo significant change in terms of the production, trafficking, sale and use of illicit drugs. A key recent development has been the growth of online markets, which has been linked with the availability of a broader spectrum of drugs, particularly new psychoactive substances (NPS). The

⁽¹⁾ Due to Russia's invasion of Ukraine, and in line with the EU position, ongoing and planned bilateral engagement between the EMCDDA and representatives of Russia and Belarus has been suspended.

FIGURE 1
The European Neighbourhood Policy-East (ENP-East) region



reported emergence of new trafficking routes for heroin and cocaine through the Black Sea, with involvement of international criminal networks, is another relatively recent phenomenon that highlights the need for continuing vigilance in this area. New developments have also been noted in drug production, with synthetic drug production sites identified and dismantled in several countries in the region. In addition, there are concerns that the Russian invasion of Ukraine in February 2022 may impact on drug flows and lead to increased drug-related harms, both in Ukraine and in neighbouring countries.

The findings detailed in this report are based on semi-structured interviews conducted between September and December 2021 with over 40 stakeholders in the six countries of the ENP-East region. Stakeholders included government representatives, law enforcement agencies, non-governmental organisations (NGOs), researchers and international organisations. To substantiate the information that emerged from these interviews, scientific literature and other data and reports published by governmental and non-governmental entities were consulted. However, it is important to note that in general there is a lack of routinely collected and detailed information on the drug situation in the region. This highlights the importance of strengthening routine drug monitoring data systems for collecting and reporting reliable and comparable information.

Methodology

The information presented in the report refers mainly to the period 2018-2021, unless stated otherwise. The primary source of information is qualitative data obtained from interviews with key informants in the ENP-East region. The main topics explored in the interviews included perceived drug availability, use, trends and harms, and drug production, trafficking, sales and prices. Two further sets of sources were explored to supplement the data from these interviews. First, published reports and scientific literature were consulted, focusing on drug seizures, dismantled laboratories, drug prices and information on drug use. Further information was also sought on trafficking routes and organised criminal networks, as identified by law enforcement officials in the interviews. Second, quantitative and qualitative datasets collected by several countries in the region, and coordinated or supported by the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA), were analysed (see the section '[Supplementary data sources](#)').

While attempts were made to substantiate the information collected from the interviews by using these supplementary data sources, a key limitation was the lack of detailed and reliable information on the drug situation in the region. As significant gaps remain, this report provides a partial overview of drug markets in the ENP-East region. This highlights the importance of strengthening routine drug monitoring systems for collecting and disseminating reliable and comparable information on the drug situation. Nonetheless, it is important to note that the findings presented here should be viewed as preliminary and interpreted with caution due to limitations in the data available to inform the analysis.

Qualitative interviews

Interviews were conducted with key informants from different professional backgrounds and organisations: NGOs (16), government agencies (11), healthcare providers (2), researchers (1), people who use drugs (1), and international organisations (1). Interviews were conducted with key informants from all six countries: Armenia (4), Azerbaijan (5), Belarus (4), Georgia (3), Moldova (7), Ukraine (6); experts on the regional situation (3) were also interviewed. Key informants were identified through the networks of the researchers and the EMCDDA and through snowballing by referrals from those interviewed. A semi-structured interview guide with key topics was used and adapted to the field of expertise of each interviewee. All interviews were conducted remotely using online video conferencing applications, lasted between 45 and 75 minutes, and were performed by two researchers.

Using qualitative interviews as a primary source of data is both a strength and a limitation of this report. Interviews can provide valuable information in relation to the latest developments in the drug situation as perceived by the respondent, including insights that existing studies may not have captured. Particularly in a region where other data sources are limited, conducting key informant interviews can shed light on phenomena and developments that may otherwise be difficult to observe. However, a limitation is that the interview provides a subjective insight into the drug situation based on the experience and expertise of the key informant. Having a large sample of interviewees, from various professional backgrounds, helps to manage this limitation, but does not overcome it. As such, other sources were used to supplement, and where possible substantiate, the information gathered from the interviews.

Supplementary data sources

To supplement the qualitative interviews, where available, the report draws on quantitative data from studies and surveys supported by the EMCDDA and implemented in the countries of the region in the framework of the EU4Monitoring Drugs technical cooperation project. This includes the European Web Survey on Drugs (EWSD) ⁽²⁾, the European Syringe Collection and Analysis Enterprise (ESCAPE) ⁽³⁾ and the European School Survey Project on Alcohol and Other Drugs (ESPAD) ⁽⁴⁾. Each of these projects has its own strengths and limitations, a discussion of which is beyond the scope of this report, but which can be examined on the respective topic pages of the EMCDDA or project websites.

Where appropriate, information on cross-border trafficking and supply has also been corroborated through EMCDDA core monitoring activities. Core monitoring data are derived from annual data-collection exercises, using standardised reporting tools, conducted by the EMCDDA through its network of national focal points across the 27 EU Member States, Norway and Türkiye.

Report outline

The report begins by providing an overview of key findings, focusing on production, trafficking, distribution, organised criminal networks, use and availability, and health and harms. A preliminary analysis of the crisis in Ukraine following Russia's invasion in February 2022 is also presented. The report subsequently discusses the main drivers and facilitators of drug markets in the region, drawing attention to the rise of online markets, what is known about the activities of criminal networks, and the impact of the COVID-19 pandemic.

Individual overviews of each key drug type found in the region are presented (cannabis, heroin and synthetic opioids, cocaine, amphetamine and MDMA, methamphetamine and new psychoactive substances). For each drug type, what is known about the current situation is reviewed with regard to production and trafficking, distribution and availability, and use and harms. The report concludes by considering the regional situation, highlighting broader issues such as knowledge gaps, the

impact of megatrends and the availability of responses to the drug situation.

⁽²⁾ For further information, see https://www.emcdda.europa.eu/activities/european-web-survey-on-drugs_en

⁽³⁾ For further information, see https://www.emcdda.europa.eu/topics/escape_en

⁽⁴⁾ For further information, see <http://www.espad.org/>.

Key findings

Drivers and facilitators

- ▶ A key recent regional development appears to be the expansion of online drug markets. These markets apparently now play a more important role in the sale and purchase of drugs in Armenia, Belarus, Georgia, Moldova and, until recently, Ukraine. This development has been linked with a perceived increase in the availability of some NPS such as 4-methylmethcathinone (4-MMC) and α -pyrrolidinopentiophenone (alpha-PVP), although it is not possible to empirically substantiate this finding.
- ▶ The COVID-19 pandemic seems to have led, at least temporarily, to reduced availability and use of drugs that are predominantly smuggled into the region, such as heroin, MDMA, amphetamine and cocaine. This is likely to be linked to COVID-related disruptions to trafficking routes. However, small-scale and home production of some drugs, such as amphetamine and methamphetamine, seem to have increased as a result. The COVID-19 pandemic may also have accelerated the interest in online drug markets.
- ▶ The situation in Ukraine since the Russian invasion in February 2022 remains volatile. It is expected that the transit of drug shipments through Ukraine will reduce in the short term. In addition, it is possible that an increase in the use of other entry points for drug shipments will be seen in the Black Sea region. Domestic drug production is also likely to remain subdued, while health services, including drug treatment, will continue to face disruption and operational challenges.
- ▶ Some countries in the region have also experienced instability in recent years, linked to governance and territorial issues that have created challenges for law enforcement generally and have therefore potentially impacted on trafficking and associated criminal activities. Some respondents suggested that Russia was playing a destabilising role in this respect. This issue is difficult to explore in detail in this report. However, we note that the broader political challenges facing the region have the potential to impact on the future drug situation in ways that are currently difficult to predict but are potentially important and will therefore require active monitoring.

Production

- ▶ Amphetamine and methamphetamine are produced across the region on a relatively small scale, while NPS production has also been noted in Ukraine. These drugs appear to be predominantly destined for domestic markets, although it is possible that they may also be smuggled to neighbouring countries.
- ▶ In Georgia, a reported emerging trend was the production and use of homemade 'conifer vint' since around 2015. Conifer vint is the name of methamphetamine produced from an ephedrine-containing plant. This may have pre-dated developments in Afghanistan, where large-scale methamphetamine production using ephedrine extracted from the ephedra plant has been reported recently.
- ▶ Production of 'street methadone' has also been reported to take place in Ukraine and Moldova. Usually available in crystal form, the drug is consumed locally and trafficked to Belarus, Georgia and Russia.

Trafficking

- ▶ The region is a significant transit hub for illicit drugs, as several major trafficking routes flow through it. Belarus, Moldova and Ukraine border the EU and are relatively close to areas known for large-scale production of amphetamine and methamphetamine, while Armenia, Azerbaijan and Georgia are situated near Afghanistan, the global centre for heroin production. Overall, the ENP-East region has seen an increase in the quantities of drugs reported seized between 2016 and 2020. Cannabis is the drug consistently reported to have been seized in the highest quantities, followed by heroin.
- ▶ Two major heroin trafficking routes from Afghanistan, the Balkan and Northern routes, impact on the region. A branch of the Balkan route (the Southern Caucasus route) is also thought to be used to move heroin across the region. In addition, methamphetamine trafficked from Iran, potentially of Iranian or Afghan origin, has been noted in the Southern Caucasus.
- ▶ Cocaine seizures linked to Ukrainian seaports prior to February 2022 indicate a possible attempt to develop a

cocaine trafficking route from South America through the Black Sea, for consumption in the ENP-East region, the EU and Russia. Although the conflict in Ukraine has interrupted this activity, if resumed it could have potentially important implications for both the region and the EU, and it therefore merits close monitoring and operational follow-up.

- ▶ A potential threat to the region may be the production and trafficking of synthetic drugs originating from the EU. Some indirect evidence of this is reflected in the perception among experts that methamphetamine and MDMA use has increased in some ENP-East countries. However, robust empirical data are not currently available to substantiate this impression. There are also some indications from law enforcement sources that amphetamine and MDMA have, at times, been smuggled from the EU into Ukraine and Moldova.

Retail and availability

- ▶ Information on the retail prices of drugs across the region remains scarce. Key informants consistently reported that heroin prices are high compared with those of other drugs, and that its purity is low, which may have influenced a shift towards the use of less expensive synthetic drugs and NPS.

- ▶ It is reported that there appears to be a greater availability of synthetic drugs since 2018, particularly of methamphetamine and synthetic cathinones such as alpha-PVP and 4-MMC.

Organised criminal networks

- ▶ Limited information is available on the impact of the drugs market and its criminal actors on security in the region. However, the reported rise in drug trafficking through Black Sea ports is thought to have been linked to an increase in corruption.

- ▶ The criminal networks most active in drug production, trafficking and distribution are reported to be composed of locals and nationals from countries bordering the region. There are also some indications that international criminal networks may also have a presence in the region. For example, a large cocaine seizure in the port of Odessa in 2021 was linked to the Italian 'Ndrangheta.

Drug use

- ▶ There are indications that drug use patterns have shifted in recent years towards synthetic drugs, both imported and domestically produced. An important caveat here is the lack of good data on trends in drug prevalence and use. Addressing this information gap should be regarded as an important priority for the future.

- ▶ The use of heroin is reported to have decreased, while the illicit use of synthetic opioids (particularly street methadone) is reported to have increased. Key informants suggested that the relatively low price of street methadone and medications diverted from opioid agonist treatment, as well as the low purity of heroin, appears to be a driving factor for the interest in synthetic opioids.

- ▶ The information that does exist provides some indications of an increase in the use of methamphetamine in the Southern Caucasus countries and of synthetic cathinones in Moldova and Ukraine. Changing patterns of use have been noted among specific sub-groups, such as an increase in methamphetamine and NPS use among young people and individuals with high-risk patterns of drug use. 'Chemsex' has also emerged as an issue in some subcultures.

Health and harms

- ▶ Experts warn that the perceived increase in NPS and methamphetamine use poses a health threat due to their association with an increased risk of mental health disorders, including psychotic episodes. Furthermore, the use of methamphetamine with synthetic opioids may increase the risk of overdose or experiencing other adverse health consequences.

- ▶ The information available suggests that overall, domestically produced drugs in the region usually appear to be low in purity and of varying (and typically unknown) composition. This raises additional public health concerns and underlines the need for greater investments in forensic and toxicological data.

Potential impact of the war in Ukraine

In February 2022, Russia launched an invasion of Ukraine, creating a humanitarian crisis that is still evolving. These developments also have the potential to impact on the drug markets in Ukraine and neighbouring countries. While it is difficult to anticipate the medium- to long-term impacts on the drug situation, some immediate consequences are already obvious.

First, it is expected that drug trafficking through Ukraine will decrease in the immediate term, particularly in relation to heroin and cocaine. It is also possible that this disruption will shift drug trafficking through other entry points in the Black Sea region. In addition, it is likely that the illicit production of amphetamine, street methadone and NPS, such as 4-MMC and alpha-PVP, will be disrupted due to a lack of precursors and other chemicals in Ukraine. Further, as a proportion of drug purchasing and selling behaviours now takes place online, it is expected that these methods of acquiring drugs will be disrupted due to attacks on Ukrainian infrastructure, including internet, banking and postal services.

The crisis has disrupted health services, including drug treatment and harm reduction services, and reduced access to care for people with substance use disorders. Logistical challenges also affect the continuation of drug treatment, specifically opioid agonist treatment ⁽⁵⁾ services. Concerns exist about the availability and access to supplies of methadone and buprenorphine. These negative developments in service availability pose a risk of increased transmission of infectious diseases, particularly as injecting drug use and drug-related infections remain major public health challenges in Ukraine. Prior to the Russian invasion, Ukraine had an estimated 350 300 injecting drug users, among whom the estimated prevalence of HIV and hepatitis C virus (HCV) infection was roughly 20 % and 64 %, respectively (Titar et al., 2021). Further, it is likely that the use of alcohol, drugs or both will increase in Ukraine as the conflict unfolds, which often goes hand in hand with increases in mental health comorbidities (EMCDDA, 2022b).

The situation in Ukraine highlights the need for ongoing monitoring and support to health services, including in neighbouring countries that are hosting a large number of Ukrainian refugees. Importantly, the crisis is likely to have a

significant impact on the national treatment and harm reduction systems of neighbouring countries and of other EU Member States. As such, ensuring the continuity of care for those fleeing the war should be regarded as a priority. A detailed rapid assessment of the impact of the war in Ukraine on drug issues has been produced by the EMCDDA (2022b).

⁽⁵⁾ The term 'opioid agonist treatment' is used here as the preferred term to cover a range of treatments involving the prescription of opioid agonists to treat opioid dependence. The reader should be aware that this term includes opioid substitution treatment, which may still be used in some of the EMCDDA's data collection tools and historical documents.

Main drivers and facilitators of ENP-East drug markets

Emergence and expansion of online markets

Around the world, drug markets have become established in online spaces, offering new opportunities for criminal networks and individual drug resellers while at the same time creating new challenges for law enforcement. Developments in the online sphere have been rapid, affecting the ways in which drugs are marketed, sold and purchased (EMCDDA, 2016). These developments are also reported to have affected the ENP-East region, where the emergence and expansion of online drug markets is an important development that has been noted over the past few years.

Although street-level markets still exist across all countries in the region, key informants noted that the use of online drug markets has seen a marked increase in recent years and that more people are purchasing their drugs online (for supplementary analysis, see the box '[European Web Survey on Drugs analysis on sources of supply from Georgia and Ukraine](#)'). Further, there are indications that a broader range of drugs may have become accessible as a result of these developments. There also exists a perception that online markets offer drugs that are more potent or of higher purity than those from street markets and other offline methods of purchase.

The online markets from which individuals purchase their drugs include the surface web and the darknet, social media platforms and communication apps. A recent study by the Eurasian Harm Reduction Association (EHRA) found that QR codes and links to websites offering drugs can be found on walls in public areas across a large number of cities in the region (van der Gouwe, 2021). In particular, various social media platforms have become popular mediums for marketing and selling drugs, for example 'channels' on the messaging application Telegram.

The Hydra and Matanga markets (see the box '[Substances offered on the Matanga darknet market](#)') have, until recently, been the main darknet markets used in the region. These markets appear to cater for both retail-level sellers and individuals purchasing for their personal use. Hydra, mostly a Russian-language market, has provided a relatively stable source of drugs and other illicit goods over the past decade (CRRC, 2020; Davitadze et al., 2020; Flashpoint, 2021; Lakhov, 2020); however, the market was shut down by German police in April 2022 (Tidy, 2022).

The emergence of online drug markets has potentially led to drug markets in the region becoming more dynamic and interconnected. These online markets may have facilitated the introduction, sale and purchase of drugs that were previously not available, including NPS (UNODC, 2022b). As reported by key informants, this is potentially reflected in the perceived increased availability and use of a wider range of drugs. As noted earlier, however, these suggestions require follow-up in more quantitative research exercises.

It was also reported that there had been an increase in the use of 'dead drops' ('zakladki') as a method of delivering drugs purchased online in the region (van der Gouwe, 2021; EMCDDA, 2020a; EMCDDA and Europol, 2019; UNODC, 2021b) and, to a lesser extent, postal services. These developments can make it more challenging to intercept or disrupt drug sales. The use of chatbots was also reported to have reduced the need for the 'traditional' infrastructures needed to sell drugs. Chatbots are automated software applications that can generate messages or engage in automated conversation in social media channels. They can for example be used to attract attention to websites where drugs are sold (see Figure 2 for examples).

Broader context of criminal activities

Law enforcement agencies in the region have reported that most people involved in the domestic production,

Substances offered on the Matanga darknet

Matanga is a darknet market that, since 2014, has operated in Georgia and appears to attract buyers from Russia, Ukraine and Belarus. A 2020 study found that most sales activity on the platform relates to cannabis, comprising around 56 % of recorded transactions, followed by cocaine and MDMA (CRRC, 2020). The study found that cocaine accounts for nearly a quarter of the platform's revenue. There was also a wide variety of NPS offered on the site, including substances such as alpha-PVP and 25I-NBOMe. It was also found that most listings on the Matanga market were for small quantities likely to be purchased for personal use.

European Web Survey on Drugs analysis on sources of supply from Georgia and Ukraine

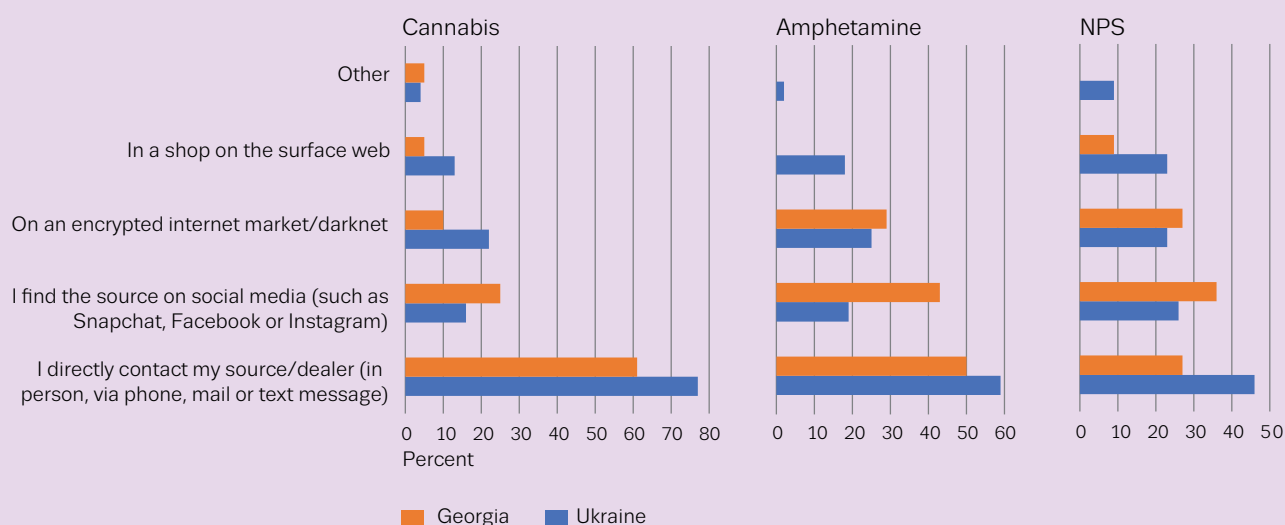
Through multiple-choice questions, EWSD respondents in Georgia and Ukraine were able to indicate how they sourced the drugs they reported purchasing and using recently. It should be noted that some of the sample sizes were very small; the survey is based on a convenience sample and as an online survey it is not representative of drug purchasing patterns more generally. Nonetheless, the results do provide a window on the ways in which these EWSD respondents sourced their drugs.

Three examples from the EWSD data, of herbal cannabis, amphetamine and NPS, are provided below. For herbal cannabis, directly contacting the source/dealer was the option most frequently selected by respondents from both countries. However, for 25 %

and 16 % of recent buyers in Georgia and Ukraine, respectively, social media were one of their sources. Using the darknet and shops on the surface web were also popular options among Ukrainian respondents.

For recent amphetamine and NPS buyers, internet-based methods for sourcing these drugs appeared to be popular among respondents. However, caution needs to be taken in interpreting the EWSD results as they are not generalisable to any larger population. Further, the sample sizes of recent amphetamine and NPS buyers in Georgia were very small (14 and 11 respondents, respectively). Thus, these results are interesting, but should be regarded as preliminary and require further investigation in a larger study.

Sources of herbal cannabis, amphetamine and NPS reported by EWSD respondents in Georgia and Ukraine in 2021

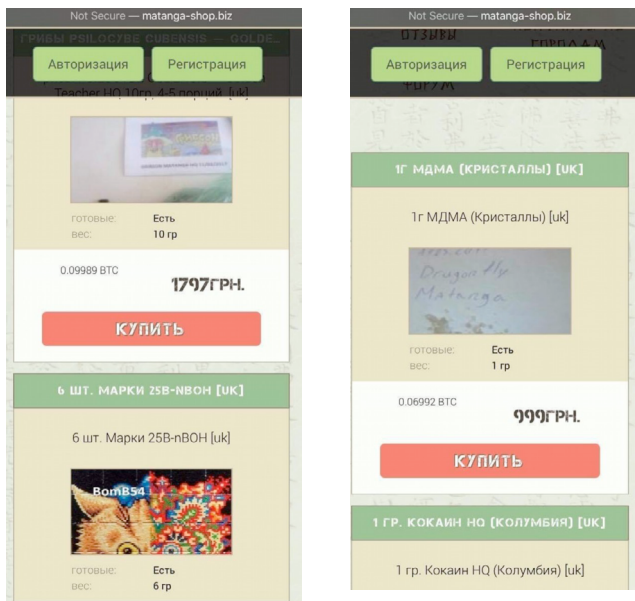


Number of respondents – cannabis: Georgia, 84, Ukraine, 367; amphetamine: Georgia, 14, Ukraine, 185; NPS, Georgia, 11, Ukraine, 57. Sources: EWSD, 2021a and 2021b.

trafficking and sale of drugs are locals or nationals from countries neighbouring the region (e.g. Russians, Iranians or individuals from former Soviet republics) (Melnychuk, 2021). There are also some indications of international drug-related criminal networks operating in the ENP-East region, although information on this topic remains limited. However, the presence of one such criminal network, the Italian 'Ndrangheta, was reported in Ukraine during the summer of 2021, when a seizure of 120 kilograms of cocaine was made at the port of Odessa (Sydoruk, 2021).

Due to the scarcity of information, the extent to which drug-involved criminal networks compete with each other in the region and the scale of drug-related violence remain largely unknown. Similarly, the broader consequences of the illicit drugs trade on the legal economy and governance are also unclear. Based on the limited information available, it does not seem that the rule of law in the region is extensively undermined by drug-related crime at present (IPFPEDM, 2022; NDO, 2022). However, there are indications of drug trafficking fuelling corruption in Black

FIGURE 2
Screenshots from online drug shops in Ukrainian
(‘Matanga-Shop’)



Source: Alternative Georgia, Tbilisi, Georgia.

Sea ports, in parallel with a potential increase in the trafficking of drugs through these entry points. Thus, an increased future negative impact of drug market activity on governance and security in the region must be regarded as a threat.

The political and economic influence that the Russian state tries to exert on the region was noted by some respondents as potentially having a negative impact on security and governance in some areas. Although this issue is not explored in detail here, it is noted that the broader political challenges facing the region have the potential to impact on the future drug situation in ways that are currently difficult to predict, but that are also potentially important and require active monitoring and further investigation.

Impact of the COVID-19 pandemic

The EMCDDA produced a report on the impact of COVID-19 on the drug situation in the ENP-East countries (EMCDDA, 2020a). According to this report, drug markets contracted to a small to moderate extent following the introduction of COVID-19 confinement measures. Disruptions were also noted to drug supply chains and increases were reported in the retail-level prices of some drugs. Small-scale or home production of certain substances, such as desomorphine (locally known as

‘krokodil’) and amphetamine or methamphetamine, increased temporarily as other drugs were more difficult to access. Probably as a result of public order measures aimed at restricting person-to-person contact, contactless drug dealing seems to have increased at the retail level.

The impact of the pandemic on drug use seemingly differed depending on the substance and frequency of use, as was experienced in EU countries. For example, the use of cannabis appears to have been least affected, although patterns diverged between those using cannabis recreationally and more frequent users. Further, for those substances that are predominantly trafficked into the region, such as heroin, MDMA, amphetamine and cocaine, use seems to have decreased. In parallel, the use of licit substitutes, such as alcohol, and the misuse of pharmaceuticals may have increased. The reduced availability of heroin in some countries may also have increased the demand for treatment, including access to opioid agonist treatment. Simultaneously, the provision and access to health services not related to COVID-19, including drug-related services, appears to have decreased. However, as the pandemic has unfolded, many countries in the region have rapidly adapted their services, for example allowing take-home opioid agonist treatment and the provision of remote and mobile services.

While it is difficult to foresee the long-term impacts of COVID-19 on drug markets, services and drug use patterns, some developments have been noted. According to the key informants interviewed for this report, a potential longer-lasting effect of the pandemic appears to be a further increase in drug purchasing behaviours online.

Based on the impact and lessons learned from the pandemic, several recommendations can be made. For example, in view of the successes achieved in adapting service provision, authorities may need to consider how to maintain innovative approaches, such as online consultations and psychological support and, where appropriate, take-home medications through opioid agonist treatment programmes. Further, it will be important to monitor any changes to the availability and use of drugs as the pandemic subsides, including home-based drug production in some countries.

For further information, see the EMCDDA trendspotter briefing on the impact of COVID-19 on the drug situation in the ENP-East countries (EMCDDA, 2020a).

Cannabis

The main types of cannabis products available in the region are herbal and resin (hashish). Synthetic cannabinoids are covered in the [NPS](#) section.

Production

Herbal cannabis is cultivated across the ENP-East region for personal use and for the illicit market; the extent to which cannabis resin is domestically produced is unclear. The legal consequences of cannabis cultivation vary across the countries in the region ⁽⁶⁾.

Trafficking and supply

In the Southern Caucasus countries and Ukraine, the United Nations Office on Drugs and Crime (UNODC) has reported an increase in cannabis seizures over the past five years (UNODC, 2022a). Cannabis seizures account for the largest quantity (roughly 68 %) of drugs seized in 2020 in the ENP-East region (see the [Appendix](#)). Herbal cannabis cultivated in the region is trafficked within the region and to neighbouring countries (Figure 3).

Belarus, Moldova and Ukraine report the trafficking of cannabis to and from Russia, to and from the EU and from North Africa. Based on unpublished data from the Polish national focal point, over the past few years, cannabis has been smuggled along the so-called 'Spanish Road' from Morocco, crossing the EU to Ukraine and Belarus and

⁽⁶⁾ For further information, see https://www.emcdda.europa.eu/publications/topic-overviews/content/drug-law-penalties-at-a-glance_en.

FIGURE 3
Main trafficking routes for cannabis in the ENP-East countries



potentially into Russia. Key informants suggested that the areas under Russian occupation in Ukraine have played an important role in drug trafficking and that organised criminal networks coordinate drug production and distribution from these areas. This suggestion requires further verification and follow-up, especially given the dynamic situation in this area.

Cannabis also appears to be trafficked into the Southern Caucasus countries from Iran, for example through the southern parts of Armenia.

Retail sale

Cannabis products are sold both on physical drug markets and, to a lesser extent, through online markets.

In Georgia, the average reported cost of 1 gram of herbal cannabis was EUR 28 in 2019 (NDO, 2021). In 2020 in Ukraine, the cost of 1 gram of herbal cannabis ranged between EUR 0.64 and EUR 8.12, and 1 gram of cannabis resin on average cost EUR 19.49 (IPFPEDM, 2022). More recent results, from the 2021 round of the EWSD, indicated a mean price of EUR 6.2 per gram of herbal cannabis and EUR 15.8 per gram of cannabis resin in Ukraine (EWSD, 2021b).

Availability, use and harms

Cannabis is perceived to be the most commonly used illicit drug in the region and to be widely available. Overall, the perception is that trends in cannabis use have remained stable across the region, although the absence of robust empirical data sources means that there is uncertainty on this issue.

Different potencies and strains of herbal cannabis and types of resin are reported to be available in the region. Key informants reported that the 'quality' of cannabis is generally perceived to be high in the Southern Caucasus countries. Conversely, the perceived quality of cannabis in Belarus, Moldova and Ukraine was reported to generally be regarded as 'poor'. It is likely that these qualitative criteria reflect, at least in part, the potency of cannabis products available on the illicit market. According to key informants in Ukraine, some cases have been observed of cannabis products adulterated with synthetic cannabinoids, an issue that has also been noted in the EU and that could have implications for public health (EMCDDA, 2022a).

Based on the latest ESPAD study conducted in 2019 in Ukraine, cannabis use has seemingly remained relatively stable in recent years, with 7.9 % of students aged 15-16 reporting to have ever used cannabis (ESPAD, 2020) compared with 9 % in the previous study (ESPAD, 2015). This difference may be due to sampling variation or other methodological issues and should not be interpreted as necessarily indicating a difference in prevalence between these time points. Key informants stated that cannabis use has been increasing in Georgia. With effect from July 2018, the country's Constitutional Court decided that cannabis use in private should not be an offence for adults. However, the court did not address the issue of cannabis possession for personal use in general. According to the latest ESPAD study in Georgia, 14 % of students aged 15-16 reported having used cannabis at least once in their lifetime in 2019 (ESPAD, 2020), compared with 11 % of students in 2015 (ESPAD 2015).

Cocaine

While data are limited, cocaine hydrochloride (powder cocaine) seems to be the only form of cocaine currently available in the region. Freebase or 'crack' cocaine does not appear to be commonly available in the region. However, it is possible that powder cocaine buyers may themselves convert their cocaine to its freebase form, although the extent to which this may be taking place is unknown.

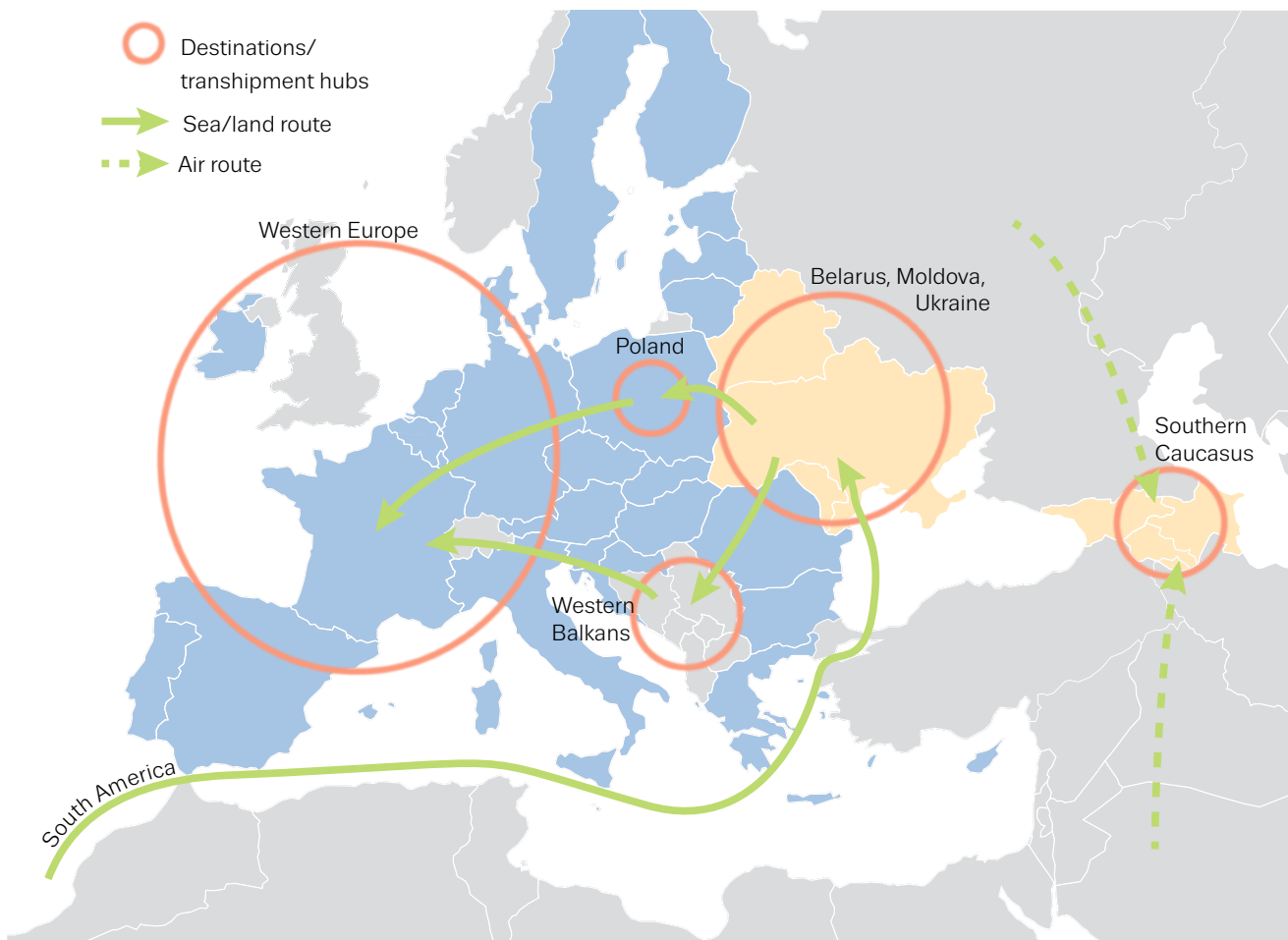
Trafficking

The available data would suggest that cocaine seizures overall are low in the region. An exception to this is Ukraine, which reported the largest quantities of cocaine seized in 2019 and 2020 (almost 837 kg in 2019 and close to 166 kg in 2020). This may reflect the country's emerging role in

cocaine trafficking routes (Figure 4), as discussed below. Overall, cocaine was the third most common drug reported seized in the region in 2020 in terms of quantity (see the [Appendix](#)), although this is mainly due to the large seizures made in Ukraine.

A large number of routes and transshipment points exist between cocaine producers in South America and consumer markets in Europe (EMCDDA, 2022a). Most of the cocaine seized in the EU is transported by maritime shipping containers to large ports in the Netherlands, Belgium and elsewhere. However, a new cocaine trafficking route may have developed recently, whereby cocaine is trafficked from South America through countries bordering the Black Sea, potentially destined for the EU market. Drug flows through this route are, however, small in comparison with the known major entry points for cocaine into the EU.

FIGURE 4
Main trafficking routes for cocaine in the ENP-East countries



Prior to the Russian invasion of Ukraine, cocaine shipments, including inside maritime containers, were reported to have arrived through the port of Odessa, and potentially other Black Sea ports. These shipments were thought to have been subsequently transported by road to consumer markets in the Balkans, Poland or western Europe. According to key informants, larger cocaine shipments (50 kg or more) arriving in Odessa from South or Central America were destined for further transit, whereas smaller amounts (less than 10 kg) were typically intended for the domestic market. Key informants also suggested that there have been instances when port officials and workers have been involved in and have facilitated the transfer of cocaine shipments.

Most individuals involved in cocaine trafficking in Ukraine are reported to be Ukrainian nationals who are familiar with the area and can facilitate transit. However, nationals from Russia and other neighbouring states are also reported to be involved to some extent. The involvement of EU citizens cannot be excluded. According to a Ukrainian government agency report, the presence of Latin American organised criminal networks in Black Sea ports has also been observed (IPFPEDM, 2022).

In 2021, Ukraine identified a transnational network active in the country, which may indicate the possibility of an increasing role for Ukraine in cocaine trafficking to the EU, as well as a possible diversification of cocaine trafficking routes. The Security Service of Ukraine seized 120 kilograms of cocaine worth approximately EUR 18 million in the port of Odessa that was being trafficked from South America to Europe. They arrested three individuals from the Italian 'Ndrangheta mafia organisation and also nationals from Romania, Albania and Ukraine (Sydoruk, 2021).

Cocaine for the domestic market is also reported to have entered Ukraine from the EU. The National Focal Point of Lithuania has also reported that cocaine originating from South America has transited Lithuania by maritime shipments or road transport to Russia, Belarus and some EU countries.

In the Southern Caucasus, information on cocaine trafficking is more limited, probably reflecting a smaller market. Key informants reported that cocaine is usually smuggled into these countries from Russia or the Gulf Region by air. The UNODC has recently noted several individual cocaine seizures in the Southern Caucasus, although the quantities remain low (UNODC, 2022b). This points to either new transit routes or growing markets for cocaine in the Southern Caucasus.

Retail sale, availability, use and harms

Cocaine is considered a luxury drug throughout the region due to its high price. Key informants reported that the average price of 1 gram of cocaine in the region is EUR 150-300. EWSD respondents in Georgia reported that 1 gram of cocaine powder costs EUR 163.3 on average. Based on information published by Ukrainian authorities, 1 gram of cocaine costs EUR 78-195 (IPFPEDM, 2022). According to EWSD respondents in Ukraine, the average price of cocaine powder was EUR 119.5 in 2021 (EWSD, 2021b).

Cocaine use appears to be low in the region, although reliable prevalence data among the general population are unavailable. Based on EWSD data from Georgia (396 respondents) and Ukraine (866 respondents), 22 % and 21 %, respectively, of respondents reported having used cocaine in the past year (EWSD, 2021a, 2021b). While this indicates that cocaine use exists in the region, it is not possible to draw any wider inferences from this data in relation to the prevalence of cocaine use in the general population.

Key informants stated that cocaine availability is increasing in Ukraine and Georgia, albeit still at low levels, and that the drug is predominantly used in the nightlife scene. Meanwhile, in Moldova and Belarus there appears to be very little cocaine available on the domestic market. Notably, in the EU, cocaine availability is probably at an all-time high and in 2020 cocaine purity reached its highest level in a decade (EMCDDA, 2022a).

Heroin and other opioids

A wide range of opioids are available on illicit drug markets in the region, including heroin, 'street methadone', diverted opioid agonist medications (see the box '[Potential diversion of medicines used in opioid agonist therapy](#)') and synthetic opioids.

Production

The extent of opium poppy cultivation in the region is unknown and is likely to be quite limited. In Azerbaijan, however, some production of homemade poppy extracts has been reported, and there are also some indications of possible but very small-scale heroin production in Georgia (van Ginkel, 2022).

The production of homemade poppy preparations is also reported in Moldova, where they are intended for domestic use and possibly for export to the Russian market. No

Potential diversion of medicines used in opioid agonist therapy

Key informants reported that some medicines prescribed through opioid agonist treatment programmes in the region are diverted to the illicit market. The diversion of these medicines, mainly methadone and buprenorphine, was thought by some respondents to have possibly increased with the onset of the COVID-19 pandemic, as governments across the region allowed the take-home use of these substances. However, these reports need to be interpreted with caution and in the context of the long-term presence and production of street methadone in some countries in this region (EMCDDA, 2020a). Further, given the relatively low numbers of patients in receipt of opioid agonist treatment, and the perception that large amounts of 'methadone' are available on the illegal market, it seems unlikely that diversion from domestic drug treatment programmes could make up a significant proportion of the illegal market share. Given the considerable uncertainty on this issue, further work is needed on the availability, form and source of opioids available on the illicit drug market in this region. Forensic analysis is key to understanding this phenomenon.

reports of current production of opioids from poppy cultivation in Ukraine or Belarus were collected during this study.

Larger-scale production of street methadone ⁽⁷⁾ by Ukrainian organised criminal networks in clandestine laboratories has been reported (IPFPEDM, 2022; Melnychuk, 2021). Laboratory analyses from Ukrainian drug checking services have shown that what is referred as street methadone does not always contain methadone (Kushakov, 2021). According to Ukrainian key informants, a laboratory for carfentanil production was also discovered in the country recently, although no detailed information was available on this event.

Trafficking

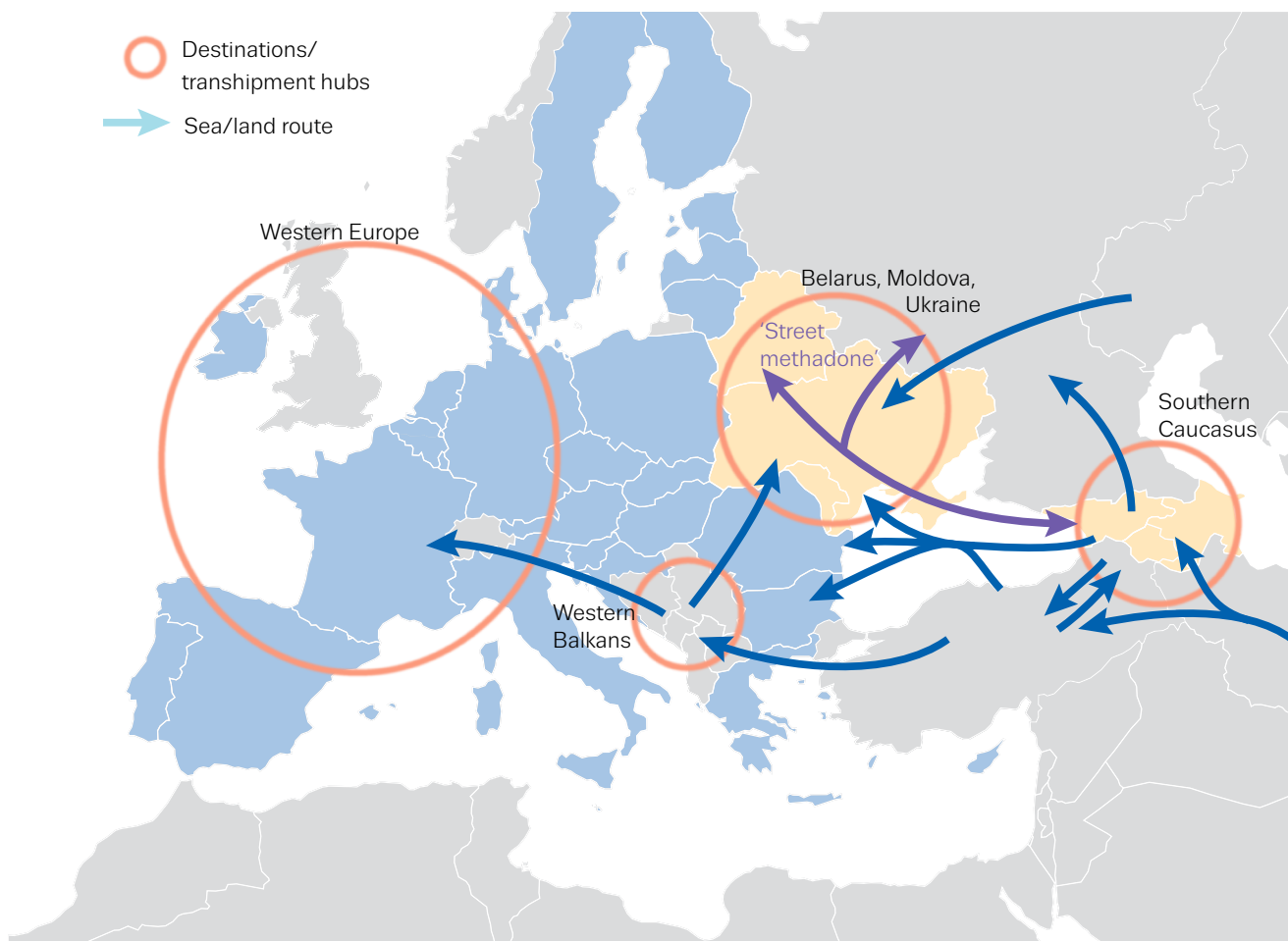
Heroin and opium produced in Afghanistan are usually trafficked through Iran before entering the ENP-East region, either through Türkiye or directly from Iran into the Southern Caucasus (Figure 5) (Sydoruk, 2021; van Ginkel, 2022). Heroin is the second most common drug seized in the region, following cannabis, in terms of quantity (see the [Appendix](#)). Almost 3 tonnes of the drug was reported to have been seized in the region in 2020.

The ENP-East region is affected by two of the main trafficking routes for Afghan opiates, namely the Northern and Balkan routes (EMCDDA, 2015). Heroin trafficked along the Northern route usually crosses from Afghanistan into Tajikistan, and is largely destined for consumer markets in Central Asia, Russia, Ukraine and Belarus. However, a branch of the Northern route has been noted whereby heroin is trafficked from Afghanistan into Iran, the Southern Caucasus and subsequently to Russia and neighbouring countries.

The Balkan route is the most important heroin trafficking route to the EU. This route, passing through Iran and Türkiye, represents the shortest distance and most direct land route to European consumer markets. The Balkan route comprises several different 'branches', whereby traffickers use overland, air and sea transportation methods to move heroin into the EU and neighbouring countries.

⁽⁷⁾ This drug is usually injected and is sometimes referred to as 'crystal methadone' (EMCDDA, 2020a).

FIGURE 5
Main trafficking routes for heroin in the ENP-East countries



The Southern Caucasus route is the term for the branch that goes from Iran to Türkiye through the Southern Caucasus. While this may be considered a subsidiary of the Balkan route, it is possible that a proportion of the opiates trafficked through the Southern Caucasus bypasses Türkiye and goes directly from the Georgian port of Batumi to Bulgaria, Romania or Ukraine (van Ginkel, 2022). The Southern Caucasus route therefore presents numerous possible links to consumer markets by land and across the Black Sea.

Key informants also reported that heroin is transported in commercial ferries on the Black Sea between Türkiye, Georgia and Ukraine. In this context, Ukraine is important for the trafficking of some heroin destined for the EU or Russia, as it serves as a transshipment point where drugs can be stored before being moved onwards to neighbouring countries by road. According to the UNODC, the available data indicate that heroin trafficking through Ukraine had probably been increasing prior to the Russian invasion in February 2022 (UNODC, 2022b). The situation

after this date is unclear, but some disruption to drug trafficking activities is likely.

While opiates are trafficked out of Afghanistan along these established routes, precursors for heroin production are also trafficked into Afghanistan along the same routes. Acetic anhydride is a key precursor for heroin production, and some has been seized in the ENP-East region (IPFPEDM, 2022; Sydoruk, 2021).

Nationals from a wide variety of countries are reported to be involved in heroin trafficking in the region. This includes individuals from Afghanistan, from key transshipment countries such as Iran, Türkiye and Ukraine, and from the intended destination countries.

Large seizures of heroin are regularly reported throughout the region. In early 2021 in Ukraine, a large heroin seizure of 1.1 tonnes was reported (Courthouse News Service, 2021). In Georgia, reported heroin seizures increased six-fold between 2019 and 2020, although the quantities remain low (from 6.3 kg to roughly 40 kg) (NDO, 2022).

According to the UNODC, Azerbaijan seized roughly 2.3 tonnes of heroin in 2020 (UNODC, 2022a), making it the country in the region that has seized the most heroin.

There are also indications that methadone tablets, possibly diverted from opioid agonist treatment programmes in Iran, and buprenorphine possibly diverted from health services in EU countries may be trafficked into the region (IPFPEDM, 2022; NDO, 2021). However, the scale of this remains unknown. As noted already, reports of synthetic opioid availability should also be considered in context of the availability of street methadone thought to be produced in Ukraine and sometimes trafficked to Belarus, Russia and Georgia (IPFPEDM, 2022; Melnychuk,

2021). Also of note is that carfentanil (less than 1 g) was seized in Georgia for the first time in 2019 (NDO, 2021). A general observation on the data available in this area is that there is considerable uncertainty on the source, content and form of synthetic opioids appearing on the illicit market and how this may be changing over time, and that this topic requires further investigation.

Retail sale

Physical and online markets for opioids exist across all countries in the region (see the box '[Sources of illicitly used pharmaceutical drugs containing opioids in Ukraine](#)').

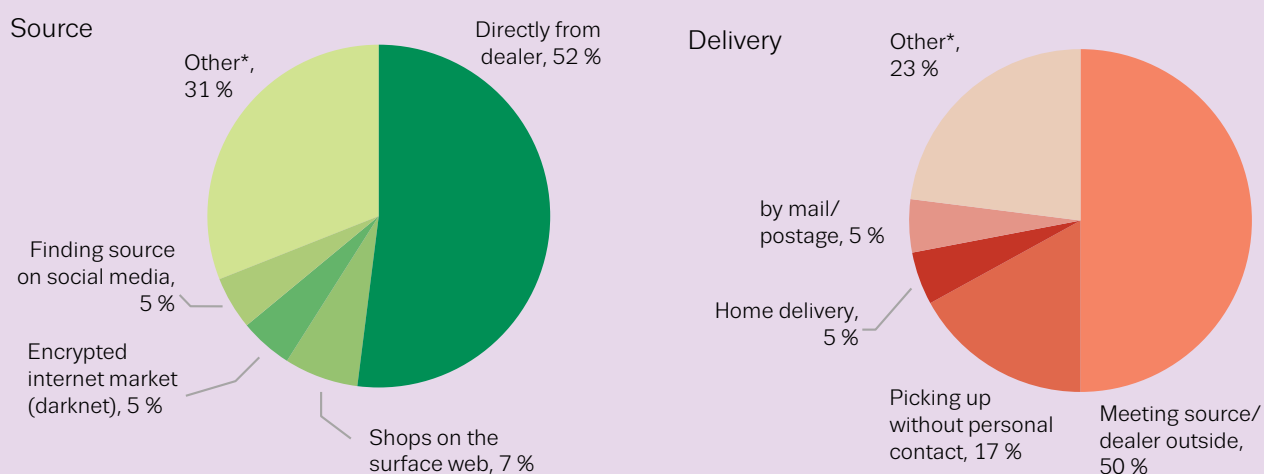
Sources of illicitly used pharmaceutical drugs containing opioids in Ukraine

The EWSD in Ukraine contained a special module related to the use of pharmaceutical drugs containing opioids, such as methadone. While the sample was small and not representative of any larger population, a proportion of respondents reporting the use of these substances also provided further information on where these drugs are sourced (61 respondents) and how they are delivered (58 respondents). While the majority of respondents reported that they source the drug directly from a dealer (52 %), 17 % reported the use of some form of digital or online technology (see figure below).

Of respondents who reported 'other', some stated that they normally source these drugs in pharmacies, through doctors or opioid agonist treatment services.

With regard to the delivery of these drugs, the largest proportion of respondents reported meeting their source or dealer outside (50 %). Meanwhile, 17 % reported some form of contactless delivery, excluding regular mail or postage. Again, some of the respondents reporting 'other' stated that they pick up these drugs in pharmacies or at opioid agonist treatment sites.

Source and mode of delivery of illicitly used pharmaceutical drugs containing opioids, e.g. methadone, in Ukraine



Based on data from 61 European Web Survey on Drugs respondents for source and 58 respondents for mode of delivery.
 * Some of the respondents choosing 'other' stated that they pick up these drugs in pharmacies or at opioid agonist treatment sites.

In Georgia and Ukraine, opioids are bought predominantly in person, but they can also be sourced online (CRRRC, 2020; IPFPEDM, 2022). Key informants indicated that street methadone sales in Ukraine have typically been organised by specific ethnic minority groups in cooperation with Ukrainians. In Belarus, key informants reported that a large proportion of opioid purchases seem to be made online.

Key informants suggested that the relatively low price of street methadone and medicines diverted from opioid agonist treatment, and the low purity of heroin appear to be driving factors for interest in synthetic opioids. In Moldova, for example, key informants reported that the average price of 1 gram of heroin was EUR 90. While not strictly comparable, the price of 1 tablet of buprenorphine (of unknown buprenorphine content) was EUR 27-36. In Georgia, the average price for 1 gram of heroin was around EUR 200 in 2019, while the price of 1 tablet (8 mg) of

buprenorphine was between EUR 85 and EUR 110 (NDO, 2021).

Availability, use and harms

Taken together, the available information indicates that heroin is no longer the dominant substance used by people with high-risk patterns of drug use in the region (Kurcevič and Lines, 2020; van der Gouwe, 2021). Further, reports suggest a broad range of drugs are injected in the region, and this is supported by findings from Moldova and Ukraine (see the box 'Syringe residue analysis in Moldova and Ukraine'). Key informants reported that a reduction in the use of heroin has been observed, while the use of other opioids has increased. As noted above, this could potentially be linked to the high price and low purity of heroin (IPFPEDM, 2022; van der Gouwe, 2021). According to key informants, some users have switched from heroin

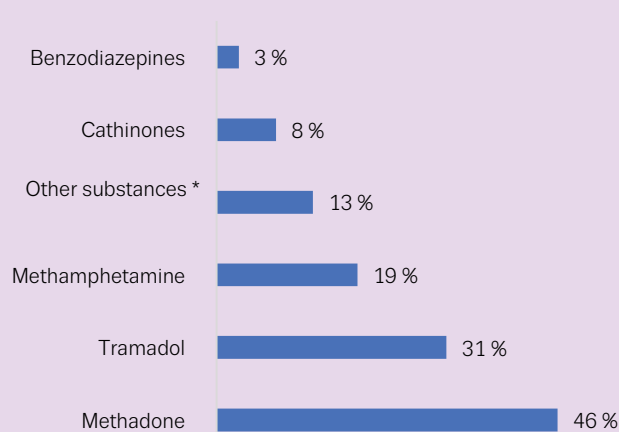
Syringe residue analysis in Moldova and Ukraine

A study to analyse drug residues in used syringes was recently implemented in Moldova and Ukraine, following the protocol established by the European Syringe Collection and Analysis Project Enterprise (ESCAPE) ^(*) network. In Balty, Moldova, 151 syringes were collected between September and October 2021 from three sites managed by the Union for HIV Prevention and Harm Reduction NGO. At least one psychoactive substance not considered a cutting agent or a metabolite was detected in 96 of these syringes. In Ukraine, 155 syringes were collected in Odessa, in three fixed and one mobile needle and syringe programmes, between August and November 2021. Psychoactive substances (other than adulterants, metabolites and degradation products) were detected in only 37 syringes

The analysis from Balty shows that methadone was present in almost 46 % of samples, followed by tramadol (31 %) and methamphetamine (19 %) (see figure). Diphenhydramine ^(*), an adulterant, was detected in 16 % of the syringes, often found together with methadone (in 11 syringes). In Odessa, methadone was found in 93.5 % of the syringes, occasionally together with diphenhydramine (4 syringes).

^(*) The ESCAPE project seeks to complement existing data on substances injected by people who use drugs, by providing timely and local information derived from the analysis of the residual content of used syringes. For further information, see https://www.emcdda.europa.eu/topics/escape_en.

Distribution of syringes (*N* = 96) by detected drug category and psychoactive substance (excluding metabolites and adulterants), Balty, September-October 2021



* Including pseudoephedrine (9 %), ibuprofen, metoclopramide, promethazine (1 %).

^(*) Diphenhydramine is an antihistamine that acts as an inverse agonist on the H1 receptors in the central nervous system and provokes sedation. As such, it may have a synergistic depressant effect when used in combination with opioids.

to cheaper or more potent substances, including synthetic opioids, methamphetamine or NPS. It is important to note that injecting drug use, particularly of opioids and stimulants, and the transmission of drug-related infectious diseases have been major public health challenges in several countries, including Azerbaijan, Belarus, Georgia, Moldova and Ukraine (see the box '[Injecting drug use and drug-related infectious diseases](#)').

While heroin use appears to have decreased, the use of counterfeit, diverted or illicit opioids, such as street methadone ⁽⁸⁾, is widely reported throughout the region, especially in Belarus, Moldova and Ukraine (IPFPEDM, 2022; NDO, 2021). In particular, street methadone has been pushing heroin and other homemade opioids (e.g. opium extracts and products, shirka, mak) out of the market (Otiashvili, 2020), and now makes up a notable part of the opioid market in these countries. This is a significant change compared with the situation roughly a decade ago, when homemade opioids appear to have accounted for a significant share of the illicit opioids market (Otiashvili, 2020).

Overall, key informants stated that the COVID-19 pandemic was associated with an increase in the use of street methadone in the region. An exception to this may be Ukraine, where it was more difficult to obtain street methadone and where prices increased in the early stages of the pandemic. As a result, some individuals obtained methadone prescriptions from private physicians and purchased it at pharmacies for their own use and to sell on the illicit market (Dumchev et al., 2021). An EMCDDA analysis found that there was no reported increase in the use of street methadone in Ukraine in the early stages of the pandemic, between April and June 2020 (EMCDDA, 2021a).

In the Southern Caucasus countries, the use of street methadone is less commonly reported and appears much rarer than in Belarus, Moldova and Ukraine. Also, traditional opioids (e.g. opium and heroin), including homemade opioids (e.g. shirka and mak), are still used. The price of opium is reported to be relatively low and its use has remained stable in the Southern Caucasus.

The data available suggest that to date, the use and availability of synthetic opioids such as fentanyl and carfentanil has been very low, with only a few reported cases of these substances being seized in Belarus, Georgia (NDO, 2021) and Ukraine (IPFPEDM, 2022).

The overall increase in drug-related mortality observed in Belarus in 2020 has been linked to polysubstance use and illicitly manufactured methadone (UNODC, 2022b). In 2020, Ukraine reported increases in post-mortem findings of opioids, predominantly of pharmaceutical opioids (IPFPEDM, 2022). There is also some suggestion that on occasions, street methadone may have been adulterated with fentanyl in Belarus to increase its quality. According to key informants, this has been reflected in the increase in overdoses over the past four or so years and has been confirmed by forensic and toxicological analyses.

Desomorphine is reported to sometimes be available, though to a limited extent. Its use is associated mostly with socially excluded groups and deprived areas ⁽⁹⁾. At the start of the COVID-19 pandemic, when borders were closed, desomorphine use and production was reported in Armenia and Azerbaijan. According to key informants, this was linked to the substance's low price and its relatively easy home production.

⁽⁸⁾ It is unclear whether this is illicitly produced methadone or methadone diverted from opioid agonist treatment programmes.

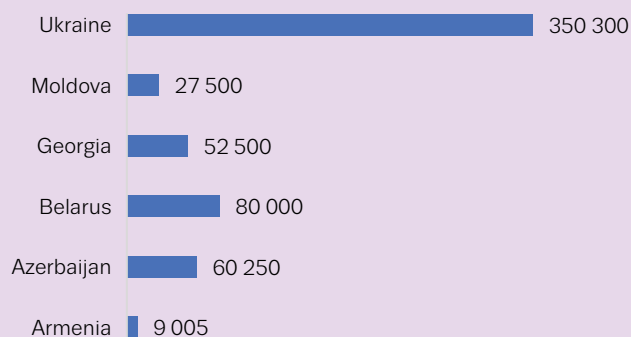
⁽⁹⁾ Desomorphine (locally called 'krokodil') is an internationally controlled semi-synthetic opioid with fast-acting effects. It is an opioid-analogue that is illicitly produced from tablets containing codeine and other ingredients (Gahr et al., 2012). The region witnessed a desomorphine epidemic between 2010 and 2015, but its use has seemingly reduced since (Otiashvili, 2020).

Injecting drug use and drug-related infectious diseases

Many drugs are injected in the ENP-East region, in particular stimulants and opioids. Injecting drug use in particular remains a challenge, with an estimated 2 out of 100 adults in Georgia injecting drugs, placing it among the top countries in the world in respect to the population prevalence of injecting drug use (Beselia et al., 2019a). The extent of injecting drug use also remains concerning in Azerbaijan, Belarus, Moldova and Ukraine (see figures; Degenhardt et al., 2017; UNODC, 2022b). The prevalence of HIV infection among people who inject drugs varies widely in the region, from an estimated 1.9-2.3 % in Armenia and Georgia to as high as 22.7 % and 20.3 % in Belarus and Ukraine, respectively (see figure below; UNODC, 2022b). Studies have indicated that the widespread use of homemade drugs, the high frequency of injection by stimulant users, and polydrug use may have contributed to the elevated risk of HIV transmission among people who inject drugs (LaMonaca et al., 2019). Further, reported rates of HIV are disproportionately high among the prison population in many of the countries in the region (Azbel, 2019).

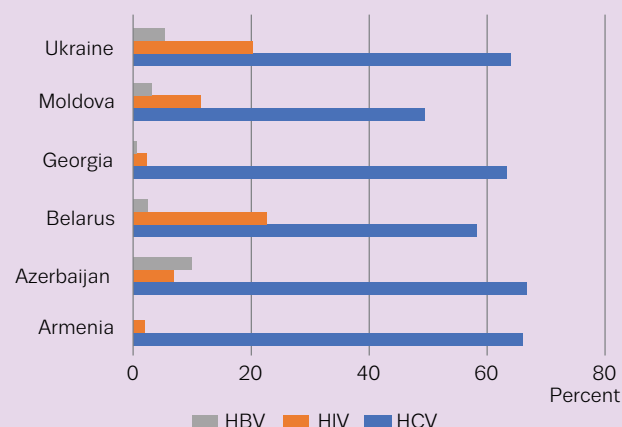
Although outside the remit of this study, responding to these drug-related harms calls for evidence-based interventions and treatment services. Further monitoring and support is needed to improve the coverage and provision of evidence-based treatment and harm reduction services across the region.

Estimated number of people who inject drugs in the ENP-East region



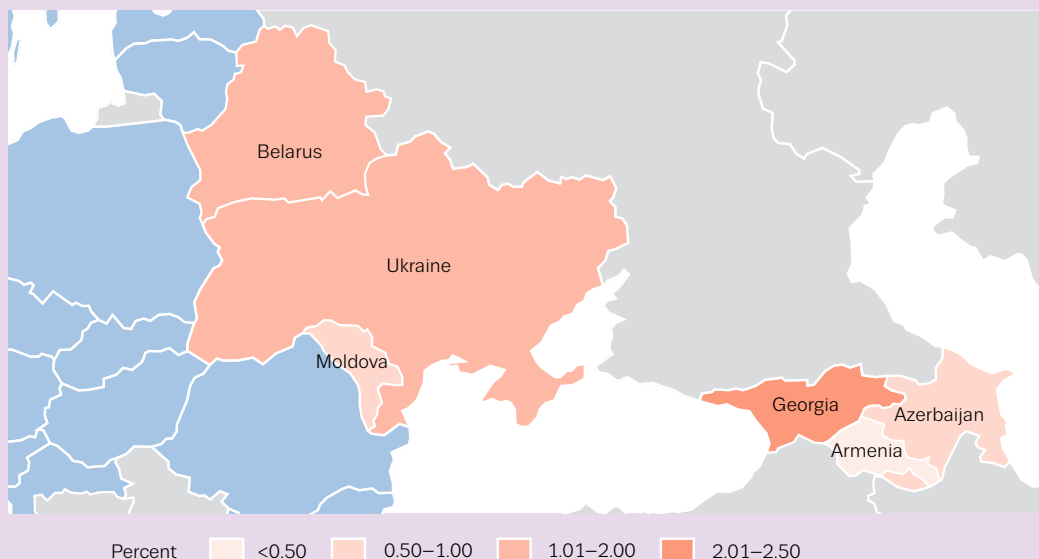
Source of data: UNODC Estimates of people who inject drugs living with HIV, HCV, HBV (2022).

Prevalence of hepatitis C virus (HCV), hepatitis B virus (HBV) and HIV infection among people who inject drugs in the ENP-East region



Source of data: UNODC Estimates of people who inject drugs living with HIV, HCV, HBV (2022)

Population prevalence of injecting drug use among 15- to 64-year-olds in the ENP-East region



Source of data: UNODC Estimates of people who inject drugs living with HIV, HCV, HBV (2022).

Amphetamine and MDMA

Amphetamine (powder and tablets) and MDMA (powder/crystals and ecstasy tablets) are available in the region. However, information in relation to these drugs needs to be interpreted with caution, as professionals sometimes use the term 'amphetamine' as an umbrella term to also refer to methamphetamine, and MDMA is sometimes considered an NPS. Furthermore, some NPS may at times be mistaken for amphetamine, methamphetamine or MDMA. Further forensic investigation is needed, as is streamlining the terminologies used to designate different drug types in the region.

Production

Overall, some domestic production of amphetamine in the region is reported, with Ukraine emerging as a producer of amphetamine in the past seven years, both for domestic use and for trafficking to neighbouring countries (e.g. Moldova, Poland and Russia). Production of MDMA is also reported in Ukraine; the extent of this remains unknown, but is not thought to be on a large scale (IPFPEDM, 2022).

Both small-scale 'kitchen-type laboratories' and larger-scale amphetamine production facilities have been reported to exist in Ukraine. The larger-scale facilities are thought to use drug precursors imported through shell companies, with recent seizures of nitroethane intended for domestic amphetamine production having been reported (IPFPEDM, 2022; Sydoruk, 2021). Key informants from law enforcement agencies reported that the production of amphetamine has remained relatively stable in Ukraine since it was first observed. Recent government reports, however, mention a possible decrease in amphetamine production and a shift to other synthetic drugs (IPFPEDM, 2022). Nevertheless, the UNODC has noted that the number of dismantled amphetamine laboratories in Ukraine rose from 17 in 2019 to 79 in 2020, this being the highest figure reported in any country for that year, although the laboratories were likely to be small scale (UNODC, 2022b).

Key informants in Armenia and Azerbaijan reported some small-scale production of amphetamine, of low quality, in recent years, although official or other data to support this suggestion are lacking.

Trafficking

While some limited domestic production of amphetamine and perhaps MDMA may exist in the ENP-East region, these drugs seem to be predominantly trafficked into the region from elsewhere (Figure 6).

In recent years, Ukraine has also identified cases of captagon tablet trafficking, probably produced and trafficked from Lebanon or Syria. Captagon⁽¹⁰⁾ tablets usually contain amphetamine, although the contents can be variable (EMCDDA, 2018). In September 2020, reports emerged of a large seizure of captagon tablets in Ukraine that had entered the Pivdenny seaport, Odessa Oblast, on the Black Sea. The 750-kilogram shipment of tablets had been concealed inside a container with sweets and originated from a country in the 'Mediterranean basin' (Ukrinform, 2021). The drugs were repackaged and concealed inside two containers in Ukraine, and appear to have been intended to be re-exported from the port of Odessa to the Persian Gulf. However, this seems not to have been reported as an amphetamine seizure to the UNODC (see the [Appendix](#)). Similar re-export cases have been observed in the EU in recent years.

In Moldova and Ukraine, in line with most of Europe, MDMA is reported to be mostly trafficked from the EU (IPFPEDM, 2022). For example, MDMA seized in the region is thought to have been produced in illegal laboratories in the Netherlands and trafficked through Germany and Poland.

Retail sale

Little is known about the retail sale of amphetamine and MDMA in the region. These drugs seem to be sold and purchased both online and offline. On the list of the most frequently sold drugs on the now-closed darknet market Hydra, amphetamine and MDMA were listed less often than cannabis, mephedrone and alpha-PVP.

Information on drug prices is also scarce. Data from EWSD respondents in Georgia indicate that the average price for 1 ecstasy tablet is EUR 26 and 1 gram of MDMA powder/

⁽¹⁰⁾ Originally, Captagon was the main brand name for a medicinal product containing fenetylline as its active ingredient. It is no longer produced today or used for therapeutic purposes. In this report the term 'captagon' is used to refer to illicitly produced tablets that are described as captagon, and not to the original pharmaceutical product.

FIGURE 6
Main trafficking routes for MDMA and amphetamine in the ENP-East countries



crystals is EUR 65.8 (EWSD, 2021a). For amphetamine, the average price for 1 tablet is EUR 15, while 1 gram of powder is sold for EUR 61.7 on average. Data from EWSD respondents in Ukraine indicate that the average price for 1 ecstasy tablet is EUR 11.4 and 1 gram of MDMA powder/crystals is EUR 33.2. According to Ukrainian authorities, 1 gram of amphetamine cost EUR 3.6-39 in 2020 (IPFPEDM, 2022). Based on EWSD respondents in Ukraine, the average price of 1 tablet and 1 gram of amphetamine was EUR 6.4 and EUR 12.5, respectively, in 2021 (EWSD, 2021b).

Use and harms

Across the region, amphetamine and MDMA seem to be predominantly used in recreational settings by young people. According to key informants, only Belarus reports little to no availability and use of amphetamine and MDMA, while Armenia and Ukraine have seen an increase in the use of both substances in recent years (see the box

'Armenia's emerging nightlife scene'). In Ukraine, amphetamine has been used for a long time and seemingly remains one of the most popular stimulant drugs used in the country.

Although this is not generalisable to any larger population, 51 % of respondents to the EWSD in Ukraine reported last year use of amphetamine (out of 866 respondents) (EWSD, 2021b). Meanwhile, 59 % of EWSD respondents in Ukraine reported having used MDMA/ecstasy in the last 12 months. Supplementary data from the latest ESPAD survey among Ukrainian students aged 15-16 show that 1.4 % of respondents reported ever having used amphetamine, compared with 1.1 % for MDMA (ESPAD, 2020). A recently conducted drug checking pilot in Ukraine also indicated the presence and relative popularity of MDMA and amphetamine in the nightlife scene (Kushakov, 2021).

EWSD data from Georgia show that 23 % of respondents reported having used amphetamine in the last 12 months while 55 % had used MDMA/ecstasy (data from a sample

of 396 respondents) (EWSD, 2021a). The latest ESPAD study reports that 1 % of students in Georgia had ever tried amphetamine, compared to 2.2 % who reported ever having tried MDMA (ESPAD, 2020).

Armenia's emerging nightlife scene

In recent years Armenia has seen an emergence of the festival and nightlife scene. Key informants noted that chemsex has also recently been identified in the country. In parallel, online drug markets have expanded, which key informants suggested has facilitated access to synthetic drugs. According to key informants, these developments have been accompanied by a noticeable increase in the use of MDMA, amphetamine and NPS among young people. It should be noted that robust empirical data are not available to substantiate these opinions of key informants.

Methamphetamine

Several types of methamphetamine are available on consumer markets in the region, including homemade products that are referred to by local names such as 'vint' and 'conifer vint'. Methamphetamine may also be trafficked from neighbouring states (Figure 7).

Vint is an injectable form of methamphetamine produced from medicines containing ephedrine and pseudoephedrine, while conifer vint is methamphetamine prepared from an ephedrine-containing plant (probably *Ephedra vulgaris*) that grows in Georgia. The process of making conifer vint supposedly resembles the production of vint: it involves several chemical precursors and the final product is also injectable (Otiashvili et al., 2017).

Production

Organised criminal networks seem to be playing a role in the production of methamphetamine in some countries in the region. This includes Azerbaijan, where it appears that methamphetamine production has been scaled up since 2018 (see the box '[Methamphetamine use and production in Azerbaijan](#)'). A small number of methamphetamine labs were also reported to have been dismantled in Ukraine in 2020, indicating that production existed in the country, at least to some extent.

Users are also involved in small-scale home-based production of methamphetamine for personal use and retail sale. This includes the two main homemade methamphetamine products that are produced and sold in the region, namely vint and conifer vint. There is currently

FIGURE 7
Main trafficking routes for methamphetamine in the ENP-East countries



FIGURE 8
Ephedra bushes at city outskirts, Tbilisi



Source: Alternative Georgia, Tbilisi, Georgia

no evidence to suggest the significant involvement of organised criminal networks in these kinds of products, nor is it possible to comment on its potential scale. Vint is a form of methamphetamine produced from medicines containing ephedrine and pseudoephedrine and has historically been produced on a small scale for the local market in the Southern Caucasus. In Armenia and Azerbaijan, key informants noted that vint production was common until approximately five years ago. However, with the emergence of other sources of methamphetamine, including crystal methamphetamine, local production of vint appears to have decreased. Meanwhile, an emerging trend in the production and use of homemade conifer vint

since 2015 has been reported in Georgia. Conifer vint is produced from the ephedra plant (see Figure 8), apparently using similar processes to those seen in Afghanistan, where ephedra plant-based methamphetamine production has become established (see the box '[Methamphetamine from Afghanistan](#)'; EMCDDA and Europol, 2022b; UNODC, 2021a).

Trafficking

There are indications that some methamphetamine is trafficked into the Southern Caucasus from Iran, possibly

Methamphetamine use and production in Azerbaijan

Over the past few years, Azerbaijan has witnessed the emergence of methamphetamine use. The drug is reported to be available in the country and is used both by young people in recreational settings and individuals with high-risk or chronic and long-term patterns of drug use. Among the latter group, methamphetamine use may be combined with the use of opioids. Reports suggest that the use of methamphetamine and opioids in combination has led to an increase in overdose deaths in Azerbaijan over the past two to three years. However, official data are scarce due to insufficient recording of drug overdose cases, so it is difficult to substantiate this observation.

A contributing factor to the perceived increase in methamphetamine use may have been the reported increase in the domestic production of methamphetamine. Key informants reported that methamphetamine producers have brought the skills and equipment required for setting up domestic labs from Iran, suggesting that there may be a diffusion of production knowledge in the region, which may have negative long-term implications.

Methamphetamine from Afghanistan

Large-scale methamphetamine production in Afghanistan, potentially based on extraction from the ephedra plant, has been noted in several recent EMCDDA reports, including the 2022 EU drug market analysis on methamphetamine (EMCDDA, 2020b; EMCDDA, 2021b; EMCDDA and Europol, 2022b). Several cases have been recorded in which large consignments of Afghan-origin methamphetamine have been smuggled along pre-existing heroin trafficking routes. This is a potential risk for the Southern Caucasus countries, which are affected by these trafficking routes.

While none of the Southern Caucasus key informants reported the presence of Afghan-origin methamphetamine in their countries, methamphetamine trafficked from Iran has consistently been reported, and this may be of Afghan origin. Indeed, according to the UNODC (2022b), several methamphetamine seizures linked to Afghanistan were noted in Azerbaijan between January 2019 and September 2021. Forensic profiling can determine the production methods and potential origin of the methamphetamine seized. However, systematic testing of seizures to determine their origin does not currently appear to be taking place in the Southern Caucasus.

of Iranian or Afghan origin, and into Belarus, Moldova and Ukraine, or alternatively from production sites located in the EU (e.g. the Netherlands and Czechia). However, there are also some indications that methamphetamine is smuggled out of the region to neighbouring consumer markets. For example, in 2020 the National Focal Point of Slovakia reported that several methamphetamine trafficking cases had been noted where the drug was seized while being trafficked from Ukraine to Slovakia.

Retail sale

Information on the methamphetamine retail market in the region is scarce, with the available information pointing to the existence of both online and street-level markets. Vint and conifer vint are allegedly often sold by people who use and produce these substances themselves. As they are generally homemade, sales seem to take place only at the street level.

Crystal methamphetamine is marketed on both the physical and online drug markets. EMCDDA analysis of drug sales in 2019 indicated that vendors located in Armenia and Ukraine were active in listing methamphetamine on darknet markets.

Overall, the data available would suggest that the methamphetamine available on markets in the region is of variable quality, depending on the production method used and the source country. Methamphetamine that has been trafficked from neighbouring countries, such as Iran and eastern European states, is considered to be generally of higher purity than domestically produced vint or conifer vint.

Availability, use and harms

While there are no reliable prevalence data on methamphetamine use in the region, key informants reported that there has been an increase in the use of crystal methamphetamine and a decrease in the use of vint in Azerbaijan and Armenia. A factor contributing to the increase in crystal methamphetamine use appears to be that the drug is comparatively cheap and widely available. Meanwhile, experts from Georgia suggested that the trend has been for increased use of conifer vint since 2015.

Crystal methamphetamine use also exists in Moldova and Ukraine, albeit at lower levels than in the Southern Caucasus. Use of vint is reported to be uncommon in Belarus, Moldova and Ukraine.

Methamphetamine is used both by people with high-risk patterns of substance use and by young people in recreational settings. While individuals with high-risk patterns of drug use often inject methamphetamine, recreational patterns of use are more likely to involve smoking or snorting the drug (using pipes or foil). Key informants also reported that methamphetamine is increasingly used in the LGBTIQ community, sometimes associated with chemsex practices. Chemsex appears to be a particularly high-risk behaviour associated with methamphetamine use, as intensive drug-taking episodes may occur in conjunction with episodes of unprotected or high-risk sexual behaviour (Kurcevič and Lines, 2020; van der Gouwe, 2021). These developments are worrying, given the context of relatively high levels of HIV and HCV prevalence among people who inject drugs in countries such as Belarus and Ukraine.

In the EWSD, 12 % and 20 %, respectively, of all respondents in Georgia and Ukraine reported last year use of methamphetamine (EWSD, 2021a, 2021b).

New psychoactive substances

The most common new psychoactive substances (NPS) in the region reported to this study include synthetic cathinones α -pyrrolidinopentiophenone (alpha-PVP) and 4-methylmethcathinone (4-MMC, also referred to as mephedrone) – both now controlled at EU level and internationally – as well as synthetic cannabinoids (although no specific synthetic cannabinoids were identified by the key informants).

Synthetic cathinones are often referred to as 'bath salts' or 'sol' (a Russian term) in the region (Kurcevič and Lines, 2020). Synthetic cannabinoids are often referred to as 'spice' or 'synthetic cannabis'. In Georgia, the terms 'NPS' and 'bio' almost exclusively refer to synthetic cannabinoids (Beselia et al., 2019b).

It should be noted that information in relation to NPS needs to be interpreted carefully, as the term 'NPS' is sometimes understood and used differently within the ENP-East region (van der Gouwe, 2021). Professionals and people who use drugs sometimes perceive the term to include any synthetic substances that have not historically been available on the domestic drug market, such as MDMA.

Production

Overall, the extent of NPS production in the region remains unknown, but is likely to be marginal, with most of these substances being imported into the region. There have been indications of some production of synthetic cathinones and processing of synthetic cannabinoids in Belarus, Moldova and Ukraine, while production has also been noted in the Southern Caucasus. For example, Georgia reported dismantling three alpha-PVP-producing labs in 2019.

Laboratories producing alpha-PVP are reported to have been operational in Moldova until 2018. However, after the dismantling of several laboratories, domestic production seems to have ceased and there is no evidence that it has re-emerged. In Belarus, domestic production of mephedrone and alpha-PVP is reported to have decreased following the dismantling of several production sites over the past three years.

Trafficking

Synthetic cathinones appear to be trafficked into the Southern Caucasus from China, the EU, Russia, Türkiye and Ukraine. Key informants reported that Georgia has seen a substantial increase in NPS seizures over the past few years. These drugs were apparently trafficked from the EU, China and Türkiye (Figure 9).

Synthetic cannabinoids appear to be mostly trafficked into Belarus, Moldova and Ukraine from China, with seizures apparently having increased in these countries in recent years. Some NPS produced in Ukraine are reported to be trafficked to markets in neighbouring countries, mainly Moldova (IPFPEDM, 2022).

Retail sale

The emergence of NPS in the region has been gradual over the past decade, although a more rapid expansion of their sale has been noted since 2018. These drugs are now reported to be widely available and easy to purchase on online drug markets such as darknet-based marketplaces and through social media channels (e.g. Telegram). Based on key informant interviews, it appears that NPS are predominantly sold through these digitally facilitated markets.

Price data for NPS remain limited and fragmented. Key informants report that in Moldova, 1 gram of alpha-PVP costs EUR 15, while in Belarus 1 gram of alpha-PVP or mephedrone costs EUR 30-50. On the Hydra darknet market, mephedrone and alpha-PVP followed cannabis as the second and third most frequently sold drugs. While synthetic cannabinoids are reported to be cheap when compared with herbal cannabis or cannabis resin, comparable and reliable price data are not available.

Availability, use and harms

Synthetic cathinones use is reported in Belarus, Moldova and Ukraine, where these substances appear to have become one of the main types of drug used in recent years. Important factors that have influenced the use of NPS are their price, potency and wide availability.

FIGURE 9
Main trafficking routes for NPS in the ENP-East countries



Overall, the availability and use of synthetic cathinones seem to be largely limited to 4-MMC and alpha-PVP. However, a lack of systematic forensic and toxicological analysis means that it is not possible to determine whether the drugs marketed and sold as 4-MMC and alpha-PVP actually contain these substances.

Conversely, the use of synthetic cathinones seems to be low and infrequent in the Southern Caucasus. However, the use of synthetic cannabinoids has been noted. Some key informants stated that synthetic cannabinoid use is increasing and that more people are entering treatment as a result (e.g. for problematic use and mental health problems) (van der Gouwe, 2021). In Belarus and Ukraine, synthetic cannabinoids do not seem to be widely used. However, key informants reported a potential increase in their use in Moldova (see the box 'Emerging use of NPS in Moldova'). Further, according to the UNODC, Georgia has reported an increase in NPS use over the past decade (UNODC, 2022b). However, it is unclear what specific NPS this increase relates to.

It appears that the main groups of NPS users in the region include young people, who have been noted to experiment with NPS, and also current and former high-risk opioid

Emerging use of NPS in Moldova

According to reports from Moldovan law enforcement, NPS are estimated to make up roughly half of the country's drug market, reflecting an overall market shift towards NPS in recent years. Moldova stands out in the region as the only country in which reports suggest that synthetic cannabinoids are more widely used than herbal cannabis. While it is not possible to substantiate this with quantitative data, the recent shift from herbal cannabis to synthetic cannabinoids has been noticeable, according to key informants. In addition, synthetic cathinones seem to be widely used in Moldova, with 1 gram of alpha-PVP selling for around EUR 15.

users. NPS use in Ukraine has, for example, been linked to parties and raves attended by young people. Key informants noted that NPS use among high-risk opioid users may be influenced by the high price, low purity and low availability of heroin, and that users may thus switch to substances such as NPS that are cheaper and perceived to be more potent. Some high-risk opioid users may also be attracted by the different effects that NPS can produce. While synthetic cannabinoids seem to be mostly used by groups of young people, synthetic cathinone use appears to be spread across all groups of NPS users.

Different administration routes have also been noted among different groups of NPS users. People with patterns of high-risk drug use seemingly tend to inject synthetic cathinones, whereas young people and users in recreational settings tend to smoke the drug or consume it orally.

Overall, NPS are considered a new public health challenge and a cause for concern across the region, as health incidents related to their use are reported to be increasing. Among others, cases of psychosis appear to have been on the rise, linked to the use of synthetic cathinones and synthetic cannabinoids (van der Gouwe, 2021). Specific services addressing the needs of NPS users remain underdeveloped across the region, although attempts have been made in recent years to improve the capacity of health and harm reduction services to respond to NPS-related problems (van der Gouwe, 2021).

Outlook

Trafficking routes

As the report highlights, there are various indications that countries in the ENP-East region are increasingly being used as transit points for heroin and possibly cocaine flows destined for the EU and neighbouring countries, in particular through Black Sea ports. Use of maritime trafficking routes from ports in Georgia and Türkiye appears to have also increased as a result of COVID-19 travel restrictions. The conflict in Ukraine and increased Russian military activity in the Black Sea are currently affecting these relatively new drug trafficking routes. As such, active monitoring of drug shipments through the Black Sea and any potential shift in these routes would help the future preparedness of law enforcement authorities in the EU and neighbouring countries.

In addition, methamphetamine seizures in the Southern Caucasus highlight the risk of the region becoming a transit route for methamphetamine produced in Iran or Afghanistan, which may be trafficked together with heroin on existing heroin trafficking routes. Conducting chemical profiling tests of methamphetamine seizures in the Southern Caucasus would help to determine the potential origin of these drugs and would therefore be useful for targeting interdiction efforts.

Knowledge gaps

Lack of data

The main knowledge gap relating to the regional drug situation stems from the lack of systematically collected, reliable and comparable data. The lack of routine drug monitoring data makes it challenging to analyse the country-level and regional situation and to develop any reliable trends-based analyses. While some data may be collected by individual government departments or states, such data are generally not made available.

Further, the EMCDDA-led studies and surveys drawn upon for supplementary data are carried out in only a limited number of countries in the region. The introduction of other more novel and cost-efficient data-collection methods remains limited, but clearly has the potential to improve our understanding of market trends and drug consumption patterns in the region. Particularly lacking are

good forensic and toxicological data as well as empirically robust data on drug use prevalence. Drug checking services are largely unavailable throughout the region, although there have recently been a few pilot projects. Drug checking services can be a useful tool for providing information on which drugs people are actually using and the purity of these substances⁽¹¹⁾. Such services, together with dedicated studies, might also help to clarify some of the issues around the different terminologies used to refer to various types of drugs (see 'Differing terminologies', below). Other data-collection methods such as wastewater analysis and needle and syringe testing (the latter being undertaken currently in coordination with the EMCDDA ESCAPE project in a few countries in the region) could further help to provide a better understanding of the regional drug situation.

Differing terminologies

In the course of the interviews conducted for this report, it became clear that the terminology used for different substances differed widely between countries and stakeholders. For example, synthetic substances that have been used for a long period of time in the EU, such as MDMA, are sometimes considered and referred to as 'NPS' by professionals and people who use drugs in the region. This is likely to be because these substances are relatively new to the market. Further investigation is needed on this topic, including testing and analysis of drug samples in order to clarify what drugs are being seized and used in the region. Overall, it is important to be aware of the sometimes differing and confusing terminologies used to designate different drug types in the region when analysing and interpreting data.

Impact of Russian invasion of Ukraine

As a result of the Russian invasion of Ukraine in February 2022, the drug situation in the region as described in this report, particularly in Ukraine and neighbouring countries, has probably changed significantly. In the short term, disruptions and changes in drug production and trafficking are plausible, and negative health consequences due to disruptions in the supply of drugs and healthcare services are also already apparent. The long-term consequences of

⁽¹¹⁾ For further information, see https://www.emcdda.europa.eu/spotlights/spotlight-drug-checking_en.

the war are difficult to predict at this stage, but do require ongoing monitoring.

Impact of global megatrends

There are several megatrends⁽¹²⁾ that are likely to continue to influence the development of drug markets in the region.

Digitalisation

The expansion of online drug markets appears to have been a significant development in the regional drug phenomenon. While offline methods for purchasing drugs still exist, and probably still predominate, it was consistently reported that the number of people using the internet to acquire drugs has seen an increase in recent years. It is possible that the perceived high availability of a broad spectrum of drugs in the region has been influenced by the emergence of these digitally enabled and online markets. That said, there is still considerable uncertainty on the extent to which digitally enabled markets play a role in drug supply, and considerable challenges involved in monitoring this highly dynamic area.

The developments in online drug markets in the region also have the potential to impact on the drug situation in the EU. Online markets in the ENP-East region may in the future seek to target consumers in the EU by marketing their products in English or at a cheaper price than the drugs currently sold on EU markets. It seems possible that digitally enabled drug markets will have a greater role in the future in facilitating access to drugs in this region. As such, monitoring developments in how digitalisation is facilitating drug supply will also be of growing importance for understating future drug trends.

Globalisation and transnational mobility

As the report shows, there are preliminary indications that international criminal networks are becoming established and more active in the region. Similar developments have been noted in the most recent *EU Drug Markets: In-depth analysis* (EMCDDA and Europol, 2022a, 2022b), whereby Latin American drug trafficking organisations have established networks in the EU to facilitate methamphetamine and cocaine production and trafficking. The establishment of international criminal networks in the ENP-East region can pose a significant threat to security

and health and therefore requires ongoing monitoring and investigation.

Events in neighbouring countries and regions have also led to a perceived increase in the movement of people into the ENP-East region. This includes the movement of people from Iran and Lebanon to the Southern Caucasus and most recently the large wave of refugees fleeing the Russian invasion of Ukraine. These large flows of people may have an impact on the trafficking and use of drugs. Vulnerable people may be exploited to move drugs across borders, and individuals fleeing war zones may be at heightened risk of developing problematic patterns of substance use (see EMCDDA (2022b) for analysis of responsiveness and preparedness in addressing the drug-related needs of displaced Ukrainians in EU countries bordering Ukraine). Political instability can also create opportunities for organised criminal networks. Taken together, these are issues that need to be monitored to ensure that market changes are appropriately addressed and adequate harm reduction, treatment and health provisions are in place and adapted to the needs of people who use drugs. Particular attention needs to be given to assessing the health and social support needs of displaced people or migrant communities who may be at increased risk both of experiencing drug-related problems and of being vulnerable to exploitation by criminal groups involved in drug production, trafficking or sales.

⁽¹²⁾ Megatrends are long-term driving forces that are observable now and that will most likely have a global impact. For further information, see https://knowledge4policy.ec.europa.eu/foresight/tool/megatrends-hub_en.

Abbreviations

4-MMC	4-methylmethcathinone
alpha-PVP	α -pyrrolidinopentiophenone (<i>also</i> α -pyrrolidinovalerophenone)
COVID-19	coronavirus disease 2019
EHRA	Eurasian Harm Reduction Association
EMCDDA	European Monitoring Centre for Drugs and Drug Addiction
ENP	European Neighbourhood Policy
ESCAPE	European Syringe Collection and Analysis Project Enterprise
ESPAD	European School Project on Alcohol and Other Drugs
EU	European Union
EU4MD	EU4Monitoring Drugs project
EWSD	European Web Survey on Drugs
HCV	hepatitis C virus
LGBTIQ	lesbian, gay, bisexual, transgender, intersex and queer
MDMA/ecstasy	3,4-methylenedioxymethamphetamine
NPS	new psychoactive substances
UNODC	United Nations Office on Drugs and Crime

Glossary of terms

Chemsex is the use of drugs before or during sex to enhance sexual performance and pleasure, increasing risks of sexually transmitted infections and the development of drug dependence.

Conifer vint is homemade methamphetamine, mostly domestically produced and used in Georgia. It is prepared from an ephedrine-containing plant that is endemic to Georgia. The overall process of production is similar to that of vint, so the final product should contain methamphetamine (Otiashvili et al., 2017).

Dead drop (locally called 'zakladki') is a method used to pass items (including illicit goods) between two individuals using a secret location. It allows the vendor to drop the product at a secret and random geographical location that only the two parties are aware of.

Desomorphine (locally called 'krokodil') is a semi-synthetic opioid with fast-acting effects. It is an opioid-analogue that can be manufactured by boiling tablets containing codeine and other ingredients (Gahr et al., 2012).

High-risk drug use is defined as 'recurrent drug use that is causing actual harms (negative consequences) to the person (including dependence, but also other health, psychological or social problems) or is placing the person at a high probability/risk of suffering such harms' (EMCDDA, 2017).

Mak is the local term for a homemade opioid derivative. For more information see Hearne et al. (2016) and Gahr et al. (2012).

Shirka is the local term for a homemade opioid derivative made from poppy straw. For more information see Hearne et al. (2016).

Street methadone refers to an illicitly produced substance that is called 'methadone' by people who use drugs and that is available on the illicit market. It comes as a powder and is injected, and is sometimes also referred to as 'crystal methadone' (EMCDDA, 2020a).

Vint is homemade methamphetamine, produced domestically from medications containing ephedrine and pseudoephedrine (i.e. conversion of ephedrine to methamphetamine by reduction).

Appendix: Methodological notes on drugs seizures in the ENP-East region

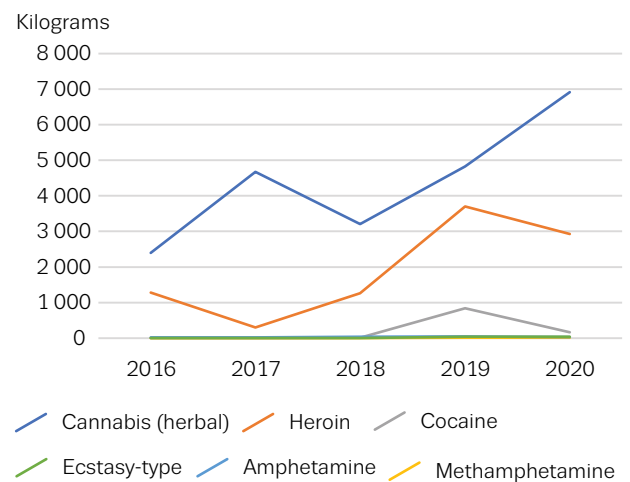
Part 1: Trends in the estimated minimum total quantity of selected drugs seized in ENP-East countries

The seizure dataset for the region (Table A1) has been created based on data from three different sources to achieve the highest possible level of completeness. Nevertheless, the data available for analysis are clearly still incomplete and differences that are difficult to explain exist between the sources available. Due to incomplete national datasets for the period 2016-2020 ⁽¹³⁾, data from the following countries have not been included:

- heroin: Moldova
- cocaine: Azerbaijan, Belarus, Moldova
- methamphetamine: Azerbaijan, Belarus, Moldova, Ukraine
- amphetamine: Armenia, Azerbaijan
- 'ecstasy'-type stimulants: Armenia, Azerbaijan

As such, caution should be used when interpreting these data (Figure A1). For example, Azerbaijan reported that 200.5 kilograms of methamphetamine was seized in 2020. This amount is eight times greater than the total seized amounts reported by Armenia and Georgia in 2020, which are included in the figure. However, due to missing data

FIGURE A1
Trends in quantity of selected drugs seized in the ENP-East countries, 2016-2020



between 2016 and 2019, Azerbaijan was excluded from the analysis and from the total figure of methamphetamine seized in the region.

⁽¹³⁾ Country data were excluded when it was not possible to develop a complete time series for the period 2016-2020. UNODC data were primarily used, and if any of the supplementary sources contained data for years not covered by UNODC data, these were used with the aim of producing a complete time series for the period.

TABLE A1
Trends in the quantity (kilograms) of drugs seized in the ENP-East countries

	2016	2017	2018	2019	2020
Cannabis (herbal)	2 399.03	4 672.59	3 208.63	4 823.37	6 915.95
Cocaine	0.42	0.25	12.32	838.03	166.085
Heroin	1 283.17	301.82	1 263.06	3 698.29	2 931.44
Amphetamine	19.49	19.64	38	50.39	34.06
'Ecstasy'-type	6.71	4.15	4.939	38.94	43.02
Methamphetamine	1.28	2.77	4.66	11.84	13.16

Part 2: Analytical note on data sources

The primary data source for the quantity of seized drugs in the region is Table 7.1 in the Statistical Annex, to the 2022 *World Drug Report* (UNODC, 2022c).

The Excel sheet was downloaded from the website on 4 July 2022 and seizure data from the six ENP-East countries were extracted into separate datasets for each drug.

Herbal cannabis: The quantities of seized herbal cannabis were retrieved by subselecting the following entries: drug group 'Cannabis-type drugs (excluding synthetic cannabinoids)', drug subgroup 'Cannabis herb (marijuana)' and drug name 'Cannabis herb (marijuana)'. The data missing from the herbal cannabis dataset included that for Georgia (2020) and Ukraine (2018). Georgia and Ukraine were included in the final dataset with complementary national reporting (see Table A2 for all missing data sources that were completed with supplementary reports).

Heroin: The quantities of seized heroin were retrieved by subselecting the following entries: drug group 'Opioids', drug subgroup 'Heroin' and drug name 'Heroin'. Data from Moldova (2016) and Ukraine (2018) were missing from the UNODC heroin dataset. While Moldova was excluded from the analysis, Ukraine was included in the final dataset with complementary national reporting.

Cocaine: The quantities of seized cocaine were retrieved by subselecting the following entries: drug group 'Cocaine-type', drug subgroup 'Cocaine' and drug name 'Cocaine hydrochloride' or 'Cocaine'. Missing from the cocaine dataset were data for Azerbaijan (2016, 2017, 2018, 2019, 2020), Belarus (2019), Georgia (2020), Moldova (2016, 2017) and Ukraine (2018). Where possible, the missing data were supplemented by national reports. Azerbaijan, Belarus and Moldova were excluded from the analysis. Georgia and Ukraine were included in the final dataset with complementary national reporting.

Methamphetamine: The quantities of seized methamphetamine were retrieved by subselecting the following entries: drug group 'Amphetamine-type stimulants (excluding "ecstasy")', drug subgroup 'Methamphetamine' and drug name 'Methamphetamine'. Missing from the methamphetamine dataset were Azerbaijan (2016, 2017, 2018, 2019), Belarus (2017), Georgia (2020), Moldova (2020) and Ukraine (2016, 2017, 2018, 2020). Azerbaijan, Belarus, Moldova and Ukraine were excluded from the analysis. Georgia was included in the final dataset with complementary national reporting.

Amphetamine: The quantities of seized amphetamine were retrieved by subselecting the following entries: drug group 'Amphetamine-type stimulants (excluding "ecstasy")', drug subgroup 'Amphetamine' and drug name 'Amphetamine'. Missing from the amphetamine dataset were Armenia (2016, 2018, 2019), Azerbaijan (2016, 2017, 2018, 2019, 2020), Georgia (2020) and Ukraine (2018). Armenia and Azerbaijan were excluded from the analysis. Georgia and Ukraine were included in the final dataset with complementary national reporting.

'Ecstasy'-type stimulants: The quantities of seized 'ecstasy'-type stimulants were retrieved by subselecting the following entries: drug name "'Ecstasy"-type substances' and drug name '3,4-methylenedioxymethamphetamine (MDMA)'. Missing from the 'ecstasy'-type stimulants dataset were Armenia (2017, 2019), Azerbaijan (2018, 2019) and Ukraine (2018, 2020). Armenia and Azerbaijan were excluded from the analysis. Ukraine was included in the final dataset with complementary national reporting.

Part 3: Analytical note on complementary data sources

To complement the missing data, the sources listed below were reviewed.

National drug reports made available to the EMCDDA

- Ukraine: IPFPEDM (2022, p. 37) – the figure ‘Seizures of Drugs and Psychotropic Substances in Ukraine on the Completed Criminal Proceedings, (kg), in 2018-2020’.
- Georgia: The Georgian National Drug Observatory (2021, pp. 57-58) – Table 17, ‘Net weight of narcotic substances seized by the MIA in 2013-2020’.

EMCDDA Questionnaire (2021)

- Responses to question II.3.1, ‘Please provide data on the amount of substances seized for the period 2018-2020’, in the EMCDDA Questionnaire (2021), sent to the national contact points of the EU4MD project in each partner country. The data collection was carried out between October and November 2021 using the EU survey tool. Responses were received only from Georgia and Ukraine.

Missing values supplemented with complementary sources

- The values added to fill in missing information are listed in Table A2.

TABLE A2

Supplementary data used for the ENP-East drug seizure trends analysis, by substance, country, year, amount and source

Substance	Country	Year	Quantity (kg)	Source
Cannabis (herbal)	Georgia	2020	156.171	The Georgian National Drug Observatory, 2021
Cannabis (herbal)	Ukraine	2018	2 054.9	IPFPEDM, 2022
Cocaine	Georgia	2020	0.034	The Georgian National Drug Observatory, 2021
Cocaine	Ukraine	2018	4.7	IPFPEDM, 2022
Heroin	Ukraine	2018	0.02	IPFPEDM, 2022
Amphetamine	Georgia	2020	0.004	The Georgian National Drug Observatory, 2021
Amphetamine	Ukraine	2018	33.8	IPFPEDM, 2022
‘Ecstasy’-type substances	Ukraine	2018	0.719	EMCDDA Questionnaire, 2021
‘Ecstasy’-type substances	Ukraine	2020	26.759	EMCDDA Questionnaire, 2021
Methamphetamine	Georgia	2020	0.092	The Georgian National Drug Observatory, 2021

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About this publication

This report presents an analysis of the drug markets in the European Neighbourhood Policy-East region covering Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine. Focused on providing insights into drug production, trafficking, sale, use and harms, the report contains data and information from studies conducted between 2019 and 2022 in the framework of the EU4Monitoring Drugs project, funded by the European Commission. It concludes with an outlook on key areas for policy and practice to address emerging drug markets' challenges.

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The European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) is the central source and confirmed authority on drug-related issues in Europe. For over 25 years, it has been collecting, analysing and disseminating scientifically sound information on drugs and drug addiction and their consequences, providing its audiences with an evidence-based picture of the drug phenomenon at European level.

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