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# DISRUPTION OR DISPLACEMENT?

IMPACT OF THE UKRAINE WAR  
ON DRUG MARKETS IN  
SOUTH EASTERN EUROPE

Ruggero Scaturro

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This research report is an output of the Global Initiative Against Transnational Organized Crime (GI-TOC)'s Observatory of Illicit Economies in South Eastern Europe in collaboration with the Center for the Study of Democracy (CSD).

The report is based on qualitative data and analysis collected through interviews with 46 stakeholders, including international and regional organizations, customs agencies, national anti-drug police units, border police, the media, healthcare providers, NGOs and people who use drugs. We would like to thank our interview partners for their valuable insights and contributions.

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## ABOUT THE AUTHOR

Ruggero Scaturro is a senior analyst at the GI-TOC and a PhD candidate on criminal justice and security in Slovenia. He conducts research on Eastern and South Eastern Europe, and on Italian mafia-related issues. His main areas of interest and expertise are drugs trafficking and consumption habits in Europe, as well as the history of the Cosa Nostra and its ties with other criminal networks across the Mediterranean.

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Cover photograph: Heroin seized near the Greek border with Macedonia in 2008. © Robert Atanasovski/AFP via Getty Images

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Please direct inquiries to:  
The Global Initiative Against Transnational Organized Crime  
Avenue de France 23  
Geneva, CH-1202  
Switzerland  
[www.globalinitiative.net](http://www.globalinitiative.net)

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## EXECUTIVE SUMMARY

**R**ecent studies conducted by the Global Initiative Against Transnational Organized Crime (GI-TOC) and the United Nations Office on Drugs and Crime (UNODC) show that the war in Ukraine may displace existing drug trafficking routes from and through Ukraine and exacerbate the instability that enables drug trafficking and manufacturing, including in areas not directly connected or exposed to hostilities.<sup>1</sup> Trauma derived from the conflict might also have an impact on current and future drug use patterns in communities affected by the war, which could create new opportunities for both local and foreign drug traffickers to meet this growing demand. This becomes particularly relevant when analyzing flows of traditional opioids as well as new psychoactive substances (NPS), and stimulants used by both civilians and soldiers at the front line. Neighbouring Ukraine, the South Eastern Europe region<sup>2</sup> represents a relatively small market for drug consumption and accounts for only a small amount of drug production and supply (primarily cannabis) to EU markets. However, its strategic location between East and West – and its proximity to the Ukraine conflict – might mean that it is particularly exposed to the effects of the war on traffickers' modus operandi and trafficking routes through the region.

Since February 2022, the Russian invasion of Ukraine has caused the progressive displacement and movement of traditional drug production and trafficking hubs in southern and eastern Ukraine towards the west, around the borders with Poland, Slovakia and Romania.<sup>3</sup> Similarly, in the context of criminal mobility, overwhelmed border security management between Ukraine and its neighbouring countries to the west leads to opportunities for both Ukrainian and Russian criminals to operate and manage their businesses from South Eastern Europe, thanks to the possibility to forge documents and receive 'golden' passports due to their investments in countries in the region.<sup>4</sup>

This report assesses whether the war in Ukraine and its resulting disruption are having a significant impact on drug flows through South Eastern Europe. The research is based on the assumption that, because of an intensified military presence in Eastern Europe, traditional flows of drugs have been, at least temporarily, disrupted. This includes the northern route of opioids from Afghanistan, which supplies large markets across Central Asia, Russia, Ukraine and Belarus. Furthermore, other drug routes, such as for cocaine from Latin America to the port of Odesa, have atrophied. Conversely, flows along alternative routes, such as the Balkan route, appear to have intensified.

In view of these shifts, this report offers an assessment of emerging trends in drugs flows and provides an overview of data on seizures in South Eastern Europe. It also assesses the impact that the Ukraine war is having on wholesale and retail drug prices and, where assessment is possible, on levels of purity and the perceived quality of substances.

## Methodology

The analysis presented in this report is based on information collected through mixed methods research consisting of three main phases. First, desk research was carried out. In this phase, reports by relevant regional and international organizations were collected and reviewed, as were scientific publications on regional flows, seizures, sales and prices of drugs in Eastern and South Eastern Europe.

Second, we consulted quantitative databases on drug wholesale and retail prices, as well as databases on seizures, provided by the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) and the UNODC for the period 2017–2022. In undertaking this research, we identified and filled gaps in the data, with these addressed, where possible, through official requests for information to relevant ministries.

Third, to substantiate the information collected in the two previous phases, and because most of the sources consulted offer limited information on drug trends, we conducted a total of 46 semi-structured interviews with key experts from different organizations and professional affiliations. These covered: Albania, Bosnia and Herzegovina, Bulgaria, Kosovo, Montenegro, North Macedonia, Romania, Serbia and Ukraine, prioritizing international and regional organizations (1), customs agencies (7), national anti-drug police units (15), border police (9), media and journalists (4), healthcare providers (1), NGOs (4) and people who use drugs (5).

A guiding questionnaire with key questions and topics was shared with field researchers to facilitate the work and to maintain consistency during the information-collecting process.



A nurse prepares painkillers and other opiates before a Ukrainian counteroffensive in the Donetsk region, Ukraine, April 2023. © Scott Peterson/Getty Images



## THE WAR IN UKRAINE: DISRUPTION OR DISPLACEMENT?

**E**vidence from past armed conflicts suggests that consolidated production hubs and trafficking using affected routes are often interrupted, with traffickers using new or alternative routes, as an increased military presence makes their operations too risky.<sup>5</sup>

The sections below shed light on the extent of the impact of the war in Ukraine on the herbal cannabis, cocaine, heroin, synthetic drugs and NPS markets in South Eastern Europe.

### Cannabis

Cannabis was largely cultivated across pre-conflict Ukraine for domestic and neighbouring countries' consumption markets – both outdoor (with 1.8 million plants eradicated in 2019 alone) and indoor,<sup>6</sup> in greenhouses equipped with a system of drip irrigation, lighting and heating that made it possible to harvest up to three times a year.<sup>7</sup> However, recent frigid winter temperatures, power cuts and fertilizer shortages may have contributed to decreased harvest, pushing up what were low wholesale cannabis prices, and resulting in higher retail prices.<sup>8</sup> In 2020/21, a gram of cannabis cultivated in Ukraine ranged in price between €2 and €4 whereas, according to fieldwork conducted in Lviv, Odesa and Kyiv since the beginning of the war, the price has risen to €4.50–€6.50.<sup>9</sup> For example, in Suceava, a Romanian town close to the Ukrainian border traditionally supplied with herbal cannabis from Ukraine, users reported a decrease in availability of cannabis in the second half of 2022.<sup>10</sup> This decline in supply coincided with an increase in the supply of 'fake weed' (such as knotgrass) – i.e. common plants sprayed with chemicals and sold as cannabis (see more in the NPS section below).<sup>11</sup>

Although there is no up-to-date information on consumption habits or the prevalence of drug use, local consumption of herbal cannabis appears to have remained high over the course of the conflict, with increased demand also witnessed among military personnel.<sup>12</sup> Major cannabis producers in Europe may see this as an opportunity to fill potential gaps in the supply chain. In December 2022, for instance, Spanish police dismantled a criminal network comprising Ukrainians, Spaniards, Germans and Moroccans, arresting 30 people for trafficking cannabis from the south of Spain to Ukraine. The shipment was disguised as 'Ukraine aid' in a solidarity convoy carrying basic supplies for displaced Ukrainians.<sup>13</sup>

According to interviews conducted for this report, it is still too early to assess whether the war in Ukraine has had a direct impact on cannabis markets across South Eastern Europe and whether regional supply could meet Ukrainian demand. Nonetheless, a few assumptions can be formulated. Over the last two to three years, major cannabis producers, such as in the countries of Albania, North Macedonia and, to a lesser extent, Bosnia and Herzegovina, Kosovo and Serbia, have not registered obstacles to cultivation directly connected to the COVID-19 pandemic. Furthermore, all of the experts interviewed for this report agreed that, particularly because of geographical distance of traditional areas of cultivation from Ukraine, the war has not had any significant impact on them.<sup>14</sup> Conversely, although seizures alone are not a sufficient indicator of drug supply and, in absence of other analytical data, increased detection of cannabis cultivated areas over the last two years may bolster the possibility of stable (or probably increased) production of cannabis herb in southern Balkan countries.

In Albania, for instance, the number of cannabis plants eradicated by law enforcement authorities increased from 66 927 in 2017, to 166 212 in 2021, and 116 212 in 2022.<sup>15</sup> Similarly, cannabis plants eradicated in Kosovo amounted to 259 in 2018, with this rising to 24 502 in 2022.<sup>16</sup> There are also indications of increased indoor cultivation in the country, as well as in Serbia, and Bosnia and Herzegovina.<sup>17</sup>

Wholesale prices in Albania and Kosovo have also remained quite stable over the 2021/22 period, with the cost of 1 kilogram of cannabis, depending on different strains, ranging from €1 400 to €1 500 in 2021, to €1 700–€1 800 in 2022.<sup>18</sup>

Past research conducted by the GI-TOC in the Western Balkans has shown how cannabis cultivation in the region far exceeds the needs of local demand, with large quantities produced to supply consumption markets in Central and Western Europe.<sup>19</sup> For example, the cannabis produced in Albania is trafficked in all directions: north to Montenegro, north-east to Kosovo, west to Italy, south to Greece and east to North Macedonia and Turkey. One particularly active route is from the Shkodër region in Albania (notably the Dukagjin Highlands) to Montenegro and then into the EU.<sup>20</sup>

Multiple seizures of Albanian cannabis in transit from Serbia to Romania and Hungary indicate that the drug reaches its final destinations easily.<sup>21</sup> Furthermore, recently, criminal networks from South Eastern Europe have established a strong presence in Western Europe (such as in Belgium, Spain and the UK), where they cultivate mainly indoors and supply local demand at more profitable rates by cutting transportation costs.<sup>22</sup>

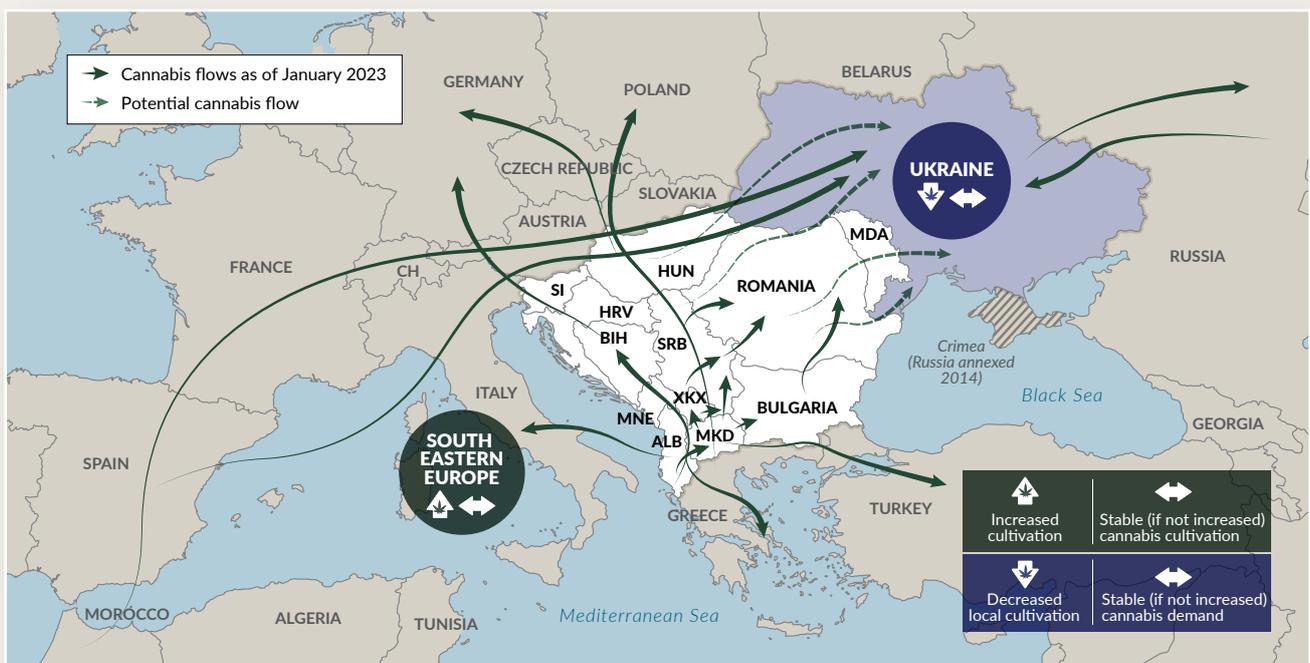
Past research conducted by GI-TOC estimated that the price of 1 kilogram of cannabis cultivated in the Western Balkans increases in value by €200–€300 for every country border crossed, with its retail price similarly increasing.<sup>23</sup> For example, in January 2023, 1 gram of cannabis cultivated in the Western Balkans and entering Romania from Serbia is sold for between €7 and €9, or 30–40% more than the average price in Albania, Bosnia and Herzegovina, Kosovo, Montenegro and Serbia.<sup>24</sup> Although Ukraine has not been a traditional target market for cannabis cultivated in South Eastern Europe, by applying the above logic to the retail price of South Eastern Europe's cannabis selling in Ukraine, the probable cost would be €8–€10 per gram.

Although there is no evidence from law enforcement operations to suggest that cannabis cultivated in South Eastern Europe – or Western Europe by South Eastern European criminal networks – reaches the Ukrainian market from Romania, according to a representative of the Romanian police, this remains a very probable scenario for the near future.<sup>25</sup> In areas of Ukraine far from South Eastern Europe, such as Sumy Oblast, a 5 gram cone of cannabis is currently sold for 1 600 Ukrainian hryvnias or €40, implying a price per gram of €8.<sup>26</sup>

	2020/21	2022/23
Ukraine	€2–€4	€8–€10
Romania	€6–€7	€7–€9
Western Balkan Six	€5	€6

**FIGURE 1** Cannabis herb retail prices per gram, 2020/21 and 2022/23.

Additionally, the perceived quality of cannabis cultivated in the Western Balkans is understood to be higher than in Ukraine by Ukrainian traffickers displaced across South Eastern Europe, who therefore see a profitable opportunity in establishing a stable supply chain to Ukraine.<sup>27</sup> In fact, as shown in the infographic below, stable supplies underscored by little price fluctuation in South Eastern Europe, combined with potential shortages of cannabis in Ukraine may cause shifts in traditional cannabis flows (also affected by increased demand from soldiers). Following this logic, increasing flows traditionally originating in South Eastern Europe and directed north-west may start moving north-east to supply the Ukrainian market.



**FIGURE 2** Existing cannabis flows to Ukraine and potential supply routes from South Eastern Europe.

## Cocaine

Prior to the war, Ukraine was a relatively important transit country for international cocaine trafficking, especially through the port of Odesa. Notably, in the 2010s, the port became a significant trans-shipment point for cocaine from Latin America. Located on the north-western coast of the Black Sea, the port is a perfect hub from a logistical perspective, as it is well connected to mainland Ukraine and to South Eastern Europe's land infrastructure. Reportedly, shipments of cocaine have arrived at the port regularly, with these subsequently being transported by road through Romania and Poland to consumer markets in Eastern, Central and Western Europe.<sup>28</sup> In 2010, for instance, Ukrainian customs seized 580 kilograms of cocaine hidden in a cargo of scrap metal on a container ship from Bolivia.<sup>29</sup> More recently, in three distinct operations carried out between 2019 and 2020, authorities discovered 429 kilograms of the drug hidden in containers carrying bananas from Latin American ports.<sup>30</sup>

Although most traffickers identified in past operations have been Ukrainian nationals, the ease of trafficking cocaine through the port of Odesa has become an increasingly important factor in attracting foreign criminal networks traditionally active in the international cocaine trade. A recent GI-TOC assessment of South Eastern European ports shows that, although most of the cocaine supplying large Western European consumption markets arrives directly at major western ports, the role played by Romanian and Bulgarian ports located in the Black Sea has been increasing, as has the presence of Western Balkan criminal networks involved in this trafficking.<sup>31</sup> For instance, an operation in 2016 carried out by Romanian authorities at the port of Constanta led to the seizure of 2.5 tonnes of cocaine hidden in a container of bananas from Colombia. According to Romanian officials, the shipment involved individuals from several countries – notably Serbia, with Romanian expats in Latin America working closely with Colombian traffickers.<sup>32</sup>

The same appears to apply at the port of Odesa. For instance, in 2021, in the context of a seizure of 120 kilograms of cocaine, Ukrainian authorities dismantled a trafficking ring comprising three individuals from the Italian 'Ndrangheta, as well as nationals from Romania and Albania.<sup>33</sup>

Although readily available, cocaine in its powder form has always been considered an elite drug in Ukraine, with an average retail price of €120 per gram in 2021.<sup>34</sup> Since February 2022, however, because of Russian military strikes, the port of Odesa has been closed by the Ukrainian authorities, with operations at the container terminal suspended indefinitely.<sup>35</sup> According to expert interviews and GI-TOC fieldwork, the closing of the port appears to have two main implications. First, as, for the time being, Odesa is no longer a primary entry point for cocaine, shortages in direct supply from Latin America would result in an increase in the drug's retail price.<sup>36</sup> In fact, as emerges from data collected between the end of 2022 and the beginning of 2023, the price of a gram of cocaine ranges between €140 and €150 (implying an increase of 16–25%) in central and north-western Ukraine, and reaches €170 in Odesa (implying an increase of 41%).<sup>37</sup>

	2020/21	2022/23
Ukraine	€120	€140–€170
Western Balkan Six	€75–€100	€75–€100

**FIGURE 3** Cocaine powder retail prices per gram, 2020/21 and 2022/23.

Second, while flows to the port of Odesa may have been disrupted, it is possible that this is being offset by an intensification of flows of cocaine at other major entry points close to Ukraine. All interviewed experts, as well as informants, agreed that the war in Ukraine has not hindered the flow of cocaine powder into South Eastern Europe, with markets in this region having become even more profitable with the end of the trade congestion caused by the COVID-19 pandemic.<sup>38</sup> Both wholesale and retail prices have, in fact, remained relatively stable over the last two years. These range, respectively, between €30 000 and €45 000 per kilogram and €75–€100 per gram at reportedly high levels of purity (up to 60%) in the western part of the region and rather low (20–25%) in the eastern part (Bulgaria and Romania).<sup>39</sup>

According to a 2022 report by the EMCDDA, prior to the Ukraine war, some of the cocaine arriving in Odesa was also destined for South Eastern European markets.<sup>40</sup> However, in absence of proofs of disruption of such supply and no detection of cocaine price variation in South Eastern Europe in the months after the war may suggest this was probably not the case.

Nevertheless, the closure of Ukrainian ports may lead to a shift in trafficking patterns through South Eastern Europe. Indeed, data from the past two to three years suggests that South Eastern Europe is becoming a transit region, as indicated by significant seizures at Adriatic, Aegean and Black Sea ports.<sup>41</sup> These ports may become key entry points for supplying cocaine to Ukraine in the future.

Indeed, the ports of Constanta in Romania and Varna in Bulgaria have become important hubs for imports to and exports from Ukraine.<sup>42</sup> In the past, these ports have had problems with corruption and security.<sup>43</sup> An increase in licit traffic, without a corresponding increase in investments aimed at improving scanning and cargo-checking systems, could increase the vulnerability of ports in the Black Sea region to becoming alternative entry points for cocaine. Until 2020/21, for example, Bulgarian authorities did not believe that the port of Varna was a significant entry point for the international cocaine trade.<sup>44</sup> However, at the beginning of 2022, the same authorities seized a shipment of 50 kilograms of cocaine in a container coming directly from Latin America.<sup>45</sup>



**Bulgarian authorities seize a shipment of 50 kilograms of cocaine in a container from Latin America, Varna, Bulgaria, 2022.**

© BNT News



**FIGURE 4** Current, disrupted and potential cocaine flows in South Eastern Europe and Ukraine.

## Heroin

Heroin and opium produced in Afghanistan traditionally reach Western European markets through two main trafficking routes: the northern route either through Central Asia or through Iran, the South Caucasus, and then Russia towards the West; and the Balkan route, which, from Iran and Turkey, reaches Bulgaria and then North Macedonia and Serbia, in a north-west direction.

Due to its geographical position, Ukraine has always played a major role as a destination and transit country for both flows. In the years prior to the war, Ukraine was home to one of the largest heroin consumption markets in the world.<sup>46</sup> Between 2018 and 2020, the number of adults injecting mainly heroin was estimated at 350 000, or 1.7% of the adult population.<sup>47</sup> However, the estimation does not take into consideration other ways of consuming heroin (i.e. smoking), suggesting that the actual population of people using heroin (as opposed to only injecting it) might be much higher.



In May 2021, authorities seized 45 million euros' worth of heroin in the port of Constanta, Romania.  
© Romania Insider

According to preliminary fieldwork conducted in Ukraine, local consumption of heroin is reportedly declining in favour of an increased demand for synthetic opioids, such as methadone.<sup>48</sup> However, large seizures of the drug may also suggest that heroin remained available across the country in the years before the war. In 2019, Ukrainian police seized 600 kilograms of heroin in Kyiv, dismantling a criminal network comprising Moldovans, Turks and North Macedonians.<sup>49</sup> In January 2021, 1 035 kilograms of heroin were seized in the western city of Lviv and, six months later, an international operation led to the seizure of 368 kilograms of heroin trafficked from Iran to Ukraine through Armenia and Georgia.<sup>50</sup> More specifically, the latter shipment of heroin was transported by truck from Iran to the Georgian port of Poti, via Armenia, and then transported to the Ukrainian port of Chornomorsk.<sup>51</sup>

The role of ports and maritime routes across the Black Sea has risen over the last decade, with increasing seizures at Turkish, Georgian, Ukrainian, Romanian and Bulgarian ports between 2015 and 2021, suggesting that flows of heroin from Afghanistan and Iran do not follow pre-determined routes (i.e. the northern route and the Balkan route) but constantly mutate and divide into sub-flows.<sup>52</sup> Of particular relevance is the additional maritime route that, by circumnavigating the Balkan Peninsula, brings heroin from Iranian, Pakistani and Turkish ports directly to the Adriatic ports of Albania, Montenegro, Croatia, Italy and Slovenia. For example, in the Slovenian port of Koper, authorities have seized 1.2 tonnes of heroin in less than two years, with the substance typically shipped from Iranian and Pakistani ports.<sup>53</sup>

According to the UNODC, the war might have two opposite effects on opiates being trafficked via Ukraine. On the one hand, the Russian invasion may have increased impunity for the illicit drug trade and, ultimately, led to an increase in trafficking flows. However, to date, there is no indication of intensified trafficking along the northern route, which includes routes by land from Russia to eastern Ukraine. On the other hand, trafficking through areas of intense military hostilities may become too risky for traffickers, who then opt to divert opiate flows previously moved through Ukraine to alternative routes.<sup>54</sup> Following this hypothesis, Russian military strikes in the east of Ukraine, and the closure of the port of Odesa, would suggest a probable scenario in which there is an increase in flows across the Black Sea and, subsequently, along the Balkan route, with this representing the shortest distance and most direct land route to European consumer markets.

	2020/21	2022/23
Ukraine	€30–€40	€40–€50
Romania	€30–€40	€30–€50
Western Balkan Six	€25–€30	€30–€40

**FIGURE 5** Heroin retail prices per gram, 2020/21 and 2022/23.

While there is no information on heroin having been seized along the northern route through Russia and Ukraine, interviewed representatives from national security and law enforcement agencies, supported by evidence from multiple police operations, suggested that flows along the Balkan route remained active in 2022. Large seizures made all along this route back up this thesis.<sup>55</sup> In February 2023, for instance, Turkish authorities seized nearly 250 kilograms of heroin in Hakkâri, a village close to the border with Iran, while, six months later, Bulgarian authorities seized 106 kilograms of the drug found in a car entering the country from Turkey.<sup>56</sup>

In Bulgaria and Romania, key entry points in the east and south-east of the Balkan Peninsula, wholesale (€20 000–€25 000 per kilogram) and retail prices (€30–€50 per gram) of high-quality heroin currently appear stable, as do the profiles of the traffickers involved (ethnic Kurds, or Bulgarians with Turkish citizenship).<sup>57</sup> Meanwhile, local consumption is believed to be declining.<sup>58</sup> Similar trends have been registered in the rest of South Eastern Europe. In Bosnia and Herzegovina, Kosovo, North Macedonia and Serbia, heroin flows in transit to Western Europe reportedly remained stable in 2022, with progressively smaller quantities of the drug remaining for local markets, where the price of a gram of heroin ranged between €30 and €40.<sup>59</sup> At the same time, Albania remains a peripheral transit country for heroin. However, Albanian traffickers reportedly exchange cannabis cultivated in the country for heroin in Turkey, then traffic it across Western Europe.<sup>60</sup>



**FIGURE 6** Heroin flows across the northern and Balkan routes, 2019–2022.

## Synthetic drugs and precursors

Increasingly over the past decade, Ukraine has become a production hub for synthetic drugs intended for the supply of both local and neighbouring countries' markets of amphetamine-type substances (ATS), including methamphetamine and MDMA, which have largely become widely available, particularly online.<sup>61</sup>

As of today, and according to the Ukrainian State Bureau of Investigations (SBI), synthetic drugs are self-supplied in Ukraine, and sold to all regions of the country – including at the front line in the east.<sup>62</sup> In the first six months after the Russian invasion, Ukrainian law enforcement launched more than 270 investigations into drug trafficking at the front line.<sup>63</sup> However, large shipments of synthetic drugs were also supplied from abroad. For example, in September 2020, the SBI seized 750 kilograms of fenethylamine tablets (known as Captagon) hidden in a container carrying sweets onboard a ship that anchored at the port of Odesa from a port 'of one of the Persian Gulf countries'.<sup>64</sup> In addition, and as is the case with the supply chain for other Eastern European markets for these kinds of drugs, MDMA is also trafficked to Ukraine from EU countries. For example, large quantities seized in the country are believed to have been produced in the Netherlands, trafficked by truck across Germany, and brought into Ukraine through its border with Poland.<sup>65</sup>

Prices have also remained relatively stable since the beginning of the Ukraine war, with the price of an amphetamine tablet ranging from €8 to €15 between 2020 and 2022. Similar trends have been observed for MDMA (€10–€11 per tablet or €33–€39 per gram in powder form).<sup>66</sup> However, in the absence of data on the purity of the drug and its price, reportedly large availability and no price variation suggest that, despite the war, the synthetic drugs market remains stable thanks to consistent demand and largely uninterrupted local production. And, while it might be too early to assess trends in demand, a decrease in synthetic drug users resulting from population displacement has been offset by an increased number of users dealing with the stress of the war – especially within the armed forces.<sup>67</sup>

Over the past three to four years, Ukrainian police have progressively been dismantling a high number of clandestine 'kitchen-type' laboratories throughout the country, suggesting that local ATS production has also been on the rise. In 2020 alone, 79 of these laboratories were dismantled by Ukrainian authorities – a significant increase compared to the 17 dismantled in 2019.<sup>68</sup> In most cases, the confiscation of laboratories in Ukraine also entails the seizure of ephedrine and pseudoephedrine. This would suggest that ATS are largely produced in 'kitchen-type' laboratories, which guarantee the production of potent substances, but through processes that are difficult to scale up.<sup>69</sup> Between January 2021 and February 2023, for instance, Europol led a multi-state police operation against a transnational criminal group operating between the Czech Republic, Romania, Slovakia and Ukraine found to be transporting approximately 6.7 tonnes of ephedrine hydrochloride into Ukraine, with the aim of distributing the precursors to multiple laboratories throughout the country.<sup>70</sup>

Furthermore, at the beginning of the Russian occupation in the east of Ukraine, and with the interruption of commercial operations at the port of Odesa, laboratories for synthetic drugs, particularly those located in Kharkiv and the Donbas region, temporarily suspended production. This corresponded with an increase in detection in the centre and west of the country, such as in Kyiv and in the Prykarpattia Oblast, on the border with Slovakia, Hungary and Romania.<sup>71</sup> In central regions of the country, such as in Kyiv Oblast, after initial disruption,<sup>72</sup> production and distribution of synthetic drugs returned through the use of online platforms and the postal system.<sup>73</sup> In March 2023, for instance, in the context of a confiscation of a laboratory, police seized 135 grams of 1-Phenyl-2-nitropropene (P2NP), a chemical compound employed in the manufacture of ATS.<sup>74</sup>

It is not clear whether the war in Ukraine has had any impact on the synthetic drugs markets in South Eastern Europe as, within the region, consumption habits are diverse.

From this perspective, the region can be divided into two main sub-areas, with Albania, Kosovo and Montenegro on one side, and Bosnia and Herzegovina, Bulgaria, North Macedonia, Romania and Serbia on the other.

From a 2022 EMCDDA report, it emerges that, over the past decades, the use of synthetic drugs in Albania, Kosovo and Montenegro was relatively limited, with no sufficient data available currently to assess changes in the market in relation to the war.<sup>75</sup> In some countries, such as Albania, the use of ATS was relatively foreign to the drug culture there until recently.<sup>76</sup> However, there are indications that the presence of synthetic drugs is increasing. In January 2023, for instance, Albanian authorities seized 1 007 tablets of ecstasy hidden in the luggage of three Albanian citizens arriving at Tirana airport on a flight from the Netherlands.<sup>77</sup> These drugs are also supplied from within the region (i.e. from Serbia and North Macedonia through Kosovo, or from Bulgaria through North Macedonia and Kosovo) or imported from the EU.<sup>78</sup>

In Albania, Kosovo and Montenegro, retail prices remained stable between 2020 and 2022, with prices of €17–€20 for an amphetamine tablet and €10–€15 for a tablet of MDMA.<sup>79</sup> The use of MDMA seems to have increased recently, especially during summer months when there are more tourists or people from the diaspora in Western Europe – ‘who bring their drug habits with them’ – or in places where tourists congregate, such as coastal areas or at music festivals.<sup>80</sup> Similarly, authorities have observed an increase in the detection of LSD in Albania during the tourist season. This drug is likely to be produced in Western Europe, as local traffickers reportedly lack the expertise to manufacture it.<sup>81</sup>

The situation in Bulgaria, Bosnia and Herzegovina, North Macedonia, Romania and Serbia is different. But all of the experts interviewed confirmed that, due to well-established trafficking networks, as well as demand, the market has not been directly affected by the war in Ukraine.<sup>82</sup>

Traditionally, Bulgaria and Romania have seen a significant demand particularly for methamphetamines in its crystal and powder forms, but other synthetic drugs have also been detected transiting the region. In September 2020, for example, in the Romanian port of Constanta, authorities seized the largest amount of fenethylamine tablets (Captagon) in the country’s history, with 751 kilograms found in a container carrying boxes of organic soap. This shipment had departed from the Syrian port of Latakia, passing Turkey before arriving at its final destination, and was probably meant to supply both national and regional demand.<sup>83</sup>

In Bulgaria, methamphetamines (powder) – known as ‘pico’ – are common and retail for €30–€35 per gram – whereas, in crystal form, the retail price is €20–€25 for 0.8–1 gram. Both prices remained stable throughout the period 2020–2022.<sup>84</sup> Production of amphetamines is also present in Bulgaria and Romania, but authorities have seized little of the substance over the last two years, with the exception of areas close to Serbia and North Macedonia.<sup>85</sup> Here, ATS constitute most of the synthetic drugs market and are produced locally, as in Bosnia and Herzegovina.<sup>86</sup> Methamphetamine powder (known as ‘speed’ in the region) is reportedly the most common amphetamine-type drug available in these countries, with its retail price remaining stable at between €10 and €20 per gram, depending on purity levels.<sup>87</sup>

In March 2023, North Macedonian police discovered a laboratory producing synthetic drugs and seized 7 kilograms of amphetamines, approximately 1 kilogram of cocaine and 22 kilograms of cannabis.<sup>88</sup> According to official sources, the amphetamine seized was destined for local demand, with a retail price of €30 per gram.<sup>89</sup>



Synthetic drugs discovered in an operation that dismantled one of the biggest laboratories in South Eastern Europe, in Tetovo, North Macedonia.

© Southeast European Law Enforcement Center

MDMA tablets are also largely available in the region, with these typically trafficked from Western Europe, particularly from the Netherlands, from where they are shipped in small parcels using the postal service. These often go undetected, being easily hidden in car compartments or personal bags, and are then sold for €8–€10 per tablet.<sup>90</sup>

	2020/21	2022/23
Ukraine	€10–€11	€10–€11
Bulgaria and Romania	€8–€10	€8–€10
Western Balkan Six	€10–€15	€10–€15

**FIGURE 7** MDMA retail prices per tablet, 2020/21 and 2022/23.

Traditionally, Romania and Bulgaria have always been hubs for the transit of ATS and home to 'kitchen-type' laboratory production, as also suggested by periodic seizures of ephedrine and pseudoephedrine. This illicit trade in precursors is directed towards Western Europe from Afghanistan, using the same trafficking patterns as for heroin along the Balkan route.<sup>91</sup> Between 2021 and 2022 (as of 15 December), for instance, Bulgarian authorities seized a total of 38 564 kilograms, 7.39 million tablets and 1 160 litres of ephedrine and pseudoephedrine. Production usually derives from small-scale kitchen laboratories, and precursors and equipment are ordered online, mainly from China.<sup>92</sup>

However, in the last three to four years, authorities have also started to detect pre-precursors used for large-scale ATS production, such as phenylacetone (BMK) detected in 2022 by Bulgarian customs.<sup>93</sup> Already in 2018, however, Bulgarian border police had discovered 2.5 tonnes of APAA, another ATS pre-precursor used for industrial production, in a container on board a ship that anchored at the port of Varna from China.<sup>94</sup>

Furthermore, recent evidence suggests that the trafficking of pre-precursors to the region is also taking place by air. In February 2022, North Macedonian police at Skopje airport seized 1 105 kilograms of 1-Phenyl-2-Propanone (also known as P2P), an organic compound used in the manufacture of ATS.<sup>95</sup> However, a laboratory for large-scale production of ATS in North Macedonia was already detected back in 2017 in the town of Tetovo, when authorities dismantled one of the biggest laboratories in South Eastern Europe, and seized 204 696 tablets of undefined ATS and 67 packs of precursors with a net weight of 35 044 grams.<sup>96</sup>



**FIGURE 8** Amphetamine and methamphetamine trafficking routes in Eastern and South Eastern Europe, 2020–2022.

To date, there is reason to believe that ATS are typically produced in improvised, clandestine laboratories supplying local markets. There are also instances of intra-regional trafficking from Serbia to Bosnia and Herzegovina and, to a lesser extent, Serbia to North Macedonia. However, the increased detection of pre-precursors in Bulgaria, North Macedonia and Romania raises questions around whether these are being used in the domestic and close regional synthesis of ATS using the large-scale production P2P method, are merely transiting through and out of the region (probably to Western Europe), or are intended for local production for regional and Ukrainian markets.

### Emerging synthetic drugs

Since the beginning of the conflict, Ukrainian authorities have detected significant amounts of new psychoactive substances, or NPS. Overall, the availability of NPS seems to be largely limited to synthetic cathinones  $\alpha$ -pyrrolidinopentiophenone (alpha-PVP, known as 'flakka') and 4-methylmethcathinone (4-MMC, or mephedrone), with seizures of these drugs taking place throughout the country.<sup>97</sup> For example, between December 2022 and January 2023, police conducted multiple operations leading to the seizure of 10 kilograms of alpha-PVP, and 100 litres of precursors at a clandestine laboratory in Kyiv; 11 kilograms of alpha-PVP in the Kharkiv region; and, again in Kyiv, an undisclosed amount of alpha-PVP and mephedrone worth approximately €3 000, according to official sources.<sup>98</sup>



**Ukrainian police dismantle a synthetic drug laboratory responsible for the production of alpha-PVP.** © Office of the Security Service of Ukraine in the Odesa region Facebook page

The extent of NPS production in Ukraine remains unknown, and both fieldwork and information from police operations suggest that most of these substances and their precursors are being imported into the country without being disrupted by the war. The main suppliers of NPS are China, the EU (the Netherlands, in particular) and Turkey. Most of the trafficking occurs using postal parcels.<sup>99</sup>

There is very little official analysis on the presence of NPS in South Eastern Europe, but from the fieldwork conducted, and based on seizures and police operations, there is evidence of the existence of active consumption markets for such substances, particularly in Romania.<sup>100</sup> Furthermore, in Romania, as in Ukraine, NPS are reported to be easy to access on dark web-based marketplaces, as well as on social media, especially Telegram. Data collected by the GI-TOC between December 2022 and January 2023 shows that the most common NPS consumed in Ukraine and Romania is alpha-PVP. In Ukraine, the substance is sold at retail for approximately €15 per gram, whereas in Romania, it is mainly sold per dose, for approximately €2.<sup>101</sup>

Another NPS largely available in both Ukraine and Romania is so-called 'crystal', i.e. 3-MMC (or 3-methylmethcathinone), a 'designer' drug from the substituted cathinone family, which is very similar in structure and effects to 4-MMC. A gram of 3-MMC retails for 100–150 Romanian leu (RON) (€20–€30).<sup>102</sup>

In Bulgaria, synthetic cannabinoids, such as ADB-BINACA (known as Bilka), shipped by post in quantities of up to 30 grams from China, make up most of the NPS market.<sup>103</sup> The price per gram ranges between €5 and €15.<sup>104</sup> Usually, this cannabinoid is sprayed over dried cannabis, or other plants (either knotgrass or tea leaves), and then left to dry. The same practice has been observed in Romania, where synthetic cannabinoids are sold in pre-made joints for RON20–30, or €4–€6.<sup>105</sup>

There is very little evidence concerning NPS markets in the rest of South Eastern Europe, and the impact of the Ukraine war on these markets is, for the time being, unknown.<sup>106</sup>



## MOBILITY OF UKRAINIAN DRUG TRAFFICKERS

**W**ars and instability often displace flows and criminal markets, and criminal actors may move to seek opportunities elsewhere. Past reports by the GI-TOC have shed light on the international mobility of South Eastern European criminal networks as a result of the instability caused by the dissolution of former Yugoslavia and the fall of communism in Albania.<sup>107</sup> Ukrainian traffickers operating abroad are not a new phenomenon. In 2014, for instance, Mexican authorities arrested a Ukrainian national, suspected of running a large criminal organization dedicated to laundering money and trafficking arms and drugs in Europe, Asia, the Middle East and the US.<sup>108</sup> And, in some cases, Ukrainians have collaborated with Russians in the pursuit of illicit drug trafficking. For instance, in September 2020, Cambodian authorities arrested two Russians and one Ukrainian, sentencing them in April 2022 to more than 20 years imprisonment for trafficking approximately 20 kilograms of crystal meth destined for the Ukrainian market.<sup>109</sup>

Nevertheless, increased militarization and resulting disruption to drug trafficking flows through Ukraine may force Ukrainian drug traffickers to seek lucrative opportunities elsewhere. Since the beginning of the war, there have been a number of cases of Ukrainians engaging in drug production and trafficking outside Ukraine. Although these instances are limited, the police operation referred to below raises concerns about the possibility that the activities of some Ukrainian organized criminal groups may shift abroad. In Kazakhstan, in January 2023, police arrested Ukrainian citizens in the context of an operation that led to the dismantling of synthetic drugs laboratories in Almaty.<sup>110</sup>

The presence of Ukrainian traffickers has also been noted in both South Western and South Eastern Europe. In Spain, for instance, Ukrainian nationals were among 30 people arrested in Malaga in December 2022, accused of trafficking cannabis disguised as aid for Ukraine.<sup>111</sup>

In South Eastern Europe to date there have been only two cases in which the authorities have identified the involvement of Ukrainians since the beginning of the war. In August 2022, a joint operation by the Italian Guardia di Finanza and Albanian police led to the arrest of two Ukrainian citizens, together with four Albanians, for smuggling 992 kilograms of cannabis from Albania to Italy using speedboats.<sup>112</sup> Nonetheless, the presence of Ukrainian drug traffickers in the region was reported before the war. In 2021, for example, Serbian authorities arrested a Ukrainian citizen at a border crossing between Serbia and Hungary, charging him with trafficking 18 kilograms of Rinasek tablets (pseudoephedrine).<sup>113</sup>



## FINAL OBSERVATIONS AND OTHER POSSIBLE SCENARIOS

**A** number of observations can be drawn from the analysis presented in this report. The sections below summarize some of the concerns to be taken forward, as well as setting out possible scenarios that may result in the foreseeable future.

- **Most officials tend to downplay the impact of the war on drug flows in the region.** Most opinions rely on the 'distance' factor, with officials arguing that the war is simply too far away to significantly affect the Balkan region. While this assessment may be validated in part, given the stability of drug prices in the Balkan region at the retail level, it fails to take into consideration the long-term impact of the war in Ukraine. This might be reflected in drug markets within the country, as well as in the potential for increased activity across South Eastern Europe – not only as a relatively safe drug transit region, but also as a major supplier of drugs, especially cannabis and, possibly, synthetic drugs.
- **Stable, if not rising, cannabis demand in Ukraine may be increasingly met by traditional South Eastern European cannabis producers, such as Albania, North Macedonia and, more recently, Kosovo.** In this context, given the rise in the number of seizures of cannabis exchanged for heroin along the Balkan route, and the abundant supply of opiates in Afghanistan, larger inflows of heroin are to be expected in South Eastern Europe. These may be anticipated to have uncertain impacts on the wholesale trade, as well as affecting the retail prices of cannabis and heroin.
- **The closure of the container terminal in the port of Odesa, as well as the closure of other Ukrainian Black Sea ports, has generated an increase in commercial operations in Romanian and Bulgarian Black Sea ports.** However, if these increased commercial operations are not accompanied by a corresponding increase in investments in security and integrity measures, the ports of Constanta and Varna, reportedly understaffed, may be further exposed to cocaine, heroin and synthetic drug precursor inflows.

- **Predicting shifts in trafficking patterns will be key for regional law enforcement agencies.** The border police and customs officials working at border crossings between Ukraine, Poland, Slovakia, Hungary and Romania may be overwhelmed given the limited personnel currently employed in these roles. Larger investments in security and data collection at borders will help authorities to be more vigilant concerning possible new routes, as well as being able to concentrate their efforts where these are most needed.
- **Post-traumatic stress disorders resulting from the war may have an impact on drug consumption habits in Ukraine.** The local demand for NPS (often regarded as 'bath salts' or 'legal highs') is on the increase in Ukraine and the wider western Black Sea region, particularly in Romania and Bulgaria. However, while law enforcement agencies are increasingly detecting and dismantling 'kitchen-type' laboratories as well as pre-precursors for large-scale production, local health departments and NGOs that typically provide opioid harm-reduction programmes have little knowledge of the chemical composition and effects of NPS.



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