



EUROPEAN DRUG TRENDS MONITOR



About this report

This is the fourth report of the Global Initiative Against Transnational Organized Crime's European Drug Trends Monitor, an output of our Observatory of Organized Crime in Europe. This series of bulletins tracks developments in European drug markets to provide an analysis of trends in availability, pricing and criminal dynamics across major European cities. European drug markets are undergoing considerable changes, triggered by the confluence of several major trends in supply and demand. These include an oversupply of cocaine, a growing crack epidemic, significant shifts in the production of heroin in Afghanistan, the gradual emergence of synthetic opioids, the

partial legalization of cannabis in some countries, and the rise of synthetic stimulants such as synthetic cathinones, especially against the backdrop of Russia's war against Ukraine. At the same time, we seek to document the growing illicit market of diverted or falsified prescription drugs, such as painkillers, tranquilizers and anaesthetics.

As European drug markets rapidly transform, with consequences for public health, criminal dynamics and related violence, the European Drug Trends Monitor seeks to provide up-to-date analysis to inform public debate and supplement data from

governments and international organizations. Trends are being monitored in major European cities and regions. Across Europe, information is gathered on drug availability, retail and wholesale prices, and criminal dynamics in trafficking activities. The monitor relies on field research, analysis of data provided by authorities, information gained through interviews, and the monitoring of media and incidents such as drug seizures. It also draws on the monitoring and analysis of hundreds of social media channels and encrypted messaging apps such as Telegram and Signal, as well as dozens of dark web marketplaces where illicit drugs – alongside diverted, falsified and counterfeit prescription drugs – are being commercialized.¹ Additionally, discussions on dark web forums, where users, producers and sellers openly exchange information and tips, provide valuable insights on emerging trends, supply chains and distribution methods.

The European Drug Trends Monitor finalized its fourth round of data gathering and field research in February 2026. This bulletin focuses exclusively on the latest trends and changes in the market dynamics for cocaine, a substance for which Europe has been facing significant adaptations and dynamics in the past year. Research has focused on major cities and transit regions in Belgium, the Netherlands, France, Spain and Italy, current key entry points for cocaine to Europe.

There are methodological limitations and caveats on how to interpret the findings. No toxicological analysis of the surveyed substances can be conducted, therefore caution needs to be applied when analyzing the data. In addition, the findings rely partly on sources within the criminal underworld. Finally, the research focuses only on the supply of illicit drugs, not the potential demand for them, limiting explanations of the size of drug markets.

KEY TREND 1: Falling seizure volumes at major European ports do not reflect any significant market contraction.

Recent developments in cocaine seizures at major European ports reveal a growing divergence between visible enforcement outcomes and the underlying dynamics of supply. While total volumes intercepted at principal maritime hubs in north-west and southern Europe declined sharply during 2024 and 2025, indicators drawn from wholesale pricing, retail availability and field-based qualitative market observations point to a market that remains well supplied.²

In Belgium, for example, the evolution of seizure data at the Port of Antwerp illustrates this shift particularly clearly. After several years of sustained growth in total volumes intercepted, culminating in historically high levels in 2023, seizure tonnage fell markedly in 2024 and declined further in 2025.³ At the same time, the number of individual seizures increased, likely pointing to a redistribution of risk across a larger number of smaller consignments rather than a reduction in overall trafficking activity.⁴ Enforcement and judicial sources interpret this pattern as evidence of a deliberate transition away from large, consolidated multi-tonne shipments towards sub-100-kilogram loads that limit the operational impact of any single interception.⁵ Similar dynamics are reported in the Netherlands, where Dutch Customs recorded a decline in total cocaine tonnage seized at the Port of Rotterdam in 2024, alongside a continued rise in the number of (smaller load) interceptions. Although large seizures continue to be reported – for example, the January 2026 seizure of around 5 tonnes at the port of Rotterdam⁶ – overall

the statistical profile of seizures seems to have shifted from fewer high-volume cases towards more frequent lower-volume shipments, reinforcing a narrative of fragmentation rather than of a scarcity of supply.⁷

This operational shift reflects broader adaptations within port-based criminal ecosystems. In Antwerp and Rotterdam, multiple sources describe certain networks, including Albanian-speaking groups, as maintaining a presence across multiple stages of the value chain, from extraction at port terminals to inland transport and wholesale distribution. Rather than relying on single high-volume consignments, these groups are reported to manage diversified logistics portfolios that combine containerized maritime shipments with overland transport, postal channels and human couriers.⁸ Such arrangements are frequently framed by interlocutors in terms of ‘calculated losses’: the objective is not to shield individual consignments from seizure, but to preserve throughput and continuity of supply. In this context, the redistribution of risk across smaller shipments represents a strategic adjustment rather than a contraction of activity.⁹

This interpretation is supported by the absence of corresponding signals of market stress. Wholesale prices in Belgium and the Netherlands have fallen steadily since late 2023, reaching approximately €15 000– €16 000 per kilogram in 2025, down from ranges in the mid-€20 000s or higher in previous years (see Figure 1).¹⁰

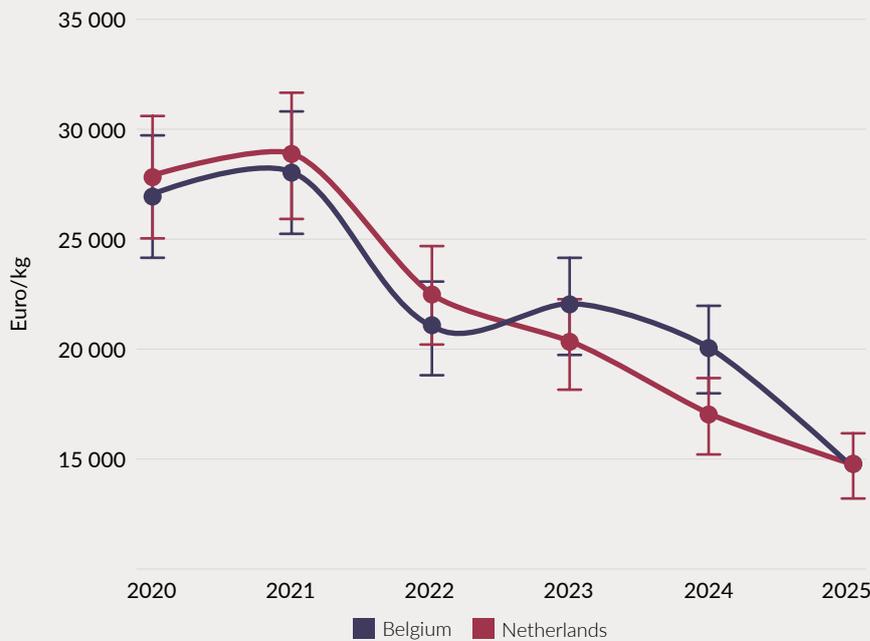


FIGURE 1 Mean wholesale prices (1 kg or more) of cocaine in Belgium and the Netherlands (2020-2025).

SOURCE: multiple sources consulted by GI-TOC during fieldwork in 2025 and 2026.

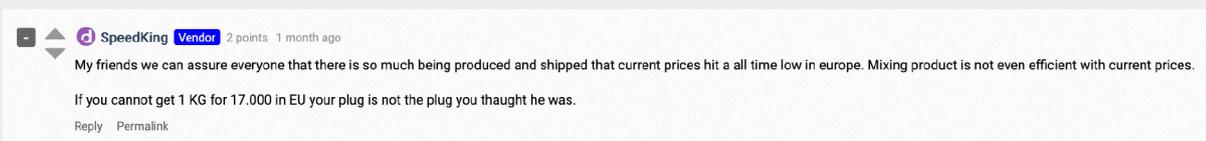
This trend appears to be replicated along several western bound entry points for cocaine across Europe. For example, in Spain, enforcement and judicial sources in the Barcelona area report comparable wholesale prices of €12 000–€14 000 per kilogram, also well below historical benchmarks.¹¹ These trends are widely understood by institutional and market actors as indicators of structural oversupply rather than declining demand.¹² In a context where available data on cocaine use does not suggest a contraction of demand across Europe,¹³ the continued downward trend on prices suggests that trafficking networks retain the capacity to move large volumes into European markets despite heightened enforcement at traditional entry points.¹⁴

This pattern aligns with qualitative observations from field sources who describe cocaine as arriving at a pace and in a condition that leaves little practical space for extended storage or heavy reprocessing before redistribution. As one source put it, ‘cocaine arrives so fast we don’t have time to cut it anymore’.¹⁵

The digital space confirms this trend. Across multiple discussions on darknet marketplaces, there appears to be a shared informal price anchor: in one case, no more than €17 000 per

kilogram described as a readily attainable rate rather than a premium offer.¹⁶ In this particular case, paying above this threshold is framed as unnecessary.

The persistence of supply in the face of declining seizure tonnage appears to be closely linked to the diversification of routes and methods recently highlighted by the GI-TOC.¹⁷ While containerized maritime shipping remains a primary entry mechanism in areas such as Barcelona, enforcement sources report that it is increasingly complemented by alternative pathways. These include trans-shipment through West Africa using bulk cargo and overland redistribution along Sahelian corridors feeding the Libya–southern Europe axis, and the renewed use of semi-submersible vessels across the Atlantic.¹⁸ Interceptions of so-called ‘narco-submarines’ have risen in recent years. In January 2026, Portuguese authorities seized nearly 9 tonnes of cocaine approximately 230 nautical miles from the Azores, arresting four crew members (three Colombian nationals and one Venezuelan).¹⁹ The operation marked the third interception of a semi-submersible by Portugal within a year, underscoring the extent to which high-risk, long-haul maritime transport continues to supplement European-bound supply chains.



Post by a dark web vendor on Tor under the alias ‘SpeedKing’, claiming that €17 000 for 1 kilogram of cocaine is not out of the norm, as of December 2025.

KEY TREND 2: Retail prices for cocaine show a striking level of stability despite decreasing wholesale prices, enhancing criminal margins significantly.

At the retail level, the current oversupply dynamic is not leading to lower prices for users. Instead, street prices have remained largely stable despite a significant drop in wholesale costs.

This disconnect has widened the margin between cheap upstream supply and steady retail pricing, allowing drug sellers to capture substantially higher profits. Street markets in Belgium, the Netherlands, France, Spain and Italy consistently report prices in the range of €45–€65 per gram, with only modest variation by location, relationship or purchase quantity.²⁰ This nominal stability persists even in the aftermath of major seizures and high-profile enforcement operations, reinforcing the conclusion that supply continuity is being preserved. However, this apparent price stability conceals a substantive shift in the quantity and purity offered to consumers. Whereas €50 previously purchased close to 1 gram of cocaine, current transactions more commonly yield 0.6 to 0.7 grams, albeit at significantly higher purity levels (see Figure 2).²¹

Period	Quantity purchased	Purity
2021–2024	0.9g–1g	30%–40%
2025–2026	0.6g–0.7g	70%–80%

FIGURE 2 Average amount and purity of €50 worth of cocaine at the retail level in Belgium, the Netherlands, France, Spain and Italy.

SOURCE: Multiple sources consulted by the GI-TOC during fieldwork in 2025 and 2026.

For cocaine users, this translates into a scenario of sustained accessibility to a purer substance rather than scarcity.²² Forensic and drug-checking data further reinforce this interpretation. Street-level samples analyzed in Belgium in the recent years show a median purity of 82%, with concentrations ranging from 4% to 100%.²³ Cocaine carried internally by drug mules also exhibited very high purity, with concentrations between 81% and 97%, and most pellets unadulterated.²⁴ Drug-checking services in Barcelona similarly report sustained increases in cocaine purity in the last year, with typical values now reaching 60%–65% and some samples exceeding 70%–80%, a sharp rise compared with levels of 30%–40% observed in the past 5–6 years.²⁵ The combination of high purity and stable retail pricing indicates that the market is not compensating for scarcity by cutting product more aggressively or raising prices, but rather operating in an environment of abundant supply.

Data from darknet marketplaces and encrypted messaging channels across Europe further show a tightly clustered retail price band for cocaine, typically between €45 and €60 per gram, with the usual quantity-based discounts (see Figure 3).²⁶

Diversification of risk emerges also from accounts of the Paris and Barcelona retail and intermediate markets. Distributors describe a highly fragmented landscape characterized by thousands of small-scale retail operators, delivery networks coordinated through encrypted messaging applications and limited reliance on street-level dealing. In this environment, cocaine is reported to circulate rapidly, with product arriving and being redistributed at a pace that reduces the incentive for stockpiling or extended processing.²⁷ The proliferation of ‘delivery-first’ models also allows networks to reconfigure distribution patterns quickly in response to law enforcement pressure, further insulating the market from localized disruptions.

The combination of route diversification and decentralized storage enhances operational flexibility and reduces the strategic value of any single chokepoint. While Antwerp and Rotterdam remain central nodes in the European cocaine trade, traffickers increasingly utilize smaller ports and secondary logistics hubs to complement activity at major terminals.²⁸ Rather than displacing trafficking away from core ports entirely, enforcement pressure appears to be spreading it across a broader network of access points, diluting the impact of targeted interventions. This spatial diffusion is accompanied by a growing reliance on non-maritime methods, including lorries and postal services, which integrate cocaine flows into the wider commercial logistics infrastructure and further complicate detection and interdiction efforts.²⁹

An additional structural factor shaping this adaptive landscape is the continued role of corruption as an enabling mechanism. High-profile cases involving compromised public officials, including judicial figures, underscore the extent to which internal access and institutional vulnerabilities remain part of the trafficking equation.³⁰ This embeddedness allows traffickers to anticipate and manage enforcement pressure, reinforcing the logic of calculated losses and adaptive logistics, rather than generating conditions of systemic disruption.³¹

The cumulative effect of these dynamics is a growing decoupling between traditional enforcement indicators and the reality of the cocaine market. Declining seizure tonnage at major ports may reflect successful investments in detection technology, operational coordination and international cooperation, but it does not necessarily correspond to a reduction in the scale of trafficking. This statistical transformation can create the appearance of progress when assessed through tonnage-based indicators alone, even as wholesale and retail markets continue to exhibit signs of abundant supply.

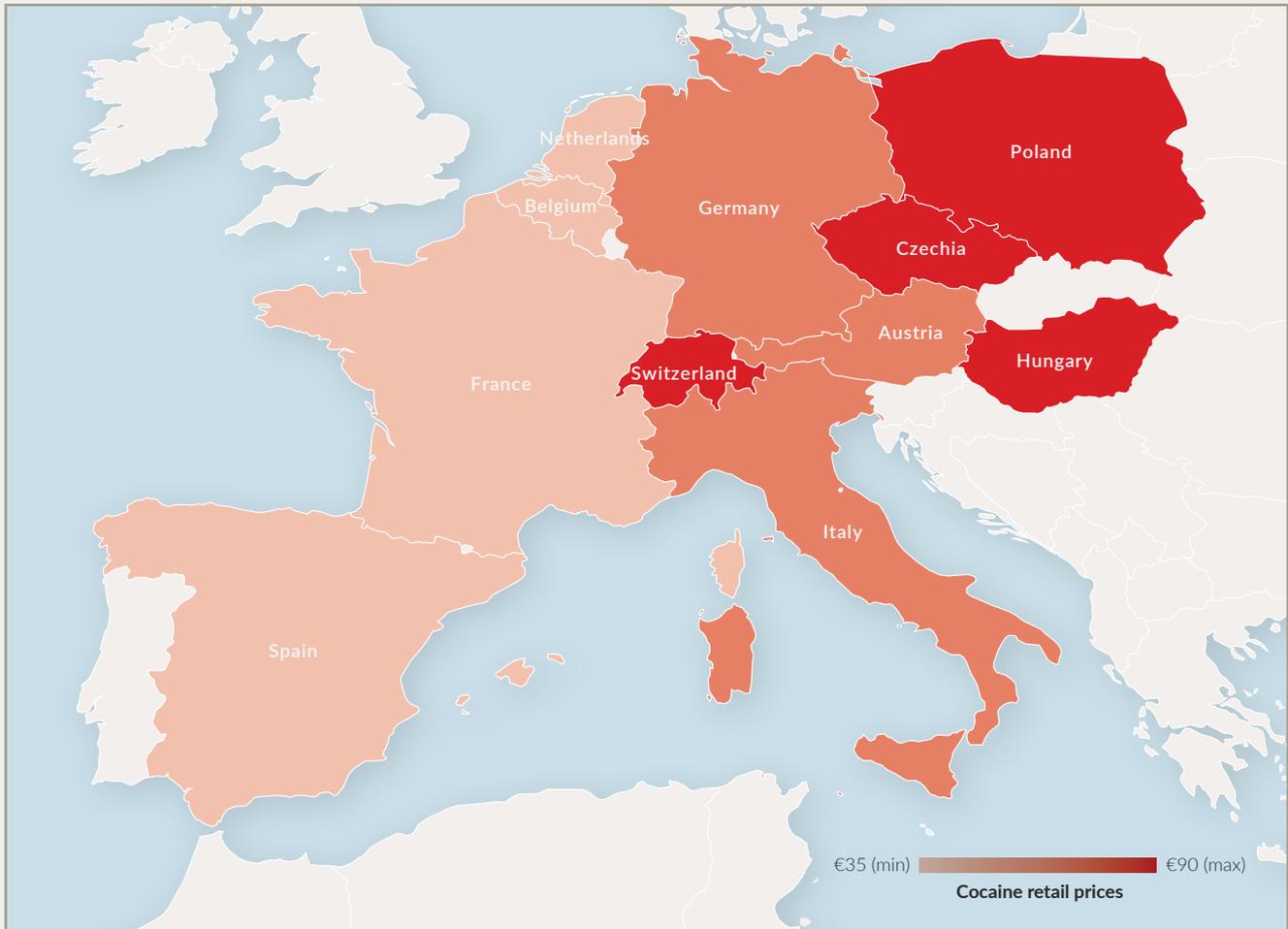


FIGURE 3 Online retail prices of cocaine in selected countries, per gram.

SOURCE: Research conducted between November and December 2025 on Dread, DrugHub, Onionmarket, DarkMatterMarket, WeTheNorthMarket, Kerberos, BlackOps, DrugHub, Torzon, Darkmatter, Nexus, and Shadow X, as well as Telegram.

From a policy and monitoring perspective, this raises important questions about how success is measured and interpreted. Seizure data remains a critical component of situational awareness, but its analytical value depends on being situated within a broader set of indicators.³² Price trends, purity levels, the number and size distribution of seizures, the proliferation of alternative routes and

the structure of digital and physical retail markets all provide complementary insights into the health and resilience of the cocaine supply system. Without these additional lenses, there is a risk that declining tonnage figures will be misread as evidence of market contraction rather than as a signal of strategic adaptation.

KEY TREND 3: The cocaine value chain is moving closer to European markets as local processing, adulteration and branding expand within Europe.

Across the European cocaine market, key downstream stages of the cocaine value chain are increasingly taking place inside the continent.³³ While the coca plant is exclusively grown within South America, intermediary stages – such as adulteration, re-crystallization, re-blocking and branding – are now more frequently conducted within European

wholesale and retail markets.³⁴ This relocation reflects a broader professionalization of the European market, in which importation, storage, transformation and distribution are increasingly compartmentalized into specialized functions within Europe.³⁵

Europol press releases in 2025 confirm continued law-enforcement action against cocaine infrastructure in Europe. In December 2025, a Europol-supported operation in Spain dismantled a Dutch-led cocaine network using advanced concealment methods requiring European-side extraction.³⁶ The expansion of cocaine processing sites in Europe provides one of the clearest indicators of this relocation. Across the European Union, at least 34 sites related to cocaine production were dismantled in 2023. Of these, the Netherlands remains a key hub: 24 locations related to cocaine production – including extraction, crystallization and packaging – were discovered in 2024, following 21 in 2023.³⁷ Many of these facilities were dedicated to adulteration and the pressing of cocaine into blocks, while others were involved in extracting cocaine from carrier materials.³⁸ This trend continued into 2025, with Europol noting in its EU Serious and Organized Crime Threat Assessment (2025) that there are indications of a further spread of cocaine extraction activities in laboratories across the EU, highlighting the ongoing expansion of European cocaine processing capacity.³⁹

According to interviewed law enforcement authorities, these figures highlight both the scale of local adulteration activity and the increase of precursor processing within Europe, a pattern traditionally confined to Latin America.⁴⁰ Multiple cocaine laboratories have also been dismantled in Spain in recent years. Between 2023 and 2026, Europol has supported a number of operations dismantling cocaine laboratories capable of producing hundreds of kilograms per month, and cocaine-extraction facilities linked to transnational networks.⁴¹ Belgium also plays a key role. Europol-supported investigations already identified cocaine processing infrastructure in Belgium as early as 2017, when a joint operation across several EU member states dismantled an international cocaine trafficking group and uncovered drug production facilities linked to the network.⁴²

A notable feature of this shift is the growing prominence of procaine as an adulterant. Historically, the most common cutting agents for cocaine in Belgium and the Netherlands were caffeine, levamisole and phenacetin. Since 2024, procaine has partially been overtaking these substances and now appears in a growing share of analyzed cocaine samples. In the Netherlands, procaine was detected in 11.8% of cocaine samples in 2024, making it the most common adulterant identified in forensic analysis, before levamisole (11.6%), phenacetin (9.1%), caffeine (4.0%) and lidocaine in (1.7%).⁴³ As illustrated in previous issues of the European Drug Trends Monitor, several characteristics explain the rapid uptake of procaine.⁴⁴ It is relatively inexpensive and can be imported in bulk, often from China.⁴⁵ Crucially, when crystallized, procaine develops a pearlescent appearance that closely resembles cocaine, allowing adulterated product to retain the visual characteristics associated with high purity. At the same time, it develops

a numbing oral effect when being tested, similar to cocaine, when being tested by buyers. Both visual and pharmaceutical features make the substance particularly suitable for adulteration and re-blocking processes carried out within Europe.⁴⁶

In an environment characterized by structural oversupply, adulteration has become part of a broader process of product management and profit maximization.⁴⁷ This shows that despite cocaine abundance, intermediate sellers still seek to enhance their margins by cutting the substance, if logistics and market pace allow to do so. High-purity cocaine arriving in Europe gets diluted to create multiple quality tiers and extend distribution networks without undermining consumer confidence. Forensic analysis in Belgium shows that cocaine blocks frequently carry external stickers and internal logos intended to signal origin or quality.⁴⁸ However, blocks bearing identical logos may contain different compositions, and some blocks stamped as cocaine consist entirely of adulterants. In 2024, analysis of 53 cocaine blocks found that fewer than 20% were adulterated; among those containing cocaine, purity ranged from 13% to 100%, with a median of 93%, slightly higher than street-level samples.⁴⁹

Field interviews provide insight into how this process unfolds in practice. In Paris, distributors describe cocaine as often arriving 'pure, or almost', before being processed locally and mixed with cutting agents prior to redistribution through delivery networks coordinated via encrypted messaging applications.⁵⁰ Fieldwork also indicates that this local transformation has become routinized: once cocaine reaches European markets, 'everyone does their own cuisine', mixing it with cutting agents and, in some cases, re-pressing the product using inexpensive hydraulic presses and applying counterfeit logos to simulate higher-quality cocaine blocks.⁵¹

Digital market data provides further insight into the implications of these developments. Across darknet marketplaces, claims related to origin or purity rarely translate into significant price premiums once quantity is controlled for. Labels appear to function primarily as reassurance signals rather than genuine drivers of value. This pattern suggests that buyers increasingly recognize the limited relevance of origin claims in a market where final processing frequently occurs far from production regions.⁵²

This evolution also complicates enforcement strategies that focus primarily on interdiction at borders or in source regions. When significant value-adding stages occur within Europe, seizures at ports or airports disrupt shipments but do not eliminate the infrastructure needed to process and distribute cocaine domestically. The presence of laboratories, storage facilities and precursor supply chains enables networks to resume operations quickly and maintain market continuity.

KEY TREND 4: Europe's cocaine market is evolving into a highly diverse, service-driven ecosystem increasingly shaped by the two-way integration of European and Latin American criminal actors.

The composition of cocaine trafficking groups in Europe is no longer characterized by the dominance of well-defined and territorial groups, but composed of range of often ethnically defined criminal actors operating through fluid collaborations and crime-as-a-service dynamics.⁵³ Available evidence also points to a degree of specialization organized along ethnic boundaries along the cocaine supply chain.⁵⁴

Albanian and Slavic-speaking groups, together with Italian, Dutch Moroccan and Turkish networks are consistently identified as major players in the cocaine trade in western and northern Europe.⁵⁵ Law-enforcement sources emphasize that multiple nationalities operate simultaneously, making it difficult to attribute the cocaine market to any single ethnic group.⁵⁶ In the Belgian and Dutch cocaine markets, alongside long-established Italian groups, actors include Albanian, Belgian, British, Dutch, French, Irish, Moroccan, Serbian, Spanish and Turkish criminal groups.

The cocaine market also involves a diverse set of intermediate actors along the supply chain. Nigerian cult groups, including Black Axe, and Eiyé confraternities, play an important role in drug trafficking in some European countries, such as in Italy.⁵⁷ Albanian-speaking and Dominican criminal networks have an established presence in Barcelona.⁵⁸ Meanwhile, Belgian and Dutch outlaw motorcycle gang members are involved in trafficking from the ports of Antwerp and Rotterdam, and in transporting consignments between Belgium and the Netherlands.⁵⁹ At the lower levels of the supply chain, law-enforcement sources in the Netherlands and Belgium highlight the growing involvement of young people (often under the age of 18) in cocaine-related activities such as container extraction and other crime-as-a-service tasks.⁶⁰ Arrested extractors – so-called 'uithalers' – frequently include individuals with Dutch nationality and Antillean, Surinamese, Moroccan or Belgian backgrounds, and are often described as easily replaceable.⁶¹ In a series of intrusions in the Altenwerder terminal of Hamburg port in 2023, allegedly in an attempt to retrieve cocaine, a total of 45 preparators were arrested, several of them minors. All of them had Dutch nationality, a sign of the growing transnational mobility of criminal service-providers in Europe.⁶² Field interviews further underline the multi-cultural composition of distribution networks. A Berlin-based wholesaler reported working with Albanian, Turkish and Czech actors, while Eritrean and Somali dealers were reported to operate under Albanian networks in street-level distribution.⁶³

Taken together, these dynamics underline the highly fragmented and diverse nature of the European cocaine market, where a wide range of criminal actors occupy distinct yet complementary

positions along the supply chain with a growing establishment of crime-as-a-service patterns. European-based networks have demonstrated a strong capacity to operate transnationally, embedding trusted operatives in key cocaine-producing and transit countries in Latin America and West Africa to secure access to supply, manage logistics and reduce dependence on intermediaries.⁶⁴ However, this outward expansion has not occurred in isolation. Rather, it has been accompanied by a parallel and increasingly visible movement in the opposite direction, as Latin American criminal actors seek to establish a strategic presence within Europe, closer to consumer markets, and to reinforce their position in wholesale distribution, branching into other profitable drug sectors.⁶⁵

Over the past decade, this presence has remained relatively light but steadily expanding, with local footholds used to oversee shipments, channel and launder profits, and to deploy specialized technical expertise. Cases involving Brazilian, Mexican and Colombian criminal networks illustrate how these actors now operate across multiple nodes of the European drug landscape, from large-scale cocaine logistics to synthetic drug production and investment in the legal economy.

The presence of Latin American criminal groups in Europe was traditionally confined to the Iberian Peninsula. Now, field interviews and law-enforcement reporting describe Latin American 'cooks' working in laboratories in the Netherlands and Belgium,⁶⁶ bringing specialized knowledge of crystallization and chemical processing that enables European networks to replicate techniques previously confined to production regions. This growing footprint is also visible in the technical segments of the cocaine supply chain. Colombian and other Spanish-speaking South American nationals have been identified in cocaine extraction laboratories in Europe, often supported by Dutch and Belgian nationals in local operations.⁶⁷ However, there has lately been a shift of these groups toward new operational grounds, as confirmed by the recent dismantling of synthetic drug production facilities in France⁶⁸ and Poland,⁶⁹ and subsequent arrests and confirmations that Mexican criminal actors have been involved in the criminal operations.

The relocation of value-adding stages into Europe has significant operational consequences. By shifting adulteration, crystallization and branding closer to consumer markets, criminal networks reduce their dependence on upstream actors and increase their ability to adapt quickly to enforcement pressure. Local processing allows rapid adjustments to supply disruptions or operational losses without requiring major changes to transatlantic trafficking routes.⁷⁰

Portugal has also emerged as a key stage for this ‘downstream’ expansion. In November 2025, Portuguese police arrested Ygor Daniel Zago (alias ‘Hulk’) – described as a senior figure of the major Brazilian criminal group Primeiro Comando da Capital (PCC) – in an upscale condominium in Cascais, on charges including criminal association, corruption and money laundering.⁷¹ Domestic reporting suggests PCC-linked structures in Portugal control commercial establishments, real estate and even have

stakes in local football, signalling a deliberate strategy of embedding in the licit economy as well as exploiting Portugal’s position as a lusophone bridge between South America, West Africa and EU cocaine markets.⁷² This reflects the PCC’s broader evolution from a São Paulo prison gang to a transnational actor with the capacity to influence local criminal ecosystems, including within Portuguese prisons.⁷³

KEY TREND 5: As controls tighten in north-western European ports, traffickers are increasingly exploiting southern Mediterranean Sea lanes, particularly the Morocco-Spain corridor and the Sicily Channel, for offshore cocaine deliveries.

As enforcement pressure intensifies in major northern European ports, cocaine trafficking into the EU is increasingly characterized by route diversification and maritime fragmentation. Within this evolving landscape, the western and central Mediterranean have emerged as adaptive corridors that combine legacy smuggling infrastructure, offshore delivery techniques and flexible inland redistribution networks.

Morocco has increasingly emerged as a key trans-shipment hub within the western Mediterranean cocaine corridor, building on decades-old smuggling infrastructure originally developed for cannabis trafficking. The Rif region and the Andalusian coastline have long formed the backbone of one of Europe’s most established cannabis resin supply chains.⁷⁴ Today, that same logistical ecosystem is being repurposed, with cocaine increasingly integrated into routes historically dominated by hashish.⁷⁵ This convergence is repeatedly highlighted in field reporting and interviews with actors operating along the route, who describe how ‘the cocaine route merges with the weed route’ through Morocco and Algeria before reaching European markets.⁷⁶ Fieldwork has also uncovered that cocaine arriving in Morocco from Latin America, either directly at Tanger and Larache, or via West Africa, can be temporarily stored and then redistributed and dispatched onward.⁷⁷

The reuse of cannabis infrastructure is central to this shift. Moroccan trafficking networks have long operated fleets of small vessels and high-speed boats capable of crossing the Strait of Gibraltar and the Alboran Sea under constant enforcement pressure.⁷⁸ These maritime assets – together with coastal observation networks, extended family-based crews and flexible launch points – provide an ideal platform for hybrid trafficking operations that combine hashish smuggling, migrant smuggling and cocaine trans-shipment. The dismantling of a large poly-criminal network by the Spanish Civil Guard in early 2024 illustrates this convergence particularly clearly. Investigators

documented the use of trimotor speedboats to transport hashish, smuggle migrants and retrieve cocaine shipments jettisoned from container vessels near Algeciras, with multiple daily crossings between Morocco and Spain.⁷⁹ The seizure of more than 2 tonnes of hashish, over 500 kilograms of cocaine and numerous vessels highlighted the scale and versatility of these hybrid operations.⁸⁰

These developments fit into a broader pattern of route diversification and fragmentation observed across southern Europe. Research on the cocaine market in Barcelona highlights how trafficking networks are deliberately reducing their dependence on large, concentrated shipments and instead adopting more flexible supply chains that combine container traffic with maritime drop-offs, land transport and smaller shipments. Within this evolving logistics ecosystem, the western Mediterranean corridor plays a growing role as an alternative entry space into Europe, complementing Atlantic routes via West Africa and enabling cocaine to reach southern European nodes before being redistributed northwards.⁸¹ Once across the strait, the Moroccan-Spanish corridor connects directly to a wider redistribution axis stretching through Spain and France toward northern European markets. Barcelona in particular is described by institutional and judicial sources as part of a broader network of Mediterranean entry points – alongside Valencia and Algeciras – used for temporary storage and redistribution toward other European destinations.⁸²

Moroccan diaspora networks in Spain and France play a crucial role in sustaining this corridor (see Figure 4). Long-standing migration links provide trusted social infrastructure for storage, transport and wholesale distribution, enabling cocaine shipments to move rapidly from southern Spain toward France and onward to the Benelux countries.⁸³ Field interviews underline how cocaine transiting via Spain is frequently transported north by road through a patchwork of vehicles and logistics arrangements.⁸⁴ Along the Franco-Spanish axis, particularly in the Basque region, trafficking has reportedly intensified

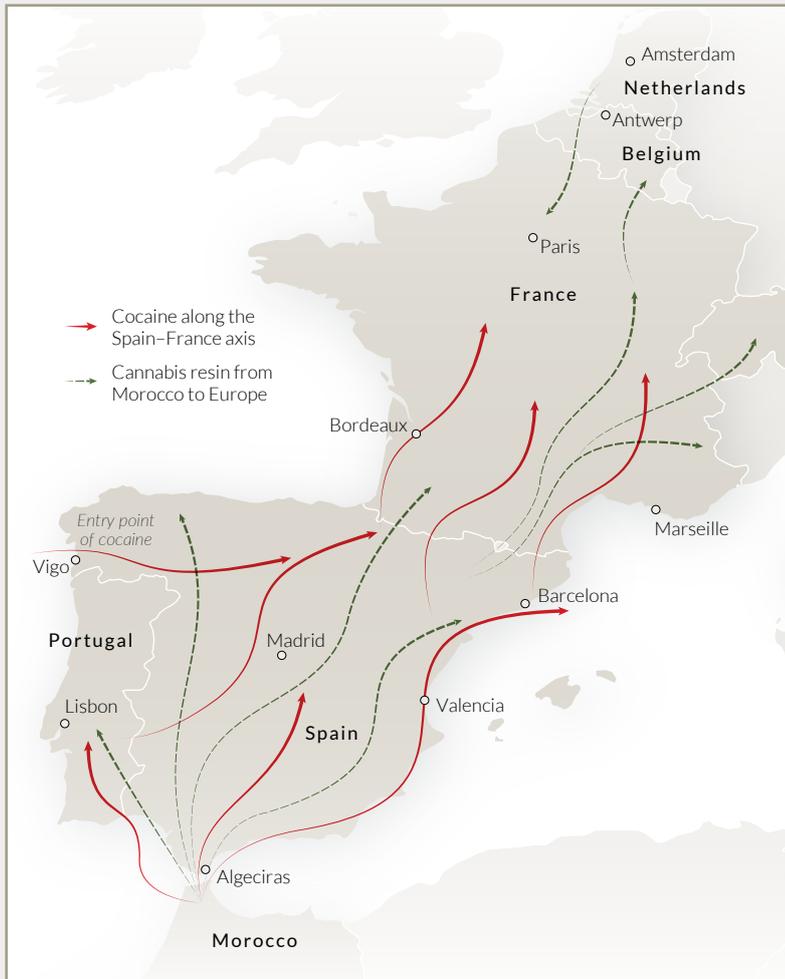


FIGURE 4 The Morocco–Spain–France cocaine axis.

markedly over the past two to three years, with sources describing a visible increase in the number of intermediate traffickers entering the market. In the Bayonne–Anglet–Biarritz area, cross-border intermediaries operate with small, but frequent, quantities, moving 3–4-kilogram consignments at a time on a biweekly basis.⁸⁵ Although such claims cannot be independently verified, they point to the perceived permeability of the corridor and to the importance of embedded protection mechanisms in sustaining flows.

The corridor’s significance for large-scale trafficking is illustrated by a high-profile seizure in the Landes, a neighbouring region in south-western France. In late January 2026, French customs officers stopped a Spanish-registered truck at the Castets toll on the A63 autoroute that connects the Spanish border with the city of Bordeaux, and found 136.6 kilograms of cocaine hidden in a double-bottom concealment in the vehicle’s tractor.⁸⁶ The case underscores how organized networks move multi-hundred-kilogram consignments deep into France by road after crossing from Spain.⁸⁷ Although this pattern is consistent with flows transiting via southern Spain – including shipments that may have entered the Iberian Peninsula through Morocco and the

Strait of Gibraltar – it is important to note that cocaine moving along this axis may also have entered Spain directly from Latin America via Atlantic-facing ports in north-western Spain, such as those in Galicia. This corridor is also characterized by a marked division of labour and diversification. Actors describe buying at €24 000–€30 000 per kilogram in Spain and reselling at €42 000–€45 000 in France, where it is sold at the retail level, often in sub-gram quantities (around 0.8 grams).⁸⁸ This cascading price structure reflects a fragmented but resilient supply chain in which multiple actors operate between importation and retail.

The western Mediterranean corridor now operates as a flexible interface between trans-shipment zones and European consumer markets – one that increasingly supports diversified trafficking portfolios and fragmented shipment strategies designed to minimize risk. Yet this adaptive logic does not stop at the Strait of Gibraltar. As enforcement pressure shifts geographically and traffickers continue to experiment with maritime delivery models, similar dynamics are becoming visible further east, such as the Sicily Channel.

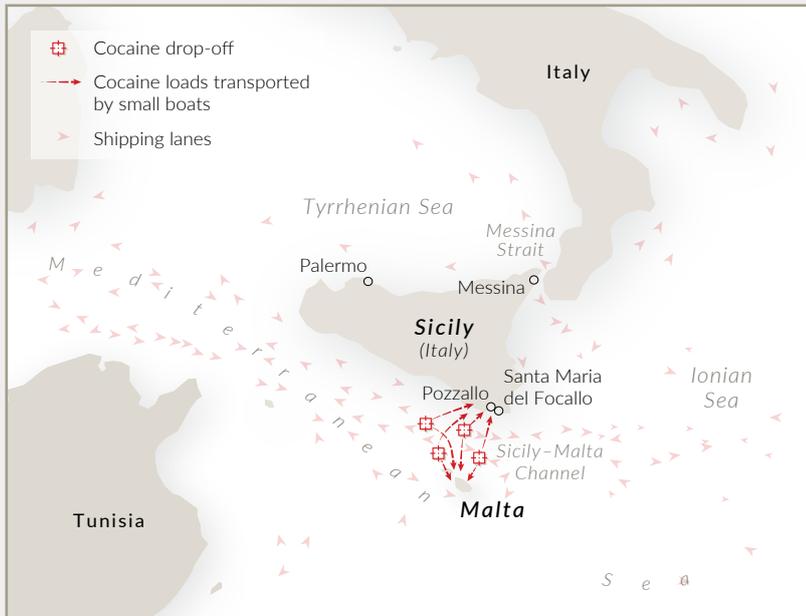


FIGURE 5 Areas of cocaine drops-off in the Sicily-Malta Channel.

Within this broader reconfiguration of southern maritime routes, the Sicily Channel (a section of the central Mediterranean Sea between southern Sicily and Malta) has increasingly emerged as a micro-corridor linking offshore deliveries, coastal retrieval and short-range redistribution across the central Mediterranean. Its position astride major east-west shipping lanes means that vessels transiting between the Atlantic and the eastern Mediterranean routinely pass through the area, creating opportunities for offshore handovers that remain physically distant from heavily monitored ports.⁸⁹ Investigative reporting on the ‘drop-off’ method describes how cocaine shipments are increasingly thrown overboard from cargo vessels and later recovered by smaller boats, often fishing vessels or fast craft operating closer to shore.⁹⁰ This technique allows traffickers to separate long-haul maritime transport from coastal retrieval, reducing the exposure of both stages and complicating interdiction efforts at sea.⁹¹

Law enforcement reporting and seizures in waters off Sicily have repeatedly underscored that significant quantities can be moved and recovered at sea, including cases where large shipments of cocaine have been found floating offshore – consistent with drop-off or loss scenarios during maritime transfer (see Figure 5).⁹² Operational reporting also points to interdictions south of Sicily involving fishing vessels and ‘high seas’ operations supported by international coordination, highlighting how trafficking activity is not confined to port approaches.⁹³ More broadly, in January 2026 Europol emphasized evolving maritime tactics, including the increasing use of non-commercial vessels and semi-submersible or low-profile craft – developments that expand delivery options beyond containerized imports and shift interdiction demands further out to sea.⁹⁴

In this context, south-eastern Sicily functions as a natural reception zone within a broader maritime corridor in the central Mediterranean area. Once loads are recovered offshore, they can be rapidly transferred inland and fragmented for onward movement. The geography of the Sicily Channel also creates a short-distance bridge towards Malta, where routine ferry traffic and leisure-boat movements provide additional opportunities for redistribution across the EU’s internal maritime border.⁹⁵ Rather than acting as a primary entry hub, Malta appears as part of a short-range logistics chain that connects coastal landings in Sicily with wider European distribution networks.

Early 2026 Italian Judicial reporting illustrates how this corridor operates in practice. In a 2024 case involving the Pozzallo-Malta catamaran route between the two islands, a Romanian national was sentenced to 17 years’ imprisonment after transporting 15 kilograms of cocaine concealed in a vehicle shipped from Sicily to Malta by ferry.⁹⁶ In March 2026, Maltese police arrested four individuals – two Maltese nationals and two Italian citizens – after intercepting a vehicle arriving from Sicily by the same catamaran route carrying just over 12 kilograms of cocaine.⁹⁷ These seizures highlight how ordinary passenger and vehicle traffic between the two islands can be exploited to move fragmented consignments after initial maritime delivery. Such movements are analytically important because they demonstrate the micro-logistics that follow offshore drop-offs: once the highest-risk maritime transfer has occurred at sea, short-distance crossings allow traffickers to disperse loads further without relying on major commercial ports.⁹⁸

The Sicily Channel also reflects the increasingly multinational character of Mediterranean cocaine trafficking. Investigative reporting describes cooperation between Latin American

suppliers and a range of European and transnational criminal actors – including Turkish, Albanian and Italian organized crime groups⁹⁹ – who collaborate to recover shipments at sea and move them across the region.¹⁰⁰ This convergence mirrors the multicultural composition observed in northern European cocaine markets and underscores the role of the central Mediterranean as a shared operational space rather than a territory dominated by a single nationality.

Taken together, the Sicily–Malta axis illustrates a broader European blind spot. For years, enforcement attention has been heavily concentrated on the Atlantic and North Sea gateway ports – Antwerp, Rotterdam and Hamburg – where record

seizures have reinforced a narrative of centralized entry points. In parallel, Mediterranean routes have gradually consolidated as lower-profile alternatives, operating in a region where security priorities have traditionally centred on irregular migration and cannabis trafficking rather than cocaine imports. This strategic imbalance has facilitated a form of maritime fragmentation: instead of concentrating risk in a single major port, traffickers distribute it across offshore drop-offs, dispersed coastal landing points, rural storage sites and short intra-Mediterranean crossings. The result is a flexible, layered logistics chain that complements containerized routes while reducing reliance on the heavily scrutinized Atlantic port infrastructure.

Notes

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