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THE NEW DRUG WORLD

RETHINKING MULTILATERAL COOPERATION IN AN AGE OF SYNTHETIC THREATS

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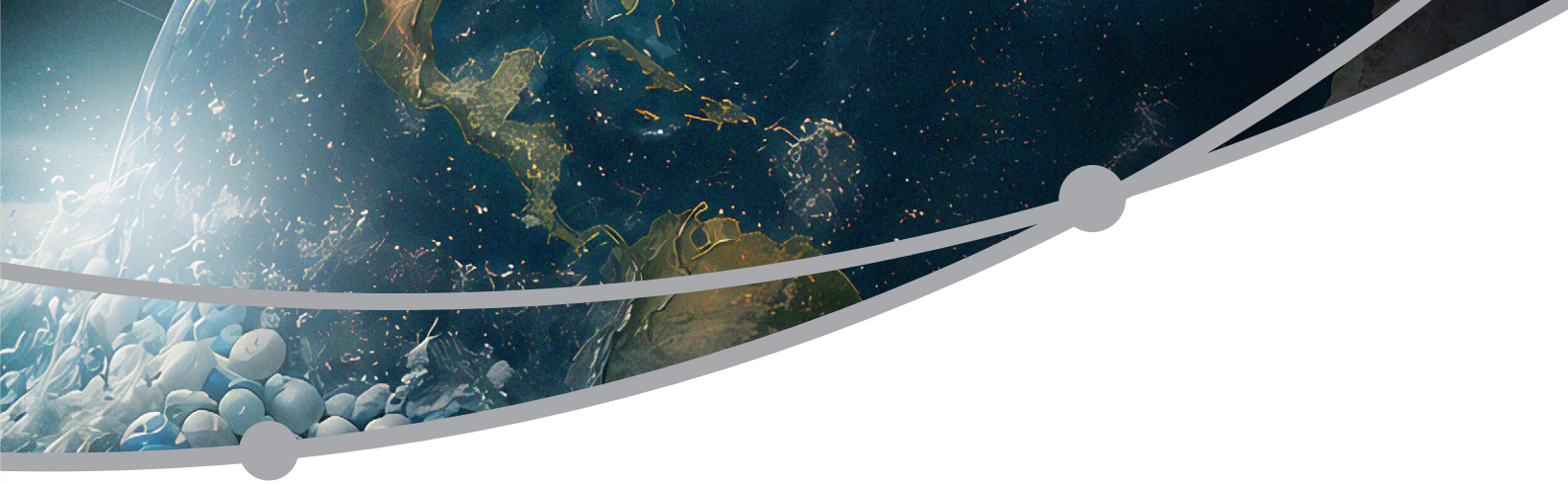
CONTENTS



SUMMARY

The architecture of international drug control has been constructed around certain assumptions about how illicit drugs are produced, how they are trafficked from source to consumption markets and who moves them. This is reflected in the international drug conventions and their scheduling frameworks, and the consensus-based multilateral cooperation agreements that support them.[1] Those defining assumptions were never perfect, but for several decades they at least provided a workable map of a recognizable drug landscape. Today, however, that landscape has been transformed, the map is out of date and the consequences of navigating by it would be a flawed understanding of the direction that global drug control should follow. This is because the global illicit drug landscape, as we once knew it, no longer exists.

Cocaine seizures may dominate media headlines, and cocaine is still a significant focus of law enforcement agencies and security assets globally. Nevertheless, despite an estimated surge in cocaine production in recent years, the cocaine trade has not significantly changed its fundamental structure. Neither has it contributed substantially to the changes that are being observed in the global drug economy. These changes are largely a reflection of developments in the global synthetic drug market – a complex and dynamic economy characterized by advances in technology and to an extent abetted by multilateral retrenchment. Synthetic drug supply chains have adapted to geopolitical and market developments, and have continued to grow and extend their reach. They are not tied to a specific geography, are not vulnerable to climate conditions, nor are they bound to a harvest schedule.

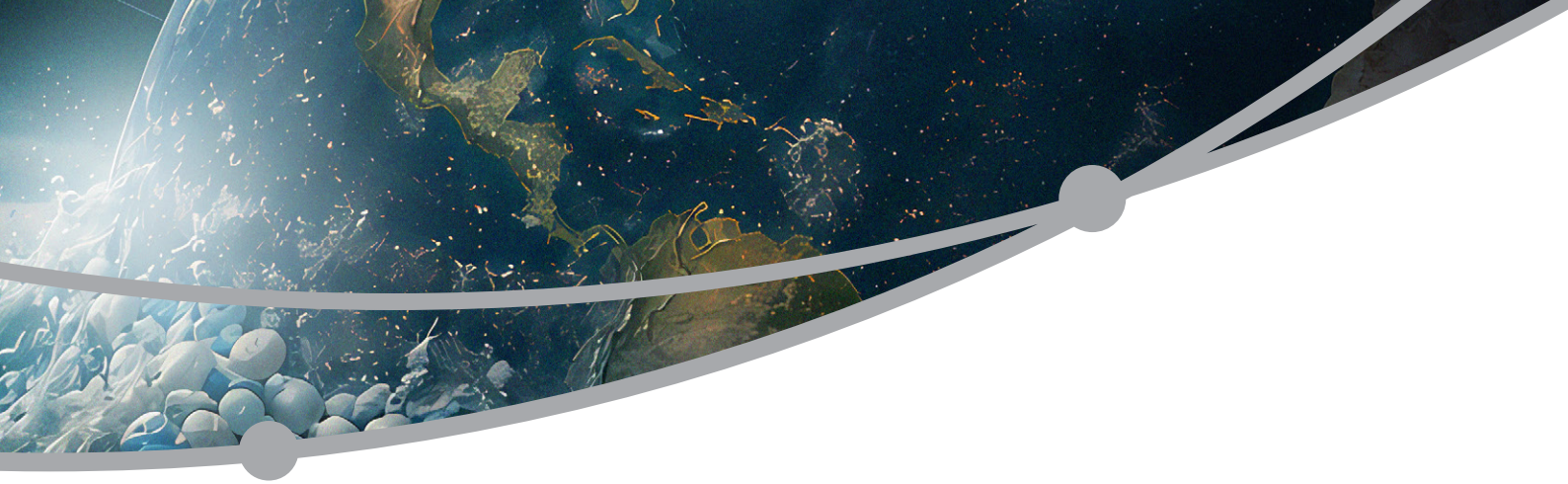
The global synthetic drug market is an environment characterized by its ability to exploit vulnerabilities in a compromised and globalized transport and communications infrastructure, shifts towards insularity in national security priorities, and the complicity of corrupted individuals and groups who operate across the licit–illicit global economic frontier. Without these features, trafficking in synthetics and their precursors, and the mobility and commodity velocity[2] they contribute to the market, would be a minor annoyance rather than the distinctive characteristic of contemporary drug market evolution that it has become.

As a consequence, today we live in a new drug world. It is one shaped by the intersection of the expanding synthetic drug economy, the adaptive and increasingly networked organized criminal groups that sustain it, the technologies that enable it and a disrupted geopolitical terrain in which the soft-power diplomacy, cooperative trust and institutional connectivity that once underpinned effective multilateral action have been significantly, though not irreversibly, eroded.

This paper synthesizes extensive research on global drug data and policy conducted over several years by the Global Initiative Against Transnational Organized Crime (GI-TOC). It offers a candid assessment of global drug policy trends, identifying four areas where multilateral cooperation is faltering and the risks posed if multilateralism continues to erode. These dynamics, however, are not irreversible, and if states and their agencies recognize the risks, re-engage with the challenges, recalibrate policies, and base their decision making and actions on cooperative responses and reliable drug data, then progress can be made to mitigate the harms of the new drug world.

Key points

- While the increase in cocaine production and seizure frequency have received considerable attention, these dynamics in the cocaine market have not impacted the global drug economy in the way that synthetic drugs have.
- The rapid proliferation of synthetic drugs has altered the structural fabric of global drug markets and challenged the international response architecture.
- Drug production and supply chains are no longer bounded by agricultural production models and have thus proliferated globally as a result of the rise in synthetic drugs.
- The increased potencies of certain synthetic drugs, and the synthesis and use of a diverse array of new or unscheduled chemical analogues, have created unprecedented challenges to public health systems and law enforcement agencies.
- Diversion of chemicals from commercial sources underpins the resilience of synthetic drug market environments.
- The increasingly horizontal structures of global criminal operations are able to exploit scalabilities, efficiencies and transaction-based networking on a global scale.
- The multilateral cooperation architecture on which drug policy was constructed has been disrupted. While this international compact should not be viewed as a failed project, a new drug policy approach needs to be developed in order to respond to the challenges of the new drug world.



THE POST-AGRICULTURAL DRUG REVOLUTION

Cocaine seizures dominate media headlines. As a criminal commodity with a long history of production and use, the cocaine trade is seen as a significant security threat by law enforcement agencies and security assets globally.[3] Cocaine is available in every country of the world,[4] and its consumption is estimated to be increasing.[5] Yet, in spite of an arguable surge in Andean cocaine production in recent years,[6] and an increase in its proliferation and use in Europe in particular,[7] the cocaine economy has not significantly changed its fundamental trade-based structure. The nature of cocaine as a substance has not changed; neither have its production methods, its agrarian foundation, nor its primary point of geographic origin. While apparently growing in volume, and with new organized criminal groups participating in aspects of its supply chain, the way the cocaine global sub-market operates has remained largely unchanged from its historically established architecture.

The cocaine economy has a traditional structure, much of which is rooted in the agricultural dependency of its source ingredient (the leaves of the coca bush) and the geographical origin of its principal cultivation zones. Even though elements of the tradecraft related to this drug and its market may be modified (e.g. transport modalities, new wholesalers, a wider cultivation geography, etc.), the cocaine business model remains largely unchanged. Cocaine has not disrupted the world drug economy in the way that synthetics have.

We must acknowledge and accept that the widespread emergence and geographic proliferation of synthetic drugs have permanently altered the structural fabric of global drug markets. More cocaine, no matter how much we think is flowing, has not and will not do this. Synthetics have changed the way organized criminal groups are structured, how they operate, where they are located and who is involved. For most of the 20th century, the global drug economy was anchored in agrarian geographies. Heroin requires opium poppies; cocaine is processed from coca leaf. The dependency of drug production on certain regionally based agricultural ecosystems gave international drug policy a spatial logic. The threat could be mapped, source countries targeted, and supply chains predicted. By extension, investments could be made in pursuing crop eradication, promoting alternative development, or targeting interdiction corridors on supply routes. With globally dispersed synthetic drug production sites alongside an expanse of supply and distribution chains, that geography has dissolved.

A coca leaf plantation in Colombia. The global synthetic drug revolution has partly come about because the production logistics are not constrained by rural agricultural ecosystems. *© Joaquín Sarmiento/AFP via Getty Images*

Driven by advances in chemistry, the globalization of supply chains for industrial chemical products, and the ways in which organized criminal networks have adapted to synthetic drug markets, a drug revolution has taken hold. The synthetic drug economy has decoupled a large component of the drug production economy from agricultural dependency. Clandestine laboratories capable of producing methamphetamine, synthetic cathinones, or ultra-potent nitazene opioids can be established in any urban or rural location, and on any continent. This geographical dispersion model for synthetic drug production has been supported by the diversion of precursor chemicals, much of which are sourced from commercial markets and providers. It benefits from technical knowledge acquired from the internet and the proliferation of online tools like generative artificial intelligence (AI), and, increasingly, from physical transaction-based networked partnerships between criminal groups that operate in the franchising of production operations grounded in bespoke, hyper-efficient synthesis formulae and techniques.

In its most recent report, the Global Organized Crime Index assessed that the synthetic drug trade had registered the largest year-on-year increase of any criminal market since its measurements began in 2021.[8] Only seven countries out of the 193 analyzed were found to have little to no synthetic drug market presence. By comparison, the presence of heroin-based criminal markets was documented in fewer counties than that of synthetics.[9] That trajectory is not a statistical anomaly: it is a structural signal that tells us that global synthetic drug expansion is not a temporary disruption but a permanent feature of the new revolutionized drug world we now inhabit.

Another reason for the revolution is that synthetic drugs have proven to be a relatively easy source of revenue for organized criminal groups.[10] They can be made anywhere, with a staggering diversity of precursor and pre-precursor chemicals used in their synthesis, and an expanding global supply chain network capable of providing these chemicals through licit and illicit channels. Barriers to market entry that surround agriculture-dependent drugs, such as cocaine and heroin, therefore do

not exist for the synthetic drug marketplace.[11] As a result, a body of entrepreneurial criminal groups and networks has emerged alongside more familiar, established criminal organizations.[12] This low threshold of participation has contributed to the ubiquity of synthetic drugs as core commodities in the global drug market landscapes.[13]

The sheer range of synthetic substances being brought to market has also posed challenges in responding to these categories of drugs. Chemical analyses of street-based retail synthetic drug supplies have uncovered a worrying array of substances in inventories in countries around the world.[14] The rapid pace of synthetic substance innovation challenges existing regulatory frameworks. Authorities struggle to keep pace with the number of new substances that reach the market, their potential health risks and their contribution to wider illicit drug market dynamics. Many countries and entire regions simply lack the capacity to identify or monitor synthetic drug emergence and proliferation in their marketplaces – a reality that reveals how much is still unknown about these illicit commodities, their flows and impacts.

What little is known about the scale of the penetration of synthetic drugs is grounded almost exclusively in the political geography of Australia, Europe and North America, and the (limited) use there of advanced chemical surveillance methods. For example, in Europe the use of wastewater-based epidemiological technology has shown widespread availability of ketamine, cathinones, amphetamine and methamphetamine in the region.[15] Community-based drug testing initiatives in North America have identified the transition in the street market supply from fentanyl to nitazenes, and the rise of orphines.[16] Voluntary pill testing services in Australia have catalogued a variety of synthetic substances across the country's retail drug market landscape.[17] However, these examples provide only a glimpse of what is the reality around synthetic drug market penetration globally. Elsewhere, such surveillance tools and techniques are mostly unavailable and the threats unaccepted or unknown.

A Myanmar police officer displays methamphetamine confiscated in a drug lab seizure, January 2026. The global proliferation of synthetic drugs is attributable to the fact they can be synthesized anywhere using readily available precursors. *© Joe Stenson/AFP via Getty Images*

Still, the limited geographical reporting we do have reveals a daunting challenge. In its latest annual reporting period, the United Nations flagged 688 new psychoactive substances (NPS) that had been identified globally, with 101 of these substances being identified for the first time.[18] In the same period, the European Union Drugs Agency reported that it was monitoring around a thousand NPS, of which 47 were identified for the first time.[19] Nevertheless, given the limited geographic coverage of chemical surveillance measures globally, it is arguably highly likely that we are only scratching the surface and do not fully grasp how extensive the presence or use of synthetic drugs has become. Even in locations where such technology is employed, there are technological and reference-based limitations. Chemical libraries, the foundation for substance categorization and classification used in traditional detection processes, tend to be fixed in their content and slow to update. This rigidity is contrasted with illicit chemists who are synthesizing substances that fall outside of these standard analytical databases, and doing so with great frequency and diversity.[20] Outside of these areas, in places without such tools, anecdotal evidence suggests that, compared to popular market-based narratives, we appear to know far less about what is going on in global drug markets than we think we do.[21]

This is an important caveat, as it extends to information from the realm of surveillance to that of public health. Alongside the breadth and diversity of global synthetic drug markets is the emerging and confounding scale, range and reach of apparent substance contamination and adulteration being seen in street market supplies, and the subsequent risks this poses to the health of populations of people who use drugs.[22] Limited testing initiatives are revealing that substances often are not what they are expected to be by people who use drugs. The detection of opioid analogues is increasing, as is the presence of commingled veterinary tranquilizers and benzodiazepines.[23]

Synthetic opioids, such as fentanyl, nitazenes and their analogues, are being found unexpectedly in a number of countries.[24] Often undetected were it not for voluntary revelations provided by community-based chemical testing initiatives, or through postmortem analysis, these substances contribute to drug-related morbidity and mortality worldwide.[25] The World Health Organization (WHO) notes that 80 per cent of deaths attributed to drug use globally are related to opioids.[26] The increased detection of such substances poses unprecedented challenges to public health systems and law enforcement agencies alike, many of which are unaware of the presence of such opioids in local drug supply chains.[27] In North America, for example, community-based drug checking data highlights the heightened risk inherent in the continent's synthetic drug supply, a feature that significantly inhibits overdose prevention programmes.[28] This comes as the most common fentanyl contaminants (benzodiazepines and the veterinary tranquillizers medetomidine and xylazine) do not respond to overdose reversal medications. And as regional and global drug politics wrestle with ever more securitized responses to fentanyl analogues, and to a lesser degree with nitazenes, the most recent phenomenon of orphines[29] has revealed yet another generational class of synthetic opioids that now contaminate street drug supplies in Canada, the US and a number of other countries.[30]

Pills containing fentanyl on display at a Drug Enforcement Administration laboratory. In December 2025, the US designated the synthetic opioid as a weapon of mass destruction. *© Angela Weiss/AFP via Getty Images*

The role of precursor chemicals

As countries grapple with these wide-ranging threats posed by the synthetic drug environment, the global pharmaceutical and chemical industries that supply its producers expand at a rapid pace, and yet remain largely unregulated, particularly in China and India, as well as across the developing world.[31] This growth is mirrored by an increase in the scale of illegal trade in chemicals globally.[32] A proliferation of expert actors and brokers, including complicit chemists and firms producing and selling synthetic substances and their precursors, has enabled industrial products and supply chains to be diverted into illicit economic activity at scale. Such instances of diversion, which occur either directly from the chemical and pharmaceutical enterprises that manufacture these substances or through acquisitions from complicit or compromised organizations that source supplies, ostensibly on behalf of legitimate industrial clients before brokering them to organized criminal end users, demonstrate the ineffectiveness of the voluntary schemes that are supposed to regulate such a vast and complex industrial sector.

For organized criminal groups to sustain synthetic drug production, they are critically dependent on access to precursor and pre-precursor chemicals. The systematic manipulation of legitimate chemical supply chains through diversion, fraudulent end-user declarations, the use of unscheduled analogues, and the exploitation of regulatory gaps constitutes a structural vulnerability that industry control frameworks have not adequately addressed. The International Narcotics Control Board, the independent monitoring body for the implementation of the UN drug control conventions, determined that illicit drug markets are experiencing a dramatic period of change driven to a substantial extent by the exploitation of precursor chemical supply chains, with synthetic drugs at the centre of this shift.[33] Additional independent analysis concluded that precursor chemical diversion is a primary enabler of the global synthetic drug manufacturing ecosystem, noting that the diversion of chemicals from legitimate commercial sources has sustained the production capacity that underpins expanding drug market environments.[34]

The role of China has continued to dominate discussion related to the identification and disruption of illicit precursor supply chains. Its chemical and pharmaceutical industry had combined sales of over €2.9 trillion in 2024. Almost 42 per cent of the world's chemical and pharmaceutical sales originate in China, making it the largest chemical and pharmaceutical producer in the world.[35] Chinese-origin precursors have long been seen as a significant component of the global synthetic drug production landscape.[36] In response, authorities in China have implemented improvements to their regulatory regime around the movement of scheduled chemicals. These included becoming the first country to place fentanyl and its analogues under national control (beginning in 2019),[37] implementing more restrictive reforms to the way chemical companies advertise and sell precursors through online retail marketplaces, including taking down some websites,[38] and placing under control a growing number of previously unscheduled fentanyl precursors (2024).[39]

The pharmaceutical and chemical industries that supply precursors used in the manufacture of licit and illicit synthetic drugs are largely unregulated, particularly in China and India. *© Narinder Nanu/AFP via Getty Images*

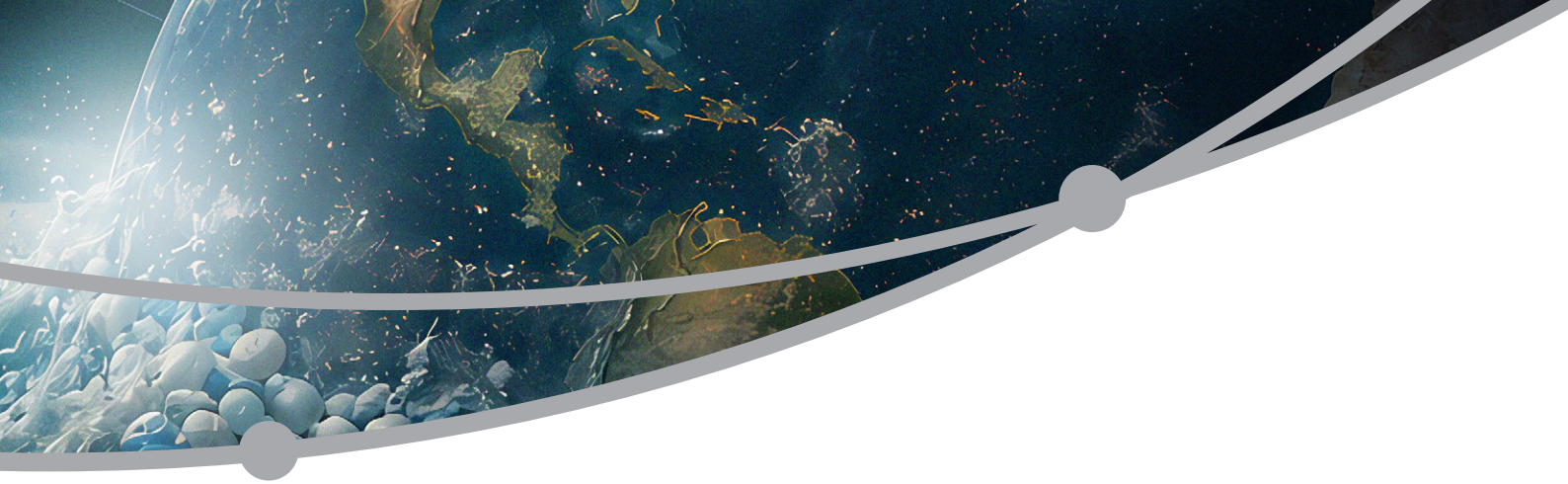
Precursor chemical diversion is a primary enabler of the global synthetic drug manufacturing ecosystem

These initiatives contributed to an improvement in multilateral engagement between China and several affected states, including Canada, Mexico and the US, with bilateral working groups established and some improvements in agency-to-agency cooperation over previous years. In respect to tangible impacts from these actions, and acknowledging that drawing inferences from data related to Chinese government drug policy actions is inherently speculative, recent research has posited that precursor supply chain controls implemented by China offer a plausible explanation for the measured reduction in the purity and potency of unregulated fentanyl in the US marketplace.[40] Other commentators have raised concerns however over the socio-economic and industrial impact that these class-wide scheduling actions by China may have on one of the world's other large global chemical and pharmaceutical suppliers, India.[41]

India's pharmaceutical industry supplies 20% of the global demand for generic drugs.[42] It is also the world's largest manufacturer of psychotropic substances,[43] the third largest manufacturer of agrochemicals (after China and the US) and the sixth largest chemical producer globally.[44] As with China, India-based companies are documented suppliers of licit and scheduled precursors – directly and through diverted licit flows – to illicit synthetic drug production hubs in the Mekong region,[45] producers in Afghanistan,[46] clandestine labs located in eastern and southern Africa[47] and production hubs in Mexico, Canada and the US.[48] Although the volume of chemicals originating from India and exported to some of the major synthetic-drug producing regions is low compared to the quantities from China, the role played by Indian chemical providers in the production of illicit synthetic substances should not be ignored. All the more so when one considers that the Indian pharmaceutical industry is projected to see tenfold growth over the next 20 years.[49]

While recognizing that the global drug market has been structurally altered by the growing impact of synthetics, we also need to acknowledge, as a second thematic tenet, that organized crime itself has transformed and this is reshaping the new drug world.

Placards commemorate opioid overdose fatalities. The World Health Organization estimates that 80 per cent of deaths attributed to drug use globally are related to opioids.
© Andrew Lichtenstein/Corbis via Getty Images



THE CHANGING FACE OF ORGANIZED CRIME

Traditional, linear understandings and expectations of organized criminal group structures, motives, presence and behaviour are obsolete. Organized criminal networks have become adaptive, modular and geopolitically entangled. No longer are they the hierarchical, territorially bound organizations that dominated normative 20th century understanding of the mob personified by international drug trade gangs. They have morphed into something qualitatively different, and are increasingly integrated with state actors, licit industries and geopolitical agendas.

Today, most drug trafficking organizations do not look like the traditional mafias and cartels of popular imagination. Instead, they share more in common with distributed service networks. They outsource logistics to specialist brokers, procure chemicals by means of legal corporate facades, and launder proceeds through cryptocurrency infrastructure and trade-based financial schemes that span numerous jurisdictions and regulatory environments. These increasingly horizontal and effective organizational structures exploit scalabilities, maximise efficiencies and enable near-friction-less, transaction-based networking on a global scale.

In practical terms, many of these networks have no fixed headquarters, no identifiable leadership visible in the physical supply chain and no single jurisdictional footprint. For example, European law enforcement operations reported the seizure of more than 60 clandestine synthetic drug production labs across the continent in the first quarter of 2026.[50] Research has demonstrated that Mekong meth supply chains now extend from South East Asia to African, Central American and European shores.[51] Mexican cartels have near-shored meth production to African locations in partnership with local syndicates using Asian chemicals, and ship the resulting product to Pacific-based consumers.[52] Synthetic drugs are no longer the future of organized crime:[53] they are its profitable present, and they have become globalized.

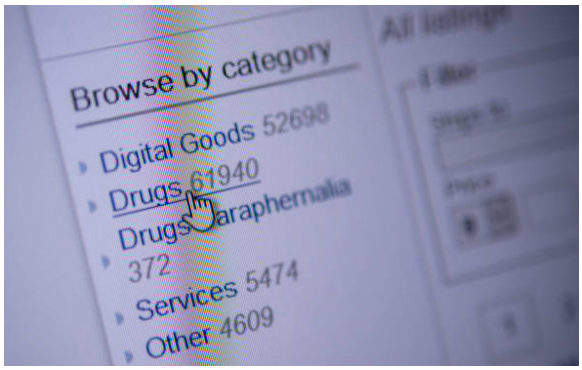
The rapid globalization of synthetic drugs has had several profound impacts on organized criminal structures. It has disrupted traditional marketplace dynamics, supply chains and actors in ways that consumers and suppliers are no longer restricted by the limitations of geography. Traditionally, illicit drug supply chains had to manage risk across multiple jurisdictions and seek logistical efficiencies for the production, supply and distribution of their agriculturally bound commodities from rural points of origin. By comparison, synthetic drug production and distribution can be achieved nearly anywhere, with far fewer inputs, and significantly diminished spatial and temporal constraints along the supply

chain from source to market. The overlap with legitimate chemical trade dynamics and the fungibility of its end products reduce risks, limit supply chain frictions, and complement distribution efficiencies in ways that are not possible for more traditional drug suppliers.

Impact of digital marketing

The third major shift defining the new drug world is the effect digitalization has had on the illicit retail marketplace. Today, digital market infrastructure has penetrated most countries and in so doing has created a borderless, rapidly developing transactional environment that has changed the way many retail drug markets structure their operations. Particularly since the COVID pandemic, significant portions of the illicit drug trade have migrated from street-level, face-to-face distribution networks to clear web and dark web crypto-markets, encrypted messaging platforms and social media sales channels. The anonymity and financial security provided by these online marketplaces and peer-to-peer mobile phone-based applications has altered the street-based profile of distribution and retail sales. These platforms operate without meaningful geographic constraint, with considerable anonymity and with Amazon-like diversity and efficiency. In a world that has more mobile phones than people,[54] with nearly three-quarters of the global population connected to the internet,[55] the significance of these technological advances to illicit drug market operational dynamics is paramount. Alongside efficiency gains, these technologies inject further layers of resilience into synthetic drug business models. The subsequent impact of these features to the potential broad-based disruption of the traditional drug retail industry, not to mention disruption to the drug control efforts of security agencies, is enormous and has become a contributing factor in the manifestation of a new drug world.

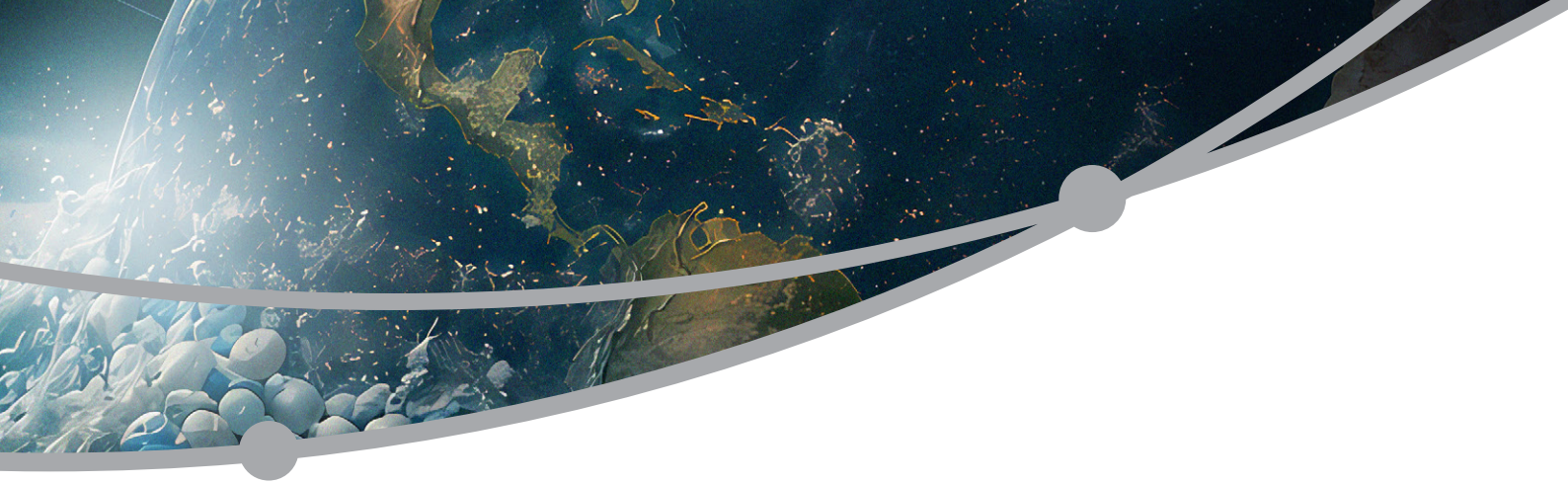
This digital transformation is not a niche phenomenon. It is a mainstream feature of drug markets in all high-income countries, and an accelerating trend in middle- and low-income ones. It represents a realignment of supply and distribution principles. The successful seizure of the Archetyp online drug marketplace in 2025, one of the largest at the time, reveals just how challenging this environment has become for regulatory authorities.[56] While each crypto marketplace taken down may represent a disruption victory for law enforcement, evidence reveals nevertheless that an interdicted platform's transactional volume quickly shifts to successor platforms within weeks.[57] It is a business model that is, in a meaningful sense, enforcement-resistant by design.



A substantial portion of illicit drugs are marketed using darknet platforms, encrypted messaging and social media sales channels. *© Sebastian Gollnow/Picture Alliance via Getty Images*

A final point to consider in how the new drug world is being shaped, and addressed, is where we sit today as a drug policymaking community.

The trade in synthetic drugs is rapidly and unrelentingly altering the architecture of the global drug market



DRUG POLICY IN AN AGE OF RETREATING MULTILATERALISM

In a short period of time, significant geopolitical repositioning has fractured the multilateral cooperation architecture on which drug policy development and implementation has depended. This has been driven by broader disruption of the geopolitical order in which that architecture was fundamental. This development is perhaps the one that most directly challenges how illicit drugs are considered going forward.

International drug policy development, at its foundation, has been a multilateral enterprise. It requires shared intelligence and coordinated implementation. It requires diplomatic trust to sustain the intelligence-sharing and operational relationships through which transnational criminal networks can be identified, penetrated and prosecuted. All of these requirements are now under strain in a geopolitical order characterized by 'great power' competition, democratic backsliding in states that are also significant drug transit or production territories, and the deliberate weaponization of information and institutional trust by adversarial actors.

As multilateral cooperation frameworks continue to buckle, criminal networks benefit. They exploit gaps between jurisdictions and route their supply chains through bilateral blindspots. They grow in the spaces that states cannot or will not collectively see, either in new sites beyond their frontiers, or in emergent local places at home. The synthetic drug transformation is not a regional phenomenon or a transitional market disruption. It is a pragmatic, structural reorganization of the global drug economy, which is now embedded in the criminal markets of 96% of the world's countries.[58]

In considering how to navigate this new drug world, we must acknowledge and accept the degree to which public security imperatives have displaced the consensus-based and rights-anchored multilateral tradition that once gave the international community, through the Commission on Narcotic Drugs (CND), its unifying purpose. Narrow regional frameworks and interest-based partnerships[59] have begun to fill the space that eroding multilateral consensus has left vacant. Funding models and agencies that once gave meaningful operational weight to public health and human rights principles have been redirected back towards security-first objectives, a reorientation that reflects genuine pressures, but risks also winnowing the collective global response precisely at the moment when its breadth is most needed.

DEA agents in an anti-drug operation in Los Angeles. Securitized responses have begun to fill the space that waning multilateral consensus has left vacant. *© Allen J. Schaben/Los Angeles Times via Getty Images*

Past responses to evolving drug market trends have seen governments and international organizations adopt a multifaceted approach, combining law enforcement efforts with public health initiatives. Some have achieved positive results, particularly those that are grounded in evidence- and public health-based objectives.[60] However, the gravity of the current crisis, in particular when we recognize the limits of our knowledge and capacity to understand and respond to what is happening in today's drug markets, is inescapable. Increased investment in international surveillance, cooperation and information sharing has become crucial in addressing the transnational nature of synthetic drug markets and their trade. Yet the current geopolitical environment has seen previous consensus-based multilateral aspirations falling victim to a disruptive political emphasis on national citizen security and more subjectively defined domestic approaches to drug threats.

For example, the Global Coalition to Address Synthetic Drug Threats, an initiative launched in 2023 and promoted at the 67th CND meeting in 2024, and having enlisted most of the world's nations to pursue a coordinated, multilateral approach to documenting and disrupting the threats created by expanding synthetic drug markets and their actors, has receded over the past year into the political backwaters.[61] And, for the first time, in March 2024 two of the four resolutions tabled at the CND were called to a vote. This was seen as a violation of the traditional 'Vienna consensus' on such things.[62] In the end, the tabled resolutions passed but without unanimous agreement among the Commission members.[63] This act broke a decades-long tradition of consensus decision-making that had characterized the CND process.[64] Arguably, it foreshadowed what has become interpreted as a disruption to traditional political dynamics.[65] This initial breaking with consensus signified what was to become a reorientation in global drug policy decision-making and the competing strategic priority-setting of states moving forward. That the impacts of this development coincided with a rapidly proliferating global synthetic drug market is unsettling. Later, following the vote requests made in 2024, in the subsequent CND meeting of March 2025 none of the meeting's six tabled resolutions achieved consensus. This was an indication that what was looking like a strained global drug policy environment had now become clearly fractured.[66] A year later, the absence of consensus on every tabled resolution was repeated at the 69th CND in March 2026.[67]

Further to this point on how the politics of drugs are addressed and how they are controlled at the global level, UN member states, as a matter of accepted practice, continue to exclude drugs from any thematic or response-based discussion at the meetings of the Commission on Crime Prevention and Criminal Justice (CCPCJ), the pre-eminent global forum for addressing transnational organized crime, as well as within the framework of the UN Convention Against Transnational Organized Crime (UNTOC) Conference of Parties. This exclusion is a further concern in terms of how drug policy is envisaged, defined and addressed at the multilateral level.[68] That one of the world's largest illicit commodities – drugs – is excluded from discussion at a forum founded on the objective of developing and coordinating global solutions and response approaches to achieve the disruption of global organized crime raises fundamental concerns.

This drug control-related tension among partners at the global level is also reflected in the content of regional drug forums. For the first time in its history, the North American Drug Dialogue, a trilateral mechanism for the coordination of drug policies between Canada, Mexico and the US, failed to reach consensus on a joint outcome statement following its January 2026 meeting. Instead, each country issued its own national statement.[69] At the Inter-American Drug Abuse Control Commission of the Organization of American States (OAS) member countries have failed to reach consensus on a unified hemispheric action plan on drugs, and have become increasingly divided on the way forward.[70] There is growing tension in the continental drug policy consensus as defined under the stewardship of the African Union (AU), with some states increasingly expressing more conservative values than those represented in the AU Plan of Action on Drug Control and Crime Prevention.[71] A similar lack of harmony exists within the membership of the Association of South East Asian Nations (ASEAN) in the context of the ASEAN Work Plan on Securing Communities Against Illicit Drugs, with conservative and moderately reformist political agendas colliding on how to define the region's way forward on drug policy.[72]

Generally, there appears to be a growing movement across states towards a more conservative interpretation of drug policy, encapsulating what is a return to prior security-driven narratives and solutions. The geopolitical tension engulfing drug policy forums has been exacerbated by various recent unilateral decisions and interventions, each of which has had ramifications beyond their nationally defined objectives. In January 2025 the United States designated eight drug trafficking cartels as terrorist entities,[73] thus formally converging perceived criminal threats with terrorist ones. Canada followed in February 2025, by designating seven of these groups in the same manner.[74] Argentina and El Salvador have made similar designations.[75] That these policy decisions provide more tools to aid in the efficacy of disruption, arrest and prosecution efforts against organized drug trafficking entities has been contested.[76]

More recently, in a move that drew criticism, the US shifted to direct military action, targeting vessels in international waters believed to be transporting illicit drugs.[77] In pursuing this policy of direct action, dozens of vessels have been sunk in the western Atlantic and eastern Pacific oceans.[78] Claims of successful cocaine market disruption followed as a consequence of these actions.[79] However, subsequent research by addiction experts on the impact of these strikes, as measured by evaluations of the retail price, chemical purity and ease of availability of cocaine in US street markets, suggests that there has been no disruption to the cocaine supply in the US as a consequence of these interdictions.[80] In addition, ongoing GI-TOC monitoring of cocaine price and purity in 12 European cities, a process that has been occurring for over a year, reveals a continuing decline in price and a corresponding increase in purity across monitoring sites.[81] This finding aligns with the most recent data released from

the European Union Drug Agency (EUDA), which confirms that after an annual seizure volume of 330 tonnes of cocaine in Europe in the most recent reporting year, cocaine prices continue to decline while cocaine purity in the region continues to increase.[82] These indicators are inconsistent with a disrupted market, and instead signal a market that continues to experience an abundant supply. This finding of an absence of measurable causal connection to market disruption in the US is not surprising: after all, analytical research has shown that dynamic law enforcement interventions seldom have the ability to significantly, and on their own, disrupt a resilient drug market.[83]

On the strategic drug policy front, in December 2025 the US designated the synthetic opioid fentanyl as a weapon of mass destruction.[84] The decision placed this critical post-surgical pharmaceutical in the ranks of a host of chemical, biological, radiological and nuclear (CBRN) materials. Even though this was a unilateral state action that was met with criticism,[85] it is one that also needs to be seen in the context of a shift in the play of global power dynamics where populist responses to illicit drugs and their perceived threats have become preferred to more traditionally inclusive measures.

A new drug policy for a new drug world

These kinds of actions suggest that the era of exercising power in a post-war rules-based international order through consensus-based diplomacy would appear to be over. Prioritizing homeland citizen security prerogatives through direct interventions over the softer, principle-driven and consensus-based strategic orientations of the recent past is now the new normal. The resulting disruption to the drug policy environment we see today requires states, particularly those in the majority that are not viewed as 'great powers', to reconsider their role within the new geopolitical drug policy landscape.[86] This may be done, for example, in the context of seeking transactional-based coalitions (at the state or institutional level) around issue-specific security-based concerns. Principal among these concerns, with respect to security and organized crime, should be how cooperative approaches can be reasserted in an environment that necessitates a collective urgency to mitigate the harms of the expanding synthetic drug-based global market.

While cocaine appears to dominate current drug control attention, particularly among the states of Latin America and the North Atlantic corridor, it is instead the trade in synthetic drugs that is rapidly and unrelentingly altering the architecture of the global drug market. The global illicit synthetic drug trade has quickly established a presence in nearly every country of the world, is dominated by increasingly sophisticated and networked transnational criminal networks intertwined with licit economic and political actors and agents, and operates in a modular framework of geographic autonomy. However, our recognition and acceptance of its expanse and diversity are weak. Technological advancements have facilitated ever more discreet methods of networked manufacture, trafficking and distribution. Synthetic drugs, as illicit commodities, represent a dominant revenue stream for organized criminal groups today. They have acted as a catalyst for the widespread infiltration of entrepreneurial actors into the global drug market. The complicity of pharmaceutical and chemical industry organizations, brokers and agents in the provision of

The US has conducted joint military maritime exercises as part of Washington's campaign against alleged drug traffickers in the Latin America–Caribbean region. *© Martin Bernetti/AFP via Getty Images*

the essential precursor chemical building blocks to support the rapidly expanding number of global clandestine labs fuels the resilience of this embedded criminal economy.

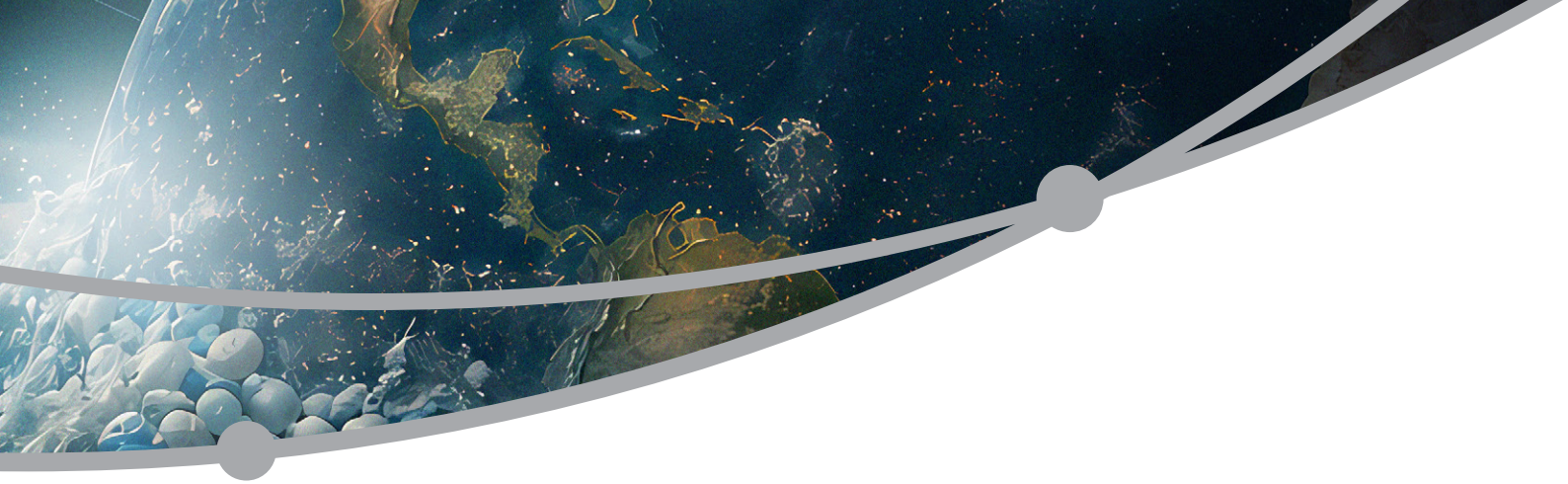
Actionable measures must be taken to impel states and regional blocs, and their related multilateral bodies, towards the realization that collective approaches and redefined objectives need to be considered and pursued in response. Such measures are becoming particularly pressing in a geopolitical climate that is seeing declining state emphasis placed on the pursuit of multilateral, consensus-based initiatives, and more on subjectively defined, national security-based interests. It is this specific challenge that must concern the membership of the recently inaugurated CND Expert Panel. As a representative body of international drug experts, the panel has been tasked by the UN to produce actionable recommendations to improve the implementation of the international drug control conventions. That this initiative occurs at a moment of waning multilateral cooperation in the drug policy project is fortunate, but the panel will also face challenges. The panel members have much to consider and a narrow time frame in which to do so, complicated by limited financial resources to support their work and a secretariat that is neutral in these discussions.

With synthetic drug markets present in 186 countries of the world and already exerting a significant to severe influence on many of these states, the threat potential of the current situation is extraordinary.[87] Given that the majority of affected states possess only a moderately effective resilience capacity to respond to this market and its impacts, it is evident that as a global community we have been too slow to react to the new realities of synthetics, and the new world disorder from which they are profiting. Unfortunately, the same cannot be said for organized criminal organizations, the actors behind them and their enablers in the private and public sectors.

The challenge ahead is exacerbated by a synthetic drug inventory of unscheduled analogues, pre-precursor compounds and diverted dual-use substances whose vital role in legitimate industrial-pharmaceutical supply chains makes regulatory or criminal responses not merely complex but, in many cases, economically and diplomatically untenable. The diversity and pace of illicit chemical innovation is not merely outrunning our scheduling frameworks and our chemical reference libraries, it is systematically undermining the disruption architectures that the international community has spent decades constructing. In doing so, it is generating a cumulative burden of public health harm whose full human cost we are, in many regions, only beginning to measure. In spite of much political, health and law enforcement strategic policy and intervention action that has already been taken, the human, developmental and societal harms of these markets have continued to grow. The shift of state power interests away from multilateral compacts in favour of narrower, nationally focused measures only contributes further to the complexities inherent in this drug marketplace transition.

As a consequence, we inhabit a new drug world. An environment that is proving to be increasingly hostile to traditional disruption strategies, it demands we think differently, act differently and cooperate differently. In so doing, it requires us to consider a new global drug policy approach for this new drug world. Multilateralism is not a failed project, but it must be re-imagined for the power dynamics and political interests that now govern the current international drug policy system. The trajectories are clear and the harms are real. The political will to act, collectively and urgently, in redefining the principles necessary for international drug control realignment is the one variable that remains still within our grasp.

Multilateralism is not a failed project, but it must be re-imagined



NOTES

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