

PRESS RELEASE

SYNTHETIC DRUG MARKETS NOW PRESENT IN 96% OF COUNTRIES AS GLOBAL POLICY RESPONSE FRACTURES, NEW GI-TOC REPORT FINDS

Released on World Drug Day, the new report ‘Synthetics and the New Drug World’ finds synthetic drugs entrenched in 186 of 193 countries, and documents a breakdown in the multilateral consensus that has shaped international drug policy.

Geneva, 26 June 2026 – The Global Initiative Against Transnational Organized Crime (GI-TOC) today releases *Synthetics and the New Drug World*, a new report by Senior Expert **Jason Eligh** documenting a structural transformation of the global illicit drug economy, and a widening gap between the scale of the threat and the international community's capacity to respond.

According to the latest Global Organized Crime Index, synthetic drug markets are now present in 186 of 193 countries. Only seven were assessed as having little or no synthetic drug market presence, a smaller footprint than illicit heroin markets. What was once described as the future of drug trafficking has already become its present.

Although cocaine remains a major focus for law enforcement agencies and security assets globally, the report argues that it has not transformed the structure of the global drug economy in the way synthetic drugs have. Unlike cocaine and heroin, synthetic drugs do not depend on agricultural cycles or geographically fixed production areas. They can be synthesised almost anywhere, using an evolving range of precursor and pre-precursor chemicals sourced through both licit and illicit channels, and distributed via the same global logistics infrastructure that moves legitimate goods. The barriers to market entry that once contained traditional drug economies no longer apply, drawing both large transnational criminal networks and smaller entrepreneurial actors into the market.

“We continue to underestimate the extent to which the rise in synthetic drugs has re-shaped the global drug economy, and the way that organized crime has changed because of it.”

Jason Eligh, GI-TOC Senior Expert on Drugs and Drug Markets, and author of the report

The report documents the expanding scale of the contamination crisis accompanying this growth. In its latest reporting period, the United Nations identified 688 new psychoactive substances globally, including 101 detected for the first time. The EU Drugs Agency reported monitoring approximately 1 000 substances, of which 47 were newly identified. Synthetic opioids, including fentanyl, nitazenes and their analogues, have been detected in multiple regions, with evidence from North America, Europe, West Africa and Australia pointing to growing public-health risks. In many affected countries, authorities lack the capacity to identify what substances are

circulating, let alone what risks they pose.

The study argues that this expansion is unfolding at a moment of acute geopolitical fragmentation. The consensus-based multilateral cooperation architecture that has shaped international drug policy for decades is now under severe strain. In the last two annual meetings of the Commission on Narcotic Drugs, no resolution achieved consensus, a signal that what had looked like a strained global drug policy environment is now a fractured one. National security priorities and unilateral interventions are increasingly filling the space left by eroding multilateral consensus, even as synthetic drug supply chains remain inherently transnational.

The report also examines the critical role of precursor chemical supply chains. China, which is responsible for almost 42% of global chemical and pharmaceutical sales, and India, the world's largest manufacturer of psychotropic substances by weight, with a pharmaceutical sector projected to grow tenfold over the next 20 years, feature prominently in the report's discussion of precursor chemical supply chains and the diversion of licit chemical flows into illicit synthetic drug production. A companion GI-TOC publication on India's specific role in global synthetic drug markets is released alongside the main report.

KEY FINDINGS:

- Synthetic drug markets are present in 186 of 193 countries - a larger geographic footprint than illicit heroin markets, with only seven countries assessed as having little or no synthetic drug market presence.
- The decoupling of drug production from agricultural ecosystems has lowered barriers to market entry, enabling entrepreneurial criminal actors to enter the market alongside established transnational networks.
- An expanding inventory of new psychoactive substances, combined with growing contamination and adulteration of street supplies - including the emergence of orphine analogues as a third generation of novel synthetic opioids - is creating unprecedented challenges for public health systems and law enforcement.
- Clear web and dark web crypto-markets, encrypted messaging platforms, and social media sales channels are reshaping the distribution and retail landscape, producing business models that can quickly reconstitute after interdiction.
- For the first time in the history of the Commission on Narcotic Drugs, no resolution achieved consensus at its last two annual meetings - the clearest signal yet that the multilateral architecture underpinning international drug policy has moved from strained to fractured.

ABOUT THE GI-TOC

The Global Initiative Against Transnational Organized Crime is a civil society organization founded in 2013 to promote innovative approaches to tackling organized crime. Its global network comprises experts in law enforcement, governance and development who are dedicated to developing strategies and responses to organized crime. Its mission is to enhance analysis of, encourage action against, and support resilience to organized crime, in order to reduce its negative impact on people, the environment, businesses and states.

For more information or to interview the report's authors, please write to: newsroom@globalinitiative.net

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