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EUROPEAN DRUG TRENDS MONITOR



About this issue

This is the fifth issue of the European Drug Trends Monitor, published by the Global Initiative Against Transnational Organized Crime (GI-TOC), as an output of its Observatory of Organized Crime in Europe. This series of bulletins tracks developments in European drug markets, providing analysis of trends in availability, pricing and criminal dynamics.

As drug markets change, 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 complement data produced by governments and international organizations. Information on drug availability, retail and wholesale prices, trafficking methods and criminal dynamics is gathered across major European cities and transit regions.

The monitor is based on field research, the analysis of data provided by authorities, information obtained through interviews, and the monitoring of media reports and enforcement operations. It also draws on analysis of social media channels and encrypted messaging applications (such as Telegram and Signal), and dark web marketplaces and forums, where illicit

drugs, diverted medicines and related services are advertised and discussed. While the findings of the field research are referred to throughout the text, they are not always individually referenced.

The European Drug Trends Monitor finalized its fifth round of data collection and field research in September 2026. This issue examines five developments currently shaping European drug markets: rising wholesale cocaine prices and market volatility; the use of agile trafficking methods to bring cocaine onto the continent through remote coastal entry points; the continued expansion of the synthetic drug trade, with production in Poland signalling broader geographical reconfiguration; greater cannabis availability and a diversification of sourcing options, including from jurisdictions with permissive policy frameworks; and the rise of logistics as crime-as-a-service.

These findings are subject to methodological limitations and caveats. As no toxicological analysis of the substances discussed could be conducted as part of this research, caution should be exercised when interpreting some of the findings. Additionally, aspects of the analysis rely on information obtained through interviews with individuals operating within criminal environments. Finally, as the research mainly focuses on the supply of illicit drugs and related criminal dynamics rather than patterns of demand, conclusions about the overall size of drug markets are necessarily limited.

KEY TREND 1: Rising wholesale cocaine prices in Europe – signs of a shift from plentiful supply to greater volatility.

Cocaine remains widely available in Europe, but rising wholesale prices and shifting trafficking routes point to growing market volatility, despite relatively stable retail prices.

From 2020 to 2025, Western Europe's cocaine market was characterized by expanding availability and falling wholesale prices,[1] indicating a market nearing saturation. More recent research, however, raises the possibility that this period of cheap cocaine is giving way to greater price volatility, despite evidence of abundant supply.

Open-source research and contacts in Belgium and the Netherlands indicate that wholesale prices have increased in recent months, reaching approximately €20 000–€30 000 per kilogram offline and €29 000–€33 000 online, a broad return to 2023–2024 levels.[2] Fieldwork in France identified a similar trend.[3] Although these observations cannot yet establish a Europe-wide price recovery, the consistency in the pattern across three interconnected cocaine markets, all of which serve as gateway countries to the wider European market, suggests that the exceptionally low wholesale prices observed in 2025 and early 2026 may be signalling less predictable conditions.

The causes could be manifold, but contacts in France and the Low Countries linked the recent price increases to major disruptions to trafficking and distribution networks. Criminal contacts cited a major seizure earlier this year as at least a partial explanation of reduced supply. Dutch contacts specifically pointed to the interception of more than 30 tonnes of cocaine by Spanish authorities on the *Arconian*, a dry bulk vessel, in May 2026.[4] There is insufficient evidence to establish a direct causal relationship between this seizure and subsequent price shifts. But the case illustrates the potential impact of removing an exceptionally large consignment from an interconnected wholesale market.

As outlined in Key Trend 2 below, the *Arconian* operation has been associated with a major European high-value target: convicted Dutch cocaine trafficker Jos Leijdekkers.[5] However, trafficking schemes on this scale rely on a much broader ecosystem of investors, suppliers, brokers, transport coordinators, logistical facilitators and downstream buyers. Shipments are usually pooled by several distinct wholesale traders. Field research suggests that this was the case with the *Arconian*.[6] The disruption of one major consignment may therefore generate losses and supply chain issues for several criminal groups.

However, it would be reductive to attribute the recent cocaine price increases primarily to disruption caused by law enforcement. Changes in production and supply conditions in Latin America, variations in purity, and rising logistical expenses (including transportation costs and payments to corrupt facilitators) may also influence wholesale prices.

Trading strategies may also have an impact. Following highly publicized seizures, traffickers and intermediaries sometimes exploit perceptions of scarcity to generate mark-ups, even when overall availability has not declined proportionately. After several years of falling wholesale prices and narrowing margins, suppliers may be opportunistically rebuilding profit margins as market conditions permit.

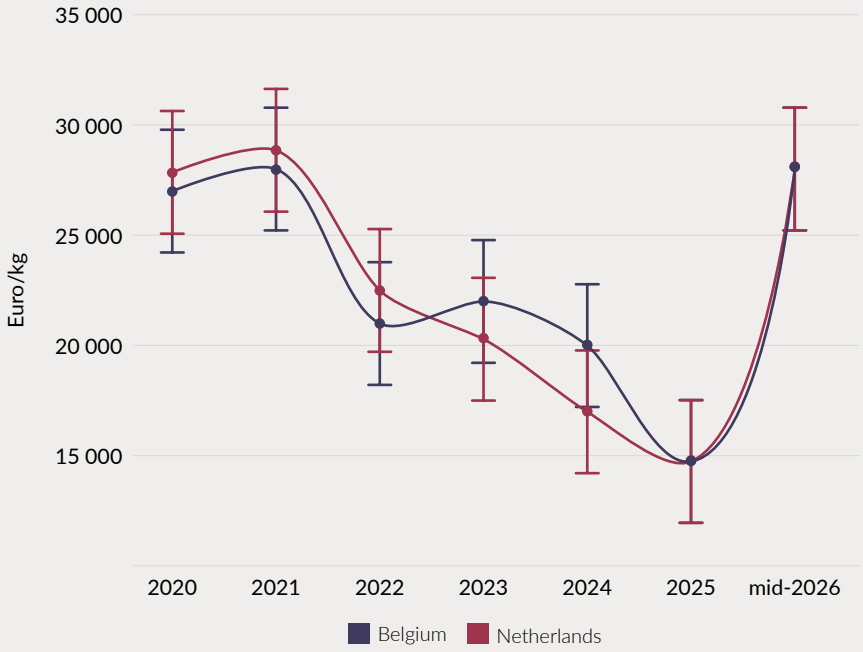

FIGURE 1 Mean wholesale prices of cocaine (1 kilogram or more) in Belgium and the Netherlands, 2020–2026.

SOURCE: Field contacts consulted by the GI-TOC in 2025 and mid-2026

Geographic shifts in regional cocaine trafficking are also continuing, potentially exacerbating risks and driving up costs along the supply chain. For instance, there are indications that trafficking networks are increasingly exploiting maritime entry points outside of Europe's main container ports (see Key Trend 2). Major container hubs are still important nodes for large-volume trafficking, as demonstrated by the seizure of almost 8 tonnes of cocaine in Rotterdam in January 2026.[7] Nevertheless, Belgian customs seized just 5.4 tonnes of cocaine at the Antwerp–Bruges port during the first half of 2026, compared with 16.7 tonnes during the same period in 2025.[8] In 2023, cocaine seizures at this port totalled 116 tonnes.[9] While this decline may reflect earlier interceptions at transhipment points or changes in transport strategies, it may also indicate the growing popularity of alternative routes. One sign of this diversification is the growing use of high-powered speedboats known as *narcolanchas* to transport cocaine from North Africa to southern Spain.

Alternative methods and entry points may require additional transport stages, intermediaries and logistical services, all of which can increase costs and contribute to price volatility, even without a corresponding decline in the overall volume of cocaine reaching the continent.

However, shifts in wholesale prices are not necessarily reflected in retail prices. During periods of relatively cheap wholesale cocaine supply, retail prices have remained generally stable in Europe, with dealers often sticking to historical levels established over long periods of time. Similarly, fieldwork in France suggests that the recent increases in procurement costs are not being passed on to consumers. Despite wholesale prices rising from approximately €17 000 to €25 000–€30 000 per kilogram, interviewees said that cocaine continued to sell for approximately €40 per gram at fixed retail dealing points and €50 per gram through delivery services.[10] Dealers in France also reported reducing the quantity contained in individual sales packages, particularly for crack users. Rather than a conventional increase in the advertised retail price, consumers may therefore receive less cocaine for the same price.[11]

Elsewhere in Europe, Telegram listings also suggest that retail cocaine prices have remained relatively stable despite changing supply and wholesale pricing conditions.[12] In the Netherlands, the cheapest listings for 1 gram averaged around €55–€65, compared with approximately €85–€90 in Germany (up from around €65–€75 in 2024 and 2025).[13] Belgian listings were closer to Dutch levels. German 'menus' also advertised 0.5 gram packages at €40–€50, potentially preserving an accessible transaction price. At larger quantities, however, differences narrowed considerably: 10 gram units were advertised for €350–€400 in the Netherlands, and €400 in Germany and Belgium.[14] This suggests that price pressures may be absorbed unevenly along the distribution chain, with retail markets adjusting through smaller quantities, volume discounts and product differentiation rather than straightforward changes in the headline price per gram.

With the assumption that purity levels have remained the same, the divergence between wholesale and retail prices has implications for illicit earnings. If procurement costs rise while nominal street prices remain stable, middle- and low-level distributors may experience margin compression. In France, mid-level traffickers reported shrinking profits, while some reported that criminal actors – often minors – were switching to crime-as-a-service activities, such as vehicle theft, which were perceived as more lucrative.[15]

Perhaps the most pressing question is whether this trend will affect levels of criminal violence. Higher cocaine prices do not automatically lead to greater conflict. However, where cocaine shipments are pooled among a wide range of criminal actors, it is important to assess how major losses could alter relationships and financial interests within trafficking operations. When several groups have investments tied up in shipments, or credit arrangements and shared logistical services are involved, interception creates uncertainty about who bears the loss, who remains liable for payment and whether a shipment has been genuinely seized or diverted. Disruption can therefore generate secondary disputes that persist long after the cocaine itself has been removed from circulation.

One example of such destabilization occurred in Overasselt in the Netherlands on 31 August 2026, when a group of masked men descended on the fortified home of Jan G Junior.[16] The attack left a security guard dead and two police officers injured. As of mid-September, 35 suspects had been arrested,[17] including Dutch, Belgian, French and Algerian nationals. According to Dutch media reports citing criminal sources, the confrontation was linked to a dispute over 812 kilograms of cocaine seized at the border between France and Spain on 29 August, although prosecutors have not confirmed the precise motive.[18] Media reports also identified Jan G Junior, who escaped the attack before fleeing to Germany, where he was arrested, as a previous associate of Leijdekkers. This alleged connection is notable given reports linking Leijdekkers' network to the cocaine seized aboard the *Arconian*.[19]

The paradox is that the very characteristics that make Europe's cocaine market so resilient can also expose criminal actors to considerable volatility. A highly networked market can recover rapidly from the loss of individual traffickers, shipments or routes, as alternative suppliers and logistical channels are always available. However, this same interconnectedness means that major disruptions spread quickly among various actors. While law enforcement operations may have limited long-term effects on aggregate cocaine availability in Europe, they can still generate significant immediate consequences, such as higher prices for particular buyers, changes in criminal alliances, disputes over losses and, in some cases, violence.

The emerging picture is therefore not one of cocaine scarcity. Instead, an abundant supply may coexist with supply volatility. The price increases reported in France, Belgium and the Netherlands in late 2026 suggest that the equilibrium created by plentiful, cheap cocaine may be becoming less predictable. It is unclear whether this constitutes a temporary correction following major enforcement operations or the beginning of a more structural change.

Monitoring wholesale prices alongside trafficking routes, criminal partnerships and violent incidents will therefore be critical. If the current signals continue, the next phase of Europe's cocaine market may be defined less by the availability of cocaine than by who can reliably access the supply, at what cost, and how criminal actors respond when established relationships and supply channels are threatened.

KEY TREND 2: The third wave of cocaine trafficking – *narcolanchas* reshape entry into Europe.

Cocaine trafficking is increasingly circumventing major ports to avoid security pressure, as *narcolanchas* and agile maritime smuggling networks emerge as alternative routes into Europe.

Southern and Atlantic maritime approaches to Spain and Portugal are becoming more significant in the changing pattern of European cocaine supply. *Narcolanchas* – high-speed semi-rigid vessels long associated with cannabis resin smuggling – are now being used to deliver cocaine,[20] reflecting a convergence between established Morocco–Spain trafficking infrastructure and flows extending through West Africa, the Atlantic and the Canary Islands.[21]

This development is notable because of the sophistication of the existing maritime ecosystem between North Africa and Spain. *Narcolanchas* are not simply boats transporting drugs from one coast to another; they operate within a system of logistical networks that supply vessels with fuel, provisions, replacement crews and other services.

In May 2026, Spanish customs surveillance and the National Police dismantled what they described as one of the largest and most active networks providing logistical support to high-speed semi-rigid vessels transporting drugs from Morocco. The group was operating near the Punta Umbría estuary of the Odiel River in Huelva municipality. Around 20 000 litres of fuel were seized, and four people arrested.[22]

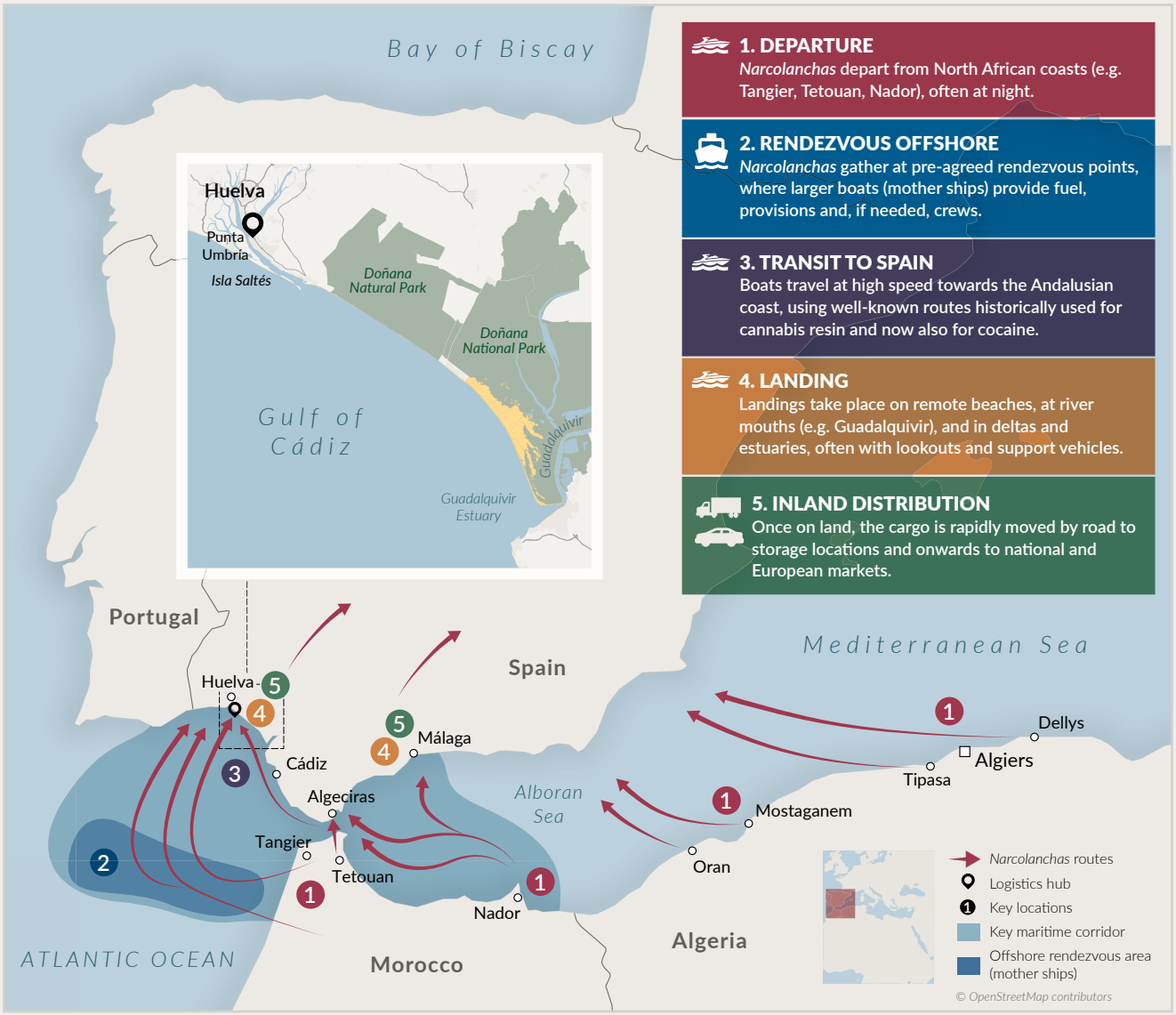

FIGURE 2 How *narcolanchas* operate between North Africa and the Iberian Peninsula.

A reliable fuel supply is essential for *narcolancha* networks as it enables their high-powered vessels to operate beyond the traditional short crossing and to remain at sea for longer periods. Logistics groups on land and at sea provide fuel, provisions and crews.

The flexibility these networks provide is particularly important as enforcement pressure intensifies. The concentration of police resources in established trafficking areas along the southern Spanish coast merely leads to the displacement of activities elsewhere. According to a Guardia Civil officer, it is impossible for authorities to shut down one operation without 'several new ones cropping up in the meantime'.[23]

In April 2026, an international operation led by Spanish authorities concentrated on the eastern Atlantic corridor between the Canary Islands and the Portuguese Azores resulted in the interception of 11 tonnes of cocaine and 8.5 tonnes of hashish. The criminal networks involved were transporting the drugs from Latin America to Europe by means of complex at-sea transfers designed to circumvent major ports and conventional detection methods.[24]

The seizure of the *Arconian* on 1 May 2026 illustrates the scale this model can reach. Spanish authorities intercepted the Comoros-flagged bulk carrier off the coast of Western Sahara, discovering more than 30 tonnes of cocaine on board. Analysis indicates that the drugs were probably loaded in Sierra Leone, with smaller boats expected to collect the shipment close to the Canary Islands and potentially make further transfers closer to European shores.[25]



Originally associated primarily with the Morocco–Spain cannabis trade, high-powered *narcolancha* vessels are increasingly being used to smuggle large quantities of cocaine into Europe. *Photo: Guardia Civil*

The significance of this case is reinforced by its reported connection to Jos Leijdekkers.[26] Spanish investigators have alleged that Leijdekkers was behind the *Arconian* shipment, highlighting the capacity of major European criminal networks to coordinate exceptionally large consignments through West African staging points and complex offshore delivery arrangements.[27]

The *Arconian* was carrying more than 42 000 litres of additional fuel, which investigators believe was intended to support the vessels involved in collecting the cocaine offshore.[28] These support and supply networks extend the potential operating range of smaller craft. This reduces their dependence on conventional ports and allows trafficking networks to exploit maritime spaces beyond standard port controls.[29] Drug consignments can then be rerouted to remote coastal landing points and river deltas in mainland Spain and Portugal.

Morocco plays a significant role in this shifting logistical landscape. Criminal networks in the region already have access to high-performance vessels, pilots, fuel networks, landing crews and logistical infrastructure, which they use for the cannabis resin trade.[30]

However, Moroccan criminal groups are not assuming control of cocaine trafficking. Fieldwork in Spain points to a fragmented and service-oriented criminal ecosystem, involving Spanish, Moroccan, Albanian and other Balkan actors alongside Colombian and other Latin American networks.[31] Rather than operating as isolated organizations, these actors form fluid relationships around shipments and services, cooperating when interests converge, but at other times competing or coming into conflict. This ecosystem also depends on facilitators who can provide access to ports and vessels, money laundering services and, critically, corrupt officials who can provide infrastructure and information.[32]

Conventional investigative approaches are struggling to keep pace with the changing threat, with authorities continuing to rely on traditional methods.[33] Newer technologies, including drones, have had a positive impact, but are insufficient to address the scale of the problem.[34]

The biggest challenge for Spanish law enforcement will be leveraging its considerable investigative and intelligence capacity to combat a more mobile and geographically dispersed trafficking ecosystem. A widening gap in quality between law enforcement vessels and the high-performance craft utilized by traffickers is of particular concern. Some of the enforcement fleet has been described as outdated, inadequate and prone to maintenance issues, partly due to budgetary constraints.[35] There is a risk that these factors will undermine morale, increasing the risk of the corruption and bribery that facilitate trafficking operations.

Unfair odds: *Narcolanchas* versus patrol boats

The risks faced by maritime authorities stemming from asymmetric vessel capabilities were demonstrated in Barbate, Cádiz, in February 2024. Six Guardia Civil officers approached several *narcolanchas* in a small, six-metre-long semi-rigid craft equipped with a single 80-horsepower engine. They were subsequently attacked by a 14-metre trafficking vessel with four outboard engines of around 300 horsepower each.

The *narcolancha* manoeuvred around the police vessel before ramming and passing over it, killing two officers and seriously injuring another.[36] The incident exposed concerns about the resources available to law enforcement agencies tasked with confronting *narcolancha* crews. Media reports indicated that the Guardia Civil's maritime service vessels in the area had been out of operation, resulting in the deployment of a smaller craft.[37]

This case also illustrated the willingness of some *narcolancha* crews to confront law enforcement. Video evidence examined during the investigation showed that at least two vessels made as many as seven high-speed passes around the Guardia Civil craft in less than three minutes.[38]

According to a Guardia Civil officer, traffickers have become more aggressive and emboldened, as they often have 'better means, better boats, faster [boats]' than the officers confronting them.[39] Firearms are also becoming more visible among some trafficking groups, including AK-47 rifles.[40]

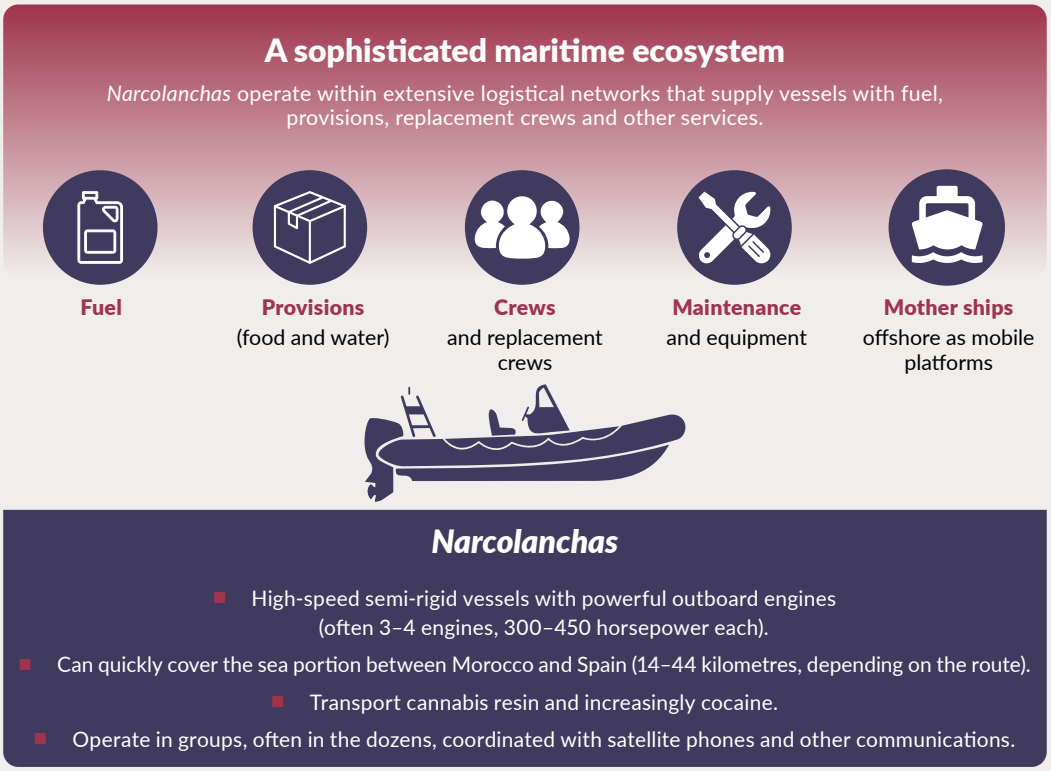

FIGURE 3 The maritime ecosystem of *narcolanchas*.

The growing exploitation of the *narcolancha* ecosystem by cocaine traffickers could represent an important structural change in the market. It can be seen as part of a potential third wave of cocaine trafficking to Europe, from the historical prominence of Spanish ports as a principal gateway, through the growing importance of the major container ports of north-western Europe, to experimentation with routes and methods that circumvent major ports altogether.

The growing use of remote coastlines and smaller vessels illustrates an intensifying whack-a-mole dynamic between law enforcement and traffickers, as greater security pressure on major ports causes displacement towards less controlled maritime entry points rather than reducing overall supply. The development of *narcolanchas* into a component of Europe's cocaine logistics system is a notable manifestation of this trend and deserves close monitoring.

KEY TREND 3: Poland's rise as a production hub is reshaping Europe's synthetic drug markets.

Poland is emerging as a major hub for synthetic cathinone production, supported by industrial-scale manufacturing, flexible criminal networks and adaptable chemical supply chains.

Synthetic cathinones – a class of drugs chemically related to cathinone, a natural stimulant found in the khat plant – are becoming a major component of Europe's stimulant market. In the past, synthetic cathinone markets on the continent relied on finished substances imported from Asia, particularly China and India, with the Netherlands serving as a logistical and redistribution hub for markets in Belgium, France and elsewhere in Europe.[41] However, the expansion of production capacity in Poland signals a shift away from this import-dependent model towards a geographically diverse manufacturing landscape.

Of the 63 synthetic cathinone production sites reported in the EU in 2024, 47 were in Poland (up from 40 in 2023), 11 were in the Netherlands and three were in Germany. The facilities were producing a variety of substances. Across the EU, 22 sites produced 4-CMC (clephedrone); 19 produced 4-MMC (mephedrone); 15 produced 3-CMC (clophedrone); and five produced alpha-PVP. Fieldwork conducted in Poland in early 2026 similarly identified the same four stimulants in the domestic synthetic drug market.[42] These developments suggest that Poland should now be viewed as a major European manufacturing centre.

Recent law enforcement operations have revealed the scale and resilience of this ecosystem. Operation Fabryka, coordinated by Europol and conducted between February 2025 and January 2026, targeted a Polish criminal network with Belgian and Dutch involvement.[43] The initiative resulted in 85 arrests across Europe, including 19 in Poland and one in Germany. It also led to the dismantling of 24 industrial-scale laboratories in five EU countries. About 1 000 tonnes of chemicals were seized, potentially sufficient to manufacture more than 300 tonnes of synthetic drugs. The investigation also exposed extensive transnational infrastructure for the procurement and distribution of precursors, largely coordinated from Poland.[44]

Rather than relying exclusively on vertically integrated criminal groups, parts of this economy appear to operate through modular and compartmentalized networks.[45] Chemical procurement, synthesis, laboratory management, transport, wholesale distribution and retail are divided among specialized actors who may have limited knowledge of other parts of the operation. Law enforcement authorities described arrangements resembling a crime-as-a-service model, in which chemical expertise, laboratory operation or logistics can effectively be provided as specialist services.[46]

Such compartmentalization increases resilience: dismantling a laboratory or arresting a transporter does not necessarily expose the organizers or disrupt the wider production chain. Operations are built around mobility and adaptability. According to Polish interviewees, short-term warehouse rentals are used to store chemicals or equipment, sometimes for only a few months, and production networks are capable of relocating when enforcement pressure is brought to bear.[47] Laboratories can also alter their output according to precursor availability or demand, including switching between substances such as 4-MMC and 4-CMC.[48]

Production in Poland also forms part of a wider transnational net. In February 2026, a Europol-supported operation involving Poland, Ukraine and Moldova uncovered an international network producing and trafficking synthetic drugs, primarily cathinones such as alpha-PVP. Authorities conducted coordinated checks at 510 locations, dismantled 36 production sites and 74 storage facilities, and took 103 people into custody.[49]

Another defining feature of this market is access to chemical precursors. Cathinone production relies on overlapping sources, including illicitly manufactured chemicals, products diverted from legitimate industries and non-scheduled intermediates traded through commercial channels.[50] Much of the supply of precursors for illicit production in the EU appears to originate outside the bloc, particularly in China and India, although intra-EU sourcing is more relevant for certain chemicals. Interviews with Polish stakeholders highlighted how criminal actors exploit legitimate companies, commercial logistics and regulatory ambiguities to obtain the necessary substances.[51]

Although regulatory responses are improving, the market's adaptability continues to present challenges. Commission Delegated Regulation (EU) 2026/314, which came into effect in September 2026, brought nine additional precursor chemicals under EU control, including several used in the production of synthetic cathinones.[52] While these measures strengthen oversight, the classification of these substances could encourage the use of alternative intermediates, masked precursors or more obscure procurement channels.[53]

Similar dynamics are evident in consumer markets. Following the introduction of controls on well-known cathinones such as 3-MMC and 3-CMC, alternatives, including 2-MMC and NEP, became more prevalent in Europe.[54] Evidence from the European Union Drugs Agency in 2025 showed that products sold as 3-MMC often contained other cathinones, demonstrating how quickly the trade can adapt.[55]

Poland's emergence as a manufacturing base encompasses more than just an increase in clandestine laboratories. It indicates a flexible manufacturing ecosystem supported by chemical suppliers, specialized expertise and transnational logistics. Disrupting individual production sites may have limited, short-lived effects unless these enabling structures are also addressed.

The dismantling of a major cathinone laboratory in Nauen, Germany, involving Polish and Ukrainian nationals, suggests that production capabilities are spreading beyond established manufacturing hubs.[56] At the same time, the combination of expanding production and seizures, alongside comparatively low recorded prevalence, raises questions about the ultimate destinations of Europe's cathinone output. Poland's growing role may therefore be indicative of a broader geographical reconfiguration of Europe's synthetic drug economy, increasingly characterized by two major production hubs: the Netherlands and Belgium on the one hand, and Poland on the other, with production becoming more dispersed, adaptable and difficult to disrupt.

KEY TREND 4: A cannabis market in transition – new sources, routes and regulatory spillovers.

The cannabis market in Europe is diversifying, as growing flows from North America and Thailand compete with established supply routes and trafficking models.

Europe's cannabis market is undergoing a geographical and structural reconfiguration.[57] Existing supply systems remain important: Morocco is still the main source country for cannabis resin (hashish), and Spain its principal gateway. Spain remains a major production centre for herbal cannabis, with large-scale, mostly indoor, cultivation taking place across the continent.[58] However, developments in 2025 and the first half of 2026 suggest that the market is drawing on a diverse range of supply sources and distribution pathways.

The illegal production of cannabis in Europe, as well as imports of resin from North Africa, are facing growing competition from herbal cannabis originating from jurisdictions where the drug has been fully or partially legalized for recreational purposes; the most notable being Canada, the United States and Thailand.[59]

Despite the growing supply being diverted from licit sources, the Spain–France trafficking corridor has remained particularly resilient. This is due to its proximity to Moroccan resin production, Spain's own cannabis cultivation and well-established logistics networks connecting the Iberian Peninsula with northern European markets. Operation CABRAS, for example, led by the French Gendarmerie in 2025, revealed a structured criminal organization operating from a logistical base in southern Spain, where cannabis resin and other drugs were stored and prepared before being transported into France.[60] The network used convoys of vehicles equipped with hidden compartments and employed counter-surveillance measures while frequently changing vehicles and routes.[61]

In parallel, however, US, Canadian and Thai cannabis have become a significant component of European supply, presumably reflecting the legalized or decriminalized status of cannabis in these countries. Much of the 65.5 tonnes of cannabis seized by Dutch customs in 2025 – up from a total of 14.5 tonnes in 2024 – was attributed to source markets in the United States, Canada and Thailand.[62] Dutch police also said that substantial quantities entering the Netherlands were intended for onward distribution in Europe.[63] Similar patterns are visible elsewhere: the UK's Border Force detected more than 15 tonnes of cannabis arriving by post from Thailand in the final quarter of 2024 alone, while seizures at Irish airports have revealed large consignments arriving from Thailand and the United States.[64]

The trend can therefore be understood as the emergence of new transnational wholesale supply chains, with major Western European maritime and air infrastructure functioning as gateways through which non-European herbal cannabis is integrated into the wider European market. This growing role of maritime imports is visible in the Netherlands, despite its reportedly successful ongoing national controlled cannabis supply chain experiment.[65] In the first half of 2026, authorities in the port city of Vlissingen intercepted 127 kilograms of cannabis across 18 seizures, compared with 78 kilograms in a single interception during the same period in 2025.[66]

Canada also appears to be a key source country. In May 2025, French and Canadian authorities dismantled a network suspected of importing 3 tonnes of herbal cannabis into France, mainly by commercial air freight to Paris Charles de Gaulle Airport, since October 2024.[67] Ten suspects were arrested in France and Quebec. During the subsequent investigation, around 1.2 tonnes of illicit goods were seized, including a 550-kilogram shipment of cannabis.[68] French investigators described this as the first case of a Canadian organized criminal group supplying France with cannabis on this scale. They also found that the network had supplied other European countries through Charles de Gaulle, which highlights the potential role of major air cargo hubs as entry and redistribution points within European markets.[69]

Rather than using individual couriers to carry cannabis in passenger luggage, traffickers have reportedly been concealing large consignments within regular commercial air freight shipments. They have also been using the identities and commercial details of legitimate companies, without their knowledge, to make the shipments appear genuine.[70] This suggests a model that relies less on physically controlling transport infrastructure and more on mimicking legitimate commerce.

Evidence from the Netherlands suggests that this method is becoming more popular. In 2025, around 6 tonnes of cannabis were intercepted in air freight shipments at Schiphol airport, compared with approximately 1.5 tonnes detected during passenger checks. Furthermore, the number of cannabis seizures at the airport more than doubled compared to the previous year.[71] As with maritime container shipping, commercial air freight allows traffickers to exploit the volume and complexity of legitimate international trade. While both passenger couriers and cargo shipments undergo customs checks upon departure and arrival, air freight enables larger consignments to move through established commercial logistics networks, including freight forwarding, warehousing and cargo handling services.[72]

Recent developments in Germany and Poland also suggest that the import of cannabis from Canada is a growing regional phenomenon. In August 2026, for instance, a Berlin court convicted members of a network responsible for smuggling over 7 tonnes of herbal cannabis from Canada into Germany. Between August 2023 and November 2024, seven shipments of approximately 1.1 tonnes each were reportedly transported by sea, concealed among timber in shipping containers.[73] A front company in Brandenburg provided a legitimate commercial appearance and a site where the cannabis could be unloaded. The court described the case as an example of international organized crime, identifying specific, siloed roles, including a German distributor, an entrepreneur responsible for the front company and a dedicated logistician.[74]

In Poland, customs interceptions suggest that cannabis from North America is reaching Central and Eastern Europe through a variety of channels. In July 2026, officials at Gdynia port intercepted 945 kilograms of cannabis in a container from Canada, concealed in vacuum-sealed packages among used clothing intended for a Polish textile firm.[75] Other notable seizures include the 2025 interceptions of more than 140 kilograms of cannabis from Canada and 67 kilograms from the United States, and a further 140 kilograms from Canada in the first half of 2026.[76] These and similar cases indicate that North American supply is reaching Central and Eastern European markets through smaller postal or courier consignments. A similar trend is visible in the Netherlands, where customs intercepted 563 kilograms of cannabis in postal parcels in the Eindhoven region in the first four months of 2026, mainly from the United States and Canada. Such shipments have become more common since early 2025.[77]

Like Canada, the United States is also becoming a source of cannabis for Europe, partly due to the diversion of 'Cali' cannabis (meaning 'from California', although it is unclear whether the branding actually refers to a Californian origin or is simply a marketing strategy). These products are often marketed as high-value strains. A French investigation identified at least 21 shipments being transported from California to France between June 2025 and May 2026.[78] Traffickers initially sent consignments of several dozen kilograms before scaling up to shipments of around 100 kilograms. The product was concealed in commercial consignments of flat-pack furniture, arcade machines, fitness equipment and clothing, and was transported by air freight to Charles de Gaulle airport. Four intercepted shipments alone contained more than 430 kilograms of cannabis, but investigators believed the total volume imported by the network probably exceeded a tonne. Similar consignments were identified in Luxembourg, Germany and Switzerland.[79]

This gradual scaling is analytically significant. Rather than committing to large volumes immediately, it seems the California–France network tested the reliability of its logistical chain before increasing shipment size. Legitimate businesses were reportedly used as unwitting delivery addresses, with criminal network members impersonating employees to collect consignments on arrival. These practices demonstrate an important characteristic of this type of cannabis trafficking: criminal groups do not need to infiltrate the entire logistics chain if they can exploit identities, documentation and delivery processes at its edges. This lowers the barriers to entry, enabling relatively small networks to access international freight infrastructure without requiring the sophisticated port extraction capabilities typically associated with containerized drug trafficking.[80]

The growth in North American supply is connected to the liberalization of cannabis legislation in Canada and some US states over the past decade, although this link should be interpreted with caution. The European Union Drugs Agency has argued that the competition, overproduction and falling prices associated with regulatory changes in North America are likely to entice European traffickers.[81] Dutch police distinguish between illegal overproduction in the regulated cultivation sector, where cannabis is produced beyond permitted quantities and diverted into illicit channels, and wholly illicit cultivation, where producers operate entirely outside the licensed system despite being based in jurisdictions with legal cannabis markets. The key development is therefore not necessarily the direct diversion of cannabis from licensed companies, but rather the creation of a large production ecosystem in which cultivation expertise, high-potency products and excess supply coexist with illicit exporters.[82]

Thailand is another emerging source for the European cannabis market, driven by a series of regulatory changes. After initially deregulating cannabis in 2022, Thailand tightened its rules again in 2025, restricting the use of cannabis flowers to medical purposes only and putting an end to the largely unregulated nascent domestic recreational market that had emerged.[83] A recent Europol-supported investigation into a Balkan criminal network found that cannabis was being trafficked to the EU from Thailand, Albania and the United States. The group was allegedly responsible for moving 1.5 tonnes of cannabis and 2.7 tonnes of cocaine by air and sea between October 2024 and April 2026.[84] This indicates that emerging flows do not necessarily give rise to new criminal organizations, but can be incorporated into existing poly-drug networks with established financing, coordination and logistical capacity.



Recent drug seizures at European airports point to the United States, Canada and Thailand as growing source markets for European cannabis supply. *© Arne Dedert/picture alliance via Getty Images*

Legal and medical cannabis supply chains are also being exploited within Europe. In July 2025, Portuguese authorities seized 2.2 tonnes of cannabis from a facility in Grândola that was ostensibly cultivating cannabis for medicinal purposes.[85] According to the investigators, the operation was supplying criminal organizations.[86]

Germany has experienced a different form of regulatory spillover.[87] Following cannabis reforms in April 2024, imports for purported medicinal purposes grew from around 19 tonnes in the first half of 2024 to approximately 80 tonnes in the first half of 2025. Prescriptions covered by statutory health insurance, however, rose by less than 10%.[88] Germany's health ministry attributed part of this divergence to the misuse of online prescribing services and, in October 2025, proposed stricter requirements for in-person medical consultations and restrictions on the mail-order distribution of medicinal cannabis.[89]

These trends indicate not only greater cannabis availability and diversification of sourcing options, but also a reorganization of the European supply architecture. While Morocco and Spain remain fundamental to supply, they now coexist with significant flows from North American and Thai jurisdictions with legalized or permissive cannabis policy frameworks. The result is a more geographically dispersed market, in which traffickers can switch between source countries and transport methods. This broader supply base increases resilience: enforcement pressure applied to one route or production system may simply displace activity to another rather than reducing the overall supply.[90]

KEY TREND 5: Beyond the commodity – logistics as a service in Europe's drug economy.

Criminal logistics networks are becoming commodity agnostic, allowing the same infrastructure and service providers to connect a wide range of illicit markets.

In August 2026, Europol announced that it had dismantled a criminal network operating between Spain and Algeria, arresting 78 trafficking suspects in the process.[91] Rather than functioning solely as a cannabis trafficking organization, the groups allegedly acted as a logistics provider, using *narcolanchas* and associated infrastructure to facilitate illicit flows in both directions across the Mediterranean.

While cannabis resin was allegedly transported from Algeria to Spain, other operations reportedly involved shipping of MDMA, firearms and explosives to Algeria, as well as transporting migrants and fugitives. The network is also said to have provided logistical services to other criminal groups.[92] Therefore, the organization's value lay not only in its access to cannabis, but also in its control of boats, crews, coastal infrastructure and contacts that could be monetized across several illicit markets.

The convergence of criminal markets is not a new phenomenon. Poly-drug trafficking and crime-as-a-service have long been features of Europe's criminal landscape. What recent cases illustrate, however, is a more discernible distinction between the commodity being traded and the logistical capability required to move it. Transport routes, vessels, couriers, brokers, legitimate businesses and financial channels can function as reusable criminal infrastructure, allowing logistics providers to serve different markets and criminal groups as required.

In March 2026, an operation led by Spain, Bulgaria and Greece targeted a network that allegedly exchanged 'Frankenstein' firearms[93] sourced from the Western Balkans and Türkiye for cannabis produced in Catalonia.[94] This case demonstrates how illicit supply chains that were previously distinct can intersect through actors capable of connecting producers, transporters and criminal customers across borders.

This commodity-agnostic model is also evident in the exploitation of legitimate logistics systems. In June 2026, for example, a joint French and Spanish investigation identified 114 parcels containing an estimated 1.45 tonnes of cannabis that had been sent from the Barcelona area to the Rennes region of France over a period of almost two years. Two Spain-based suspects were alleged to have coordinated procurement and dispatch, while a France-based individual controlled downstream distribution. Forged identities were used to send the parcels and GPS trackers were used to monitor the consignments. The same parcel system was then used in reverse to send the proceeds back to Spain. Authorities estimated that assets connected to the organization amounted to approximately €4 million.[95]

From an economic perspective, this is a rational way to diversify risk. Rather than concentrating several tonnes in a single truck or container, traffickers can embed dozens or even hundreds of consignments within ordinary parcel deliveries. The loss of one shipment does not compromise the entire consignment, and commercial courier providers unwittingly supply transport, tracking and cross-border delivery, eliminating the need for traffickers to maintain their own fleet. The use of GPS devices and false identities shows how criminal actors combine readily available technology with legitimate logistics services to create a scalable model.[96]

As discussed in Key Trend 4, recent cases involving cannabis originating in North America have seen networks divide responsibilities among suppliers, importers, freight organizers and downstream distributors. These arrangements highlight a further development in the phenomenon of crime-as-a-service. While certain criminal services, such as money laundering, document fraud or encrypted communications, have traditionally been considered specialist endeavours, logistics providers have developed the ability to connect otherwise separate criminal markets. They do not necessarily derive their competitive advantage from expertise in cannabis, cocaine or any other commodity, but from their ability to move illicit goods through ports, airports, commercial freight and parcel networks, and legitimate companies.[97]

Companies occupy different positions within this architecture. Some are deliberately set up or controlled as fronts,[98] while others may be exploited without the knowledge of their owners or employees.[99] Distinguishing between criminal ownership, corrupt facilitation and unwitting collusion is a significant task for law enforcement, as superficially similar shipments can depend on very different forms of criminal interaction with the legitimate economy.

These developments suggest that the drug economy is becoming a system where logistical capability functions as a transferable criminal asset. However, this does not mean that commodity-specific expertise has disappeared. Producing synthetic drugs, sourcing cocaine in Latin America or cultivating cannabis still require distinct relationships and knowledge. But convergence is largely occurring in the middle of the supply chain, where transport, storage, brokerage, documentation, financial settlement and retrieval can service multiple commodities and criminal actors.

For authorities, this alters the potential disruption points. While seizing individual consignments is still critical, investigations focused exclusively on one particular drug may overlook the infrastructure connecting several criminal markets. Those who control vessels, commercial freight channels, parcel systems, warehouses or financial services may be more consequential targets precisely because removing them could affect several illicit supply chains simultaneously. The challenge, therefore, will hinge not only on identifying those who control a particular drug market, but also on pinpointing who provides the infrastructure that allows different criminal markets to connect.[100]

Notes

1 In France, reporting in mid-2025 indicated that cocaine was trading for €17 000–€18 000 per kilogram. In Belgium and the Netherlands, wholesale prices fell steadily from late 2023, reaching approximately €15 000– €16 000 in 2025, a fall of around 30% compared to 2024. In Spain, enforcement and judicial contacts in the Barcelona area in 2025 reported wholesale prices of €12 000–€14 000 per kilogram, also well below historical benchmarks. By July 2026, fieldwork in Spain indicated that wholesale prices were falling towards €10 000 per kilogram. Observatory of Organized Crime in Europe, European Drug Trends Monitor Issue 4, GI-TOC, March 2026, https://globalinitiative.net/analysis/european-drug-trends-monitor-1/; Julien Constant, *Cocaïne: Prix très bas, production élevée… Un « tsunami blanc » déferle sur Paris et l'Île-de-France*, *Le Parisien*, 30 June 2025, https://www.leparisien.fr/faits-divers/cocaine-prix-tres-bas-production-elevee-un-tsunami-blanc-deferle-sur-paris-et-lile-de-france-30-06-2025-MOLDXM6FRJAQDC4J3T6HHBVS4Q.php; interview with a representative of the Spanish Guardia Civil, July 2026, online.

2 Interviews with representatives of Dutch and Belgian law enforcement authorities, September 2026; research conducted on Telegram channels, September 2026.

3 A mid-level dealer reported purchasing cocaine for around €17 000 per kilogram approximately four months earlier, compared with €25 000–€30 000 at the time of the interview. Other criminal actors interviewed in France similarly placed current prices within this range and described the increase as extending beyond their local context. Interviews with members of the criminal underworld, France, August and September 2026.

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