

News release

EUROPEAN DRUG REPORT 2025: HIGHLIGHTS

Rapid drug market shifts create new risks and challenge Europe's preparedness

(05.06.2025, LISBON) **EMBARGO 10.00 WEST | 11.00 CEST** Rapid shifts in Europe's drug market are creating new health and security risks and challenging the region's capacity to respond. This warning comes from the **European Union Drugs Agency (EUDA)** in its ***European Drug Report 2025: Trends and Developments***, released today ⁽¹⁾. Based on data from 29 countries (**EU-27, Norway and Türkiye**), this annual review highlights latest trends and emerging threats.

Now in its **30th edition**, the report provides evidence to inform drug policy and practice. It shows how Europe's drug market continues to evolve, with both suppliers and consumers adapting to geopolitical instability, globalisation and technological advances. It also warns of risks to public health, posed by the availability and use of an increasingly diverse range of substances, often of high potency and purity. Polysubstance use remains a concern, complicating the delivery of effective prevention, treatment and harm reduction services.

The **EUDA** supports the EU and its Member States in anticipating and responding to new drug-related challenges. It does so via a range of new services, including targeted alerts, timely threat assessments, precursor tracking, and in-depth forensic and toxicological analyses. Among the emerging threats highlighted in the report — and which call for Member State preparedness — are: synthetic cathinones, highly potent synthetic opioids and potent cannabis products.

Magnus Brunner, European Commissioner for Internal Affairs and Migration emphasises the recent developments faced by the EU, stating: 'The illicit drug trade poses a severe threat to the health and security of our citizens. It fosters an environment of intimidation and corruption, undermining the fabric of our communities, businesses and institutions. The fierce rivalry among criminal networks not only heightens gang violence and homicides but also increasingly involves the recruitment of minors into criminal activities. A safe and secure EU is our highest priority. Under *ProtectEU*, the European Internal Security Strategy, we are intensifying our efforts to dismantle these criminal organisations, disrupt drug trafficking operations, and address the troubling trend of youth recruitment. The *European Drug Report* highlights emerging threats, underscoring the need for decisive action'.

Alexis Goosdeel, EUDA Executive Director adds: 'Amid global instability and fast-changing drug trends, Europe faces multiple challenges that put its citizens at risk. The rise of highly potent substances and more complex patterns of drug use is placing health and security systems under strain. This calls for a general overhaul of our approach and a shift from monitoring the situation to actively assessing and strengthening our preparedness. We must design a comprehensive European and national preparedness framework to respond effectively, scaling up prevention, treatment and harm reduction services and adapting them to today's realities. To reach these objectives, we must improve our monitoring and alert systems and use them to build our response capacity. Now is the time to act together to protect public health and safety, and save lives'.

Europe's stimulant market: cathinones gaining ground

The report highlights the increased availability of [synthetic cathinones](#), reflected in 'unprecedented imports and seizures'. These are synthetic stimulants, chemically similar to cathinone, the active ingredient in khat. A total of at

least 37 tonnes of synthetic cathinones were reported in 2023 (27 tonnes in 2022 and 4.5 tonnes in 2021). Most of this involved a small number of bulk imports from **India**, primarily through the **Netherlands**.

The **EU Early Warning System (EWS)** on new psychoactive substances (NPS) identified seven new synthetic cathinones in 2024, bringing the total number of these substances monitored in Europe to 178. The **EUDA** has recently undertaken risk assessments of three new synthetic cathinones: 2-methylmethcathinone (2-MMC), 4-bromomethcathinone (4-BMC) and *N*-ethylnorpentedrone (NEP). By January 2025, the agency had also risk assessed, for the first time at EU level, eight precursor chemicals used for producing synthetic cathinones.

Although inadvertent use of synthetic cathinones in drug mixtures and tablets remains a concern, consumers also purchase these substances intentionally as their stimulant drug of choice. Treatment data also reflect the growing presence of synthetic cathinones, with an increase in treatment entrants among countries reporting this data (425 clients in 2018 to 1 930 in 2023).

In 2023, 53 synthetic cathinone production sites, some of which were large-scale, were dismantled in the EU (29 in 2022), mainly in **Poland**. This is one illustration of the significant intensification of drug production in Europe. In 2023, authorities dismantled production facilities across Europe, including: 250 for methamphetamine, 93 for amphetamine, 36 for MDMA and 34 for cocaine.

New synthetic opioids: nitazenes pose risk of fatal poisonings

The **EUDA** estimates that there were 7 500 drug-induced deaths in 2023 (up from around 7 100 in 2022), mainly involving opioids in combination with other substances. Europe's opioid market continues to evolve, with various substances besides heroin now available. [New synthetic opioids](#) (synthetic substances which act on the opioid receptors in the brain, with effects broadly similar to heroin), play a relatively small role in Europe's drug market overall. However, they do feature prominently in the **Baltic countries**. There is also growing concern about their use in other EU Member States. In 2024, the **EUDA** issued a [Call to action](#) to EU partners and Member States, urging them to unite against the growing threat posed by new synthetic opioids.

A total of 88 new synthetic opioids have appeared on the European market since 2009. These are often highly potent, creating risks of poisoning and death. In 2024, all of the seven new synthetic opioids formally notified to the **EWS** were nitazenes. To date, 22 nitazenes are being monitored in Europe. A recent **EUDA pilot threat assessment**, focusing on new synthetic opioids in the **Baltics**, found that nitazenes accounted for a significant share of overdose deaths in **Estonia** and **Latvia**. In 2024, at least seven **EU Member States** and **Norway** reported harms linked to nitazenes.

The report highlights the rising availability in Europe of fake medicines containing nitazenes, which typically mimic legitimate prescription drugs (e.g. oxycodone, benzodiazepines). This raises concerns about the potential for these products to be used by a broader range of consumers, including young people. Due to the high potency of nitazenes, these fake medicines pose a significant risk of severe poisoning and overdose. One of the key responses to opioid-related overdose is the administration of naloxone by medical professionals or as part of take-home naloxone (THN) programmes. A growing number of countries report offering THN programmes (15 EU Member States in 2023, with three more initiating pilot programmes in 2024).

China's control of 10 nitazenes may redirect the market away from nitazenes (e.g. metonitazene, protonitazene) towards novel derivatives or alternative opioid drug families. In 2024, substances from the 'orphine' family (e.g. cychlorphine, spirochlorphine) were identified through the EWS, underlining the need for close monitoring.

There has been speculation that any future reduction in the availability of heroin in Europe, following the Taliban's ban on opium poppy cultivation and opium production in **Afghanistan**, could potentially lead to market gaps in Europe being filled by synthetic opioids. There is also the possibility for stimulants, such as cocaine and synthetic cathinones, to be used as heroin replacements. The report states: 'In the face of uncertainty, Europe needs to improve its preparedness to address potential challenges emanating from such a market shift'.

Potent cannabis products and wider availability of semi-synthetic cannabinoids

Developments in the cannabis market are creating new challenges for how countries respond to Europe's most commonly consumed illicit drug — 24 million European adults (15–64 years) are estimated to have used cannabis in the last year. The average THC content of cannabis resin has doubled over the last decade to 23 % in 2023, more than twice that of herbal cannabis (stable at 11 %). Evaluating cannabis-related health risks is complicated today by the wider range of products available, including high-potency extracts and edibles.

Some products sold on the illicit market as cannabis may be adulterated with potent new [synthetic cannabinoids](#), without users' knowledge. These substances mimic the effects of THC, the main psychoactive ingredient in cannabis (and act on the same receptors in the brain). **China's** controls of synthetic cannabinoids in 2021 have reduced their availability in Europe. However, there has been a rise in the availability of [semi-synthetic cannabinoids](#) (which may be produced from CBD, another ingredient in cannabis), such as hexahydrocannabinol (HHC), recently placed under international control. In 2024, of the 20 new cannabinoids detected via the EWS, 18 were semi-synthetic. In June 2024, **Hungary** reported an outbreak of 30 acute non-fatal poisonings linked to 'gummies' containing potent semi-synthetic cannabinoids.

On the policy front, a number of EU Member States (e.g. **Germany, Luxembourg, Malta, Netherlands**) have changed, or are planning to change, their approach to recreational cannabis use and supply. These changes include new regulations concerning home growing, non-profit growing clubs and cannabis use in private. The **EUDA** highlights the need to monitor and evaluate these developments to fully understand their impact on public health, safety, security and the internal market.

Cocaine: rising health concerns and high availability

Cocaine is Europe's most commonly consumed illicit stimulant drug, used by around 4.6 million European adults (15–64 years) in the last year. There are increasing concerns around its negative impact on public health. It is the second most common illicit drug reported both by those entering drug treatment services for the first time (35 000 in 2023 compared to 31 500 in 2022). Data from the [Euro-DEN Plus](#) sentinel hospitals in 2023, suggest that cocaine was the most frequently reported substance by those presenting to hospital emergency departments — mentioned in 25 % (1 695) of acute drug-toxicity presentations. Both cocaine injection and the use of crack cocaine are reported in a growing number of countries. In 2023, there were an estimated 9 900 crack-related treatment entries (8 100 in 2022).

Seizure data confirm that availability of cocaine in Europe remains high. For the seventh year in a row, record quantities of cocaine were seized by EU Member States, amounting to a reported 419 tonnes in 2023 (323 tonnes in 2022). **Belgium** (123 tonnes), **Spain** (118 tonnes) and the **Netherlands** (59 tonnes) accounted for nearly three-quarters (72 %) of the total quantity seized, underscoring their role as key entry points for cocaine trafficked into Europe (preliminary data for 2024 suggest that the situation is changing). Other countries are also being targeted as entry points, for example **Germany** (43 tonnes), **France** (23 tonnes) and **Portugal** (22 tonnes).

Large seizures in Europe's ports highlight how illicit drug traffickers continue to exploit commercial supply chains. In 2024, **Spain** reported its largest ever seizure of cocaine in a single shipment (13 tonnes), concealed in bananas originating in **Ecuador**. Under the [EU Roadmap to fight drug trafficking and organised crime](#), the [European Ports Alliance](#) aims to boost the resilience of ports against drug trafficking and criminal infiltration.

Competition within the illicit drug market is driving cocaine-related crime, including gang-related violence and homicides. In 2024, the **EUDA** issued a [Call to action](#) to break the cycle of drug-related violence, following the first [European conference](#) on the topic. This underlined the urgent need for cross-sector collaboration to ensure a safer and more secure Europe.

There are signs that the steady increase in cocaine availability in the EU in recent years is having an impact on cocaine use, as seen in several data sources, such as wastewater analysis. Cocaine residues in municipal wastewater increased in over half of the cities with data for 2023 and 2024. Given that the estimated time lag between first cocaine use and first treatment demand is around 13 years, then the rise in availability may translate

into a surge in treatment demand in the coming years. This calls for an urgent assessment of EU Member States' response capacity in anticipation of a potential rise in treatment demand.

Strengthening EU preparedness on drugs: new EUDA services

To support Europe's preparedness in the face of increasingly complex drug problems, the **EUDA** is developing a new set of integrated services ⁽²⁾. These are focused on four key areas: anticipating emerging drug-related challenges and their consequences; alerting in real time on new drug risks and threats; helping the EU and its Member States strengthen their responses; and facilitating EU-wide knowledge exchange and learning for evidence-based drug policies and interventions.

New initiatives — such as a *European Drug Alert System* and a *Health and Security Threat Assessment System* are being developed to enhance early warning and situational awareness. Meanwhile, a *European Network of Forensic and Toxicological Laboratories* will analyse drug samples, train experts and exchange information on new developments, such as threats posed by new synthetic opioids. The agency also has a new role in collecting and analysing information on drug precursors and their diversion and trafficking, enabling it to notify Member States of new detections and support the European Commission with scientific data. Together, these efforts will form a strong foundation for a more resilient European response to drugs.

Chair of the EUDA Management Board, Dr Franz Pietsch concludes: 'I commend the EUDA on the 30th edition of the *European Drug Report*. This flagship publication has been a trusted reference for three decades, helping shape Europe's understanding of the drug situation through evidence-based analysis. Covering both long-term trends and emerging threats, this latest report offers crucial insights into today's challenges and tomorrow's risks. We are deeply grateful to our networks and partners for their years of dedication in providing the data and expertise that make this possible'.

Notes

⁽¹⁾ For more on the *European Drug Report 2025*, see <https://www.euda.europa.eu/edr2025>. The report describes the drug situation to the end of 2024, based on data from 2023, or the latest year available. Among others, the report findings will feed into the next EU Drugs Strategy.

⁽²⁾ [Regulation \(EU\) 2023/1322](#) of the European Parliament and of the Council of 27 June 2023 on the European Union Drugs Agency (EUDA) and repealing Regulation (EC) No 1920/2006.