

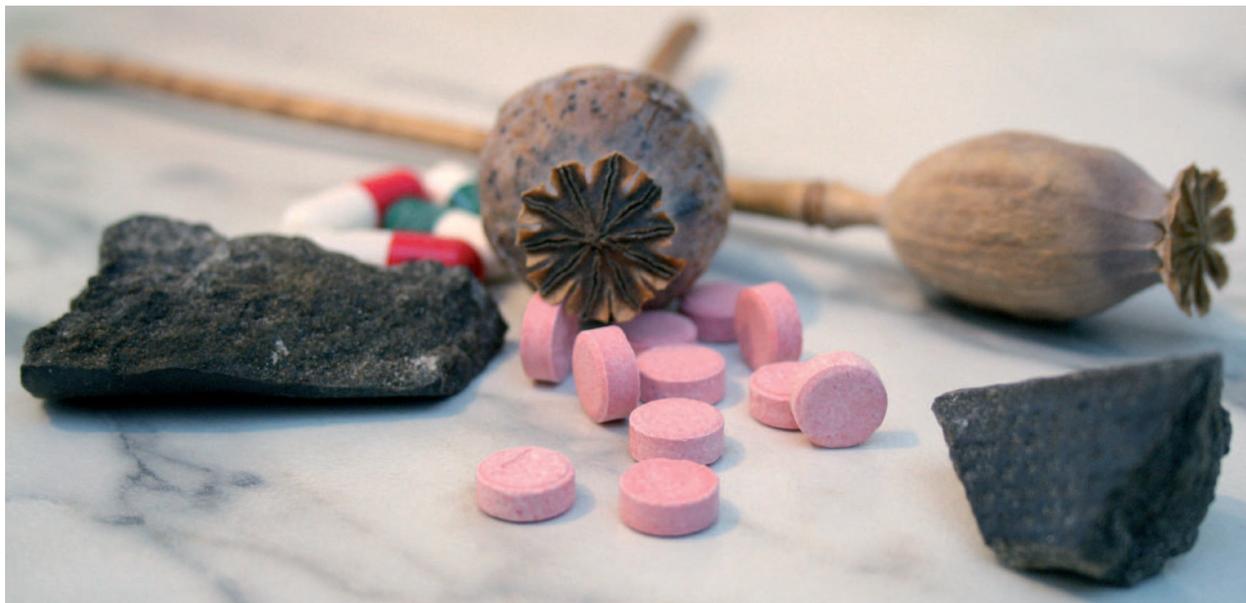


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European Monitoring Centre  
for Drugs and Drug Addiction

SERVICE SURVEYS, LIFESTYLE  
AND CHRONIC DISEASES



# BELGIAN NATIONAL REPORT ON DRUGS 2014

NEW DEVELOPMENT AND TRENDS

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BELGIAN NATIONAL REPORT  
ON DRUGS 2014 (DATA 2013)

NEW DEVELOPMENT AND TRENDS



**Scientific Institute Public Health (WIV-ISP)**

Operational Directorate Public Health and Surveillance

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# CHAPTER 10.

## DRUG MARKETS

*Blanckaert P.*

- Record amounts of seized labs and precursors in 2013 confirmed the role of Belgium as a producing country for synthetic drugs such as MDMA and amphetamine.
- MDMA content in ecstasy tablets reached an all-time high level in 2013, pointing towards a fully recovered MDMA market.
- Pre-precursors continue to play a growing role in the synthesis of amphetamines.

### 1. INTRODUCTION

This chapter provides an overview of the drug market in Belgium. Information about the origin of illegal drugs (section 2.1), drug trafficking (section 2.2) and drug seizures made by federal police services (section 3), as well as drug price data (section 4.1) and data regarding drug purity (section 4.2) in Belgium is discussed. The used contaminants and cutting agents are also briefly covered in section 4.3.

## 2. SUPPLY TO AND WITHIN THE COUNTRY

Information regarding drugs origin and trafficking is provided by the Drug Programme of the General Directorate of the Judicial Police, Direction of Crime against Persons (DGJ-DJP).

### 2.1. DRUGS ORIGIN: NATIONAL PRODUCTION VERSUS IMPORTED

For cannabis, most seizures in Belgium originated from The Netherlands or Belgium itself. Cannabis resin is an exception, for which Morocco remained the most frequent country of origin (Ovaere, personal communication). Additionally, three tonnes of cannabis resin coming from Pakistan were seized in 2013. Nevertheless, several tonnes of herbal cannabis were imported from Ghana, Honduras and Senegal (see also 3.1).

Heroin and cocaine are not produced in Belgium and hence always imported (Ovaere, personal communication, 2014). In 2013, heroin was largely imported from Turkey. In addition, heroin seizures were also imported from Africa and Pakistan. The predominant countries of origin for cocaine remain Colombia, Peru and Bolivia. Cocaine is also imported from other Latin American countries such as Chili, Panama, Costa Rica, Mexico and Venezuela. A new tendency is the import of cocaine from Brazil. In 2013, a very small amount of cocaine was also imported from Africa (Ovaere, personal communication).

Belgium and The Netherlands are well-known for their production capacity of amphetamine and ecstasy. In 2013, the largest synthetic drug lab ever was discovered and seized in Belgium (see also 3.3). The predominant country of origin for most seized NPS remains China.

### 2.2. TRAFFICKING PATTERNS, NATIONAL AND INTERNATIONAL FLOWS, ROUTES, MODI OPERANDI AND ORGANIZATION OF DOMESTIC DRUG MARKETS

The drug market is a complex phenomenon (Decorte and D'Huyvetter, 2013; Smet et al., 2013). Besides being a country of destination, Belgium is also a transit country for most illicit substances.

As a result of increased pressure on cannabis cultivation in The Netherlands, the majority of the Belgian cannabis production is destined for export to the Dutch drug market, where it is sold in "coffee shops". The motivation to grow cannabis can be either for personal consumption or profit. The materials

used for the cultivation are often purchased in Dutch grow shops, although also more Belgian grow shops have started to appear (Decorte and Paoli, 2014). During the growth process, several strategies are used to maximise profit. For example, avoiding electricity costs by illicit manipulation of the electricity meter is a common practice (Decorte and Paoli, 2014; Vanhove et al., 2014). Also, in order to minimise conviction, false identity cards are used to rent locations suited for cultivation. These and other factors contributing to the damage caused by domestic cannabis plantations have been investigated in the CANMARKT study. In addition, this research reported other additional harms related to the cultivation of cannabis, including theft of plants, harvest or equipment and the destruction of plants. Threats and the actual use of violence have also been documented. The results also show that growers were mainly motivated by the pleasure of the growth process itself and growing cannabis for personal consumption rather than profit-oriented. The majority of growers worked alone (66.3% of respondents) or collaborated with one partner (21.4%). However, since this research was survey-based, it is assumed that criminal growers did not participate in this investigation (Decorte and Paoli, 2014).

Also, in this context, cannabis social clubs are operating in Belgium. Currently, five clubs are known with a total membership of 450 persons. These clubs grow cannabis for the personal consumption of their members, without any intention of selling cannabis products to non-members. Members are carefully selected as the clubs have strict criteria for enrolment. These include, among others, a minimum age (18 or 21 years), residence in a certain area, absence of a criminal record and absence of drug abuse problems. In addition, members also have to take part in an intake interview. These clubs operate on the premise of collectively growing one plant per member. As the possession of one female cannabis plant currently has the lowest priority for prosecution, cannabis social clubs try to evade legal issues. A statement of ownership signed by a member, with a copy of his/her identity card, is attached to each individual plant. Crops are usually harvested every 2 to 3 months. The cannabis is distributed among the club's members after every harvest by paying a fixed amount per gram. As such, there is no constant availability of cannabis. Also, there are imposed limits to the amounts each member can buy (Decorte, 2014).

Belgium also remains a transit country for cocaine traffic from South- or Central-America to Europe. The main routes of entry in Belgium are the port of Antwerp and the Brussels airport (Zaventem, for mostly only smaller quantities). Cocaine is also still imported through passengers of international flights originating from the Dominican Republic, Jamaica, Suriname or the Dutch Antilles. The cocaine is mostly destined for export to The Netherlands. The share that is destined for Belgian consumption is first exported to the Netherlands. Only after Dutch organizations have cut and split the drugs, the cocaine is imported again for the Belgian drug market.

Heroin is imported by road (Turkish origin), air (East and South African origin) and maritime traffic (mainly from Mozambique and Pakistan) (Ovaere, personal communication).

Similar to the cannabis and cocaine market, Dutch citizens probably play a prominent role in the Belgian production and distribution of synthetic drugs. Synthetic drug laboratories in the Belgian-Dutch border region involve international organised criminal networks (Smet et al., 2013). In addition, most NPS imported in Belgium are destined for further transport to countries including Germany, France, Spain and the UK.

Over the last few years, the Belgian retail drug market has changed as well. According to the results of a case study in Antwerp on retail trade of cannabis, cocaine, amphetamine and ecstasy, the drug market became less visible the past years. Analyses of police charges and public prosecutor files conducted by researchers of the Institute of Social Drug research (ISD) show that different channels are used for drug dealing. Besides dealing on the street, dealers prefer to sell their drugs in private houses, bars, (rented) cars and through the internet. Consequently, these transactions attract less public attention (Decorte and D'Huyvetter, 2014). Reducing the number of visible transactions can be considered as risk management (Smet et al., 2013). Face-to-face interviews with drug users, drug dealers and experts professionally working in the drug domain reveal that the retail market of cannabis is largely separated from the retail market of cocaine and heroin on the one hand and the market of ecstasy and amphetamine on the other hand (Decorte and D'Huyvetter, 2014). Nevertheless, some retail dealers are also involved in polydrug trade (Decorte and D'Huyvetter, 2014). This is especially the case for dealers of synthetic drugs. The retail market of synthetic drugs is very open and informal. The wholesale market of these drugs, on the contrary, is less accessible. Consequently, more knowledge concerning these wholesale and middle market echelons is needed in order to optimize the monitoring of drug supply in Belgium (Smet et al., 2013).

### 3. SEIZURES

Information regarding drug seizures and seized illicit drug laboratories is provided by the Drug Programme of the General Directorate of the Judicial Police, Direction of Crime against Persons (DGJ-DJP). These data are extracted from the General National Database (GND), which gathers all police reports in Belgium, both at the local and at the federal level. In Belgium, federal police services collect data on drug prices for both the Flemish and the French Community.

#### 3.1. QUANTITIES AND NUMBERS OF SEIZURES OF ILLICIT DRUGS

An increase of around 10% was seen in the total number of drug seizures in Belgium in 2013 (38,069 total seizures in 2012 versus 41,824 seizures in 2013) (Table 10.1).

Large increases were observed in the number of both cannabis resin and herbal cannabis seizures. In 2012 a total of 27,004 seizures were made, in comparison to 30,641 in 2013. As a consequence, an increase of 13% cannabis-related seizures was observed. In total, 73.2% of all seizures made in 2013 were related to cannabis, with cocaine being the second primary seized drug (8.7% of all seizures). The proportion of amphetamine and heroin seizures was 7.1% and 5.8% respectively. The numbers of seizures of synthetic drugs in general also increased compared to 2012. The increase in the number of ecstasy-related seizures over the years (21% in comparison with 2012) demonstrates the recovery of the ecstasy market.

**Table 10.1 | Number of drug seizures by substance between 2007 and 2013**

Drug type	2007		2008		2009		2010		2011		2012		2013	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Cannabis														
Total	25,532	69.6	22,418	69.7	29,212	71.8	27,512	71.2	29,847	72.0	27,004	70.9	30,641	73.2
Resin	5,870	16.0	4,921	15.3	6,206	15.3	5,048	13.1	5,622	13.6	4,818	12.6	5,529	13.2
Herbal	19,196	52.4	16,831	52.3	22,274	54.8	21,485	55.6	23,155	55.9	21,075	55.3	23,900	57.14
Plants	4,660	1.3	666	2.1	732	1.8	979	2.5	1,070	2.6	1,111	2.9	1,212	2.89
Heroin	2,850	7.8	2,307	7.2	3,054	7.5	3,433	8.9	2,930	7.1	2,507	6.6	2,431	5.8
Cocaine	3,656	10.0	3,345	10.4	4,021	9.9	3,448	8.9	3,777	9.1	3,859	10.1	3,653	8.7
Amphetamine	2,767	7.6	2,646	8.2	2,944	7.2	2,912	7.65	3,079	7.4	2,830	7.4	2,978	7.1
Methamphetamine	.	.	.	.	.	.	64	0.2	99	0.24	102	0.26	107	0.25
Ecstasy-type	1,798	4.9	1,412	4.4	921	2.3	650	1.7	919	2.2	1,098	2.9	1,338	3.2
LSD	1	0.0	.	.	.	.	59	0.2	85	0.2	49	0.12	76	0.2
GHB*	.	.	.	.	473	1.2	503	1.3	605	1.4	550	1.4	546	1.3
Khat*	.	.	.	.	49	0.1	51	0.1	87	0.2	70	0.18	54	0.13
<b>Total</b>	<b>36,604</b>	<b>100</b>	<b>32,128</b>	<b>100</b>	<b>40,674</b>	<b>100</b>	<b>38,632</b>	<b>100</b>	<b>41,428</b>	<b>100</b>	<b>38,069</b>	<b>100</b>	<b>41,824</b>	<b>100</b>

\* GHB and Khat are only monitored by BMCDDA since 2009

Source: Federal police

In parallel with the number of seizures, the quantity of seized cannabis has drastically increased (Table 10.2). In 2012, 1,338 kg of cannabis resin were seized; this number changed to 4,274 in 2013 and presents an increase of over 300%. This phenomenon can be explained by one exceptionally large seizure from Pakistani origin (3,020 kg), made in February 2013 by the customs services in the port of Antwerp (Ovaere, personal communication). Likewise, for herbal cannabis, 14,882 kg was seized in 2013, compared to only 5,635 kg in 2012 (or a 250% increase). Especially three large shipments contributed to the total amount of seized herbal cannabis. In November 2013, 7,600 kg of herbal cannabis was seized in the port of Antwerp in a shipment of coconuts originating from Senegal. A few days later, another 4,178 kg of cannabis were seized, this time coming from Ghana. Another container coming from Honduras was seized earlier in the year, containing a smaller amount of 1,781 kg of herbal cannabis (Ovaere, personal communication).

For cocaine, the seized amount in 2013 was drastically lower compared to 2012. This has to be put in perspective, since one very large seizure was responsible for the large quantity of seized cocaine in 2012. As such, the total quantity of seized cocaine is comparable to the years previous of 2012. In 2013, the largest cocaine seizure was 353 kg, coming from Chili (Ovaere, personal communication).

A drastic increase in the quantity of seized heroin was observed in 2013: 1,182 kg of heroin were seized; an increase with over 1,000% compared to the previous year. This rise is due to one very large seizure of 865 kg coming from Mozambique and destined for The Netherlands (Ovaere, personal communication).

A worrying observation is the tenfold increase in seized quantities of methamphetamine. For years, methamphetamine has been practically absent from the Belgian drug market. However, these last numbers indicate a gain in availability. It is currently unclear whether this synthesized methamphetamine was destined for consumption on the Belgian market or for export. The amount of seized amphetamine has more than tripled (54 kg in 2012 versus 178 kg in 2013). Also, a 38% increase was observed in the number of seized ecstasy tablets. These developments are a logical consequence of the drastic increase in the number of seized synthetic drug production laboratories (Table 10.4). Comparable to other European countries, the presence of LSD in Belgium remains anecdotal, at least judging by the quantities seized in 2013. Moreover, the total quantity of seized LSD blotters keeps decreasing over the years. A decrease was also observed in the amount of seized GHB. The amount of seized khat plants roughly remained the same.

**Table 10.2 | Total quantities of seized drugs by substance between 2007 and 2013**

Drug type	Unit	2007	2008	2009	2010	2011	2012	2013
Cannabis resin	kg	58,544	1,529	18,659	3,153	5,020	1,338	4,274
Herbal cannabis	kg	12,732	4,891	4,486	5,208	6,095	5,635	14,882
Cannabis plants	units*	148,251	177,190	272,714	312,528	337,955	330,675	396,758
Heroin	kg	548	63	275	386	140	112	1,182
Cocaine	kg	2,470	3,851	4,605	6,844	7,999	19,178	6,486
Amphetamine	kg	483	411	49	362	112	54	178
Methamphetamine	kg	.	.	.	39	2	3	38
Ecstasy-type substances	tablets	541,245	162,821	31,025	32,954	64,384	26,874	37,152
LSD	units	1	.	.	3,924	838	225	121
GHB	litre	.	.	104	24	82	76	45
Khat	kg	.	.	1,685	1,018	1,128	1,298	1,149

\* Change in methodology: since 2008 the capacity of cannabis plantations is reported instead of the actual seizure and the reporting of plantations is done directly to the DGJ-DJP instead of through the GND. The data from 2006 and 2007 are less reliable.

\*\* GHB and Khat are only monitored by BMCDDA since 2009.

Source: Federal police

Besides the quantities seized of the more classic illegal substances, also a seizure of 4 tonnes of mCPP was reported. This shipment was destined for a company that did not have the required documents for importing mCPP (mCPP can also be used for the production of trazodone, a registered anti-depressant). In the previous years, 13 shipments (ranging from 3 to 7 tonnes) had already been received by this company (Ovaere, personal communication).

With regard to NPS, each year, very large quantities of these substances are seized in Belgium, mostly in transit from China to another EU country. For example, almost 12 kg of JWH-018, a synthetic cannabinoid, was seized in 2013. Other synthetic cannabinoids, such as 5F-AKB48 (1 kg), 5F-UR144 (20 kg) and AM-2201 (1 kg) were seized as well. Also 4.5 kg of ketamine and 2.3 kg of Ayahuasca plant material were seized in 2013.

### 3.2. QUANTITIES AND NUMBERS OF PRECURSOR CHEMICALS USED IN THE MANUFACTURE OF ILLICIT DRUGS

The Federal Agency for Medicines and Health Products (FAMHP) together with the Federal Police Services provided information with regard to drug precursors in Belgium.

The majority of seized drug precursors in 2013, as well as the largest seized quantities originated from China and were generally destined for The Netherlands. Other quantities have been seized in synthetic drug production

laboratories and/or labs for the conversion of pre-precursors (see also section 3.3). An overview of drug precursors seized in the time period 2011-2013 is provided in Table 10.3.

A decrease is observed in the amount of seized 1-phenyl-2-propanon (benzylmethylketon, BMK), the direct precursor for amphetamine synthesis: only 40 litres were seized in 2013. This may indicate that this precursor is being used less and less for the production of amphetamines. In light of the decreasing amounts of seized BMK, the drastic increasing amount of APAAN that was seized in Belgium in 2013 is of special attention.

In April, a seizure of 4 tonnes of APAAN was performed by the custom services in the port of Antwerp. The container's origin was China and was destined for The Netherlands. In July, again 1,120 kg were seized. Other seizures of APAAN were made in conversion labs or in amphetamine or ecstasy production laboratories (Ovaere, personal communication). This confirms that most illicit amphetamine laboratories in Belgium used APAAN as a pre-precursor in 2013. However, it is worth noting that European regulation listed APAAN as a controlled precursor since the end of 2013 (EU regulations 1258/2013 and 1259/2013). Hence, it is expected that, once the current stock of the suppliers APAAN is sold out, illicit drug producers will turn to other non-controlled (pre-)precursors to evade drug and precursor laws.

An important quantity of (iso)safrole has been discovered in 2013 in the largest synthetic drug laboratory ever seized in Belgium (see also section 3.3). The 720 litres of this product are meant to be pre-precursors for PMK, which in turn is the direct precursor for MDMA, the principal component of ecstasy tablets. Additionally, 2 containers coming from China with a total content of 45,838 kg of methylamine, a reagent for the synthesis of MDMA, were seized in the port of Antwerp (Ovaere, personal communication).

**Table 10.3 | Amounts of precursors seized between 2011 and 2013**

Substance	Unit	2011	2012	2013
1-phenyl-2-propanon (BMK)	litre	.	503	40
Phenyl-2-nitropropene	kg	1	.	.
N-methyl-L-alanine	kg	.	1,150	.
Formamide	litre	15	.	.
Formic Acid	litre	265	.	.
Sodium hydroxide	kg	896.5	5,875	.
(iso)Safrole	litre	9,000	.	720
Gamma-butyro-lactone (GBL)	litre	30	9	7.5
Alphaphenylacetoacetonitrile (APAAN)	kg	10	8,763	5,392
Methylamine	kg	.	.	45,838
Piperonylmethylketon (PMK)	litre	.	.	2,781

Source: FAMHP, data 2011-2013, personal communication; Ovaere, personal communication, 2014

### 3.3. NUMBER OF DRUG PRODUCTION SITES DISMANTLED, DESCRIPTION OF METHODS OF PRODUCTION AND PRECISE TYPE OF ILLICIT DRUGS MANUFACTURED THERE

As mentioned above and similar to our neighbouring country The Netherlands, Belgium is a well-known production country for synthetic drugs as well as cannabis. Since the years 2000, organised criminal networks are active in the Belgian-Dutch border region to set up synthetic laboratories, sometimes combined with cannabis cultivation (Smet et al., 2013). The different steps of the production are often spread over the two neighbouring countries (Ovaere, personal communication). The capacity of criminal organizations to separate the different stages of drug production makes the law enforcement effort particularly difficult. Nevertheless, every year, a number of illicit ecstasy or amphetamine laboratories are seized. Also other types of illicit drug laboratories are found. Table 10.4 gives an overview of dismantled synthetic drug labs in the period 2007-2013.

**Table 10.4 | Number and type of synthetic drug labs dismantled by Belgian police services between 2007 and 2013**

Lab type	2007	2008	2009	2010	2011	2012	2013
<b>Labs for synthetic drugs</b>							
Amphetamines	3	3	1	4	1	.	2
Methamphetamine	.	.	.	.	1	.	.
APAAN conversion lab	.	.	.	.	.	2	1
MDMA	.	1	.	.	1	1	2
MDMA + amphetamine + APAAN conversion	.	.	.	.	.	.	2
Amphetamine + APAAN conversion	.	.	.	.	.	.	4
LSD	1	.	1	.	.	.	.
GHB	.	1	.	2	.	2	2
DMT	.	.	.	.	.	.	1
Unknown/unspecified combinations	4	.	.	.	.	.	2
<b>Other</b>							
Creation of tablets	.	1	.	.	.	1	.
Production of NPS	.	.	.	.	.	1	.
<b>Total</b>	<b>8</b>	<b>6</b>	<b>2</b>	<b>6</b>	<b>3</b>	<b>7</b>	<b>16</b>

Source: Ovaere, personal communication, 2014

Whereas in the last few years the number of seized drug labs tended to be relatively stable, a drastic increase in the number of seized synthetic drug production laboratories (pre-precursor conversion labs included) was noticed in 2013. 16 production sites (3 partially dismantled) and 2 sites for the stocking

of products or materials were found, compared to only 7 laboratories in 2012 (Ovaere, personal communication).

The most mediatized cases concerned 2 production sites of exceptional capacity (Ovaere, personal communication): 1 active site and 1 non-active site. After chemical analysis, several substances such as isosafrole (precursor for PMK), PMK (precursor for MDMA), MDMA, APAAN (precursor for BMK), BMK (precursor for amphetamines), amphetamines and even traces of methamphetamine (produced from BMK) were found.

Also worth mentioning is the seizure of an MDMA laboratory with a large scale production capacity, estimated at 179 kg of MDMA per batch. This equals to more than one million ecstasy tablets per production run (Ovaere, personal communication).

In 2012, the emergence of APAAN/BMK conversion laboratories was noticed. This phenomenon increased in 2013. The labs for production of amphetamines and the conversion of APAAN into BMK represent the largest number of dismantled labs. It is worth mentioning that the set-up of these labs was strikingly professional and with enormous production capacity.

MDMA production has reached an industrial level in Belgium. The past shortage of precursors, *in casu* PMK, clearly has been resolved by the use of alternative precursors. Currently, PMK is synthesized starting from pre-precursors such as safrole and PMK-glycidate (comparable to the APAAN-BMK conversion for amphetamine synthesis). This renewed availability of MDMA precursors is yet another indication of the recovering market and might contribute to the higher average concentrations of MDMA in ecstasy tablets found on the Belgian market. Consequently, an increased number of early warnings with regard to highly dosed MDMA tablets were sent in 2013 (see also chapter 7, section 2.2).

The reported number of GHB production labs is probably an underestimation as a lot of GHB is produced in so-called “kitchen labs”. These “pop-up labs” convert  $\gamma$ -butyrolactone to GHB through alkaline hydrolysis. No sophisticated materials are required for the synthesis (Ovaere, personal communication).

Similar to synthetic drugs, the Netherlands are inextricably linked to a majority of cases with a commercial character concerning the production of cannabis. The materials used for the cultivation are often purchased in Dutch grow shops (Decorte and Paoli, 2014; Vanhove et al., 2014). The discovered plantations are also often linked with persons having connections with The Netherlands or even Dutch criminal entrepreneurs (Vanhove et al., 2014). Moreover, the connections with The Netherlands increase with increasing plantation size (Ovaere, personal communication). Cannabis crops produced in Belgium, especially large scale/industrial, are most often destined for export to the Dutch market (Decorte and Paoli, 2014).

Paradoxically, a lot of Belgians travel to the Netherlands to buy cannabis and re-import it to Belgium.

In general, an (indoor) cannabis plantation can generate on average 575 g cannabis/m<sup>2</sup> (Smet et al., 2013). Most of the plantations (57.4%) can be categorised as micro or mini plantations and contain less than 50 plants. Although not all of these growers cultivate cannabis for commercial reasons, research has shown that even micro scale plantations can generate high profits (Decorte and Paoli, 2014; Vanhove et al., 2014).

The data from Table 10.5 show that the Belgian cannabis production capacity keeps increasing in 2013. Compared to 2012, the number of seized plantations increased with about 10% (from 1,111 plantations in 2012 to 1,212 plantations in 2013). Compared to 2012, an increase in the number of micro-, mini-, middle-sized and industrial plantations was observed.

**Table 10.5 | Number of seized cannabis plantations between 2008 and 2013, by plantation size**

Plantation size*	2008		2009		2010		2011		2012		2013	
	N	%**	N	%**	N	%**	N	%**	N	%**	N	%**
Micro	136	21.1	138	18.7	211	21.8	190	17.9	172	15.6	228	18.9
Mini	219	33.9	227	30.8	312	32.2	376	35.4	453	41.0	465	38.5
Small	125	19.3	161	21.8	165	17.0	187	17.6	166	15.0	156	12.9
Middle sized	58	9.0	73	9.9	94	9.7	101	9.5	89	8.0	119	9.9
Large	63	9.8	67	9.1	104	10.7	119	11.2	142	12.9	141	11.7
Industrial	45	7.0	71	9.6	82	8.5	88	8.3	83	7.5	98	8.1
<b>Total (with info)</b>	<b>646</b>	<b>100</b>	<b>737</b>	<b>100</b>	<b>968</b>	<b>100</b>	<b>1,061</b>	<b>100</b>	<b>1,105</b>	<b>100</b>	<b>1,207</b>	<b>100</b>
No info***	20		1		11		9		6		5	
<b>Total</b>	<b>666</b>		<b>738</b>		<b>979</b>		<b>1,070</b>		<b>1,111</b>		<b>1,212</b>	

\* Micro: 2-5 plants; Mini: 6-49 plants; Small: 50-249 plants; Middle sized: 250-499 plants; large: 500-999 plants; Industrial: >1000 plants  
 \*\* Percentage based on total number of plantations with known size  
 \*\*\* including cannabis cutting sites and other plantations with unknown size  
 Since 2008, the capacity of cannabis plantations is reported instead of the actual seizure; and the plantations are reported directly to the DGJ-DJP instead of through the GND. For 2007, the corrections on capacity of plantations could be done for only a part of the plantations.

Source: Ovaere, personal communication, 2014

## 4. PRICE/PURITY

### 4.1. PRICE OF ILLICIT DRUGS AT RETAIL LEVEL AND WHOLESALE LEVEL

In Belgium, information on drug street prices from both the Flemish and the French Community is collected by the federal police services. These data are obtained during interrogation of (suspected) drug dealers and users. An overview of the reported mean, minimum and maximum prices by drug type and region is provided in Tables 10.6 to 10.10 for the time period 2008 to 2013. Information regarding the street prices of drugs in the French Community is also collected by Eurotox through the use of surveys. Since no significant difference is observed with the federal police data, these data are not shown here.

The average retail prices for cannabis products for the time period 2008-2013 are presented in Table 10.6. Depending on the region, the average price for 1 gram of herbal cannabis varied between €8 and €9.5 in 2013. These values are practically identical to the previous year. The same goes for cannabis resin: the average price was €9 to €10 per gram.

**Table 10.6 | Cannabis price at street level (euro) between 2008 and 2013**

	2008			2009			2010			2011			2012			2013		
	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max
<b>Cannabis resin per gram</b>																		
Federal Police, French Community	7.9	3.0	15.0	7.5	4.0	12.0	7.0	3.0	15.0	6.7	2.0	25.0	9.3	2.5	18.4	10.0	3.0	20.0
Federal Police, Flemish Community	6.8	3.0	12.0	6.5	5.0	10.0	7.5	5.0	10.0	7.4	2.0	25.0	8.6	2.5	18.4	9.0	3.0	20.0
<b>Herbal cannabis per gram</b>																		
Federal Police, French Community	8.1	3.0	25.0	6.9	3.3	12.0	8.2	5.0	12.5	8.0	2.5	16.7	8.9	1.8	25.0	9.5	2.75	20.0
Federal Police, Flemish Community	5.9	2.6	10.0	7.4	3.0	12.5	6.4	2.8	10.0	6.9	2.5	16.7	8.9	1.8	25.0	8.0	2.75	20.0

Source: Federal police: Ovaere, personal communication, 2014

Heroin prices at street level between 2008 and 2013 can be found in Table 10.7. In 2013, the mean prices for heroin varied for the different parts of the country. There is no significant difference compared to the previous years. The prices varied between €25.5 and €31.3 per gram.

**Table 10.7 | Heroin price at street level (euro) between 2008 and 2013**

	2008			2009			2010			2011			2012			2013		
	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max
<b>Heroin unspecified per gram</b>																		
Federal Police, French Community	23.9	5.0	50.0	24.4	10.0	50.0	24.2	8.0	50.0	29.7	7.0	100.0	27.3	6.0	100.0	25.5	7.4	125.0
Federal Police, Flemish Community	25.2	12.0	40.0	22.7	10.0	40.0	23.8	9.0	62.5	30.0	7.0	100.0	28.3	6.0	100.0	31.3	7.4	125.0

Source: Federal police: Ovaere, personal communication, 2014

Retail prices for cocaine are shown in Table 10.8. Average prices varied between €49 per gram in the Flemish Community, versus €67 per gram in the French Community. For crack cocaine, no price data are available as it is almost never found, except in a few very large cities such as Antwerp and Brussels. Compared to the previous year, a 10% price increase has been observed for cocaine in the French Community. Prices in the Flemish Community remained unchanged. One explanation why cocaine prices are lower in the Flemish Community could be the presence of the port of Antwerp in Flanders, which is the major source for cocaine entering Belgium. This could potentially result in an increased supply of cocaine in that region, hence the lower prices.

**Table 10.8 | Cocaine price at street level (euro) between 2008 and 2013**

	2008			2009			2010			2011			2012			2013		
	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max
<b>Cocaine per gram</b>																		
Federal Police, French Community	47.8	5.0	87.0	52.8	10.0	100.0	52.2	30.0	100.0	51.8	20.0	100.0	60.9	20.0	125.0	67.0	14.3	133.3
Federal Police, Flemish Community	50.8	30.0	70.0	48.9	15.0	70.0	49.1	30.0	100.0	56.0	20.0	100.0	51.6	20.0	125.0	49.0	14.3	133.3

Source: Federal police: Ovaere, personal communication, 2014

Table 10.9 reflects retail prices for amphetamine, or “speed” as it is called in Belgium. A slight increase in price was observed in the French Community (from €9.8 per gram in 2012 to €10.5 per gram in 2013), whereas a very slight but negligible decrease was seen in the Flemish Community (from €8.4 per gram in 2012 to €8.2 per gram in 2013). However, the observed maximum prices decreased with 20%. A price difference between the Flemish and French Community was observed. The fact that most amphetamine laboratories are found in the Flemish Community could suggest a shorter supply route in the Flemish Community, possibly responsible for the lower price.

**Table 10.9 | Amphetamine price at street level (euro) between 2008 and 2013**

	2008			2009			2010			2011			2012			2013		
	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max
<b>Amphetamine per gram</b>																		
Federal																		
Police, French Community	6.6	1.5	10.0	10.9	2.8	25.0	9.1	2.5	10.0	8.4	3.0	16.7	9.8	3.0	25.0	10.5	3	20
Federal Police, Flemish Community	8.7	3.5	20.0	8.1	5.0	12.0	8.4	2.5	15.0	7.5	3.0	16.7	8.4	3.0	25.0	8.2	3	20

Source: Federal police: Ovaere, personal communication, 2014

The evolution of retail prices for ‘ecstasy’-tablets and LSD blotters between 2008 and 2013 is presented in Table 10.10. Prices are given per unit (per tablet or paper trip). The price of LSD has remained unchanged compared to previous years. It is however remarkable that the average price for a single ecstasy tablet has decreased from €5.8 to €4.6 per tablet in the French Community. Prices in the Flemish Community remained unchanged and also minimum and maximum prices have not changed whatsoever. Taking this into account, together with data on seizures and purity (see 4.2), this is once more a confirmation of the recovery - or even more, the blooming - of the ecstasy market in the last couple of years in Belgium.

**Table 10.10 | Ecstasy and LSD price at street level (euro) between 2008 and 2013**

	2008			2009			2010			2011			2012			2013		
	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max	mean	min	max
<b>Ecstasy per tablet</b>																		
Federal Police, French Community	4.1	1.1	10.0	4.1	1.2	10.0	5.2	2.0	10.0	4.6	2.0	10.0	5.8	1.0	10.0	4.6	1.5	10
Federal Police, Flemish Community	3.2	1.8	5.0	3.5	1.0	8.0	3.4	1.0	10.0	4.5	2.0	10.0	4.5	1.0	10.0	4.4	1.5	10
<b>LSD per dose</b>																		
Federal Police, French Community	8.3	6.5	10.0	.	.	.	.	.	.	.	.	.	10.0	3.0	10.0	10	10	12
Federal Police, Flemish Community	.	.	.	10.0	10.0	10.0	12.0	12.0	12.0	11.8	7.0	15.0	10	3.0	10.0	10	10	12

Source: Federal police: Ovaere, personal communication, 2014

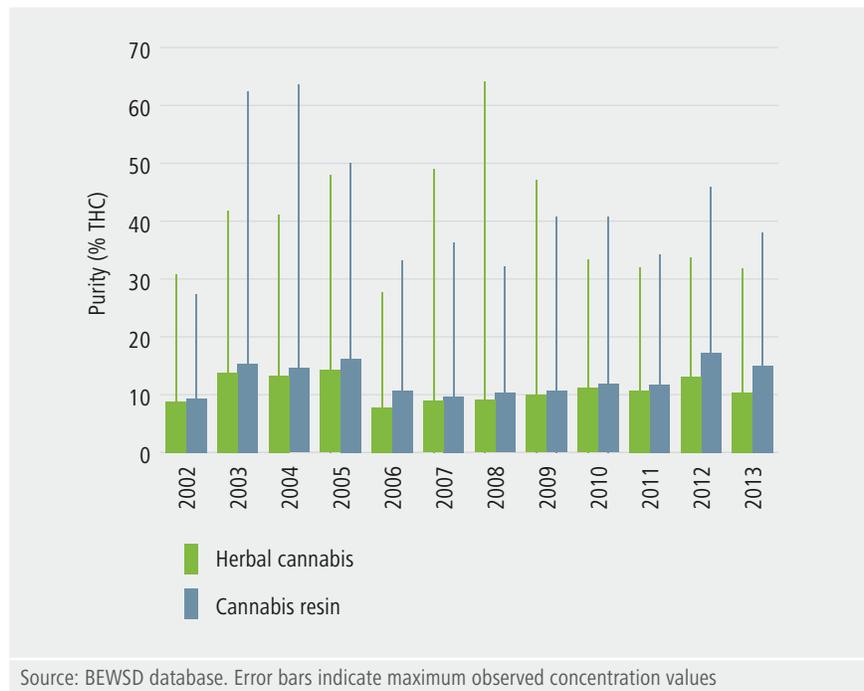
## 4.2. PURITY/POTENCY OF ILLICIT DRUGS

Mean concentrations of the most common illicit drugs (cannabis, amphetamine, MDMA, cocaine and heroin) found on the Belgian drug market between 2002 and 2013 are presented in Figures 10.1, 10.2 and 10.3. Data regarding the composition and purity of the classic illicit drugs circulating on the Belgian market are provided by the Belgian Early Warning System on Drugs (BEWSD) which keeps a database of all reported analysed drug samples in Belgium. Drug samples are mostly collected after seizure by police or federal customs, and are analysed by the National Institute on Criminalistics and Criminology (NICC). In a minority of cases, drug samples are submitted through a small-scale local drug testing project in the Brussels region (Modus Vivendi). Some research projects also aim to analyse the contents of drugs circulating at street level (e.g. analysis of the contents of amnesty bins at dance festivals). For police seizures, the results of both large and small-scale seizures are reported. Caution is needed when interpreting these results, since police seizures often encompass larger, more pure drug seizures. This can result in a potential overestimation of the purity of drugs in Belgium, especially drugs that can be cut or contaminated (powders such as cocaine or heroin).

As clearly illustrated in Figure 10.1, there have been no large changes in the concentration of tetrahydrocannabinol (THC, the active component in cannabis) for herbal cannabis or cannabis resin in the last 4 years. For herbal cannabis, the

mean THC concentration in 2013 was 10.4%, which is not significantly different with the mean concentration in 2012 (13.1%). No significant differences in maximum or minimum concentration compared to the previous year were found either. For cannabis resin, a peak 17.2% THC was observed in 2012. In 2013, the mean THC level in cannabis resin decreased, approaching previous levels (15%). The observed maximum THC concentrations in cannabis resin were lower in 2013, compared to 2012.

**Figure 10.1 | Mean THC concentration (%) in samples of cannabis (herbal and resin), 2002-2013**

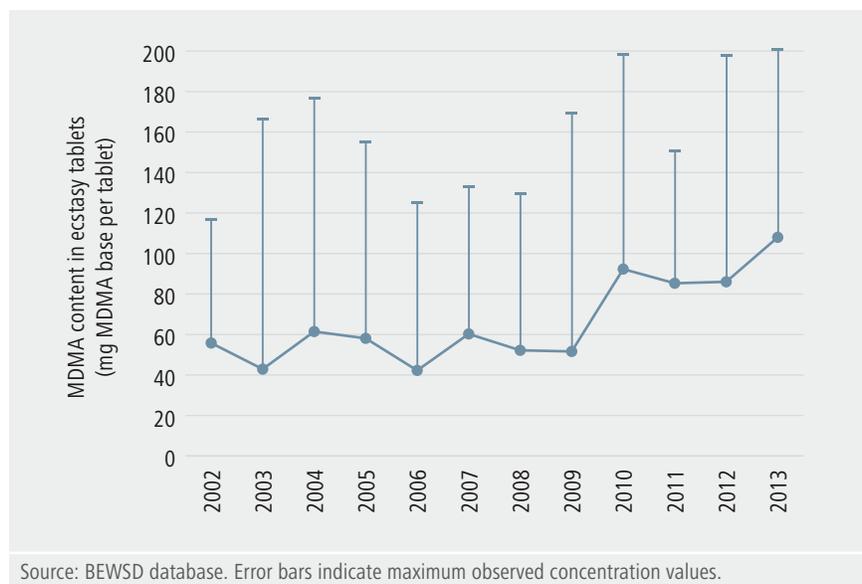


As already mentioned several times, multiple factors point towards a revival of the ecstasy market after a decline in the period 2005 to 2008. Since 2009, the mean MDMA content in ecstasy tablets has kept on rising, reaching a new record in 2013 (128.6 mg MDMA base per tablet). Also, the maximum amount observed in one ecstasy tablet was the highest ever seen in Belgium (221 mg MDMA base per tablet in 2013). This trend is alarming, especially since it has also been observed in our neighbouring countries France and especially The Netherlands. It seems that the ecstasy market in Belgium and The Netherlands is largely similar. During 2013, several alerts were issued concerning highly dosed MDMA tablets (see chapter 7, section 2.2). Tablets containing even more than 250mg MDMA base have been found in the Netherlands. For young users or first-time users, such dosages can easily result in toxicity symptoms,

especially when combined with e.g. dehydration in festive settings. The BEWSD has warned its partners extensively regarding this phenomenon. Harm reduction services in Belgium are currently well aware of this changing ecstasy market. Unfortunately, despite the swift actions to alert both field workers and users, several people in Belgium (and The Netherlands) died in 2013 due to consumption of highly dosed ecstasy tablets, or tablets contaminated with other substances, e.g. PM(M)A.

A relatively new phenomenon is the appearance of MDMA on the drug market in crystal or powder form (slang term: “molly” or “sand”). Reported average purity for MDMA powder in 2013 was fully comparable to the purity in 2012 (61.4%); however, the sample size was only 13 samples.

**Figure 10.2 | Mean MDMA content (mg) in ecstasy tablets between 2002 and 2013**

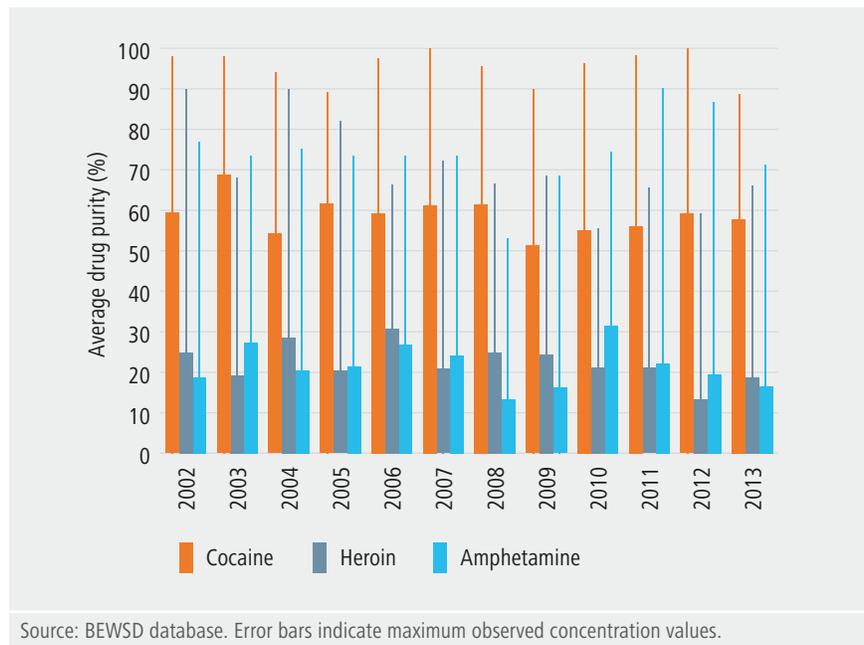


The trend of the last three years regarding the purity of amphetamine powders in Belgium was again confirmed in 2013: the purity of seized amphetamine samples keeps on decreasing sharply. Whereas mean purity values of 19.4% were observed in 2012, the mean purity was only 16.6% in 2013. Also, the maximum purity value dropped from 86.8% in 2012 to 71.2% in 2013. 4-Methylamphetamine (4-MA) remains an important contaminant on the Belgian amphetamine market (see 4.3.2.).

Concerning the purity of cocaine samples, no significant difference was found between the mean cocaine concentration in 2012 and 2013 (59.1% and 57.8% respectively; the number of collected analysed samples was similar: ~350). Compared to other EU countries, the purity of cocaine in Belgium remains very high. Also, the maximum reported concentrations are high (88.6%), but significantly lower than those in 2011 and 2012 (98.19% and 100% respectively). It has to be noted that in 2011 and 2012, large seizures of (more pure) cocaine were made, which could have skewed the results.

Contrary to the cocaine market, the purity of drugs on the heroin market remained poor. The mean heroin purity was higher in 2013 compared to 2012 (18.7% purity in 2013 versus 13.3% in 2012), but is still lower than the purity values obtained in 2011 (21.1%). The maximum obtained value was comparable to previous years (66.2%).

**Figure 10.3 | Mean purity (%) of cocaine, heroin and amphetamine between 2002 and 2013**



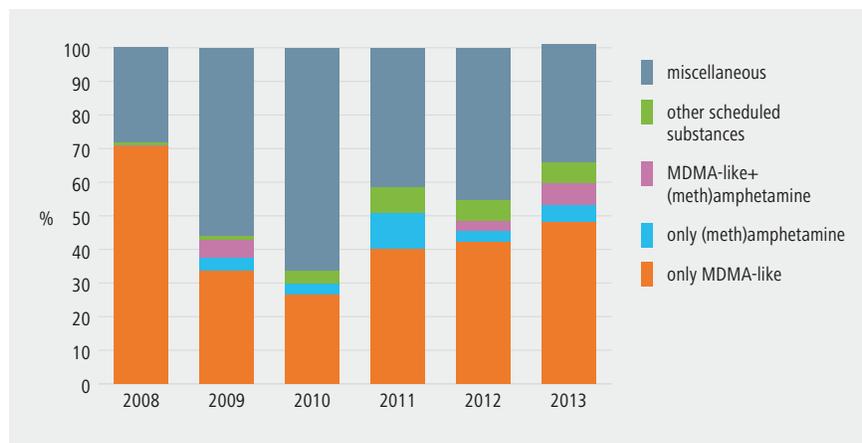
### 4.3. COMPOSITION OF ILLICIT DRUGS AND DRUG TABLETS

Similar to the information obtained for drug purity in paragraph 4.2, information on the specific composition of seized drug samples (tablets, powders and liquids) is available through the BEWSD database.

#### 4.3.1. Tablets

Compared to 2012, the amount of seized tablets containing only MDMA-like substances increased. Most tablets that were sold as MDMA effectively contained only MDMA as the active component. Only 3 tablets were analysed in 2013 containing amphetamine.

**Figure 10.4 |** Composition of illicit drug tablets between 2008 and 2013



1 Scheduled drugs refer to substances controlled under the 1971 UN Convention on Psychotropic Substances Schedules I and II and under European legislation (Council Decisions).

2 The category 'MDMA-like substances (as the only scheduled substances)' refers to tablets containing MDMA and/or other MDMA-like substances (MDEA, MDA) as the only scheduled substances, together with or without non-scheduled substances (e.g. mCPP, caffeine).

3 The category '(meth)amphetamine (as the only scheduled substances)' refers to tablets containing only amphetamine and/or methamphetamine, together with or without non-scheduled substances (e.g. mCPP, caffeine).

4 The category 'MDMA-like substances and (meth)amphetamine (as the only scheduled substances)' refers to tablets containing only MDMA-like substances and amphetamine and/or methamphetamine, together with or without non-scheduled substances (e.g. mCPP, caffeine).

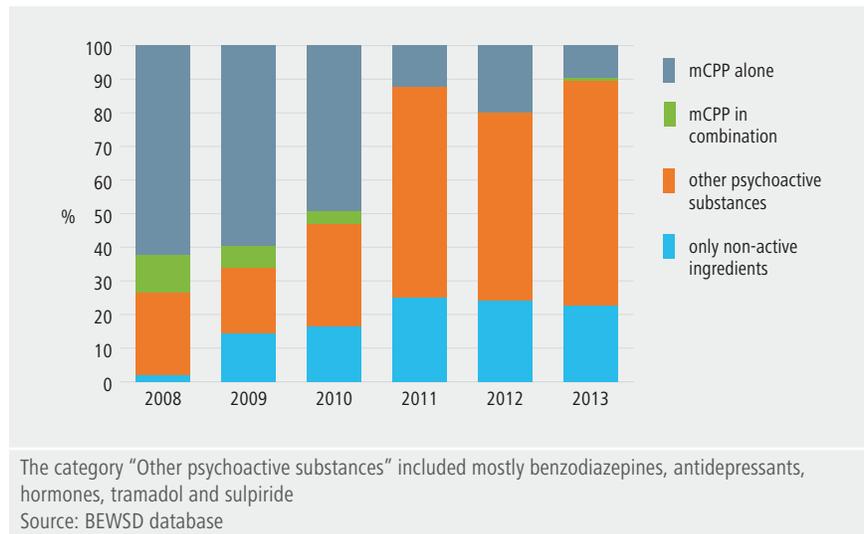
5 The category 'Others (scheduled substances)' refers to tablets containing other scheduled substances (than MDMA-like substances or (meth)amphetamine), alone or in association with MDMA-like substances and/or (meth)amphetamine, together with or without non-scheduled substances (e.g. mCPP, caffeine, DOB).

6 The category 'Miscellaneous' refers to tablets seized/submitted as illicit drug tablets but containing none of the scheduled substances under the 1971 UN Convention on Psychotropic Substances Schedules I and II or under European legislation (Council Decisions).

Source: BEWSD database

Seized tablets that did not contain any psychotropic substances (e.g. tablets containing only lactose or inert fillers) were not included in these calculations. They were also not included in the “miscellaneous” category. A detailed description of the composition of the tablets in the “miscellaneous” category is provided in Figure 10.5.

**Figure 10.5 | Description of tablet category ‘miscellaneous’ between 2008 and 2013**



The miscellaneous category mostly comprises tablets that do not contain illegal drugs, but other psychoactive substances such as pharmaceuticals. A lot of (counterfeit) benzodiazepines and prescription stimulants, such as methylphenidate, were found in the “other psychoactive substances” category. Compared to previous years, no real differences in the composition of the ‘miscellaneous’ category were observed, except a small decrease in the number of tablets containing mCPP. Also, a substantial amount of tablets were analysed and found to contain pharmaceutically active, but non-psychoactive substances. These predominantly included hormonal agents such as clenbuterol, methandrostenolon and oxymetholone. Also, (counterfeit) tablets containing erectile dysfunction therapy agents were observed, such as sildenafil citrate and derivatives.

#### 4.3.2. Other product types

An overview of the adulterants/cutting agents and their mean concentration in seized and analysed amphetamine, cocaine and heroin powder samples is presented in Table 10.11.

Similar to previous years, amphetamine remains the least pure drug in Belgium. Again in 2013, 4-MA was frequently found as a contaminant for amphetamine (12% of tested samples). Its presence in amphetamine samples is probably the result of a contamination of BMK with 4-methyl-BMK. In 2012 and 2013, several people have died due to this contamination (Blanckaert et al., 2013). However, the frequency of contamination with 4-MA was lower compared to last year (18% in 2012 versus 12% in 2013). The mean concentration was also lower compared to previous years (1.9% versus 7.6%).

Other frequently encountered cutting agents in amphetamine samples include caffeine (62% of tested samples, mean concentration 53%). Although 4-Fluoroamphetamine (4-FA) is already a scheduled substance in Belgium, it was detected multiple times as a contaminant in amphetamine samples (5 samples, 3%, mean concentration 3.3%). As already observed in The Netherlands, this might indicate a growing popularity of 4-FA.

Considering the high purity of cocaine in Belgium (see 4.2, Figure 10.2), the low concentration of adulterants and cutting agents in cocaine samples analysed in Belgium does not come as a surprise. In 2013, levamisole was the most frequently encountered adulterant in cocaine samples (present in 48% of samples, mean concentration ~10%). Levamisole is found worldwide in cocaine samples, and is added in the country of production (mostly Latin-American countries) to increase weight and improve the appearance of the cut cocaine. Also, it adds to the weight of freebase cocaine, since levamisole cannot be removed with the acid/base reaction required to produce smokable cocaine or crack. Due to the risk of serious side effects (such as agranulocytosis), the addition of levamisole is problematic. Levamisole can also be metabolized to form aminorex, a relatively toxic compound with stimulating properties. Caffeine, hydroxyzine, lidocaine and phenacetine were also frequently encountered.

The most used cutting agent in heroin samples in Belgium was caffeine (present in 21% of samples in a mean concentration of 20%), together with acetaminophen (paracetamol, present in 18% of samples in a mean concentration of 40%). Monoacetylmorphine (MAM), noscapine and papaverine are natural impurities or impurities originating from the heroin manufacturing process. They were present in 16 to 20% of tested samples, in relatively low concentrations (1 to 10%).

**Table 10.11 | Adulterants/cutting agents found in seized drug powders in 2013**

Drug type	Adulterants	Samples (N)	% of samples	Mean adulterant concentration (%)
<b>Amphetamine</b>	4-MA	19	12.0	1.9
	Caffeine	101	62.3	53.0
	4-Fluoro-amphetamine	5	3.1	3.3
	mCPP	3	1.9	10.7
<b>Cocaine</b>	Levamisole	255	48.0	9.0
	Caffeine	74	14.0	6.7
	Phenacetine	96	18.0	27.0
	Hydroxyzine	52	10.0	4.0
	Lidocaine	36	7.0	4.5
	Diltiazem	5	1.0	2.0
<b>Heroin</b>	Caffeine	178	21.0	20.0
	Acetaminophen	151	18.0	40.0
	MAM	178	21.0	8.8
	Noscapine	175	21.0	9.0
	Papaverine	172	20.0	0.8

Source: FAMHP, data 2011-2013, personal communication; Ovaere, personal communication, 2014

## 5. CONCLUSIONS

Drug supply to and within Belgium is rather complicated: despite being a small country, Belgium has historically been an important production country for cannabis and synthetic drugs (mostly amphetamine and MDMA). Also, the central geographical location within Europe in combination with the easy existing access points such as the large port of Antwerp and the national airports, ensures a major role in the trafficking of other narcotics. For example, the last two years, Belgium has taken up an important role in the distribution of NPS or precursor products from Asia to the rest of Europe.

As a consequence of the production capacity and the large import scale, drug prices in Belgium tend to be generally low compared to other EU member states (EMCDDA, 2014). No significant changes in price were observed in 2013 compared to previous years. Cocaine still remains the most expensive drug in Belgium.

Moreover, another result is the overall high quality of drugs observed in Belgium. With regard to drug purity in Belgium in 2013, no major differences compared to previous years were observed. No change was observed in the purity of cocaine. However, an increase was seen in the purity of analysed heroin samples. Although some slight fluctuation in the THC concentration of herbal cannabis and cannabis resin was observed in the past five years, no large changes were observed in 2013 concerning the potency of cannabis.

Amphetamine remains the least “pure” drug in Belgium. Although the contaminant 4-MA has still been reported, it’s presence starting to disappear from the market. An important evolution on the amphetamine market is the introduction of pre-precursors. Since international regulations with regard to drug precursors are enforced more strictly, drug producers have been forced to find new precursors. In 2013, very large amounts of APAAN, a pre-precursor for (meth)amphetamine, were seized. Also, the number of synthetic drug production laboratories reached an all-time high in 2013.

An alarming observation on the stimulant-market is the introduction of methamphetamine; for the first time, considerable amounts of methamphetamine were seized in Belgium. Historically, methamphetamine use has been confined to eastern European countries such as the Czech Republic and Slovakia. So far, methamphetamine (also known as “crystal meth”) and the social and national health problems associated with its use, remained absent in Belgium.

In terms of drug potency and correlated health problems, the main issue in Belgium is an obvious revival of the ecstasy market. After a few years of low MDMA content and many reported contaminants in ecstasy tablets, a drastic increase was observed in the concentration of MDMA in ecstasy tablets.

Nevertheless, apart from the increased MDMA amounts in ecstasy tablets, the composition of illegal drug tablets hasn't changed significantly compared to previous years. Less seized tablets were contaminated: most tablets that were sold as MDMA, actually contained only MDMA as active component.

In general, with regard to the information on drug purity, it is important to emphasize that the majority of the results of drug analyses are obtained from large seizures of drugs. It is well known that drugs get cut and contaminated when shifting from wholesale to retail. As such, these figures may not reliably indicate the purity of drugs circulating on the streets in smaller amounts. The latter are sometimes reported through the early warning system, however there is no consistent system for these kind of analyses. Hence, a solid data collection and data reporting system encompassing all and regular performed drug analyses are still lacking in Belgium. Although, it is of paramount importance for the accurate monitoring of the current and changing landscape of the Belgian drug market.

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