

The Drug Situation – Focus on Cocaine: Actual Trends and Developments

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Introduction: The European cocaine market has undergone substantial transformation over the past decade, with rising seizure volumes, persistently high purity levels, and expanding use across diverse social groups indicating a market that is more resilient and adaptable than previously recognised. While existing research documents cocaine trafficking patterns and consumption trends, limited understanding remains regarding the integrated mechanisms connecting global supply dynamics, transnational criminal networks, and emerging demand patterns, particularly in Central and Eastern Europe.

Objectives: This study aims to comprehensively analyse contemporary cocaine market developments in Europe, with particular focus on structural changes, trafficking methodologies, public health impacts and emerging trends in Central and Eastern European countries, including Hungary.

Methodology: This analysis integrates multiple data sources including European Union Drugs Agency (EUDA) reports, wastewater monitoring studies, law enforcement seizure data, treatment demand statistics and epidemiological evidence. The study employs theoretical frameworks from illicit market economics, transnational organised crime theory, public health and harm-reduction models, and regulatory governance theory to contextualise findings within broader European and global drug policy landscapes.

Results: The research reveals that European cocaine markets are characterised by record-level seizures exceeding 300 tonnes annually, increasing sophistication in concealment and trafficking methodologies, and Europe's transformation from a consumer market to an integrated processing hub. Wastewater analyses demonstrate rising cocaine metabolite levels in Central and Eastern European cities, including Budapest, indicating geographic diffusion of consumption. Polysubstance use involving cocaine with synthetic stimulants, opioids and alcohol has emerged as a critical public health concern, with increasing emergency department presentations and treatment demand.

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Hungary's role has shifted from primarily transit-oriented to showing early signs of domestic market expansion, with rising wastewater indicators and treatment entries.

Conclusion: The European cocaine market represents a complex, multi-layered system demonstrating considerable adaptability driven by global supply factors, transnational criminal networks and growing consumer demand. The European Union Drugs Agency's strengthened mandate provides enhanced preparedness and alert capabilities; however, traditional enforcement-only approaches prove insufficient. Effective responses require coordinated multi-sectoral cooperation integrating intelligence-led law enforcement, targeted customs screening, low-threshold health services and rapid alert systems. Central and Eastern Europe, particularly Hungary, requires urgent attention through early detection, enhanced monitoring and regional cooperation, as these countries currently face early-stage but accelerating cocaine market pressures on both supply and demand dimensions.

Keywords: cocaine, drug trafficking, trends, health risks

Introduction

The European cocaine market has undergone substantial and multifaceted change over the past decade, generating significant implications for public health, security and policy at both national and EU levels. Rising seizure volumes at major seaports, persistently high retail purity and the expansion of use into increasingly diverse social groups all point to a market that is not only larger, but also more resilient and adaptable than previously recognised (EUDA 2025b). Taken together, these indicators reflect a drug environment that has become more deeply embedded in European societies and more capable of adjusting to enforcement pressure and structural shifts.

A central institutional development shaping Europe's monitoring and response capacities is the transformation of the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) into the European Union Drugs Agency (EUDA), which took effect on 2 July 2024 through Regulation (EU) 2023/1322 [Regulation (EU) 2023/1322]. Whilst preserving its long-standing role in data collection and analysis, the new agency now operates with a strengthened mandate that places greater emphasis on preparedness, threat assessment and operational support in response to drug-related health and security risks. The regulation explicitly extends the agency's responsibilities beyond health surveillance to include supply-side monitoring, enhanced early warning functions and a reinforced role in international cooperation (EUDA 2024).

The international dimensions of cocaine trafficking remain central. Production continues to be concentrated in Colombia, Peru and Bolivia, but trafficking routes increasingly follow indirect, multi-stage pathways through regions such as West Africa, North Africa and the Caribbean before reaching Europe (UNODC 2024). In this context, EUDA's strengthened cooperation with third countries on precursor monitoring, forensic

support and environmental impact assessment reflects a significant expansion of Europe's external drug policy tools (EUDA 2025a).

Hungary's position within this broader landscape is also changing. Previously characterised primarily as a transit country, recent wastewater analyses, police investigations and treatment data show a gradual increase in domestic cocaine availability and use (EUDA 2024). This development mirrors wider trends in Central and Eastern Europe and suggests that the region may face mounting public health and security pressures. Enhancing toxicology reporting, expanding wastewater surveillance and strengthening cross-border cooperation represent logical strategic responses to these emerging patterns.

Theoretical background

Cocaine markets operate at the intersection of public health, transnational organised crime, global economic forces and regulatory governance. Because of this complexity, no single theoretical approach is sufficient to understand how these markets evolve. This section outlines the key analytical frameworks that contribute to that understanding: illicit market economics, theories of transnational organised crime, public health and harm-reduction models and, increasingly, regulatory and institutional perspectives shaped by the 2024 transition from EMCDDA to EUDA. Together, these perspectives offer complementary insights into how cocaine is produced, trafficked, distributed, consumed and regulated across different jurisdictions (TIHANYI et al. 2020a).

Illicit market economics

One essential perspective is offered by illicit market economics. Classic analytical models show that illegal markets tend to evolve strategies that maximise profit whilst minimising exposure to detection, often reorganising quickly in response to enforcement pressure (REUTER–TRAUTMANN 2009). Unlike legal markets, where regulatory oversight and transparent information shape supply and demand, cocaine markets rely on asymmetric information, informal trust and constant adaptation. Economic theory helps explain why rising purity levels combined with relatively stable prices across Europe indicate robust supply networks rather than scarcity. Strong supply enables market actors to absorb enforcement losses, diversify routes and invest in increasingly sophisticated concealment methods. Recent EUDA reporting shows that record seizure levels have not significantly reduced availability, demonstrating a fundamental economic principle: enforcement alone is unlikely to disrupt markets where underlying supply-side incentives remain strong (EUDA 2025b). From this perspective, cocaine markets behave as resilient systems capable of rapid reorganisation after law enforcement interventions.

Transnational organised crime theory

A second analytical perspective comes from the theory of transnational organised crime. Cocaine trafficking is not a linear pipeline from producer to consumer but a decentralised, multi-layered network connecting actors who specialise in different tasks. Europol (2021) describes these networks as flexible alliances rather than rigid hierarchies. Brokers negotiate shipments, corrupt logistics workers facilitate container infiltration, chemists manage extraction and chemical masking, and local distribution groups oversee last-mile delivery. The use of encrypted communication platforms, compartmentalised operational structures and outsourcing of specialised functions further enhances resilience by limiting the impact of enforcement on the wider network. Organised crime theory therefore helps explain why trafficking groups are able to adapt quickly, diversify their operations across continents and maintain stable supply even under sustained enforcement pressure.

Public health and harm-reduction theory

Public health and harm-reduction theory provides a third lens. Cocaine use poses multiple health risks, including acute cardiovascular emergencies, agitation and psychosis, as well as chronic consequences such as dependency, neurological impairment and worsening mental health conditions (EMCDDA 2022b). Public health approaches emphasise population-level monitoring, early detection, targeted support for vulnerable groups and interventions that reduce harm even when use continues. EUDA's recent analyses show increasing concerns around polysubstance use involving cocaine, synthetic stimulants and opioids, which significantly heightens poisoning and overdose risks (EUDA 2025b). Harm-reduction perspectives therefore support measures such as low-threshold services, mobile outreach, supervised consumption facilities and rapid alert systems designed to warn users of dangerous drug combinations. Viewing cocaine markets through a public health lens shifts attention from prevalence rates to the broader patterns of harm experienced in different communities.

Regulatory governance theory

A fourth and increasingly important framework comes from regulatory governance theory, particularly in the context of the institutional transformation from EMCDDA to EUDA in 2024. Regulation (EU) 2023/1322 expanded the agency's mandate, enabling it to integrate health and security perspectives more effectively. Whilst the EMCDDA focused primarily on monitoring and analysis, the EUDA has become a preparedness-oriented authority capable of issuing alerts, coordinating forensic and toxicology networks and supporting cross-border operational cooperation [Regulation (EU) 2023/1322]. This shift reflects a broader move towards anticipatory governance, where institutions are tasked with identifying emerging risks early and coordinating responses before harms escalate. Within cocaine markets, EUDA's enhanced powers support earlier detection of

trends such as chemically masked shipments, changes in precursor availability and spikes in cocaine-related poisonings.

International relations theory

International relations theory also helps to explain how global dynamics shape European cocaine markets. Production remains concentrated in Colombia, Peru and Bolivia, meaning that developments in these regions – such as eradication strategies, changes in chemical precursor controls or shifts in processing – directly influence European supply (UNODC 2024). Transit regions, including West and North Africa, play increasingly important roles due to governance vulnerabilities that allow traffickers to establish logistical hubs along multi-stage trafficking routes. This reflects broader theories of illicit flows that emphasise how weak governance environments and high-income consumer markets become interconnected through global criminal networks.

Integrating these theoretical lenses provides a more comprehensive understanding of contemporary cocaine developments. Economic models clarify supply incentives; organised crime theory explains the adaptability of trafficking groups; public health frameworks assess harms and vulnerabilities; and regulatory theory frames institutional responses and preparedness.

Cocaine in the global context

Global production in the Andean countries of Colombia, Peru and Bolivia remains the central driver of international cocaine supply. Rising levels of coca cultivation in these states, alongside improvements in processing techniques and increasingly efficient distribution logistics, have contributed to record levels of global output. International seizure statistics reflect both the scale of production and intensified law enforcement activity worldwide. The global coca-cocaine commodity chain is long and highly fragmented: cultivation and initial processing take place in source regions, intermediaries and export facilitators manage cross-border movement and destination markets, such as Europe, receive large consignments that are then channelled through extensive transnational networks.

Production trends

Cocaine production continues to be heavily concentrated in the Andean countries, with Colombia maintaining its position as the dominant source. According to the United Nations Office on Drugs and Crime (UNODC 2024), the global area under coca cultivation reached historic highs in 2022–2023. This growth is driven by economic pressures, limited state presence in rural areas and technological innovations in coca plant varieties. Advances in alkaloid extraction and the increased use of efficient chemical precursors

have further raised yields. As a result, global production has reached unprecedented levels, now exceeding 2,000 tonnes of pure cocaine annually (UNODC 2024). For Europe, this signals that upstream supply pressures remain exceptionally strong, regardless of regional enforcement efforts.

Trafficking dynamics

Trafficking dynamics add an additional layer of complexity. Cocaine destined for Europe moves through multiple transnational routes that demonstrate the adaptability of criminal groups. Direct maritime shipments from South America to major European ports such as Antwerp, Rotterdam and Algeciras remain the primary channel. However, multi-stage routes through West Africa, North Africa, the Caribbean and Central America have grown in significance (Europol 2021). These indirect routes often exploit countries with weaker law enforcement, porous borders or higher corruption risks. In several West African states, entrenched cocaine flows have enabled local criminal networks to integrate into broader Latin American and European supply chains (UNODC 2024).

The past decade has also seen growing sophistication in concealment strategies. Traffickers increasingly use containerised shipping and exploit vulnerabilities in legitimate commercial supply chains. High-risk cargo types include agricultural products, frozen goods and industrial materials, which provide plausible cover for concealment. Chemical masking techniques, in which cocaine is embedded in plastics, charcoal or liquid substances and later extracted in Europe, have become more common. EUDA assessments indicate a rise in detected cocaine extraction laboratories within Europe, signalling that the region now functions not only as a destination market but also as a processing hub for semi-refined cocaine products (EUDA 2025b).

Although smaller in volume, air trafficking remains important for high-value consignments. These operations often involve human couriers, express parcels or private aircraft that take advantage of high flight frequency and limited screening capacities at smaller airports. Law enforcement agencies have also documented increased use of maritime “mother ship” operations and offshore cargo transfers, allowing traffickers to decentralise routes and complicate interception efforts (Europol 2021).

Environmental and socio-economic impacts

The global context also encompasses significant environmental and socio-economic impacts. Coca cultivation and processing contribute to deforestation, water contamination and soil degradation in producer states. Recognising these harms, EUDA and Peru’s DEVIDA launched a joint initiative in 2025 to develop tools for monitoring the environmental consequences of cocaine production (EUDA 2025a). This demonstrates how the cocaine economy generates far-reaching effects, shaping ecosystems, livelihoods and governance structures in source regions.

Consumption patterns in other parts of the world further illustrate global shifts. North America remains the largest consumer market, characterised by high purity and substantial health-related harms. Recent trends, however, show growing demand in Oceania, East Asia and West Africa, creating new competition for supply and encouraging the development of alternative trafficking routes (UNODC 2024). Rising affluence in parts of Asia has supported emerging recreational cocaine markets, whilst rapid urbanisation in African states has contributed to local demand partly supplied by drugs transiting towards Europe. These shifts may influence European availability in the future, particularly if producers redirect supply towards expanding high-growth markets.

Trends and developments in the European cocaine market

Recent evidence indicates that the European cocaine market has entered a period of structural expansion and diversification. Multiple indicators point to consistently high availability, increasingly sophisticated trafficking methodologies and rising public health burdens. The European Union Drugs Agency (EUDA) reports that the volume of cocaine seized in Europe has reached record levels, with more than 300 tonnes intercepted annually across EU Member States in recent years, and some national figures continuing to grow in 2023 and 2024 (EUDA 2025b). These developments underline a robust supply chain capable of sustaining high-level flows even under significant enforcement pressure.

A central trend is the sustained increase in the scale and complexity of cocaine shipments. European ports such as Antwerp, Rotterdam, Hamburg, Valencia and Algeciras continue to account for most large seizures, but there is a clear shift towards the use of smaller and less monitored ports. EUDA (2025b) notes that traffickers deliberately exploit logistical bottlenecks and differences in customs capacities. This diversification reflects the strategic adaptation of criminal organisations seeking to reduce detection risks and maintain stable supply. Europol (2021) similarly highlights that criminal groups now employ advanced intelligence collection methods, including monitoring port operations, gathering information on container routing practices and corrupting essential personnel to facilitate infiltration of legitimate supply chains.

Another major development is the increasing use of chemical masking and semi-processed cocaine products. Rather than transporting pure cocaine hydrochloride directly, traffickers often embed cocaine within plastics, charcoal, wine, oils or other chemical matrices. These masked products are then transferred to extraction facilities in Europe where the cocaine is removed and refined. EUDA threat assessments indicate that more such laboratories have been discovered in several Member States, including Belgium, the Netherlands, Spain, and even countries not previously associated with cocaine processing. This shift marks Europe's growing role not only as a consumer market but also as a processing centre where intermediate products are converted into retail-ready cocaine (EUDA 2025b).

Transport routes have also diversified. Maritime routes remain dominant, but multi-leg pathways through West Africa, North Africa, the Balkan region and the eastern Mediterranean increasingly serve as alternative channels. These routes take

advantage of fragmented governance, limited border control infrastructure and corruption vulnerabilities in transit countries (UNODC 2024). Criminal groups use a mixture of container shipments, air cargo, commercial couriers, private aircraft and small maritime vessels. Europol (2021) notes that ship-to-ship transfers at sea and offshore container swapping have become more common, reflecting increased professionalisation in trafficking logistics.

On the demand side, consumption patterns indicate rising prevalence and growing social diversification. Wastewater analysis, which provides a reliable proxy for population-level consumption, shows increasing levels of cocaine metabolites in most European cities participating in long-term monitoring, particularly in western, southern and some central European urban centres (EMCDDA 2022b; EUDA 2025b). Cocaine use remains especially common amongst young adults and nightlife-associated populations, but there is evidence that consumer groups are broadening, with increased use amongst older age groups and some professional sectors.

A particularly notable development is the rise in crack cocaine use in several European countries. Historically more concentrated in the United Kingdom and parts of France, crack cocaine has expanded into new regions, especially amongst vulnerable groups in urban areas. EUDA (2025b) reports increases in health and social harms associated with crack use, including heightened risks of acute toxicity, infections and homelessness. This trend parallels developments in North America and South America, where the spread of crack markets has been associated with increased marginalisation and public health strain.

Health data further underline the expansion of cocaine-related harms. Emergency department admissions involving cocaine have risen in numerous EU Member States, with stimulant-related toxicity now constituting a significant proportion of drug-related acute presentations (EUDA 2025b). Polydrug use is an accelerating concern: combinations of cocaine with synthetic stimulants, alcohol, benzodiazepines or opioids increase the likelihood of overdose and complicate clinical management. EUDA (2025b) also notes an increase in cocaine involvement in fatal overdoses, even if cardiovascular complications may mask the true extent of cocaine-related mortality.

The expansion of European cocaine markets has security implications as well. Organised crime groups benefit from high profit margins and diversify their activities across multiple illicit markets. Europol (2021) emphasises that the cocaine trade is a key revenue source for several high-risk criminal networks active in the EU, enabling them to invest in violence, corruption and technological capabilities. Violence linked to cocaine trafficking has risen in some Member States, including increased firearm-related incidents, intimidation and competition between rival groups, particularly around port areas and major distribution hubs.

Regional developments within Europe demonstrate significant differences. Western and southern Member States continue to face the highest levels of supply and consumption, but central and eastern Member States – including Hungary – show early signs of rising cocaine use and increased trafficking activity. Wastewater monitoring in Budapest and other Central European cities indicates upward trajectories, whilst law enforcement seizures, although smaller in scale, suggest growing involvement in regional transit routes

(EUDA 2024). These developments imply that countries traditionally peripheral to cocaine markets may experience increased pressure from both supply and demand perspectives.

Harms associated with cocaine use

Cocaine use is associated with a broad spectrum of acute and chronic harms that affect individuals, communities and public health systems across Europe. These harms have intensified over the past decade due to rising purity levels, the spread of crack cocaine, increasing polysubstance use and the emergence of new, more potent drug combinations. EUDA (2025b) reports that cocaine is amongst the most frequently identified substances in emergency department presentations for drug toxicity in multiple EU Member States, indicating a growing burden on hospital systems. Understanding these harms requires a multidisciplinary perspective that integrates clinical evidence, epidemiological trends and social determinants of health.

Acute health harms remain a central concern. Cocaine's mechanism of action, involving blockage of monoamine reuptake, produces significant cardiovascular strain, leading to risks such as tachycardia, hypertension, arrhythmias, myocardial infarction and stroke (EMCDDA 2022b). Emergency physicians report increasing cases of severe agitation, chest pain and acute psychosis linked to high-purity cocaine use. These presentations often require intensive medical intervention and can be complicated by co-use of alcohol, synthetic stimulants or benzodiazepines. EUDA (2025b) highlights that stimulant toxicity is now a major contributor to acute drug-related medical emergencies in Europe, reflecting both widespread availability and the increasing potency of cocaine circulating on the market.

Chronic harms are equally significant. Long-term cocaine use is associated with cardiovascular disease, cognitive impairment, mood disorders, anxiety and depression. Regular intranasal use can cause nasal septum damage, chronic inflammation and sinus problems, whilst injection carries risks of abscesses, vein damage and infectious disease transmission. Crack cocaine, because of its method of administration and intense short-duration effects, carries additional risks, including respiratory complications and severe dependence. Research also shows that crack use is disproportionately concentrated amongst socially marginalised populations, often intersecting with homelessness, unemployment and limited access to health care (EUDA 2025b). This makes the prevention and treatment of crack-related harms particularly challenging.

A critical challenge in recent years has been the rise of polysubstance use. Many cocaine-related emergencies involve combinations with alcohol, opioids, synthetic stimulants or benzodiazepines. When cocaine is combined with alcohol, the body produces cocaethylene, a metabolite that significantly increases cardiotoxicity and the risk of sudden death. The mixing of cocaine with synthetic cathinones or amphetamine-type stimulants further increases the likelihood of severe agitation, hyperthermia and life-threatening cardiovascular events. The recent analysis of European overdose deaths indicates that cocaine is involved in an increasing proportion of fatalities, often in combination with opioids or synthetic stimulants. Although cocaine is not typically categorised as a primary

driver of overdose mortality, its presence as a co-factor significantly compounds risks (EUDA 2025b).

From a public health systems perspective, the cumulative burden of cocaine-related harms is significant. Emergency medical services, hospitals, mental health providers and addiction treatment centres all report rising caseloads related to cocaine. Treatment demand for primary cocaine problems has grown steadily across Europe during the past decade, with notable increases in first-time treatment entrants (EUDA 2025b). Although psychosocial interventions such as cognitive-behavioural therapy and contingency management show moderate effectiveness, the absence of approved pharmacological treatments for cocaine dependence continues to limit clinical options.

A further emerging concern is the environmental impact associated with cocaine production and trafficking. Whilst these effects occur predominantly in producer regions in Latin America, they form part of the broader harm spectrum. Deforestation, soil degradation, toxic chemical discharge and harm to biodiversity are well-documented consequences of coca cultivation and processing (UNODC 2024). Recognising this, EUDA and Peru's *Desarrollo y Vida Integral Drogas Alternativas* (DEVIDA) launched a joint initiative in 2025 to develop environmental monitoring tools, underlining the need for an expanded understanding of drug-related harms that goes beyond human health outcomes.

Harm-reduction responses have increasingly become central to mitigation strategies. These include targeted outreach to vulnerable populations, low-threshold treatment services, supervised consumption rooms, naloxone distribution (in cases of polysubstance exposure) and early warning systems for dangerous adulterants. The EUDA's new European Drug Alert System strengthens the capacity of Member States to respond quickly to emerging threats, such as unusually potent cocaine batches or hazardous drug combinations. Integrating these tools with national and local services offers a more comprehensive approach to addressing the multifaceted harms associated with cocaine use.

Historical overview of cocaine use and trafficking in Europe

The historical development of cocaine use and trafficking in Europe reflects changes in global production dynamics, social attitudes towards stimulant use and the evolution of transnational organised crime. Although cocaine was first isolated in the nineteenth century and briefly used for medical and tonic purposes, widespread recreational consumption in Europe began only in the late twentieth century. In the 1970s and early 1980s, cocaine was associated primarily with cultural elites, the entertainment industry and affluent urban groups. Its high price and limited availability kept the market relatively small, and most European countries saw little demand outside niche social environments (UNODC 2024).

By the mid-1980s and early 1990s, cocaine trafficking networks became more structured, influenced largely by developments in Latin America, including the consolidation of powerful trafficking organisations in Colombia and the emergence of new production areas in Peru and Bolivia. Increased production led to a greater volume of cocaine reaching North America and Europe. In Europe, the drug became associated

with nightlife culture, club scenes and the expanding youth consumer market. At the same time, decreasing prices and rising purity made cocaine more accessible to broader segments of society (UNODC 2024).

The 1990s marked a period of transformation in trafficking strategies. Organised crime groups recognised the advantages of Europe's expanding port infrastructure and the rapid growth of global container shipping. Rotterdam, Antwerp and Hamburg emerged as major entry points for South American cocaine shipments, a trend that would intensify substantially in the decades that followed. Europol (2021) notes that already at this stage, criminal groups began experimenting with concealment methods such as hiding cocaine within legal cargo, embedding it in plastics or using corrupt port workers to bypass controls.

In the early 2000s, the European cocaine market underwent further expansion. Increased globalisation, EU enlargement and the integration of Central and Eastern European economies created new opportunities for trafficking routes. Whilst western and southern Europe remained the primary destinations, traffickers increasingly exploited Balkan routes and Central European corridors. During this period, the use of West Africa as a major transit hub also became well documented. Weak governance structures, limited maritime control and political instability allowed criminal groups to establish logistical footholds in countries such as Guinea-Bissau, Cape Verde and Ghana, from where cocaine was re-routed towards Europe (UNODC 2024).

Cocaine consumption patterns also evolved. By the late 2000s, cocaine had become one of the most commonly used stimulants in Europe. Wastewater studies and population surveys indicated a steady rise in recreational use, particularly amongst young adults. Western and southern European cities reported especially high levels of consumption. The emergence of crack cocaine markets, initially concentrated in the United Kingdom and parts of France, represented another shift, bringing significant public health and social harms to disadvantaged urban communities. Unlike powder cocaine, crack markets were more closely tied to homelessness, street-level dealing and acute health risks (EUDA 2025b).

The 2010s brought another wave of structural change. Record-setting seizure volumes at major seaports highlighted the growing scale of trafficking operations. At the same time, law enforcement investigations revealed increasing professionalisation within criminal networks. Europol (2021) describes the development of decentralised, multi-layered networks involving brokers, logistics specialists, chemists, facilitators and local distributors who cooperate across continents. The use of encrypted communication, compartmentalised organisation and long-distance supply agreements strengthened the stability of trafficking operations despite intensified enforcement (NYITRAI 2025).

Towards the end of the 2010s and into the 2020s, Europe's role shifted from a purely consumer region to an integrated node in global cocaine logistics. EUDA (2025b) reports a notable increase in the discovery of cocaine extraction and processing laboratories within EU Member States, indicating that traffickers now move semi-processed coca base or chemically masked cocaine to Europe for final refinement. This development represents a significant historical shift, reflecting the continent's centrality in a globalised supply chain.

At the same time, cocaine consumption became more geographically widespread. Central and Eastern European countries, traditionally peripheral to cocaine markets, began reporting rising prevalence and treatment demand. Wastewater analyses from

urban areas in Hungary, the Czech Republic, Poland and Slovakia indicate increasing levels of cocaine metabolites, suggesting broader diffusion of consumption across the region (EUDA 2024). These shifts correspond with global patterns of expanding stimulant use, influenced by urbanisation, global cultural trends and the increasing affordability of cocaine.

Historically, cocaine markets in Europe have also responded to changes in Latin American geopolitics. For example, the fragmentation of major Colombian cartels in the late 1990s led to more decentralised production and trafficking networks, which paradoxically made supply more resilient. Similarly, variations in coca eradication policies, precursor control efforts and political instability in the Andean region have repeatedly altered the volume and purity of cocaine arriving in Europe. UNODC (2024) notes that despite extensive eradication initiatives, coca cultivation continues to expand, sustaining long-term supply pressures on global markets.

Cocaine markets in Hungary

Hungary has traditionally been characterised as a transit country within the broader European cocaine trade, positioned along indirect trafficking routes connecting the Balkans, Central Europe and Western European consumer markets. For many years, national data suggested limited domestic consumption compared to Western and Southern Europe. However, evidence from the last decade indicates that Hungary's role within the European cocaine landscape is gradually changing. Rising levels of cocaine metabolites in wastewater, increasing seizure volumes, more diversified trafficking patterns and growing treatment demand collectively point to a slow but measurable expansion of domestic markets (EUDA 2024).

Cocaine transit through Hungary was linked primarily to the Western Balkan route, which has long been associated with heroin trafficking but has increasingly diversified to include synthetic drugs and cocaine. Trafficking groups exploit Hungary's strategic geographic position, well-developed transport corridors and connections to neighbouring markets. Although Hungary is not a major seaport destination, its extensive network of road, rail and logistics infrastructure offers opportunities for secondary distribution towards Austria, Germany, the Czech Republic and Slovakia. In recent years, Hungarian law enforcement authorities have documented cases involving cocaine shipments hidden in commercial cargo, private vehicles and parcel deliveries, reflecting broader European trends towards multi-modal trafficking (EUDA 2025b).

Domestic consumption patterns have also evolved. Wastewater monitoring, introduced in several Hungarian cities over the past decade, provides evidence of increasing cocaine use, particularly in Budapest. Whilst levels remain lower than those in major Western European cities, the upward trend aligns with developments in neighbouring Central European countries. Budapest as one of the Central European cities where cocaine metabolite levels have steadily increased year-on-year, suggesting diffusion into broader social groups. Anecdotal reports from nightlife settings, hospitality sectors and

treatment providers reinforce the view that cocaine use has become more accessible and more socially normalised amongst certain population segments (EUDA 2024).

Hungary's treatment and healthcare data provide additional insights. Although stimulant-related treatment demand historically focused on amphetamine-type substances, an increasing proportion of clients are now reporting cocaine as a primary or secondary substance of concern. First-time treatment entries involving cocaine have increased across Central and Eastern Europe, and Hungarian data follow this regional trend. Treatment providers report rising cases of polysubstance use involving cocaine and alcohol or cocaine and synthetic stimulants, presenting challenges for clinical management and risk assessment (EUDA 2025b).

Hungary's evolving cocaine market reflects broader structural changes in the European drug landscape. The integration of Central and Eastern Europe into EU supply chains, rising affluence, expanding nightlife economies and increasing mobility all contribute to shifts in consumption and trafficking dynamics. These developments underline the need for comprehensive national monitoring, including toxicology reporting, enhanced wastewater analysis and regular threat assessments. Strengthened cooperation with neighbouring countries and EU agencies will be essential for addressing trafficking networks that do not respect national borders (SIVADÓ 2025).

From a policy perspective, Hungary faces several challenges. The first is early detection: cocaine-related harms may initially appear low but can rise rapidly once supply chains stabilise. The second is treatment capacity, as services historically focused on opioid and amphetamine problems must adapt to increasing stimulant-related cases. The third is prevention and harm reduction. Although Hungary does not currently face a large crack market, experiences from Western Europe highlight the importance of early intervention in preventing such markets from emerging (TIHANYI et al. 2020b).

Summary conclusion

Overall, it can be concluded that the European cocaine market today is a complex, multi-layered system with considerable adaptability, driven simultaneously by global supply factors, transnational criminal networks, growing consumer demand and changing social and economic conditions. Record levels of coca cultivation worldwide, the increasing vulnerability of logistics infrastructures, the development of concealed transport techniques and the international importance of European ports all contribute to the persistently high availability of cocaine in Europe.

The EUDA's strengthened mandate, introduced in 2024, is an important step in modernising the European drug response system. The agency's new preparedness and alert functions, support for forensic networks and communication systems enabling rapid national cooperation will all contribute to a more flexible and rapid European response to cocaine-related threats. However, the increase in polydrug use, the spread of crack cocaine and the growing burden on hospital emergency services call for urgent public health interventions.

The ongoing transformation of the cocaine market suggests that traditional tools, whether law enforcement or health policy approaches, are not sufficient on their own. An effective response is based on coordinated cooperation between several sectors: intelligence-led law enforcement, targeted customs screening, the development of low-threshold services, the renewal of prevention programmes and the operation of rapid alert systems are all areas that will be decisive for success in the coming years.

Particular attention should be paid to Central and Eastern Europe, including Hungary, where a slow but steady increase in cocaine use and transit has been observed. This region is currently in the early stages of increased risk, so early detection, monitoring and regional cooperation are key. Based on European trends, it is likely that countries in the region will come under greater pressure in the future on both the supply and demand sides (BARÁTH 2020).

The European cocaine market is no longer an isolated phenomenon, but an integral part of a global economic, social and criminal system. The basic conditions for long-term success are the consistent application of evidence-based policies, the strengthening of international cooperation and continuous adaptation to a rapidly changing environment.

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