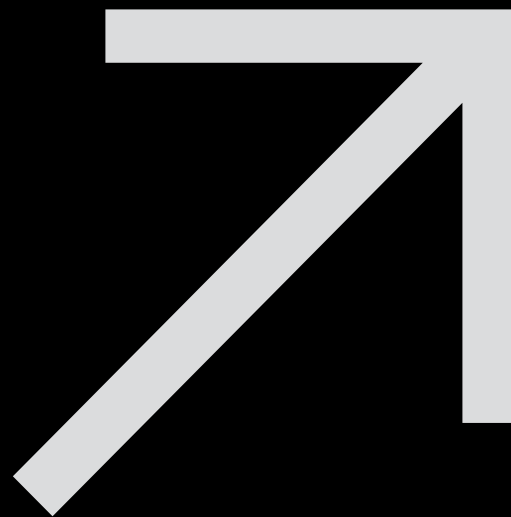
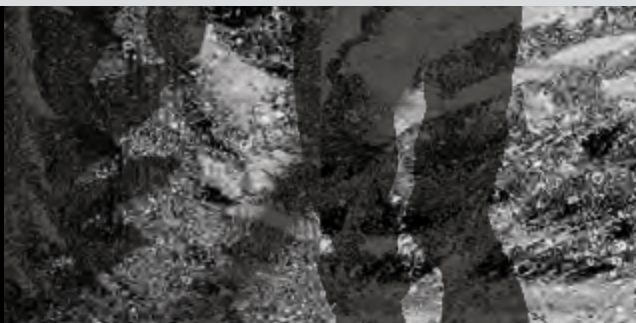
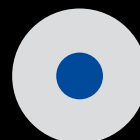


The instrumentalisation of irregular migrants' vulnerable situation for geopolitical motives may provide additional peaks in opportunities for migrant smuggling services.



Migrant smuggling

Migrant smuggling persists as an attractive and profitable criminal business. It is subject to multiple global push and pull factors, and affects all Member States either as entry point, transit, and/or destination. Migrant smugglers respond quickly to changes in the environment, leading to re-routings or changes in modus operandi. The DNA of serious and organised crime shows strongly in migrant smuggling – the presence of hybrid threats in this crime area has the strong potential to destabilise societies, and it is being nurtured through digital tools driving operations.



The loss of life related to migrant smuggling is high. Violence and recklessness increasingly characterise migrant smuggling.



Persisting and fluctuating flows

Migrant smuggling continues at a large scale. This criminal business is incessant and moves geographically according to demand, opportunities and/or obstacles. It involves a large number of criminal networks that facilitate the irregular migration or stay of a large number of customers who are treated with little regard for human dignity.

Migrant smuggling affects the EU as a whole as it involves facilitation of entry, secondary movements, exit, and legalisation of stay.

Criminal networks facilitate irregular migrants' entry into, secondary movements within, and/or exit out of the EU, and this by land, sea, air, or a combination. It may also entail the fraudulent legalisation of irregular migrants' residence status.

While routes and modi operandi show ad hoc shifts in response to changes in demand and supply, they remain largely the same over time. For entry into the EU, migrant smuggling criminal networks are active along the Central, Eastern, Western Mediterranean and Western African routes by sea.

Migrant smuggling services into the EU by land concentrate along the Eastern Mediterranean land routes and onwards via the Western Balkan routes, and with fluctuating peaks along the Eastern land routes. Members of criminal networks either act as guides while crossing the green borders or provide instructions remotely. Irregular migrants are smuggled in passenger vehicles including in rental vehicles, busses, small commercial vehicles, and in lorries (hidden among commodities, but also in fuel tanks, between the cabin and the trailer, or on the trailer).

Facilitated secondary movements within the EU remain a key criminal business, either departing from irregular migrants' first countries of arrival or from Member States where they were temporarily residing, and are overall multi-directional throughout the EU. Facilitated secondary movements may entail land and/or air transport, and along the route, irregular migrants may be held in safehouses.

The EU also serves as a departure point towards other destinations. Criminal networks organise the exit of the EU towards the United Kingdom, predominantly through crossings of the English Channel in small boats. Some criminal networks have specialised in the provision of nautical equipment for these crossings. The EU also functions as a transit for migrant smuggling by air, mostly to north America.

In addition to facilitating the entry, transit or exit of irregular migrants, an important component of migrant smuggling entails the facilitation of irregular migrants' fraudulent legalisation of stay. Common modi operandi include the misuse of visa, marriages of convenience, the use of fraudulent breeder documents (including fraudulent invitation letters) to obtain genuine documents, false declarations of paternity, and the misuse of applications for international protection. Document fraud is a key enabler in this context, as it is for migrant smuggling by air.



Hybrid threat link and digitalisation

Migrant smuggling services are shaped by the interplay of a broad range of push and pull factors³⁶. The instrumentalisation of migration has become a highly visible new factor at play today and is expected to further expand in the future. This is a further consequence of the Russian war of aggression against Ukraine and its implications for the regional and global geopolitical situation. Hybrid threat actors misuse the migratory situation to destabilise the EU and its Member States, thereby also providing additional business opportunities to criminal players in the field.

While migrant smuggling is, for a large part, inherently a physical cross-border crime, it is and will be further accelerated by digital and technological developments. As well as its reliance on online platforms for marketing, recruitment, communication and money transfers, specific to migrant smuggling is also the misuse of online applications to organise journeys (such as booking accommodation or mapping out routes to provide to the irregular migrants). The advertising strategies of migrant smuggling criminal networks are increasingly professional, showcasing successful crossings – across multiple social media platforms in parallel – to promote their services to potential migrants.

Against the backdrop of today's volatile and uncertain global context, migrant smuggling is expected to remain a profit-making criminal business. Demand is likely to remain high as migratory flows – due to economic, geopolitical, conflict, environmental or other reasons – will continue to be directed towards or via the EU. The migrant smuggling landscape may become even more volatile, unpredictable or large-scale if irregular migrants continue to be instrumentalised by hybrid threat actors to destabilise society. Current conflicts may continue in the long term or may spread to larger regions, triggering additional displacements in the Middle East, Africa or the EU's eastern neighbourhood.

The instrumentalisation of irregular migrants' vulnerable situation for geopolitical motives may provide additional peaks in opportunities for migrant smuggling services.

CASE EXAMPLE – Migrant smuggling via Russia and Belarus to the EU³⁷

A criminal network smuggled irregular migrants from Iraq via Türkiye, Russia and Belarus to northern European countries with onwards facilitated secondary movements towards Germany and the United Kingdom, the main destination countries. The criminal network adapted the modus operandi and smuggling route quickly, depending on different factors such as visa regulations, natural conditions on the route and taking advantage of the geopolitical situation. The smuggling activities were coordinated among different parts of the criminal network operating along the route. Irregular migrants paid between EUR 3 000 and EUR 5 000 per person, depending on the provided services, directly to hawala offices, also in cryptocurrencies.

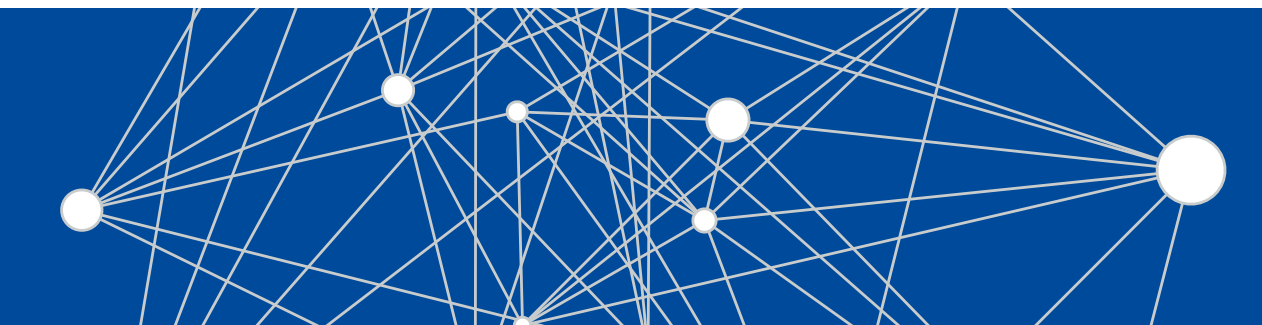
The threat of migrant smuggling is particularly exacerbated by the high degree of adaptability and opportunism that has long characterised criminal networks active in this illicit business. The supply of migrant smuggling services is constantly adapting to the dynamics of irregular migration flows or the response thereto. Such adaptability also contributes to the resilience of criminal networks against law enforcement or criminal competition.

Criminal networks continuously respond to opportunities and challenges by shifting routes, modi operandi, and offering crime as-a-service.

Significant security, economic and social implications

Migrant smuggling has a high impact on the EU and its Member States, as it is a complex challenge that combines security threats with social implications. The vast migration flows, in which organised crime facilitation plays a key role, place a huge strain on border management systems and require significant investments from law enforcement and other authorities. Particularly for journeys over sea and land, criminal networks consider their clients as commodities, lacking human dignity. Testament to this is the overcrowding of sea vessels entering and exiting the EU and of vehicles entering or transporting irregular migrants through the region.

The loss of life related to migrant smuggling is high. Violence and recklessness increasingly characterise migrant smuggling. Violence targets competing criminal actors, law enforcement officials, and irregular migrants.





The EU holds a multifaceted position, with combined roles of import, production, processing, distribution, transit, and export of illicit drugs.



The trade in illicit drugs

Drug trafficking is a dynamic global criminal business, affecting all Member States. The threat posed by drug trafficking networks has increased and will continue to do so. Both demand and supply of most types of drugs are high, as are the illicit profits criminal networks can make. The impact of drug production and trafficking – in particular on health and the environment – is substantial. Using tools such as corruption, violence, and money laundering, drug trafficking networks destabilise society and undermine legal economies and trust in institutions.

The possible further spread of dangerous synthetic opioids is a concern and must be closely monitored.



Recent fluctuations in cocaine seizures reflect a waterbed effect, leading to alternative routings and modi operandi. This could further spread drug-related violence.



Dynamic criminal market with high demand and supply and a multitude of actors

The European illicit drug market is characterised by the widespread availability of a broad range of drugs, with substances often available at high potency or purity in new forms, mixtures or combinations³⁸. The drug market is constantly developing. Chemical innovations lead to the production of novel drugs or new ways of chemically concealing drugs. The application of technological and digital innovation conceals communications and broadens drug retail channels.

Drug trafficking affects the whole of the EU. It is highly profitable and attractive, but also competitive. Drug trafficking criminal networks demonstrate the most threatening characteristics, such as the misuse of trade infrastructure and legal businesses, the use of (technological) countermeasures, and the willingness to engage in corruption and violence³⁹.

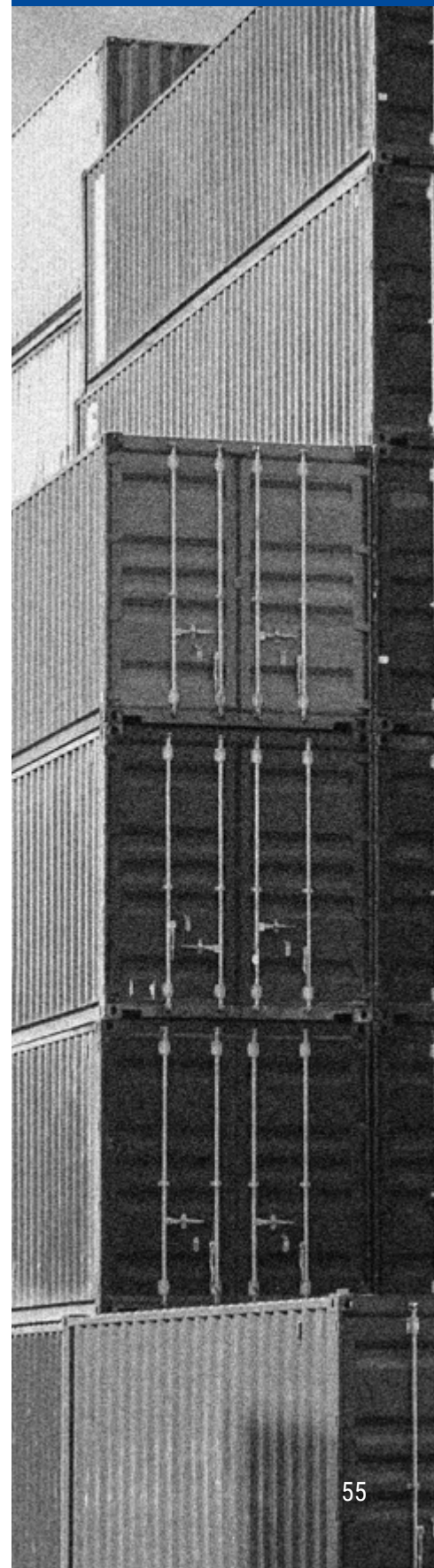
The illicit drug market is a global and dynamic criminal market, with continuously adapting routes and modi operandi.

The EU is a source, transit and destination region for various types of drugs. Cannabis herb and synthetic drugs are produced on a large scale within the EU, for local markets and for export abroad. Other drugs, such as cocaine, are imported into the EU, sometimes as intermediate products, with final processing within the EU before local distribution or export to non-EU markets.

The EU holds a multifaceted position in the drugs landscape, with combined roles of import, production, processing, distribution, transit or export.

Drug trafficking to, from and within the EU is expected to remain a key threat to the region's internal security in the coming years, as criminal networks continue to be driven by the large profits in the drug trade. The agile and sophisticated use of new production methods, technologies, legal business structures, online tools, and trafficking modus operandi will likely continue to drive both supply and demand.

Drug trafficking is closely interwoven with the abuse of legal businesses, for transportation, for concealment among legitimate loads, and for obtaining the necessary precursors/chemicals.



Far reaching impact with risks for citizens and opportunities for criminals

The impact of drug trafficking is far-reaching. Risks for users have increased as there is widespread availability of a broader range of drugs, often of high potency or purity, some of which have a high risk of life-threatening poisoning⁴⁰. Additionally, drug related violence not only targets subjects in the criminal world, but also harms various other groups in society, including public officials and innocent bystanders. Violence spilling over into the public space fuels feelings of insecurity and instils fear in citizens. Drug trafficking activities also have major financial implications. With retail value running into several billion euros, drug trafficking represents a major income source for criminal networks, further strengthening their position⁴¹. Drug production has a significant impact on the environment as it creates large amounts of hazardous waste and damages fauna and flora.

Cocaine

Changing routes and modus operandi in a competitive and violent market

The surge in cocaine production in Latin American source countries has reached unprecedented levels, supplying the EU and its Member States with substantial quantities of the drug. This increase in production aligns with the growing demand within the EU⁴² ensuring a steady influx of cocaine into European markets. This stable market equilibrium ensures that cocaine trafficking remains a highly profitable activity, making the cocaine market an attractive prospect for criminal networks.

Cocaine trafficking to the EU has become increasingly diversified in terms of transportation methods, concealment techniques, and trafficking routes.

While there was a drop in maritime seizures in some major entry points in the EU in 2024, the volume of cocaine entering the EU has likely not decreased. Instead, trafficking routes and modi operandi are further diversifying. In Latin America, departure and transit points are shifting. Ports in various countries may further emerge as key transit points for cocaine destined for the EU. On the EU side, higher amounts were seized in some other large ports in the EU, as well as in smaller, secondary EU ports. Such a waterbed effect and further variation and displacement of drug entry points in the EU, may also bring along consequences for criminal networks' operations and their competition, potentially bringing along violent activity in more locations throughout the EU, with possible involvement of young perpetrators.

Maritime trafficking using containers remains the dominant modus operandi, especially for the transport of multi-tonne shipments of cocaine bricks. Various other types of vessels, such as sailing boats, are used too. At-sea drop offs have become a more prominent modus operandi. It is further likely that some criminal networks have shifted to trafficking smaller amounts, via multiple entry points and containers, instead of multi-ton loads in one go, spreading the risk of

interception. Cocaine is also trafficked to the EU by air, both as air cargo and in person.

Cocaine trafficking to the EU has diversified in transport, concealment methods, and routes. Recent fluctuations in seizures reflect a waterbed effect, leading to alternative routings and modi operandi. This could further spread drug-related violence and drive the recruitment of young perpetrators across the EU.

Criminal networks use a variety of modi operandi to traffic cocaine to the EU. In most cases, the end product – hydrochloride salt ('cocaine powder') – is trafficked in bricks. The intermediate product, cocaine base, is also exported. The final processing then takes place in the EU. To reduce risks and optimise profits, cocaine is incorporated in various materials. It is then taken out through specific chemical procedures. Laboratories for the processing and/or extraction of cocaine are mainly found in western and southern European countries. There are indications of a further spread of cocaine extraction activities in laboratories in the EU.

CASE EXAMPLE – Cocaine injected in cardboard boxes ⁴³

A criminal network, made up of mainly Colombian and Spanish suspects, trafficked cocaine, using a sophisticated method to avoid detection. They injected cardboard boxes containing legal cargo (such as fruit) with cocaine base. Once successfully shipped in maritime containers from Colombia to Málaga (Spain), the criminal network would extract the cocaine base from the cardboard and process it into the final consumable product, ready for distribution.

Criminal networks

The immense profits associated with cocaine trafficking present significant financial incentives, attracting numerous criminal networks—often in direct competition with one another. This competition fosters not only illicit practices but also a heightened propensity for violence and corruption, as criminal networks fight for control over profitable trafficking routes and market dominance.

Cocaine trafficking networks are often resilient – many of them have been active for more than 10 years. The most threatening ones control the entire criminal process. They either have cells in source countries or cooperate with networks based there. Networks cooperate to share resources, facilitate contacts, and coordinate steps of the criminal process. Investment groups are created to fund and share the risk of importing large quantities of cocaine. Brokers play a key role in organising large combined shipments. Latin American and European criminal networks also partner in cocaine production activities in Europe.

The profits to be made in cocaine trafficking are huge and provide incentives for many – often competing – criminal networks to engage in this business, and to commit violence and use corruption.

Cocaine trafficking networks tend to use violence more frequently and resort to more extreme forms than networks trading other types of drugs. Violence is mainly used internally, within the criminal network, to guarantee discipline and cooperation, maintain control and punish associates for deals that went wrong. Violence is also used against competitors in the market to establish and stay in power. Explosives and heavy pyrotechnics are regularly used in certain Member States, most notably to intimidate network members or carry out retaliation attacks within or between drug trafficking criminal networks. The involvement of underage perpetrators in such attacks, some as young as 13, is not uncommon.

Cocaine trafficking networks often have a global reach, allowing them to simultaneously traffic from and to different locations. Networks trafficking large volumes of cocaine via containers into ports regularly resort to corruption, paying large bribes to various key actors, to safeguard the drugs⁴⁴.

The threat posed by cocaine trafficking is likely to remain high. The huge profits will continue to attract criminals. Networks will search for more sophisticated ways to conceal cocaine, new routes to circumvent enhanced security measures in major entry ports (e.g. using smaller ports) and apply new countermeasures.

Both supply and demand are expected to remain high, attracting criminal actors from within and outside the EU, competing for a share of the profitable market.



Massive supply and demand generate huge profits

Cannabis remains the most commonly consumed illicit drug in Europe⁴⁵. Cannabis trafficking has increased over the past years and it is expected to be sustained at a high level in the upcoming years.

Cannabis trafficking is expected to be sustained at a high level.

Legal and illegal markets might become increasingly intertwined.

A large variety of products is available on the illicit cannabis market in the EU, either produced locally or smuggled from other regions. Examples include cannabis oil, other high-potency extracts, edibles and vaping products. In addition, semi-synthetic cannabinoids are emerging in EU markets. Some of these products are highly potent, posing higher risks to users' health⁴⁶.

Cannabis is likely to remain the most commonly used drug in the EU, with criminal networks either focused solely on cannabis or on polydrug crime. Criminal networks will continue to diversify their trafficking routes into the EU, increasingly using a variety of entry points in the Mediterranean for smuggling cannabis resin. Taking advantage of markets where herbal cannabis has been decriminalised in various forms, it is likely that trafficking of herbal cannabis from outside the EU will increase as criminal networks seek to exploit new opportunities.

Herbal cannabis is grown in most Member States, usually indoors, albeit at different scales. Technological improvements in cannabis cultivation, such as automation or remote control, air humidity monitoring and computer-guided cultivation are a general trend.

Herbal cannabis production in the EU – both indoor and outdoor – is widespread and often large-scale. Some cannabis resin manufacturing facilities have been detected in the EU too.

There is an increase in the trafficking of herbal cannabis from countries in North America and Asia. Cannabis resin is also trafficked to the EU.

CASE EXAMPLE – Cannabis trafficked by helicopter from Morocco to Spain⁴⁷

A criminal network used modified helicopters to traffic cannabis from Morocco to the South of Spain. Once in Spain, the drugs were trafficked to France by falsely registered vehicles of heavy good trucks. Multiple false identities were used as countermeasures and the network used shell companies to launder the profits from the illicit trafficking and trade. Profits were subsequently used to grow and advance their business, including improving and expanding the trafficking system.

Criminal networks

Criminal networks involved in cannabis cultivation regularly engage specialists for certain tasks, such as installing and managing electricity at the cultivation sites, arranging transport, and building sophisticated hidden compartments in vehicles. Some criminal networks even engage experts in the genetic manipulation of cannabis. Services for waste dumping are also sourced. The tactics of criminal networks involved in cannabis production, trafficking and distribution also include violence. The pursuit of strategic dominance and the protection of key vending points are important motives for violent clashes among competing networks.



Synthetic drugs and new psychoactive substances (NPS)

EU as global production centre and expansion within the EU

The production and trafficking of synthetic drugs have increased over the past years, and this threat is expected to further increase. Both the demand and supply of synthetic drugs are high. The misuse of legal business structures for the sourcing of necessary chemicals and equipment is a common practice. This is often done via legitimate pharmaceutical companies in the EU, without them being aware of it.

The EU is central in the global synthetic drugs landscape, with EU-based production serving both the EU and international markets.

The EU is a major source of synthetic drugs distributed on a global level. The production of synthetic drugs within the region is characterised by continuous innovation and expansion.

Production has spread to more Member States. It is often industrial scale, while there is also a proliferation of small labs.

In addition to amphetamine, methamphetamine and MDMA, the production within the EU of other types of synthetic drugs has been identified: synthetic cathinones⁴⁸ (i.e. mephedrone and alpha-PVP, also known as Flakka), synthetic cannabinoids⁴⁹ and synthetic opioids (i.e. methadone). Some of these substances are controlled throughout the EU, others are forbidden in some Member States or remain entirely uncontrolled within the EU (the so-called new psychoactive substances, or NPS).

CASE EXAMPLE – Production of synthetic opioids and cathinones in the EU⁵⁰

In August 2024, several production sites of synthetic opioids and cathinones were dismantled in Poland and Ukraine. Amongst the detected facilities was the largest laboratory of synthetic opioids ever found in Poland, used to produce methadone in crystalline form. Additionally, 8 multi-laboratories, used for the production of synthetic cathinones (mephedrone, Alpha-PVP) and methadone, were dismantled in Poland and Ukraine. Next to the arrest of 7 members of the criminal network, 195 kilograms of methadone and 153 kilograms of Alpha-PVP were seized, together with large quantities of drug precursors and chemicals necessary for the production of synthetic opioids and cathinones.

Although the number of NPS appearing for the first time on the market has slowed down, the appearance of very potent synthetic opioids (such as nitazenes and diverted or counterfeit prescription opioids) on the EU drug market is a serious reason for concern. These substances are often sold as other products, such as heroin, or mixed with medicines. Users are not always aware of the contents of the substance they buy and use. There is an increase in reported poisonings, including deaths, involving nitazenes in various European countries⁵¹.

The further spread of dangerous synthetic opioids, such as nitazenes or potentially fentanyl, must be closely monitored.

As it stands, reporting on the presence of fentanyl within the EU is limited. Close monitoring of this substance and other synthetic opioids remains important.

Next to synthetic opioids, other synthetic drugs such as synthetic cathinones and ketamine are also increasingly appearing on the EU drug market, generating substantial illicit profits and causing serious health risks.



Criminal networks

Synthetic drug producing criminal networks based in the EU control multiple production units throughout the EU and beyond. Some criminal networks facilitate the import of (pre)precursors from Asia and divert chemicals from legal trade to illicit drug production facilities, misusing existing legal business structures and mislabelling chemicals.

Further innovation in chemical processes and new variants of synthetic drugs are expected, driven by new technologies and use of chemical/lab experts. A further spread of production facilities throughout the EU is highly likely.

Criminal networks will continue to look for new production methods and chemicals to circumvent controls. New variants of precursors will appear on the market, and shortages of hardware may lead to other, potentially more dangerous, production methods. The variability of synthetic substances will further increase, and their production will likely continue to spread throughout the EU.

Overdoses and dangerous production methods

Synthetic drug production has a negative environmental impact as large amounts of chemical waste are generated, leading to water and soil pollution⁵². Chemical reactions and fumes can also cause air pollution, while the production and use of synthetic drugs cause serious health issues. Dangers associated with the chemical processes may kill the cooks involved and cause fires and explosions, impacting innocent neighbours. Additionally, some European countries note a high and increasing number of synthetic drug-related deaths, mainly associated with the use of synthetic opioids, and nitazenes in particular.

Heroin

Sustained demand with shifts in supply and suppliers, as well as to other illicit drugs

The heroin trafficking market has been subject to a shifting context. Both demand and supply are sustained at a low level in most Member States, but the impact on health is high. Heroin is the most frequently used illicit opioid in the EU and the drug causing the highest levels of dependence, health issues, and mortality⁵³.

The long-term impact of the Taliban's April 2022 poppy cultivation ban on heroin availability in the EU remains uncertain. Should the poppy ban in Afghanistan remain in force, there will likely be an increase in heroin produced in other countries being trafficked to the EU. It is also possible that dangerous synthetic opioids, such as nitazenes, will spread in the EU, as a replacement for heroin.

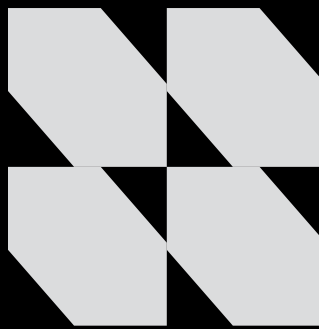
The heroin trafficking criminal business is shifting in light of the uncertainties on the effect of the Afghan opium ban and consequent uncertainties with regard to supply.

Occasionally, the final steps of the heroin production process (the conversion of morphine into heroin, cutting and packaging) take place within the EU, mainly in western European countries.

Criminal networks

Heroin trafficking criminal networks are typically rather small, hierarchically structured or relatively tightly organised, and centred around families or clans. The use of violence is less common than in other drug trafficking networks. This may be because heroin trafficking is controlled by fewer and more homogeneous groups, reducing the risk of conflicts.

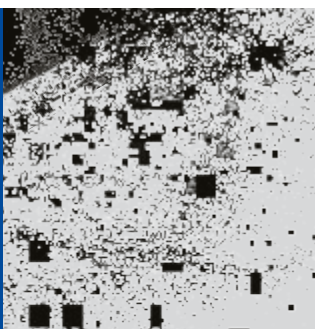
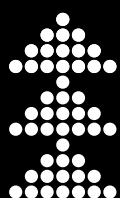
Heroin and other opioids have the highest levels of dependence, health problems and mortality.



Firearms trafficking is a security threat on its own, but even more so due to its enabling role in other criminal activities.

The trade in illegal firearms and explosives

Firearms and explosives trafficking poses a critical threat to the internal security of the EU, with recent trends indicating changing black market dynamics. Illicit firearms and explosives enable other forms of serious and organised crime and reinforce related violence. Concerns of Ukraine emerging as a significant source of illicit firearms persist. Privately manufactured firearms and the large-scale production of counterfeit weapons feature prominently. AI technologies are expected to make weapon production more accessible and precise.



The Western Balkan region continues to be a key source of illicit firearms trafficked into the EU; however, other conflict zones, such as Ukraine, may similarly emerge as significant sources of firearms trafficking.