

Changes in the NPS market in Eastern and Central Europe



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Outline



- Methodology;
- Description of the NPS market in countries;
- Description of the responses;
- Effects of the responses.

Aim, methodology



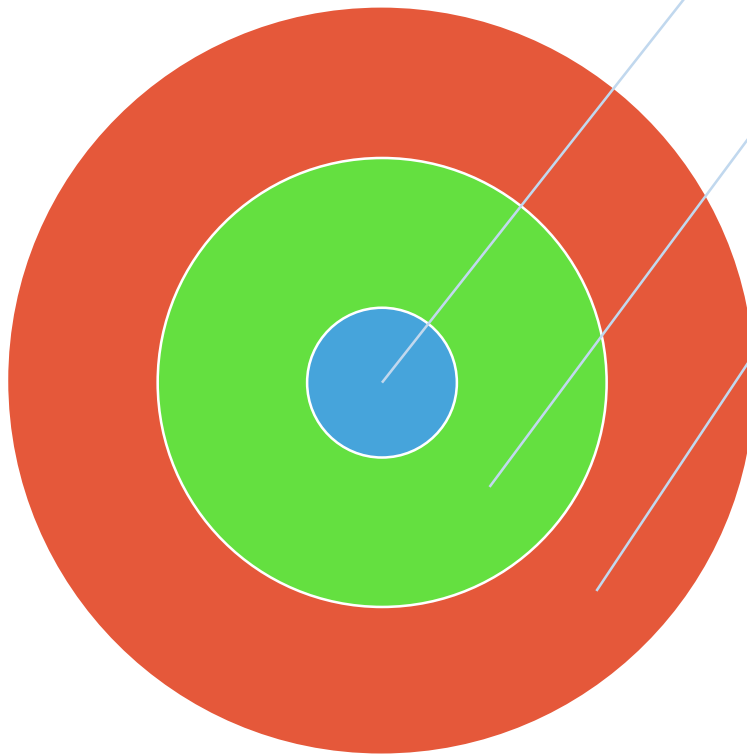
Aim:

The main objective is to explain and compare the effect on the NPS market brought by new and innovative responses in the EE, LV, LT, PL, HU, CZ, RO.

Methodology:

- A review of available literature covering the NPS market;
- An analysis of legal acts regulating NPS;
- A review of situation on the NPS issue;
- Interviews with experts;
- Collection and analyses of available data, e.g., seizure data, hospital emergencies, surveys and studies on prevalence

The NPS market

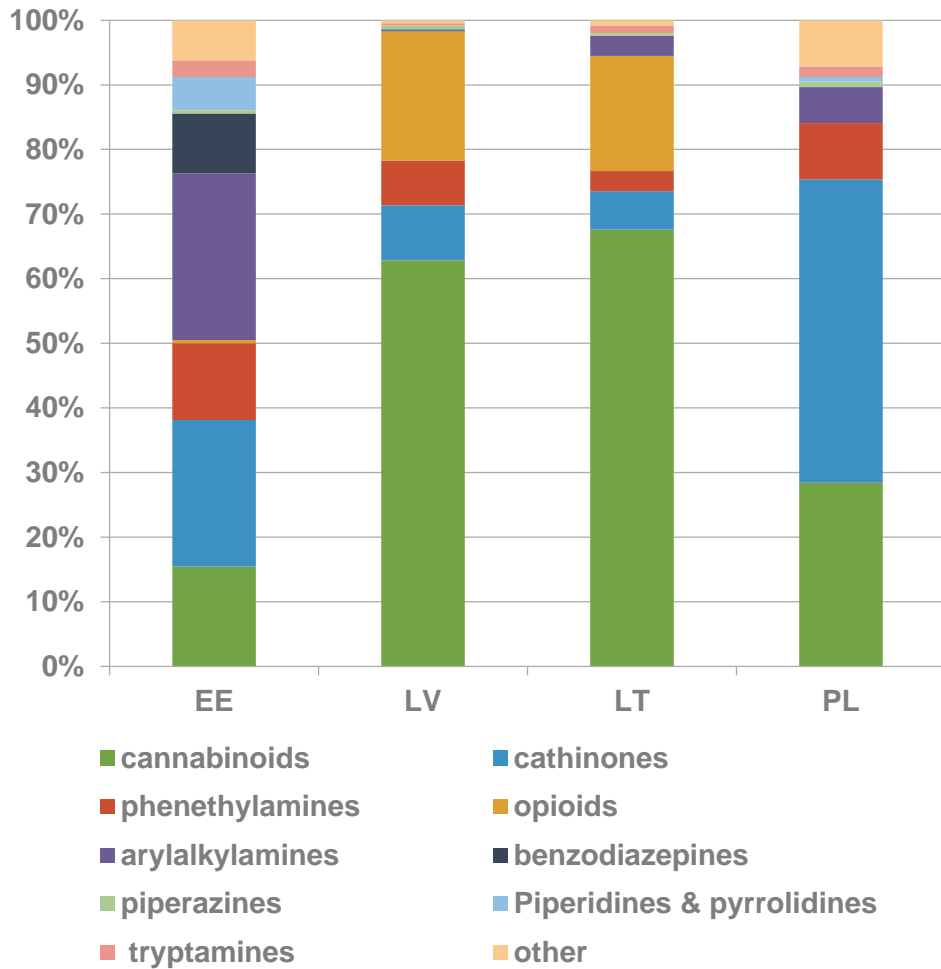


The product -
substances

Distribution: place,
legal vs. illegal, online
vs. street; price,
marketing strategies,
distributors profile

User's profile: age,
gender, occupation,
etc.

Substances in 2015



- Huge difference between the number of identified NPS – in PL more than 17 000, in RO – 15 samples (2015)
- In CZ, RO tested less than 100 samples. In HU mainly in biological samples.
- When market “legal” it is more dynamic and substances are changing more often.
- The most common substances different in each country

Situation in countries



Mainly online distribution
Cathinones, cannabinoids

HU

68 % NSP clients in 2014 , mainly cathinones
Cannabinoids - 7,7% (2013, GPS); 3.8% other NPS (2013, GPS)



Brick and mortar shops, online distribution
Cathinones; cannabinoids

PL

10% 15-16 y.o. (2015, ESPAD); 36% NSP clients (2014);
1.3% general population (2015)



Brick and mortar shops until 2014
Cannabinoids

LV

13% 15-16 y.o. (2013, ESPAD methodology); 18% party-goers
(2012); 3% (2015, GPS)

Situation in countries



RO

Brick and mortar shops until 2012
Cathinones
9.4% PWID Bucharest as the primary drug (2013)



CZ

Brick and mortar shops until 2011
Cathinones - 11% NSP clients (2013)



EE

No data on prevalence and intoxications
No shops



LT

Online shops
3% used NPS (Omnibus survey, 2013)

Legislative responses



- EE** Scheduling with a decree of the minister, special “NPS” list
- LV** Scheduling, generic system, temporary ban that entails criminal liability (rapid procedure)
- LT** Rapid scheduling, generic system
- PL** Scheduling, immediate removal from the market, large fines
- CZ** Scheduling, since 2015 procedure faster
- HU** Scheduling, a special list of substances under temporary ban / risk assessment
- RO** Scheduling, immediate removal of products from the market, criminal liability

Legislative responses



- More attention when problem is visible – brick and mortar shops (LV, PL, RO);
- In countries where NPS problem not so visible (e.g., no brick and mortar shops) substances scheduled, additional rapid control measures not introduced (EE, LT);
- In countries where NPS problem considerable, response more sophisticated. To close brick and mortar shops rapid and proactive response with harsh sanctions has worked – LV, RO. Simple fines don't work (PL);
- Important factor in developing legislation has been the negative public opinion, a pressure to schedule rapidly and punish distributors harshly.



Online distribution



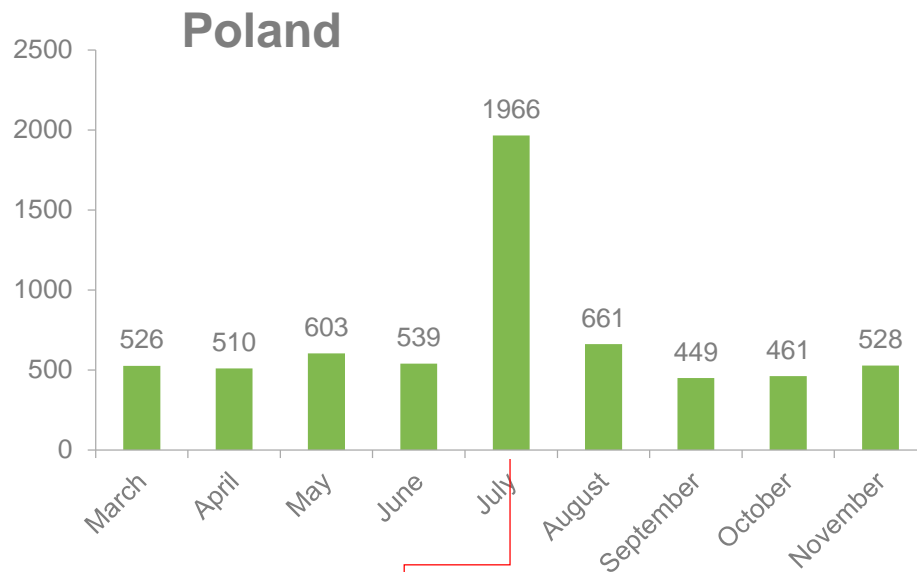
- Rapid and proactive legislation with harsh sanctions contribute also to changes in local online distribution – no more surface webpages, instead hidden chanel, darknets, foreign domains.
- In countries with unregulated substances, internet selling active.

The screenshot shows the homepage of KOLEKCJONER.nl. At the top right, there are links for 'Logowanie / Rejestracja' and a shopping cart icon labeled 'Koszyk (0)'. The main navigation menu includes 'STRONA STARTOWA', 'SKLEP', 'DOSTAWA I PŁATNOŚCI', 'PROMOCJE', and 'GRATISY'. A central promotional banner reads: 'Płać bitcoinami płacisz mniej! Płatności bitcoinami są łatwe, szybkie i bezpieczne. Zobacz jak prosto je zdobyć (przeczytaj nasz NOWY przewodnik), zapłać za nie: - w Żabce, - w Fresh Market, - w banku, - na poczcie, - lub robiąc przelew przez szybkie płatności online.' Below the banner is a category menu: 'SOLE PIORĄCE', 'WYCIĄGACZE WILGOCI', 'PIGUŁKI PIORĄCE', 'RESEARCH CHEMICALS', 'OFERTA HURTOWA', and 'KOLEKCJE'. The product grid features a woman's face on the left and three product cards: '10g BAKA' (green background), '10 szt. Gumi jagoda' (purple background with a blueberry), and '100g HARDCORE INCENSE' (black background with a hand holding a yellow smiley face).

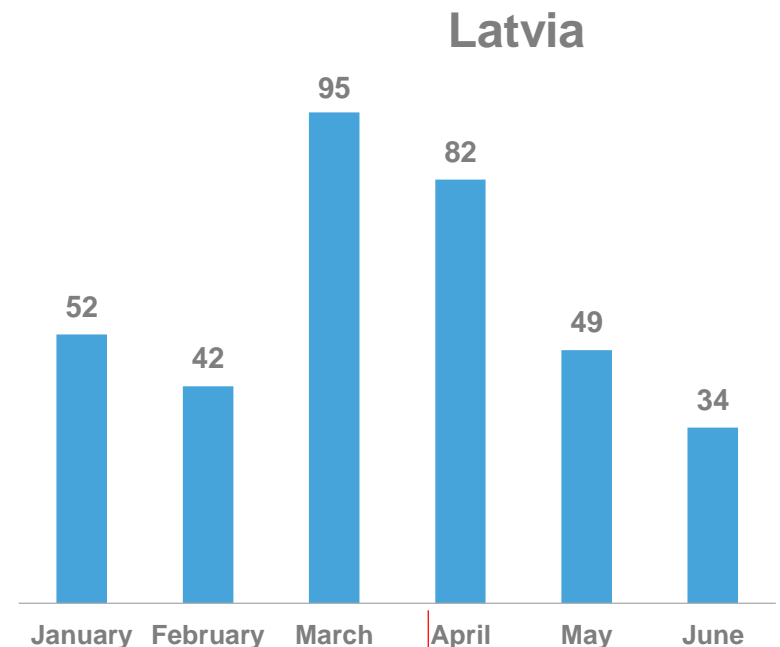
Effects of the responses



- In LV and PL when measures came into force, a number of intoxication increased. Aggressive marketing and experimenting with NPS. No data from CZ, RO and HU.



New substances scheduled



Temporary ban entails criminal liability

Effects: legal and illegal market



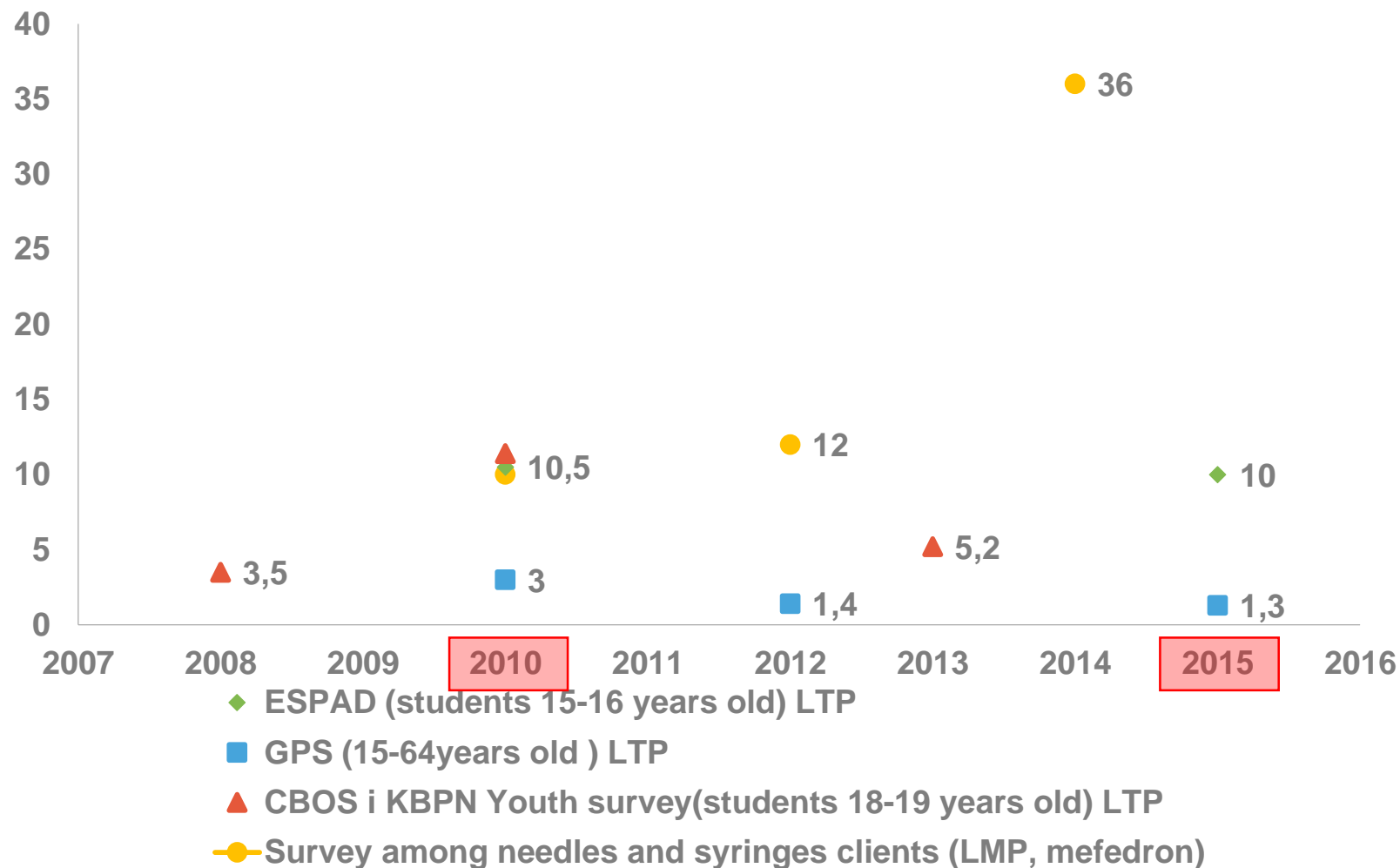
- By the end of 2015 the “legal” market closed in RO and LV
- When brick and mortar shops are closed availability of substances reduced
- Reduced NPS market might transfer to the illegal market (LV), but only in cases when “legal” market not possible. If legal market still possible, used substances will be replaced by new ones;
- Qualitative changes in the illegal market also possible. Example of heroin shortage – initially replaced by cathinones (HU, PL, RO). After closure of the “legal” market in RO users returned to heroin; in PL continued to use illegal and legal cathinones; in LV even though the “legal” market was closed, users switch to the illegal carfentanil.

Effects: intoxications and prevalence

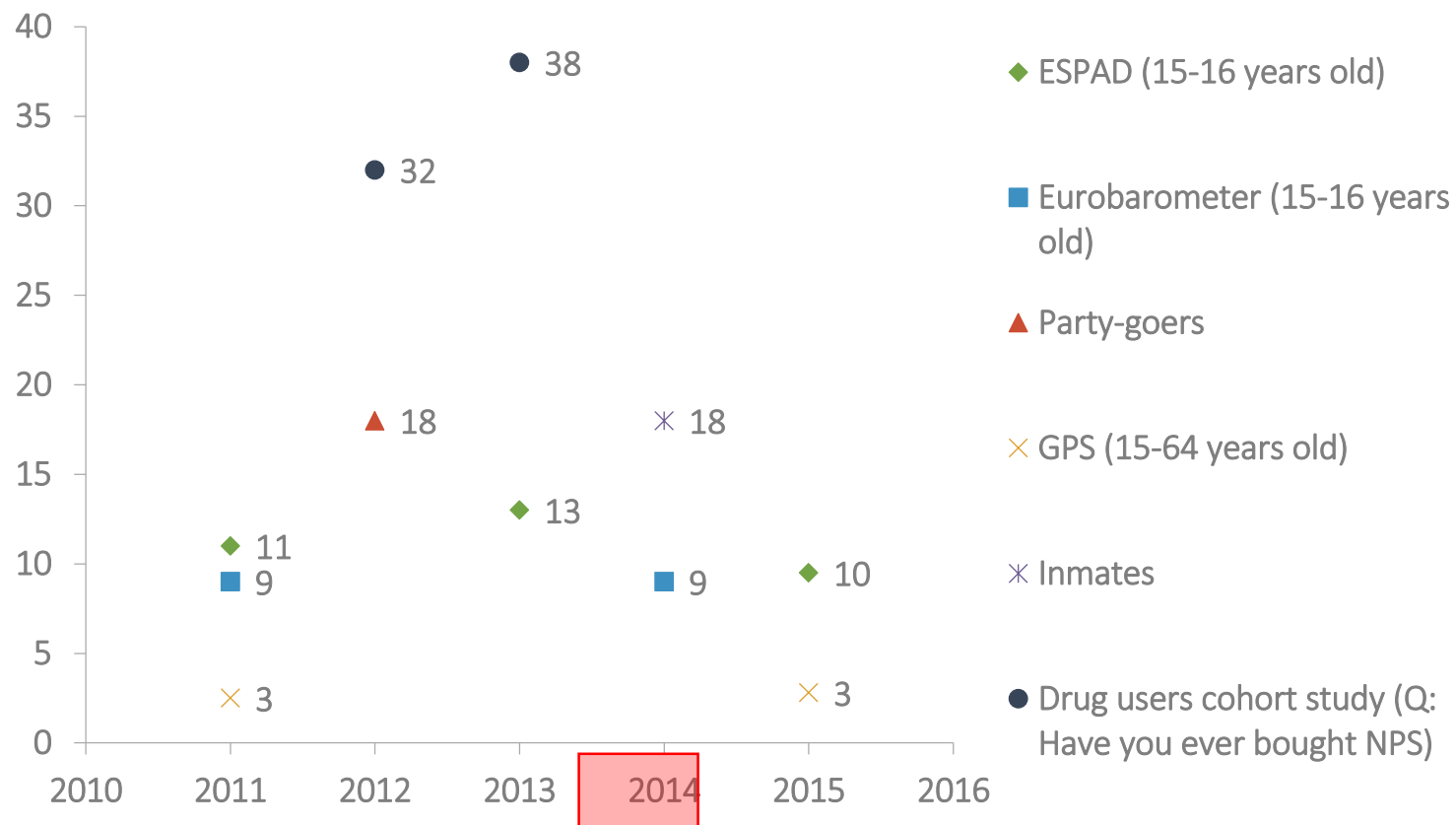


- In RO and LV a number of intoxications decreased after the closure of the NPS “legal” market. Partially could be associated with experimenting not the regular use, which is why no indications that use of other substances increased;
- Difficult to assess prevalence data, longer period necessary. However, for example in CZ and RO LTP among clients of NSP considerably decreased.

Prevalence of NPS in general population and sub-populations, 2008-2015 (%)



Life-time prevalence of NPS in general population and sub-populations, 2011-2014 (%)



Sources: **ESPAD** (LaSPAD, 2011, p. 66; Trapencieris M. et al., 2013, p. 20); **Eurobarometer** (European Commission, 2011, p. 19; European Commission, 2014, p. 10); **Party-goers** (Korojeva I. et al., 2012, p. 75); **GPS - General Population Survey** (Sniškere S. et al., 2011, p. 72); **Prisons** (Kļāve E. et al., 2014, p. 35); **Drug users cohort study** (Trapencieris M. et al., 2014, p. 29).

Effects: changes in attitudes towards NPS and illicit drugs (example of Latvia)



- The peak of the negative public opinion about NPS was reached in 2014.
- In 2014, 63% (38% in 2011) agreed that NPS should be banned at any circumstances (Eurobarometer, 2014). The first position among other EU member states.
- In 2014, 73% agreed that cannabis should be banned, in 2011 – 64% (Eurobarometer 2011; 2014);
- In 2015, 88% respondents of a local omnibus survey stated that cannabis shouldn't be legalised, in 2016 – 83% (the same level in 2012).

Conclusions

- NPS market in each country is different;
- Legislative response to the problem different in each country;
- Seems that harsh sanctions can close brick and mortar shops, consequently also reduce availability;
- NPS market development after response different as well. By the end of 2015 – NPS brick and mortar stores closed in CZ, LV, RO but, in PL operating again. In HU developed online market.
- Too early to draw conclusion on prevalence of use in wider population.
- Spread of NPS can bring negative public opinion – request to ban everything, also more negative attitudes towards legalisation of other illicit drugs such as cannabis..

Thank you!

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