



# **“The marketplace is more volatile and violent than it has ever been”**

An exploration of the links between drug market and violent crime trends in England and Wales in recent years

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### About Crest Advisory

We are crime and justice specialists - equal parts research, strategy and communication. From police forces to public inquiries, from tech companies to devolved authorities, we believe all these organisations (and more) have their own part to play in building a safer, more secure society. As the UK's only consultancy with this focus, we are as much of a blend as the crime and justice sector itself.

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## Key findings

1. Government drugs policy as it relates to crime has until recently largely been focused on volume acquisitive crime committed by drug users, while policy relating to violence has passed through various stages of focusing on guns, knives, youth violence, gangs and latterly exploitation.
2. Drug use trends vary by drug type, but powder and crack cocaine use – the latter primarily in combination with heroin – have increased in recent years, as has the use of other drugs such as ecstasy and ketamine.
3. There are some suggestions that crack cocaine use may be becoming less stigmatised, with increasing recreational/social use.
4. Powder cocaine use is commonly associated with alcohol use and is seen across the social spectrum, most strongly associated with regular visits to pubs and clubs.
5. The wholesale and retail purity of powder cocaine, crack cocaine and heroin has increased in recent years to historically high levels, with few signs of adulteration in retail products.
6. Increased cocaine supply has been driven by increased production in South America, while wholesale prices have fallen and purity has increased as mainland European and UK wholesale markets are said to have become increasingly dominated by highly professional Albanian organised crime groups dealing directly with producers.
7. Increased cocaine supply seems to have driven retail market expansion, notably (but not exclusively) in the form of ‘county lines’, many controlled out of metropolitan hubs, dealing crack and heroin in provincial towns, with drug sales commonly conducted by youths and in some cases dependent drug users.
8. Those convicted of class A drugs supply are getting younger. Between 2012 and 2017, class A drug supply convictions at court in England and Wales increased 84 per cent for under-21s but only 23 per cent for those aged 21 or over. The number of under-21s convicted of heroin supply rose 80 per cent between 2013 and 2018, while for those aged 21 and over the number convicted only rose 10 per cent; for crack cocaine the equivalent figures are 72 per cent (108 per cent to 2017) and 59 per cent respectively; while for powder cocaine they are 67 per cent (103 per cent to 2017) and 12 per cent (32 per cent to 2017) respectively.
9. In 2017/18, 322 homicides (44 per cent) were considered to be ‘drug related’ in some way, the highest number since these Homicide Index data were first collected in 2007/8.
10. Violence is most commonly associated with crack and heroin markets; less commonly it is seen in relation to cannabis cultivation and ‘spice’ markets (including in prisons), but it seems only relatively rarely in relation to powder cocaine and other drugs.

11. Violence in relation to crack and heroin seems at least partly to be a function of the social and economic contexts within which supply and use take place (notably in contrast to powder cocaine), with territorial markets, vulnerable dependent users and dealing by youths overlapping with gang and other group/territorial identities where dealing has featured alongside other forms of offending, including robbery and group violence.
12. There are complicated overlaps between the drug market and other violence at the interfaces between drug dealing and other criminal activities, group behaviours, the management of status and reputation, and social conflict including revenge.
13. Technology has served to facilitate the expansion of drug markets, recruitment and exploitation, while enabling the continuity of illicit business in the face of enforcement activity; it has also served to catalyse social disputes and accelerate conflict.
14. In some cases, including the 'dark web', technology has separated markets from places and eliminated physical cash from transactions, which may serve to mitigate the likelihood of violence.
15. Significant gaps exist in the intelligence picture, most notably at middle market level and where drug markets cross police and law enforcement boundaries or remits. More broadly, drug markets tend to be prioritised by police forces only to the extent that they are linked to violence, or more recently also exploitation.

## 1. Shifting government priorities relating to violence and drugs

An examination of the development of government policy tells us much about the changing nature of crime but also how it is framed and understood. In the late-90s and early-2000s gun crime was a particular concern, while drugs policy focused on tackling volume acquisitive crime committed by problem drug users via the criminal justice system. The focus on violence then gradually shifted to gangs, knives and finally criminal exploitation, while it is only quite recently that the relationship between drug markets and violence has been prioritised with the emerging concern about ‘county lines’ models of drug dealing, accompanied by violence. It should be said, however, that links between drug markets and serious violence have long been understood and exploitation, including of vulnerable children and youths, has always gone on.

In 2002, competition amongst local criminal ‘crews’ in Brent in Northwest London over the local crack cocaine trade had seen a surge in gun violence that had resulted in a succession of murders and other serious violence.

<sup>2</sup> The violence arose where unregulated illicit market forces intersected with the social worlds of the dealers and their friends and associates and those they otherwise came into contact with. People were attacked over unpaid debts or territorial infringements, drug dealers were robbed of their drugs and cash, revenge attacks were preferred to any kind of police involvement and drove spirals of retribution, and violence spilled out into parties, shops, nightclubs and high streets as rivals were encountered and reputations and status were built, challenged and reasserted. In 2003, 7-year-old Toni-Ann Byfield was shot dead alongside her father, a convicted drug dealer, by a man who reportedly specialised in robbing drug dealers. In total there were 17 gun murders and 69 attempted gun murders in the borough between 1999 and 2003.<sup>3</sup> Even today some of the events from that period resonate as the occasional familiar family name crops up in news reports of contemporary violence.

In the early part of the 2000s gun crime was a preoccupation for politicians and policy makers, in the aftermath of the post-Dunblane and Hungerford gun bans, and with surging gun violence – particularly in a number of urban areas – that saw gun homicides in England and Wales peak at 91 in 2001/2 (compared to 29 in 2017/18).<sup>4,5</sup> Gang violence in Manchester and Birmingham hit the headlines, notably in the latter case when friends Charlene Ellis and Letisha Shakespeare were murdered in 2003 in a gang-related drive-by shooting that caused widespread revulsion. Around the same time research on gang violence in South Manchester identified links between drug-related offending and gang-related criminality, while Home Office commissioned qualitative research on gun crime, published in 2006, described drugs markets as the ‘single most important theme’ and a ‘golden thread’ that ran throughout the 80 interviews with men convicted of gun crime offences.<sup>6,7</sup>

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<sup>2</sup> In 2002, Gavin Hales started his research career seconded to Brent Council where he was involved with the Crime and Disorder Reduction Partnership (CDRP), including conducting primary research on gun crime and sitting on the ‘Not Another Drop’ gun crime reduction steering group.

<sup>3</sup> Hales, G. with Silverstone, D. (2005) *Gun crime in Brent: a report commissioned by the London Borough of Brent Crime and Disorder Reduction Partnership, Metropolitan Police and Brent Council*. <https://researchportal.port.ac.uk/portal/files/1926330/filetodownload,58106,en.pdf>

<sup>4</sup> Povey, D., Coleman, K., Kaiza, P. and Roe, S. (2009) *Homicides, Firearm Offences and Intimate Violence 2007/08*. HOSB 02/09. London: Home Office. <https://webarchive.nationalarchives.gov.uk/20090825125838/http://www.homeoffice.gov.uk/rds/pdfs09/hosb0209.pdf>

<sup>5</sup> ONS (2019) ‘Appendix tables: homicide in England and Wales’, Table 4.

<https://www.ons.gov.uk/file?uri=/peoplepopulationandcommunity/crimeandjustice/datasets/appendixtableshomicideinenglandandwales/current/homicideappendixtables201718finalv5corrected.xls>

<sup>6</sup> Bullock, K. and Tilley, N. (2002) *Shootings, Gangs and Violent Incidents in Manchester: Developing a crime reduction strategy*. CRRS Paper 13. London: Home Office. <https://webarchive.nationalarchives.gov.uk/20081023101118/http://www.homeoffice.gov.uk/rds/pdfs2/crrs13.pdf>

<sup>7</sup> Hales, G., Lewis, C. and Silverstone, D. (2006) *Gun crime: the market in and use of illegal firearms*. HORS 298. London: Home Office. <http://webarchive.nationalarchives.gov.uk/20110218135832/http://rds.homeoffice.gov.uk/rds/pdfs06/hors298.pdf>

By 2007, the policy focus had shifted to youth gangs, in the form of the Tackling Gangs Action Programme, which was then broadened in 2008 as knife crime became an increasingly pressing concern, to include specific initiatives targeting knives (with a Tackling Knives Action Programme) as part of a broader focus on serious youth violence (from 2009).<sup>8,9,10</sup> The coalition government repackaged things under the banner of 'Ending Gangs and Youth Violence' in 2012, which included a specific focus on 'gang associated sexual exploitation' and by 2016 this has morphed into a focus on 'Ending Gang Violence and Exploitation', concerned with 'gang-related exploitation of vulnerable young people and adults', which was described as a 'new problem' (which it was not) and in relation to which 'county lines' was mentioned first.<sup>11</sup> There was no mention of the kind of child sexual exploitation that came to the fore in Rotherham, Rochdale and a number of other cities in the intervening years.<sup>12</sup> The Serious Violence Strategy, published in 2018, brings things up to date, and gives considerable attention to violence relating to drugs markets.<sup>13</sup>

Throughout the focus on various forms of serious violence over most of the last two decades – notably including those involving guns, gangs, knives and latterly exploitation – drug markets have been mentioned as causes and risk factors, but have rarely been addressed in those terms, nor has government policy engaged with the question of harm reduction as it relates to drug dealing and drug markets. Instead the focus has been on punitive approaches intended to increase the risks of detection and punishment, reduce the potential rewards from dealing and in turn tackle supply and especially use.

Indeed, looking at the trajectory of drugs policy over the same period, we see a central focus on the connection between drug users and crime that arguably first emerged with the 1995 Conservative government's national drugs strategy 'Tackling Drugs Together', which situated drugs as a criminal justice concern and placed a particular emphasis on problem drug users as the cause of much volume acquisitive crime; crime as measured by the Crime Survey for England and Wales (then the British Crime Survey) peaked in 1995.<sup>14,15</sup> This was picked up by the subsequent Labour government, which introduced Drug Treatment and Testing Orders in 1998 as a criminal justice intervention, with a particular emphasis on methadone prescription for dependent heroin users, although by 2008 policy had shifted towards abstinence and this was carried through into the early years of the Coalition government (the 2010 Drugs Strategy emphasised recovery).<sup>16</sup>

<sup>8</sup> Following the gun murder of 11-year-old Rhys Jones in Liverpool, whose attacker was trying to shoot rival gang members. On TGAP, see Dawson, P. (2008) *Monitoring data from the Tackling Gangs Action Programme*. London: Home Office.

<https://webarchive.nationalarchives.gov.uk/20090806055227/http://www.crimereduction.homeoffice.gov.uk/testbed/violentstreet011a.pdf>

<sup>9</sup> Home Office (2010) Tackling Knives Action Programme website.

[https://webarchive.nationalarchives.gov.uk/20100408115610/http://www.crimereduction.homeoffice.gov.uk/tackling\\_knives.htm](https://webarchive.nationalarchives.gov.uk/20100408115610/http://www.crimereduction.homeoffice.gov.uk/tackling_knives.htm)

<sup>10</sup> Ward, L., Nicholas, S. and Willoughby, M. (2011) *An assessment of the Tackling Knives and Serious Youth Violence Action Programme (TKAP) – Phase II*. Home Office Research Report 53. [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/116544/horr53-report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/116544/horr53-report.pdf)

<sup>11</sup> See Harding, S. (2016) *Ending Gang and Youth Violence programme: independent review*.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/570476/egyv-assessment-programme-2012-15-full-report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/570476/egyv-assessment-programme-2012-15-full-report.pdf)

<sup>12</sup> HM Government (2016) *Ending gang violence and exploitation*.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/491699/Ending\\_gang\\_violence\\_and\\_Exploitation\\_FINAL.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/491699/Ending_gang_violence_and_Exploitation_FINAL.pdf)

<sup>13</sup> HM Government (2018) *Serious Violence Strategy*.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/698009/serious-violence-strategy.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/698009/serious-violence-strategy.pdf)

<sup>14</sup> HM Government (1995) *Tackling Drugs Together: A strategy for England, 1995-98*. Cm 2846. HMSO.

<sup>15</sup> See Figure 1 of ONS (2019) *Crime in England and Wales: year ending March 2019*. 17 July.

<https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/bulletins/crimeinenglandandwales/yearendingmarch2019>

<sup>16</sup> HM Government (2010) *Drug Strategy 2010: Reducing Demand, Restricting Supply, Building Recovery: Supporting People to Live a Drug Free Life*.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/98026/drug-strategy-2010.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/98026/drug-strategy-2010.pdf)

By the time of the 2017 Drug Strategy, however, and reflecting the wider concerns about serious violence and exploitation, drug markets and dealing were given a more prominent focus, with 'restricting supply' forming the second of four priority areas behind 'reducing demand'; 'county lines' are mentioned in the context of 'drugs, gangs and related exploitation', and the strategy discusses how a 'significant proportion' of organised crime groups involved in drugs supply are 'involved in violent crime'.<sup>17</sup> Nevertheless, the approach to Heroin and Crack Action Areas (HCAAs), first piloted in 2015, has placed a renewed emphasis on drug testing and referrals to treatment.

Looked at in the round, the broad policy arc can be understood to have dealt with drugs and violence largely separately through the 1990s and first decade of the 2000s, during which time drugs policy was heavily concerned with volume acquisitive crime – the likes of burglary, car crime and shoplifting – reflecting the political priorities of the time. The arrival of the Coalition government in 2010 saw Theresa May as Home Secretary turn her back on the kind of New Public Management practiced by the previous Labour government, with an end to crime reduction targets. At the time, most indicators showed crime falling, including those relating to serious violence (a common government refrain at the time was 'crime is down, police reform is working'), but this trend has reversed since around 2013, with a surge in knife crime and homicide evident from around 2016 (especially in London). At the same time, the disclosure of large volumes of child sexual exploitation in the likes of Rotherham and Rochdale, and the recognition of the failure of state agencies to address it, combined with the declining concern about volume crime to turn attention towards risk, threat, vulnerability, grooming, exploitation and low volume but high harm crime types. Initially this was in relation to child sexual exploitation (CSE) – and included a surge of reports of historic offences – while latterly this has broadened to include child criminal exploitation (CCE), especially in the context of so-called 'county lines' models of drug dealing where at least part of the early focus arose from a concern about children missing from care.

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<sup>17</sup> HM Government (2017) *2017 Drug Strategy*.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/628148/Drug\\_strategy\\_2017.PDF](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/628148/Drug_strategy_2017.PDF)

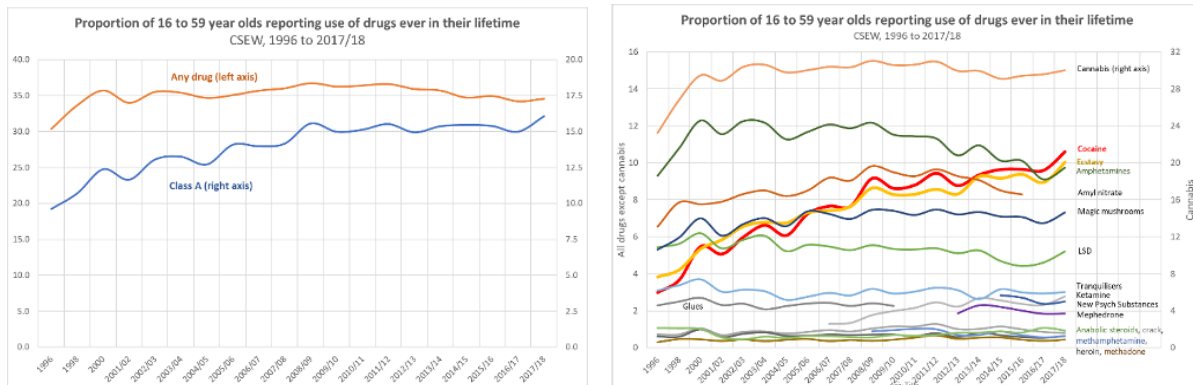


## 2. Drug use trends from Crime Survey and health data

### Crime Survey for England and Wales

The Crime Survey for England and Wales (CSEW) has long-term data on drug use declared by adult respondents (aged 16 to 59), for periods including over their lifetime, in the last year and in the last month.<sup>18</sup> Given that the CSEW is a household survey, inevitably some populations will be under- or not represented, including those living in institutional settings or who are homeless.

Looking first at *lifetime use* (below), we see that Class A drug use has risen more rapidly since 1996 than all drug use, with the latter having fallen significantly (in the statistical sense) since 2007/8 (as seen in the chart, the main fall has been since 2011/12).<sup>19</sup> In terms of individual drugs, cannabis use has been relatively flat having risen sharply in the 1990s, powder cocaine and ecstasy use have risen significantly in the last year, since 2007/8 and since 1996, while amphetamine use has fallen significantly since 2007/8. Lifetime LSD use has risen significantly in the last year but has generally been flat or falling slightly, while ketamine use has risen significantly since 2007/8 and over the last year. Crack cocaine use (0.8 per cent) and heroin use (0.6 per cent) are both rarely reported to the CSEW and there have been no significant changes in use reported by the CSEW.

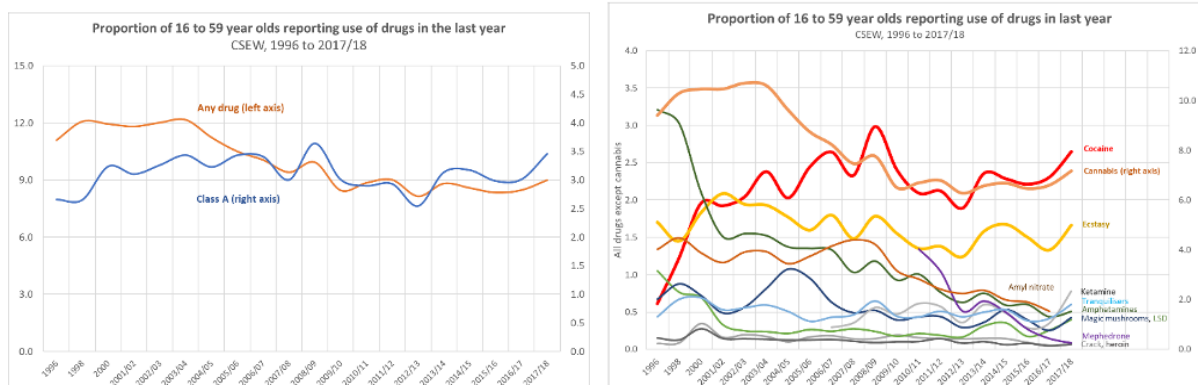


Looking at drug use *in the last year* (below) we see a rather different picture. First, use of any drug is down significantly since 1996, while class A drug use in the last year is up significantly on 1996 levels. Looking at the individual drug types, the proportion of respondents reporting cannabis use in the last year is down significantly on 1996 levels while the proportion of powder cocaine users has risen significantly, as has ecstasy use in the last year and ketamine use in the last year and compared to 2007/8. Amphetamine use has fallen significantly on both 1996 and 2007/8 levels.

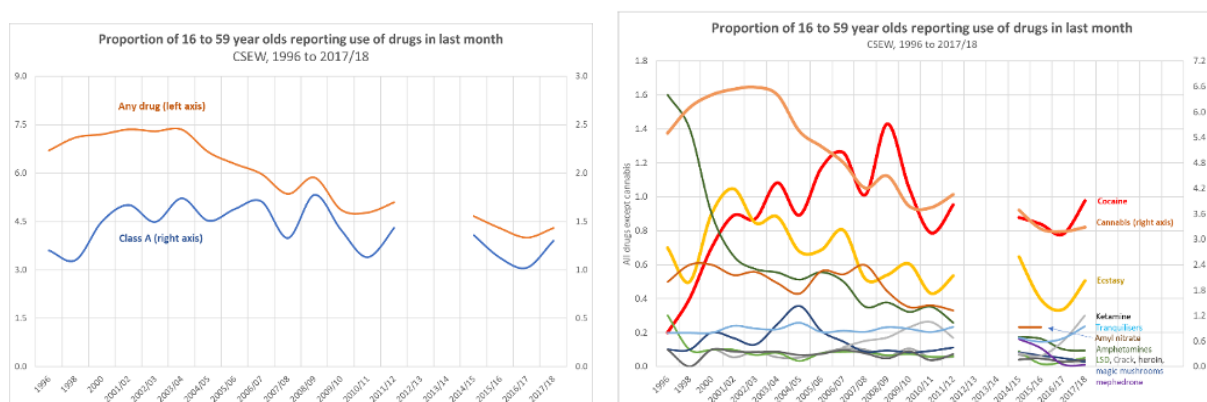
<sup>18</sup> Home Office (2018) Drug misuse: findings from the 2017 to 2018 CSEW: data tables.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/728748/drug-misuse-1718-tables.xlsx](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/728748/drug-misuse-1718-tables.xlsx). Note that these were the most recent data at the time of writing.

<sup>19</sup> The statistical significance of changes against 1996, 2007/8 and 2016/17 is indicated in the Home Office (2018) data tables linked to in the previous footnote.



Finally, we can look at use *in the last month* (below), which may give us more of a sense of what has happened to frequency of use, although there is a gap in the published data series for 2012/13 and 2013/14.<sup>20</sup> This shows that cannabis use in the last month has fallen since 2003/4, and in 2017/18 was significantly lower than in 1996 and 2007/8, while powder cocaine use was significantly higher than in 1996 and ecstasy use rose significantly in the last year, but to a level significantly below 1996. As above, amphetamine use has fallen a great deal, being significantly lower in 2017/18 than in 2007/8 and 1996, and ketamine use in 2017/18 was significantly above levels in 2016/17 and 2007/8.



The CSEW provides additional detail on the characteristics of respondents reporting drug use, including by gender, ethnicity, social practices (e.g. frequency of visits to pubs and clubs) and neighbourhood socio-economic classification (ACORN categories and Indices of Multiple Deprivation).<sup>21</sup> Two particular details are worth highlighting here, given statements from a number of public figures in recent years about purported links between ‘middle class cocaine users’ and violence (discussed further below in section (7)).

First, use of powder cocaine in the last year is highest among those visiting nightclubs more than four times in the last month (17.1 per cent) and visiting pubs/bars more than 9 times in the last month (12.0 per cent). Although data are not collected on dinner parties it seems unlikely there is such a strong correlation with cocaine use.

<sup>20</sup> Additional data on frequent users of cannabis, cocaine and ecstasy are available in Home Office (2018) Tables 2.01 to 2.08.

<sup>21</sup> See Home Office (2018) Tables 3.01 to 3.03.

Second, powder cocaine use extends across all social and economic classes. For example, for drug use in the last year among 16-59 year olds, 3.4 per cent of those earning more than £50,000 used cocaine, as did 2.0 per cent of those earning less than £10,000 and between £10,000 and £20,000; use by those living in the 20 per cent least deprived areas was 3.3 per cent, compared to 3.0 per cent among those living in the 20 per cent most deprived areas; and, use among those living in areas of 'rising prosperity' was 3.9 per cent, compared to 2.6 per cent among those living in areas classified as 'financially stretched'. The 2015 ACMD review of powder cocaine use highlighted the 'emergence of a two-tier market, with indications that low-purity cocaine powder comprises the bulk of that market' and went on to suggest that '[i]t is highly likely that increased availability of lower-quality, cheaper, cocaine powder is both a consequence of and a factor that has driven market expansion'.<sup>22</sup>

### Health data

Health data provide a different insight to the CSEW being largely based on those presenting for treatment, indicating that the number of such people who use crack or illicit opiates, singly or together, rose 4.4 per cent between 2014/15 and 2016/17, while the number of people presenting for crack problems (without heroin) increased by almost half (49 per cent) between 2014/15 and 2017/18.<sup>23, 24</sup> In addition, a three per cent increase during 2017/18 of people entering treatment for crack and opiate problems is described as:

"...represent[ing] over half (54%) of people entering treatment for opiate problems in 2017 to 2018, compared to 35% in 2005 to 2006. The latest published estimates of crack cocaine use in England (2014 to 2015) reported a 10% increase in the numbers of people estimated to be using the substance since 2010 to 2011 (166,640 to 182,828). It is likely that the recent increase in the number of people entering treatment for crack problems reflects the rise in the prevalence of the drug's use. The increase in the number of new users may be in part caused by changes in the purity and affordability of crack cocaine and patterns of distribution over the last few years."<sup>25</sup>

- Public Health England

We can chart the drug treatment commencements, here for powder and crack cocaine (below).<sup>26</sup> Hospital data on 'finished consultant episodes' for assaults by sharp objects are included because they hint at the possibility (not more than that) of commonalities between the two variables that are relevant to the discussions below; the consistent shape and timings of trends since 2012 are quite striking if not conclusive.<sup>27</sup>

<sup>22</sup> Advisory Council on the Misuse of Drugs (ACMD) (2015) *Cocaine powder: review of its prevalence, patterns of use and harm*. P.18.

<https://www.gov.uk/government/publications/cocaine-powder-review-of-its-prevalence-patterns-of-use-and-harm>

<sup>23</sup> O'Connor, R. (2019) 'What the latest estimates on opiate and crack use tell us'. Public Health Matters Blog: Public Health England. 25 March.

<https://publichealthmatters.blog.gov.uk/2019/03/25/what-the-latest-estimates-on-opiate-and-crack-use-tell-us/>

<sup>24</sup> In 2017/18, 77,248 people were in treatment for opiate use (without crack), a further 63,941 for opiate use with crack, while 3,099 were in treatment for crack use on its own and a further 3,000 for crack and alcohol use; there were 4,301 'new presentations to treatment' involving crack cocaine.

Source: Public Health England (2018) 'Data tables: adult substance misuse treatment statistics 2017 to 2018' (from Substance misuse treatment for adults: statistics 2017 to 2018).

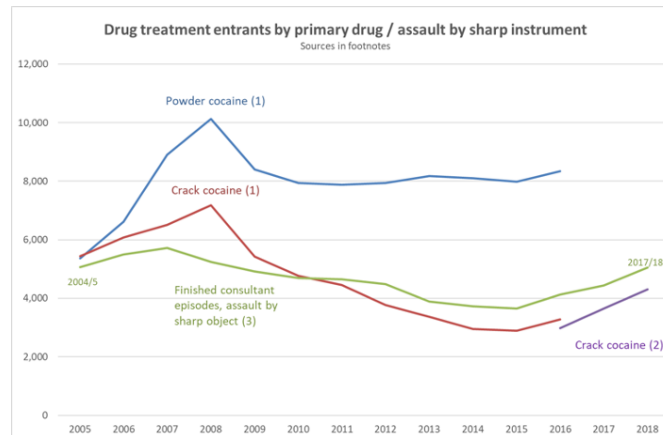
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/752515/AdultSubstanceMisuseNDTMSDataTables2017-18.xlsx](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752515/AdultSubstanceMisuseNDTMSDataTables2017-18.xlsx)

<sup>25</sup> Public Health England (2018) *Alcohol and drug treatment for adults: statistics summary 2017 to 2018*.

<https://www.gov.uk/government/publications/substance-misuse-treatment-for-adults-statistics-summary-2017-to-2018/alcohol-and-drug-treatment-for-adults-statistics-summary-2017-to-2018>

<sup>26</sup> Crack treatment entrants for (1) 2005 to 2016 from Public Health England et al. (2018) Table 3.13, and (2) for 2016 to 2018 from Public Health England (2018).

<sup>27</sup> Finished consultant episodes for (3) assault by sharp object from House of Commons Library (2018) Knife crime statistics. Appendix Table C13 (as at 4 September 2019). <http://researchbriefings.files.parliament.uk/documents/SN04304/CBPSN04304.download.xlsx>



Drug treatment data also confirm that drug users entering treatment (2016 figures) who present as using more than one substance are most commonly primarily opioid (mainly heroin) users who also use crack cocaine, something that is highly relevant to understanding current drug market structures, especially in respect of so-called ‘county lines’ models which, as will be seen below, are primarily concerned with the supply of crack and heroin together. By contrast, those who entered treatment for cocaine as their primary substance were most likely to also use alcohol and/or cannabis as secondary substances.<sup>28</sup>

Adjunctive problematic substances reported by treatment entrants in the United Kingdom, by primary drug class, 2016

Primary drug class	All adjunctive drugs										
	Opioids	Cannabis	Cocaine (total)	Powder cocaine	Crack cocaine	Stimulants other than cocaine	Hypnotics and sedatives	Benzodiazepines	Hallucinogens	Alcohol	Other Substances
Opioids	4,632	7,644	27,377	2,852	24,977	1,891	6,569	6,529	131	8,779	1,736
Cannabis	681	0	4,713	4,159	639	2,605	799	772	374	8,080	3,214
Cocaine (total)	2,578	5,226	899	537	361	1,233	762	735	186	6,616	669
Stimulants other than cocaine	299	1,192	641	514	133	409	347	195	108	838	173
Hypnotics and sedatives	545	622	427	312	125	209	63	11	34	384	214
Hallucinogens	21	125	119	104	19	80	24	25	12	88	9
Other substances	508	911	498	302	208	205	188	183	23	566	18
<b>Total</b>	<b>9,572</b>	<b>15,735</b>	<b>34,676</b>	<b>8,782</b>	<b>26,462</b>	<b>6,637</b>	<b>8,762</b>	<b>8,460</b>	<b>868</b>	<b>25,380</b>	<b>6,037</b>

In addition, most drug users entering treatment in 2016 for opioids or crack cocaine (as their primary drug) had previously been treated for drug use, and they were older than those being treated for powder cocaine and other drugs such as cannabis, MDMA and ketamine.<sup>29</sup> Of note, the proportion of primary heroin treatment entrants also using crack cocaine rose from 38.3 per cent in 2009 to 53.8 per cent in 2016, with the sharpest increase being between 2015 (47.6 per cent) and 2016; at least in London, both knife crime and gun crime surged in 2016.<sup>30,31</sup>

<sup>28</sup> Public Health England, Home Office, Welsh Government, The Scottish Government, *Public Health Wales and Department of Health (Northern Ireland) (2018) United Kingdom drug situation: Focal Point annual report 2017*. Data tables 2017, table 3.3.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/713104/UK-drug-situation-2017-data-tables.xlsx](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/713104/UK-drug-situation-2017-data-tables.xlsx).

<sup>29</sup> For those entering treatment for heroin use as their primary drug, 42,850 out of 49,231 (87 per cent) had previously received treatment and heroin users were 37 years old on average, while the equivalent figures for crack cocaine as primary drug were 4,221 out of 5,542 (76 per cent) and 36 years old. By contrast, those receiving treatment for powder cocaine as the primary drug were 31 years old on average, for cannabis 24 years old, for MDMA 21 years old and for ketamine 26 years old. See Table 3.4 in Public Health England et al. (2018).

<sup>30</sup> Table 3.18 in Public Health England et al. (2018).

<sup>31</sup> E.g. see the charts in this Twitter thread on knife crime, gun crime, robbery and homicide in London using Metropolitan Police Service data <https://twitter.com/gmhales/status/986978419505319936?s=20>.

### 3. Drug purity trends

Drug purity data from the National Crime Agency indicate that the purity of heroin and especially powder and crack cocaine has risen in recent years, and also that there is very little adulteration between wholesale and retail levels (2016 figures), which seems likely to indicate buoyant levels of supply. It is notable that retail prices per gram of powder cocaine haven't changed since 2008, and of heroin since 2012.<sup>32</sup>

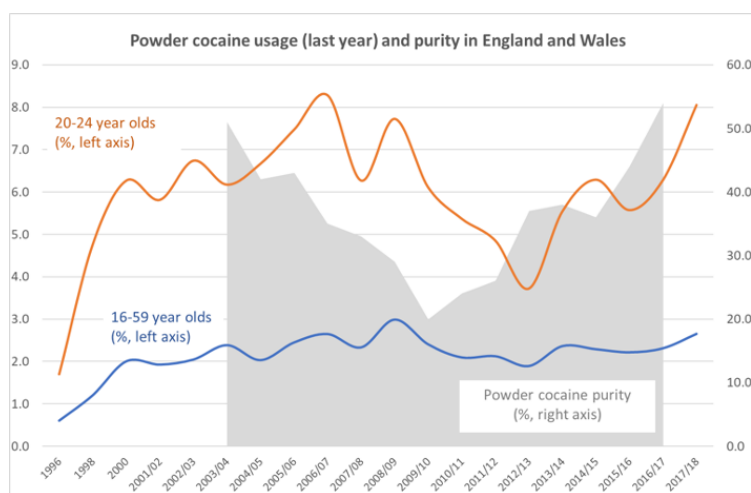
Mean purity/potency of small quantity drug seizures of certain illicit drugs in England and Wales, 2003 to 2016

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Amphetamine	11	9	10	11	11	8	8	8	10	5	7	12	10	10
Powder cocaine	51	42	43	35	33	29	20	24	26	37	38	36	44	54
Crack cocaine	70	64	65	50	52	43	27	31	26	30	36	37	48	71
Ecstasy/MDMA (mg per tablet)	65	67	66	48	52	33	44	49	71	102	†	90	†	†
Heroin	33	40	47	44	50	43	44	35	18	20	29	36	44	43

Weighted mean purity (%) of street-level and wholesale drug seizures of certain illicit drugs in England and Wales, 2016

	Street-level	Wholesale
Amphetamine	10	13
Powder cocaine	54	65
Crack cocaine	71	66
Ecstasy/MDMA (powder/crystal)	75	72
Heroin	43	45
Methamphetamine powder	75	74

When we look at powder cocaine usage trends as reported to the Crime Survey for England and Wales, and especially when we look at the age group that uses cocaine most often, we see signs of what appears to be an interesting lagged causal relationship between drug purity and rates of cocaine use: purity fell in the 2000s, followed by a reduction in drug use, and then rose from 2009/10 followed this time by a rise in consumption.<sup>33</sup>



Wider evidence suggests a similar trend has been seen for crack cocaine. The drug treatment data presented above, for example, show numbers entering drug treatment for their crack cocaine use peaked in 2008 before falling until 2015 when it began to rise again.

<sup>32</sup> Tables 7.2, 7.3 and 7.4 in Public Health England et al. (2018).

<sup>33</sup> Purity data from Table 7.4 in Public Health England et al. (2018).

## 4. Drugs markets

In broad terms, drugs markets tend to be described as having three tiers, with importation/wholesale and retail levels connected by a 'middle market' that subdivides import wholesale quantities and distributes them to retail level dealers/groups. A 2007 study reported internal Home Office analysis which estimated that at that time there were '300 major importers into the UK, 3,000 [middle market] wholesalers, and 70,000 street dealers'.<sup>34</sup> The exact structures will vary, including by commodity. For example, heroin in the UK generally originates in Afghanistan and cocaine in South America (Columbia, Peru and Bolivia), and in both cases production has been increasing.<sup>35,36</sup> A key change to supply in recent years is reported to have been the growing dominance of traffickers from the Balkans (specifically Albania) in cocaine supply into the UK (via mainland Europe) from South America. The NCA notes they have 'a presence in all major UK cities and towns and operat[e] supply networks reaching back to source and transit countries'.<sup>37</sup> By contrast to cocaine and heroin, cannabis markets are partly supplied by international trafficking and partly by domestic production within the UK.

Although the scale of dark web trade is unclear, it has undoubtedly served to globalise some retail (and perhaps middle) markets and further sever the connection between drug markets and local places that arguably began with the advent of pagers and mobile phones.<sup>38</sup> These days, open markets, where anyone can approach a dealer to purchase drugs, are increasingly rare (and not to be confused with visible drug dealing), not least given how they expose dealers to heightened risks of enforcement activity such as 'test purchase' operations by undercover police officers. Nevertheless, they seem to persist in semi-open form in some venue-based markets, including pubs, clubs and music festivals, and increasingly on social media; two interviewees referred to Snapchat and Instagram being used to advertise drugs for sale.<sup>39</sup> More broadly, and reflecting changes in the wider economy, transactions have increasingly shifted towards a model of 'just in time' delivery to the customer, enabled by mobile technology.

### Turnover

The Home Office has previously published (heavily caveated) estimates for the total size of illicit drugs markets

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<sup>34</sup> Matrix Knowledge Group (2007) *The Illicit drug trade in the United Kingdom (2nd Edition)*. Home Office Online Report 20/07. <https://webarchive.nationalarchives.gov.uk/20090121151239/http://www.homeoffice.gov.uk/rds/pdfs07/rdsolr2007.pdf>

<sup>35</sup> UNODC (2019) report that '[o]verall, the global area under opium poppy cultivation is the second largest ever estimated, after the record high of 2017' and that '[c]oca bush cultivation and manufacture of cocaine have reached record highs in 2017'. UNODC (2019) *World Drug Report 2019, Executive Summary*. <https://wdr.unodc.org/wdr2019/en/exsum.html>

<sup>36</sup> The EMCDDA (2019) *EU Drug Markets Report 2019* reports that the estimated area under coca bush cultivation in South America almost doubled between 2013 and 2017, when it reached 245,000 hectares, while opium poppy cultivation has increased from 201,000 hectares in 2007 to 414,000 hectares in 2017 (of which 328,000 hectares were in Afghanistan) [http://www.emcdda.europa.eu/system/files/publications/12078/20192630\\_TD0319332ENN\\_PDF.pdf](http://www.emcdda.europa.eu/system/files/publications/12078/20192630_TD0319332ENN_PDF.pdf)

<sup>37</sup> NCA (2018) *National Strategic Assessment of Serious and Organised Crime 2018*. P.54. <https://www.nationalcrimeagency.gov.uk/who-we-are/publications/173-national-strategic-assessment-of-serious-and-organised-crime-2018>

<sup>38</sup> Here for example is a London-based group of men being convicted for selling drugs including counterfeit medicine over the dark web in exchange for bitcoin, but also selling drugs locally for cash <https://www.mynewsdesk.com/uk/metpoliceuk/news/three-men-jailed-for-drugs-offences-379322>.

<sup>39</sup> They acknowledged that police forces 'generally don't have the capacity to look at social media'. See also McCulloch, L. and Furlong, S. (2019) *DM for Details: Selling Drugs in the Age of Social Media*. Volteface. <https://volteface.me/app/uploads/2019/09/DM-for-Details-3.pdf>



in 2004 and 2010, using survey and arrestee data.<sup>40, 41</sup> In the case of 2010, turnover in England and Wales was estimated at £3.3bn of which crack cocaine and heroin accounted for £1,172m, cannabis £1,059m, powder cocaine £814m and Amphetamines, ecstasy, LSD and magic mushrooms combined £243m.<sup>42</sup> The Office for National Statistics (ONS) also produces estimates of household expenditure on ‘narcotics’ as part of its consumer trends data series, indicating a fall from £3.5bn in 2016 to £2.8bn in 2018, but with no indication of how that breaks down by drug type.<sup>43</sup>

Convictions

Courts data published by the Ministry of Justice (specifically the Court Outcomes by Police Force Area data tool) allow us to look at convictions trends and here we will focus briefly on Class A drug supply offences at all courts.<sup>44, 45</sup> For all Class A drug supply offences, we can see in the table below that convictions fell from 2008 (the earliest year for which data are available) until 2012, after which they increased to 2017 before falling slightly to 2018. Between 2012 and 2017 the number of convictions of those under 21 rose 84 per cent while the equivalent figure for those aged 21 and over was only 23 per cent. This rise in under 21s being convicted has taken place at the same time that ‘county lines’ have been growing in prominence.

<i>n convicted</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Under 21	1476	1174	1161	1028	937	1024	1112	1254	1566	1726	1529
21 and over	5551	5331	5182	4592	4400	4795	4920	5142	5515	5404	5124
<b>Total</b>	<b>7027</b>	<b>6505</b>	<b>6343</b>	<b>5620</b>	<b>5337</b>	<b>5819</b>	<b>6032</b>	<b>6396</b>	<b>7081</b>	<b>7130</b>	<b>6653</b>

Shorter term data are also available broken down by specific drug type in the *Principal offence proceedings and outcomes by Home Office offence code data tool*, and some data are presented below for convictions relating to the supply of heroin, crack, powder cocaine and – for comparison – cannabis.<sup>46</sup>

We see that between 2013 and 2018, convictions for heroin rose 24 per cent, for crack they rose 63 per cent, for cocaine they rose 42 per cent, while for cannabis they fell 37 per cent. Looking at the age breakdown, for heroin the number of under-21s convicted rose 80 per cent between 2013 and 2018, while for those aged 21

<sup>40</sup> Pudney, S., Badillo, C., Bryan, M., Burton, J., Conti, G. and Iacovou, M. (2006) ‘Estimating the size of the UK illicit drug market’, Ch4 in Singleton, N., Murray, R. and Tinsley, L. (eds.) *Measuring different aspects of problem drug use: methodological developments*. Second Ed. Home Office Online Report 16/06. London: Home Office. <http://webarchive.nationalarchives.gov.uk/20110218135832/rds.homeoffice.gov.uk/rds/pdfs06/rdsolr1606.pdf>

<sup>41</sup> Vincent, I., Mills, H. and Blythe, P. (2013) ‘Annex 2: The scale of the illicit drugs market’, pp.103-116 in H. Mills, S. Skodbo and P. Blythe, *Understanding organised crime: estimating the scale and the social and economic costs*. Home Office Research Report 73. [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/246390/horr73.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/246390/horr73.pdf)

<sup>42</sup> Table A2.6, p.113 in Vincent et al. (2013).

<sup>43</sup> ONS (2019) Consumer trends, UK: April to June 2019. Table 0A.CN (p. 222). <https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/bulletins/consumertrends/apriltojune2019>

<sup>44</sup> Ministry of Justice (2019) Criminal Justice System statistics quarterly: December 2018 - Court Outcomes by Police Force Area data tool. [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/804509/court-outcomes-by-PFA-2018.xlsx](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/804509/court-outcomes-by-PFA-2018.xlsx)

<sup>45</sup> Specifically, offence class ‘92A.09 Production, supply and possession with intent to supply a controlled drug - Class A’.

<sup>46</sup> Ministry of Justice (2019) Criminal Justice System statistics quarterly: December 2018 - Principal offence proceedings and outcomes by Home Office offence code data tool. [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/804510/HO-code-tool-principal-offence-2018.xlsx](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/804510/HO-code-tool-principal-offence-2018.xlsx)

and over the number convicted only rose 10 per cent; for crack cocaine the equivalent figures are 72 per cent (108 per cent to 2017) and 59 per cent respectively; for powder cocaine they are 67 per cent (103 per cent to 2017) and 12 per cent (32 per cent to 2017) respectively; and for cannabis they are -19 per cent and -41 per cent respectively.

<i>n convicted</i>		2013	2014	2015	2016	2017	2018
Heroin	Under 21	220	267	317	386	386	395
	21 and over	851	859	976	990	975	937
	<b>Total</b>	<b>1071</b>	<b>1126</b>	<b>1293</b>	<b>1376</b>	<b>1361</b>	<b>1332</b>
Crack	Under 21	152	143	205	283	317	262
	21 and over	331	300	352	399	485	527
	<b>Total</b>	<b>483</b>	<b>443</b>	<b>557</b>	<b>682</b>	<b>802</b>	<b>789</b>
Cocaine	Under 21	194	263	265	361	394	324
	21 and over	1174	1328	1458	1522	1545	1312
	<b>Total</b>	<b>1368</b>	<b>1591</b>	<b>1723</b>	<b>1883</b>	<b>1939</b>	<b>1636</b>
Cannabis	Under 21	600	750	717	657	621	484
	21 and over	2203	2050	2013	1846	1531	1293
	<b>Total</b>	<b>2803</b>	<b>2800</b>	<b>2730</b>	<b>2503</b>	<b>2152</b>	<b>1777</b>

Overall then, we see that convictions for cocaine and especially crack cocaine have risen faster than for heroin, and in all three cases while the majority of convicted offenders have been aged 21 or older, the numbers of under-21s have increased much faster, especially for crack and cocaine supply – which bring us to the question of ‘county lines’. By contrast, convictions for cannabis have been falling, driven primarily by a reduction in convictions of offenders aged 21 and over since 2015.

### County lines

We should pause here to consider in a little detail the question of ‘county lines’ drugs markets – a phrase that has entered the policing and wider criminal justice system vernacular only in recent years – because of their apparent relevance to the trajectory of serious violence in many areas (as will be seen below).

The National Crime Agency defines ‘county lines’ as ‘relat[ing] to the supply of Class A drugs (primarily crack cocaine and heroin) from an urban hub into rural and coastal towns or county locations’ and refers specifically to ‘gang members’ as being involved.<sup>47</sup> The ‘line’ refers not to geographical boundaries (in the US sense) but to

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<sup>47</sup> NCA, 2018: 55.



branded deal (phone) lines (e.g. the 'Billy Line') which may be transferred between different phone numbers (or other platforms), for example following police operations to arrest dealers and seize phones, and to which multiple phone numbers may be associated. A characteristic of 'county lines' has been the exploitation of children and youths from urban areas, who are transported to distant locations to sell drugs and collect money, where vulnerable adults may also be used, for example to provide accommodation (notably in the form of 'cuckooing') or to also conduct deals.<sup>48</sup>

As will be seen below, however, both in respect of the Public Health England and Home Office *Crack Cocaine Inquiry* and the qualitative research conducted for this paper, the 'county lines' *modus operandi* of branded deal lines and exploitation is not unique to groups transporting drugs from urban hubs to extra-urban markets, nor does it necessarily involve the crossing of county boundaries. Furthermore, although policing and law enforcement generally talk about 'urban street gangs' running 'county lines', there is a strong case that many – if not most – of these groups are in fact 'organised crime groups' (OCGs).<sup>49</sup> Contacts in policing suggest that the reluctance to use the OCG label stems in part from the consequences – in terms of monitoring and operational activity requirements – that arise from groups being recorded as OCGs on the 'Organised Crime Group Mapping' database (OCGM), and in turn the limited capacity of ROCUs (police Regional Organised Crime Units) and the National Crime Agency (NCA) to have so many groups falling into their remit (personal correspondence).

We can say with some certainty that the number of 'county lines' known to policing and law enforcement has increased greatly in recent years, in part as a function of dedicated central resources being committed to understand the strategic picture, latterly in the form of the National County Lines Co-ordination Centre that was established in 2018.<sup>50</sup> As of January 2019, the NCA reported that 2,000 deal line numbers in the UK were known about, linked to 'approximately 1,000 branded county lines', with the primary exporting hubs being the Metropolitan (in particular), Merseyside and West Midlands police force areas, but that a further 23 force areas are also reported to have groups exporting from them. The numbers have increased in recent years, but it is not possible to disentangle with certainty the extent to which this reflects actual growing numbers of deal lines or the result of closer attention from policing and law enforcement; as ever, the harder particular forms of criminal activity are looked for, the more are found.

It should be said that groups travelling from urban hubs to access markets outside of the main urban areas in order to expand their businesses is not a new phenomenon, nor is the exploitation of vulnerable children, youths and adults to conduct drugs sales and provide accommodation.<sup>51</sup> Arguably what is new(er) is the extent of this activity, the degree to which children and youths are being used/exploited, and the degree to which it is a subject of attention by policing and law enforcement.

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<sup>48</sup> For a very recent discussion, see J. Spicer, L. Moyle and R. Coomber (2019) 'The variable and evolving nature of 'cuckooing' as a form of criminal exploitation in street level drug markets'. <https://doi.org/10.1007/s12117-019-09368-5>

<sup>49</sup> More recently, the NCA has started referring to 'county lines' as 'involv[ing] gangs and organised criminal networks'. NCA (2019) *County Lines Drug Supply, Vulnerability and Harm 2018: Intelligence Assessment* <https://www.nationalcrimeagency.gov.uk/who-we-are/publications/257-county-lines-drug-supply-vulnerability-and-harm-2018>.

<sup>50</sup> See: <https://www.gov.uk/government/news/national-county-lines-coordination-centre-to-crack-down-on-drug-gangs>

<sup>51</sup> E.g. see the discussion of 'commuting out of London to deal elsewhere' based on research conducted in 2007, discussed in Hales, G and Hobbs, D. (2010) 'Drug markets in the community: a London borough case study.' <https://doi.org/10.1007/s12117-009-9086-9>

## 5. Crack Cocaine Inquiry

In 2018, following the publication of the Serious Violence Strategy, Public Health England and the Home Office undertook work to explore the reasons behind the apparent rise in the use of crack cocaine.<sup>52</sup> Focus groups were undertaken with 40 drug treatment workers and 50 service users in six local authority areas in England, and 34 police officers were also interviewed either individually or in small groups.

The research found ‘there was general agreement among service users and treatment workers that crack use had increased in recent years’ and that (subject to some caveats) ‘the increase in crack use was mainly visible among existing heroin users’.

As to the factors influencing the increase, six themes are highlighted in the report:

- Aggressive marketing by dealers, primarily targeting existing heroin users, including 3-for-2 deals or even free crack.
- Easy access to and wider availability of crack, 24/7 and “quicker than a pizza”.
- The affordability of crack, including it being sold in smaller quantities and at higher purity.
- Increase in ‘county lines’ activity in three of the six areas, linked to aggressive marketing and increased availability of crack, although the report notes established local dealers in the other three areas using similar tactics and so the story is not just one of ‘county lines’.
- Less stigma associated with crack use, at least in some areas, with suggestions that new groups were increasingly taking it, including professionals, students and clubbers.<sup>53</sup>
- The lack of a police focus on drugs, reflecting less police visibility.

The research also examined the nature of links between crack cocaine and violence, and found differences between areas where ‘county lines’ operated, which were described as having become significantly more violent, and areas without ‘county lines’ where changes in violent crime were described as ‘less pronounced’. Violence was described as ‘mainly perpetrated by drug dealers’ and was reflected in increased weapons carrying. ‘Turf wars’ were also described, both between ‘county lines’ groups, and between ‘county lines’ and local groups.

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<sup>52</sup> Public Health England and Home Office (2019) *Increase in crack cocaine use inquiry: summary of findings*.

<https://www.gov.uk/government/publications/crack-cocaine-increase-inquiry-findings/increase-in-crack-cocaine-use-inquiry-summary-of-findings>.

<sup>53</sup> In the context of interviews for section (7) of this report, several interviewees reported signs of falling stigma attached to crack cocaine use in their areas.

## 6. The connection between illicit drugs and violence

The Serious Violence Strategy reports that '[t]here is strong evidence that illicit drug markets can drive sudden shifts in serious violence'.<sup>54</sup> The combination of the illicit nature of drugs such as heroin and cocaine, the (related) profits available to those prepared to risk being caught selling them, and the dependency that can result from their use (often interwoven with other forms of disadvantage), have a number of consequences that act to increase the likelihood that violence arises, while, simultaneously, violence is bad for business as it attracts the attention of policing and law enforcement. It should be said that these relationships are not deterministic and will be influenced by a range of other factors including the social and economic context within which drug dealing and use takes place. This is especially relevant to why, at least in a UK context, violence is more often associated with crack and heroin than powder cocaine markets, and to retail rather than wholesale and middle-market tiers.

In brief, drugs and violence are interlinked because:

- a) Drugs are illegal and those involved in their distribution and sale do not have recourse to the law in relation to their illicit activities (or to do so they must implicate themselves). If you are a drug dealer and someone robs you of your drugs, you may not feel able to dial 999; if someone who owes you money doesn't pay, you can't take them to court.
- b) The drug trade generally involves the physical handling of valuable commodities and cash, exposing those involved to risks of criminal predation including robbery. Losing a quantity of drugs or cash in this way will generally mean an individual is indebted to more senior criminals, which may, for example, necessitate taking bigger risks to repay the debt or result in their exploitation (indeed, one way people get drawn into drug dealing, especially at the most marginalised tiers, is through the creation of debts by those who wish to exploit them). Given the risks, many involved in handling drugs and cash seek to arm themselves – or at least secure ready access to weapons – for 'self-defence'.
- c) In the absence of legally enforceable contracts, the drugs economy is regulated by personal trust and to the extent it is imperfect or absent, violence or the threat of violence. This is especially the case in respect of debt repayments and defaults (many drugs markets operate on a system of credit).
- d) Those involved in the drugs trade must have a reputation as people 'not to be messed with' to mitigate risks of debt default, attacks and information about their activities being passed to the police. That often involves the use of overt violence to develop such a reputation, especially in response to any perceived challenges to their status, including in social settings, and may also involve the possession of or access to weapons.
- e) Drug users may engage in violence to obtain funding for drug purchases, to obtain drugs without paying, or to repay debts and so on; violent behaviours may also result in some cases from the effects of drug consumption (including in combination with other substances such as alcohol).

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<sup>54</sup> HM Government (2018) *Serious Violence Strategy*. P.21.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/698009/serious-violence-strategy.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/698009/serious-violence-strategy.pdf)

## Drugs and homicide

Analysis of *Homicide Index* data published by the ONS for the year to March 2018 provides some additional empirical insights into the relationship between drugs and violence:

“Around a quarter (24%) of homicide victims were known to be drug users, and one in nine (11%) were known to be drug dealers. These proportions were even higher among suspects: over a third (38%) were known to be drug users and around one in five (20%) were known to be drug dealers. These proportions were generally higher among males than females.

The number of homicides that have been “drug-related” in any way has increased slightly over the last decade, from 40% in the year ending March 2008 to 44% in the year ending March 2018. In the last year, there were 322 homicides that were in some way drug-related, the highest number since these data were first collected in the year ending March 2008.

In a small proportion of cases, the police flagged the suspects’ motive as “obtaining drugs” (4%) or “stealing drug proceeds” (4%).”<sup>55</sup>

- ONS

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<sup>55</sup> ONS (2019) Homicide in England and Wales: year ending March 2018.

<https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/articles/homicideinenglandandwales/yearendingmarch2018#drug-and-alcohol-related-homicides>

## 7. Recent insights from policing and law enforcement

As described in the introduction to this paper, in order to explore the links between drugs market and violent crime trends in recent years, in-depth semi-structured interviews of around an hour each were undertaken with a small convenience sample of ten well-informed law enforcement and police officers and police analysts identified through existing senior contacts. With reference throughout to violent crime trends, the interviews, which took place during the summer of 2019, covered to varying degrees drug market trends, the significance of ‘county lines’ and criminal exploitation trends, drug market-related weapons trends, the role of technology, and overlaps with other types of offending. The interviewees were able to discuss to varying degrees of detail the national picture, London, the North West and parts of Central, Eastern, South Eastern and Southern England, as well as some links into Scotland.

In order to secure the full co-operation of those interviewed and as part of the informed consent process, commitments were made to anonymise their identity and that of their force/region, as well as any details that might identify individuals or forces that arose during the interviews.

In the section that follows, the key insights the interviewees were able to offer will be interwoven with the author’s wider knowledge about drug market and violent crime trends. The intention is to offer quite a discursive and accessible account of the major trends in recent years.

### Drug markets have not been a policing priority in recent years

It is clear from the interviewees, and wider knowledge of policing, that drug markets have not generally been a policing priority in recent years.<sup>56</sup> This reflects the trajectory of government policy outlined above, in which drug users have generally been prioritised in relation to volume crime, and drug markets have only latterly emerged as a focus due their connection to growing levels of serious violence. For policing, the 19 per cent fall in real terms funding between 2010/11 and 2018/19 has seen resources pared back, and forces have become increasingly reactive, focused on responding to emergencies and investigating individual crimes, with far less capacity to do proactive enforcement and intelligence gathering operations than was the case in the previous decade.<sup>57</sup> Priorities have shifted away from volume crime towards the likes of public protection work, notably sexual offences, child protection and domestic abuse.

Against this background the policing of drugs has been significantly squeezed out. One interviewee, for example, referred to the way that in their force ‘drugs has never quite gone away, but it hasn’t been an organisational priority for many years’ with the result that there is ‘no strategic research or intelligence’; they contrasted the ‘business as usual’ approach to drugs with the more concerted efforts focused in recent years on the likes of modern slavery and child sexual exploitation (CSE).

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<sup>56</sup> In 2016, for example, only two of 43 PCC Police and Crime Plans in England and Wales mentioned drugs as a stated priority – see Hales, G. and Higgins, A. (2016) *Prioritisation in a changing world: seven challenges for policing. Police Effectiveness in a Changing World Paper 2*. London: The Police Foundation. [http://www.police-foundation.org.uk/2017/wp-content/uploads/2017/06/changing\\_world\\_paper\\_2.pdf](http://www.police-foundation.org.uk/2017/wp-content/uploads/2017/06/changing_world_paper_2.pdf)

<sup>57</sup> NAO (2018) *Financial sustainability of police forces in England and Wales 2018*. HC1501. <https://www.nao.org.uk/wp-content/uploads/2018/09/Financial-sustainability-of-police-forces-in-England-and-Wales-2018.pdf>

## Intelligence gaps abound

One consequence of the lack of priority afforded to drugs markets has evidently been that the intelligence picture is very patchy, with particular gaps at middle market level and in relation to powder cocaine generally, but also wherever supply lines cross police force or organisational boundaries, for example at the interface between forces and Regional Organised Crime Units (ROCUs), where the remit is often on the basis of the quantities of drugs being sold.

One interviewee in a role with a national view described a ‘massive gap between the local level and NCA [National Crime Agency] wholesale work’, which was framed as a ‘resource distribution issue for police’. Another described problems in their force with ‘new psychoactive substances’, primarily ‘mamba’, and remarked that they ‘haven’t got upstream to suppliers’ as the quantities are ‘not large enough to hit the ROCU remit but local police can’t take the investigation’ (note that there was no suggestion of links to violence); they also remarked that ‘[other] demand means there aren’t enough resources to look more broadly, [with] too much focus on ‘Pursue’ while the other Ps [Prevent, Prepare and Protect] haven’t been a priority’.<sup>58</sup> A broader point was made that ‘in the way forces collect and analyse information, many don’t have a good understanding of criminal markets’.

In the case of ‘county lines’ it appears that forces have very little understanding of ‘who controls the controllers’, with operational activity largely focused at street/retail level and rarely extending beyond those immediately directing the activities of the individuals completing deals with drug users.

Furthermore, interviewees described the difficulties forces confronting local drug market violence can face in securing the co-operation of exporting forces where those controlling supply lines (based in the exporting forces) are not generally engaged in overt violence and being prioritised (by exporting forces). Interviewees also described difficulties joining intelligence together between forces, notably phone call data that might help develop a clearer strategic understanding of market structures regionally and nationally (due in part to different force systems not being compatible with each other – described as an ‘untapped resource’), although efforts to do so through ROCUs and the National County Lines Co-ordination Centre are evidently starting to highlight links that hadn’t previously been identified and are now facilitating greater co-operation between forces.<sup>59</sup> Several also mentioned the way that the shift from conventional call and SMS use to platforms such WhatsApp and WiFi calling has served to limit intelligence opportunities traditionally available through call data, while one specifically referred to a lack of join up between prison and police intelligence, with the former reportedly ‘dealt with internally’.

The point was also made that even when, as in the case of murder, police investigations are very well resourced, they often focus narrowly on identifying suspects and proving who was responsible but don’t always do a good job of generating insights into the broader context within which any given offence took place; two

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<sup>58</sup> The four Ps originate in the UK’s counter-terrorism strategy (CONTEST). E.g. see HM Govt (2018) *CONTEST: The United Kingdom’s Strategy for Countering Terrorism*. June.

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/714404/060618\\_CCS207\\_CCS0218929798-1\\_CONTEST\\_3.0\\_PRINT.PDF](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/714404/060618_CCS207_CCS0218929798-1_CONTEST_3.0_PRINT.PDF)

<sup>59</sup> An example was also given of a region in which all forces use the same IT platform and can therefore ‘all see each other’s intelligence’.

interviewees noted that police and other agencies often have very little information about the exact causes or motives for serious violence, even while the underlying issues are often 'clearly linked to drugs, money or territory'. That relates to a wider issue in policing, for which strategic analysis tends to have a 12-week view at best, while tactical analysis is concerned with +/- two weeks, with the result that relatively little emphasis is generally placed on developing a longer-term narrative about changing crime patterns.

In the case of powder cocaine few insights were offered by the interviewees at any level, including at what point in the supply chain powder cocaine is diverted into the production of crack, and where crack and heroin supply lines converge. It was, however, suggested by one interviewee who had worked in a national role that crack is typically produced in quantities of up to a kilo for onward sale/distribution to retail dealers in one ounce deals, while other interviewees suggested that whereas in some cases of 'county lines' crack is transported from (primarily) metropolitan hubs to distant markets, in other cases the crack is prepared locally to those markets, for example in 'cuckooed' properties, in a setup perhaps analogous to a 'satellite hub'. One interviewee described both being present in their region.

Few insights were offered into other illicit drug markets, with the limited exceptions of cannabis and spice, which will be discussed in a little more detail below. It is also apparent that very little is known about how the proceeds of drug market sales are laundered or where they are ending up; one interviewee referred to many dealers having a 'cash lifestyle' and mentioned that they see 'no-one with a large bank balance'.

#### Police priorities relating to drugs primarily concern violence and (only latterly) exploitation, not drug use or dealing per se

A question that often gets raised in public debates (for example on social media) is why there is an apparent disparity between the policing of the cannabis use of urban youths on the one hand, and drug use in the context of 'middle class dinner parties', nightclubs and music festivals on the other (in the latter case, with further reference to the growing emphasis on drug testing services provided with the blessing of police forces and Police and Crime Commissioners).<sup>60</sup> The question is predicated on the mistaken belief that it is the drug dealing and use that is being policed as a priority, whereas the reality is that it is primarily violence that attracts police attention. Indeed, public reports of drug dealing are often dealt with as anti-social behaviour matters when violence is not involved, or an immediate police response is not possible due to other more urgent matters.

Put simply, there seems to be very little violence associated with the supply of the likes of powder cocaine, amphetamines, MDMA and ketamine and consequently they receive relatively little policing attention, whereas the overlaps between youth violence and the supply of drugs like crack and heroin (and cannabis) in cities like London, Birmingham and Manchester is of much greater concern. In the latter context cannabis use is policed largely as an adjunct to the focus on violence, for example because cannabis use provides the grounds for stop and search when the priorities are weapons and violence, or because cannabis possession is discovered in the context of policing activity concerned with violence.<sup>61</sup>

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<sup>60</sup> See, for example, <https://wearetheloop.org/>.

<sup>61</sup> See for example <https://twitter.com/gmhailes/status/1108694033403203584>.

A further consequence of the focus on violence rather than drugs is that it appears wholesale and especially middle market tiers tend not always to receive much police or law enforcement attention relative to retail markets, reflecting the relative lack of overt violence. This seems to reflect both the relative levels of control in middle and wholesale markets, with fewer more organised and professional participants, but also the general fact that violence is bad for business given the way it attracts the attention of policing – even while it may be a necessary part of business in an illicit economy, as outlined above.

One interviewee described the way that some particularly professional OCGs involved in wholesale and middle market powder cocaine supply refuse to deal on credit – unlike most others – and consequently avoid debt default situations that lead to violence in other cases, even if that means walking away from sales (for which the ‘time, date and price to be paid’ are said to be agreed in advance and not deviated from). Another described the way that in their region very ‘established and sophisticated’ OCGs ‘go unnoticed’, and keep their operations far removed from the ‘violent exploitation’ that characterises the retail end of their supply lines.

It is only in the last few years that child criminal exploitation (CCE) has become visible as a priority of government, police forces and other agencies, in the context of the shift from high volume to low volume high harm crime and the recognition of the extent and nature of child sexual exploitation (CSE) in the aftermath of scandals in Rotherham, Rochdale and other towns and cities. That is not to say that CCE is a new phenomenon, as this quote from an interview conducted in 2005 with a young man convicted of a firearms offence demonstrates:

“...it’s more olders like, giving younger people false promises. Like, ‘You sell for me like, I’ll make you anything, you can have anything you want, if you have any trouble call me’. Little kids buy that man... He said he’d be there for you, but when it comes to you in that police station and you say, ‘Ask this guy if I was at home,’ and he says, ‘I don’t know you’. When you get arrested, they hear that you’ve been arrested... they already have another helper so [the drugs are] in his house... That’s the way it is, like the way it is, when you are young and naïve, only 16. Like you think, like, ‘Fuck that, he totally sold me out’... Olders will always pick on the kids that were vulnerable.”<sup>62</sup>

As with violence, exploitation within illicit drugs markets is most visible in respect of crack and heroin retail markets, including the use of children and youths (and some drug users) to conduct drug sales and the use of vulnerable adults’ housing as residential bases from which dealing can be conducted in local areas (so-called ‘cuckooing’). As discussed above in respect of the way the connection between illicit drugs and violence is mediated by context, this seems at least in part to reflect the marginalised social and economic circumstances within which crack and heroin use is most common, with those involved in dealing often (though not always) from similarly disadvantaged backgrounds. It should also be said that research suggests not all young people engaging in drug dealing activities have been groomed and exploited, and at least some do so willingly: We find evidence of Child Criminal Exploitation (CCE) in County Lines activity, often as a result of debt bondage; but also, cases of young people working the lines of their own volition to obtain financial and status rewards.<sup>63</sup>

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<sup>62</sup> Hales et al., 2006: 63.

<sup>63</sup> Robinson, G., McLean, R. and Densley, J. (2019) ‘Working County Lines: Child Criminal Exploitation and Illicit Drug Dealing in Glasgow and Merseyside’. *International Journal of Offender Therapy and Comparative Criminology*, 63 (5). pp. 694-711.



Broadly speaking, policing and the wider criminal justice system seem to be struggling to contend with the blurred lines between grooming, exploitation and vulnerability on the one hand, and individual agency and criminal culpability on the other (noting the age of criminal responsibility is only 10 years in England and Wales). This appears to be compounded by the combined forces of young people not recognising that they have been groomed and exploited and/or being reluctant to fully explain their circumstances (for example due to the fear of retribution by those for whom they have been working), and in some cases concerns that claims of exploitation (including in the form of modern slavery) are being made falsely in order to avoid criminal convictions and sanctions.

### Wholesale changes to cocaine supply have driven the expansion of cocaine and crack dealing and use

At a wholesale level, and reflecting other evidence presented above, the key change identified by the interviewees (where they were able to comment on the subject) concerned the increased availability of cocaine at higher purity and lower cost than has previously been the case.

One particularly well placed/informed interviewee described how this has been driven by Albanian OCGs who have increasingly come to dominate wholesale cocaine importation into Western Europe, reportedly building on their previous involvement in the heroin trade via Turkey and other smuggling activities. In the case of cocaine, this has involved Albanian groups establishing their own trading relationships in producer countries, and in the process cutting out intermediaries in the supply chain and lowering wholesale costs and prices. Of note, wholesale cocaine prices per kilo in major European ports (notably Rotterdam and Antwerp) have reportedly fallen even while purity has increased to historically high levels, reflected in wholesale prices in the UK reportedly having fallen during the last five to ten years from £45,000 per kilo to £35,000 per kilo (something described as not having been seen since relevant law enforcement data records began in 1995).

It should be noted that Albanian OCGs are not the only operators at that level in the UK, nor does it appear they operate in all areas. In one region in particular, long-standing British OCGs – described as ‘really large scale’ with a presence in mainland Europe as well as Columbia and other parts of South America – are reported to continue to import cocaine and heroin in wholesale quantities for onward distribution nationally and to ‘hold their own’ against Albanian groups. More generally, however, it appears that at wholesale and middle market level heroin and cocaine are supplied via different OCGs and routes. One interviewee in a regional role remarked that they ‘can’t think of many jobs [police operations] where the middle market supply both coke and heroin’.

Another interviewee suggested that there is some evidence for the continued use of couriers importing smaller quantities of cocaine on scheduled flights from the Caribbean, an importation route that received quite a lot of attention in the 1990s and early 2000s, but which is now reportedly largely overlooked in favour of much larger but less frequent trafficking via sea routes.<sup>64</sup>

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<sup>64</sup>This recent example involved cocaine being imported by courier from Jamaica, destined for Plymouth:  
<https://www.plymouthherald.co.uk/news/plymouth-news/greedy-gang-smuggled-kilos-cocaine-3480979>.

## Violence is primarily associated with crack and heroin retail markets

There are significant differences in the degree to which markets associated with different illicit drug are also related to violence, and in general violence tends to be more visible and problematic towards retail level. It appears that violence is primarily associated with crack and heroin dealing (they are generally sold together, including through 'county lines' models) while more niche examples concern the likes of cannabis cultivation, where violence occurs around the likes of attempts to steal mature crops before they can be harvested, and 'spice' dealing in some prisons and among some homeless communities, where violence is reported to be relatively common for the numbers involved.<sup>65</sup>

While the Commissioner of the Metropolitan Police Cressida Dick, the Mayor of London Sadiq Khan and the Chancellor Sajid Javid (when he was Home Secretary) have all tried to draw a line between 'middle class cocaine use' and violence on the streets of cities like London, those interviewed for this research made almost no reference to violence associated with powder cocaine dealing (and we have seen above that powder cocaine is used across the social spectrum).<sup>66</sup> Where there are such examples, they have historically included the control of venue-based markets by door security companies (so-called 'control the doors, control the floors' strategies).<sup>67,68</sup>

Other cases of OCG-level violence linked to cocaine were mentioned in interviews. For example, one interviewee described more recent violence between different OCGs – including murders – having been triggered by their loss of control over wholesale powder cocaine supply in different areas, while another described OCGs from different cities, who as a rule never encroach on each other's cities but otherwise operate across the country, 'clashing in third force areas'.

The *Crack Cocaine Inquiry* mentioned above makes reference to one police force area in which 'officers said that their major threat was violent disputes between organisations dealing in powder cocaine, because there was a large market for the drug and dealers viewed it as more lucrative than crack'.<sup>69</sup> Similarly, one of those interviewed for this paper described powder cocaine dealing in their region as linked heavily to the night-time economy where it is controlled by door security companies and the owners of nightclubs and other venues (it is conceivable this is the same area as referred to in the *Crack Cocaine Inquiry*). In general, however, violence

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<sup>65</sup> One interviewee reported that across their region, 90 per cent of 'county lines' deal crack and heroin (where the substances dealt are known to forces).

<sup>66</sup> 'Middle-class drug users 'have blood on their hands', says Cressida Dick'

<https://www.thetimes.co.uk/article/middle-class-drug-users-have-blood-on-their-hands-says-cressida-dick-fnnrmjb7x>; 'Middle-class cocaine use fuels London's rising violence, says Sadiq Khan'

<https://www.theguardian.com/society/2018/jul/27/middle-class-cocaine-use-fuels-londons-rising-violence-says-sadiq-khan-knife-crime>; 'Sajid Javid blasts 'middle class drug users' for fuelling knife crime'

<https://metro.co.uk/2019/04/15/sajid-javid-blasts-middle-class-drug-users-fuelling-knife-crime-9207244>.

<sup>67</sup> Morris, S. (1998) *Clubs, Drugs and Doormen. Crime Detection and Prevention Series Paper 86*. London: Home Office.

<https://webarchive.nationalarchives.gov.uk/20090804180126/http://www.homeoffice.gov.uk/rds/prgpdfs/fcdps86.pdf>

<sup>68</sup> Subjectively, violence connected to door security firms seems to be comparatively rare today, and it may be that much tighter regulation of the security industry and licensed venues has played a role. See also Daly, M. (2016) *How the Drug Trade in British Clubs Has Changed for the Millennial Generation*. [https://www.vice.com/en\\_uk/article/4wbpkq/drugs-in-clubs-uk-max-daly-292](https://www.vice.com/en_uk/article/4wbpkq/drugs-in-clubs-uk-max-daly-292).

<sup>69</sup> Public Health England and Home Office (2019).

linked to these venues seems to be relatively rare, unless it involves drug users, for example where they have used cocaine and alcohol together.<sup>70</sup>

The reasons why crack and powder cocaine markets have such different associations with violence are not entirely clear but seem partly to relate to the wider social and economic contexts in which they are situated, the behaviour of drug users, and the nature of the dealing itself.<sup>71</sup> In particular, over the years crack (and heroin) dealing has in many places been local and territorial, overlapped with gang and other group/territorial identities where drug dealing has featured alongside other forms of criminality including robbery and group violence, while the deals themselves are very often conducted by youths (or drug users) in public and therefore visible to others. At times in the past these overlapping offending behaviours, taking in drug dealing, robbery and violence – often bound up in questions of social/criminal status and revenge – have been characterised as ‘disorganised crime’, with references to the apparent ‘senseless’ nature of much violence.<sup>72</sup> Smaller numbers of crack users can also be highly profitable given the way they may ‘binge’ on the drug and consume as much as they can afford, which may well create much greater levels of competition for individual users than is the case in relation to more typically occasional/social powder cocaine users (and in contrast to heroin use – often in combination with crack – where the risks of overdose are much more acute).<sup>73</sup>

The exploitative model of dealer recruitment in relation to crack and heroin may also be significant. For example, one interviewee noted in respect of ‘county lines’ that the exploitation on which much dealing relies ‘needs control and authority in home areas’ and that as ‘the element of illegal drugs has increased, the number of people involved has increased and the profits have increased, so levels of control have become more important’, implying rising levels of violence in exporting locations.

In addition, powder cocaine markets seem generally to have involved: venue-based markets such as pubs and clubs where a relatively high degree of control can be exercised over access to the market; users purchasing drugs elsewhere to be consumed in the likes of pubs and clubs; or, delivery to the user where the geographical relationship between dealer and user is less apparent – most notably in the case of powder cocaine dealing in the City of London. Powder cocaine dealers also seem to very often be drawn from rather different social and economic backgrounds to those involved in crack and heroin dealing, which may mean less of an overlap between drug dealing and other social and offending behaviours that intersect with violence (for example, territorial/gang/group related violence).<sup>74</sup>

While the connection between urban violence in the UK and powder cocaine dealing seems to be weak at best,

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<sup>70</sup> One interviewee said their judgement was that violence was linked to powder cocaine in the night-time economy, but that was a ‘personal judgement’ and that it is ‘hard to evidence’.

<sup>71</sup> The importance of these kinds of wider contextual factors in mediating the relationship between drugs and violence is discussed in Stevens, A. (2011) *‘Beyond the tripartite framework: The subterranean structuration of the drug-crime link’*. Ch 3 in A. Stevens, *Drugs, crime and public health*. London: Routledge-Cavendish.

<sup>72</sup> For an overview of the context within which such ‘senseless’ violence can start to be understood, see Hales, G. (2015) *Making sense of “senseless” youth violence*. Police Foundation blog, 9 December. <http://www.police-foundation.org.uk/2015/12/making-sense-of-senseless-youth-violence/>

<sup>73</sup> One interviewee highlighted the use of heroin to manage the ‘come down’ from crack, but noted that the market imperative is to maximise sales of crack as users can consume as much as they can afford (unlike heroin, which would kill them). It is notable in the estimates presented above for numbers of drug users and drug market turnover, that smaller numbers of crack and heroin users are estimated to account for a larger turnover than much larger numbers of powder cocaine users.

<sup>74</sup> In this recent example, 12 Albanian nationals in their 20s and 30s were convicted of supplying powder cocaine to workers in the City of London <https://metro.co.uk/2019/07/16/albanian-drug-gang-provided-city-workers-cocaine-jailed-33-years-10345002/>.

it is nevertheless important to acknowledge that there is violence and exploitation throughout the supply chain for drugs such as cocaine, including in producer and transit countries.

### Crack and heroin retail markets: urban saturation, market expansion and growing violence

Where the interviewees offered much more detail, and a more consistent picture, was in relation to the expansion of crack and heroin markets, especially in the form of ‘county lines’ (although there were regional differences).

The overarching narrative is that ‘urban street gangs’ and OCGs have sought opportunities to expand beyond ‘saturated’ local markets in urban areas, which has seen them expanding into new areas across the UK, typically where populations of heroin users already existed.<sup>75</sup> This has been ‘creating markets not just meeting demand’ and has resulted in markets which are described as increasingly visible, ‘vibrant’ and ‘agile’ but also in many cases increasingly ‘hostile’ and violent. Drug users have been increasingly able to choose from multiple sellers and have been exposed to aggressive marketing (especially of crack) with an emphasis on speed of delivery that is described as akin to a ‘Deliveroo’ model.

One interviewee described the way this model ‘exposes whole communities to greater availability as the market comes to them’, describing the transition in a town in southern England from a market controlled by a single family with irregular supply, often necessitating users to drive to larger towns to buy drugs, to the situation today where users can very quickly and easily have drugs delivered to them at their convenience. Another rural area was described as having a ‘24/7 drugs market’.

Nevertheless, the point has been made above that urban groups selling drugs in distant markets is not a new phenomenon. For example, this is from research conducted in a London borough in 2007:

“Evidence from the SNTs, borough Drugs Squad and Probation Service all highlighted the significance of drug dealers from the borough travelling out of London to access new markets, both to increase turnover, and also to exploit what are evidently perceived to be lower levels of competition and higher profit margins available outside of London... Although generally relating to crack and powder cocaine supply, this mobility has also included borough residents being arrested in other parts of the country for supplying recreational drugs such as ecstasy. It was suggested that such activity generally extends to the Home Counties and South Coast, although the Probation respondents reported one notable individual who had drug dealing links to Reading, Ipswich, Bristol, Birmingham, Cheltenham and Kent. This apparent willingness to travel has brought borough-based dealers into conflict with rivals from other parts of the country, not least where locally-based groups have made aggressive ‘moves’ on provincial markets.”<sup>76</sup>

Related to this, a couple of interviewees were keen to stress that the exploitation ‘county lines’ involve, to

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<sup>75</sup> In at least some cases, the geographical reach of individual groups involved in running ‘county lines’ is considerable. For example, interviewees described drug dealers from London and the West Midlands selling drugs in Scotland, dealers from the North West of England selling drugs in Wales, NW Scotland and Devon, and a London-based group known to have links to drug dealing in at least nine counties. That individual groups deal in multiple ‘county’ markets is evidently reflected in the same exploited children being picked up in multiple police force areas.

<sup>76</sup> Hales, G. and Hobbs, D. (2010) ‘Drug markets in the community: a London borough case study’. Trends in Organised Crime 13:13-30. P.27.

provide a workforce to expand into new markets and to *displace risk onto more vulnerable and expendable individuals* (a central logic of these markets), is not new, not limited to ‘county’ settings, nor does it necessarily involve the crossing of county or police force boundaries – although the extent of exploitation was described as having ‘gone to new levels’ in one region reflecting increases in many others as well.<sup>77</sup> This reflects a point made in section (4) above, that what is arguably *newer* is the extent of this activity, the degree to which children and youths are being used/exploited to conduct deals, and the degree to which it is a subject of attention by policing and law enforcement. As one interviewee put it, ‘we’ve gone into a space where exploitation of vulnerable people has gone to new levels [and where] anything goes’. Another remarked that ‘county lines pioneers’ showed that ‘the model works, even at a long distance, and is easily replicable’, with others following suit.

As in the evidence of the *Crack Cocaine Inquiry* outlined above at section (5) it isn’t the case that ‘county lines’ feature everywhere – in many places heroin and crack supply continues to involve locally-based groups – nor that markets have been expanding and violence increasing in all cases. For example, interviewees from one region described the situation there as more mature, which they thought partly reflected their proximity to major metropolitan hubs and therefore the longer-standing nature of drug markets in general and the ‘county lines’ model in particular, which was reported to have been present in the region for at least a decade.<sup>78</sup> Nevertheless, they remarked that markets in the region were characterised by ‘lots of churn’ – something mentioned by several interviewees – and that an ‘undercurrent of violence’ had included ‘some murders that we wouldn’t have seen before’, including committed by ‘some new [and] especially violent groups.’<sup>79</sup> Another interviewee described their force area as relatively unaffected by violence linked to drug dealing and insisted there were no ‘county lines’ operating in the force area at the time of the interview, although they do periodically appear.

In most of the other forces and regions discussed, however, crack and heroin markets are reported to have been expanding, accompanied by an increase in violence notably involving knives and machetes (in many places routinely carried by those involved in dealing crack and heroin) and less often firearms, the latter typically at OCG level, with the vast majority of shootings reported to be linked to drugs markets.<sup>80,81</sup> There have also evidently been occasional cases when corrosives have been used as weapons.

This violence reflects market competition including the displacement and resistance of local drug selling groups and other motives including the robbery of drug dealers (and its corollary, protection), debt enforcement, status/reputation management, and revenge. Interviewees from one region, for example, described the way

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<sup>77</sup> One interviewee suggested what matters is ‘just exploitation but we get hung up on geography’.

<sup>78</sup> While some of the apparent increase is undoubtedly a function of growing awareness by agencies, most interviewees were also clear that the ‘threat has genuinely expanded’.

<sup>79</sup> For example, one interviewee in a force where ‘county lines’ have become much more apparent in recent years, described how they ‘come and they go, set up and disappear, from all over the place’, alongside local drug dealers and others commuting in, including some who have settled in the region.

<sup>80</sup> Although in one region an interviewee described firearms as a ‘huge problem even close to street level’ in the context of ‘urban street gangs’

<sup>81</sup> One interviewee reported that national (Home Office) estimates suggest 70 to 80 per cent of firearms incidents are linked to drugs markets, rising to 100 per cent in one force that has recently mapped its drug markets. Several interviewees remarked that while intelligence was frequently received about firearms, they were rarely found when intelligence was acted on, potentially reflecting transient and limited availability. Another, however, said they were seeing evidence that access to firearms – and specifically the number of firearms in circulation – was increasing, although their use was constrained to some degree by a lack of ammunition (reflected in improvised ammunition, mismatched calibres etc); this was reflected in tit-for-tat shootings, in some cases only damaging property but in others resulting in homicides, and also evidence concerning firearms sales.

that those arrested in three out of the last four shootings in the region were known to be involved in 'county lines', two recent murders were 'linked to robberies of drug runners', and otherwise 'a lot of stabbings have links to drug debts and gang rivalries', typically at a more local level than shootings. Another described cases where drug users have attempted to rob dealers who were children, but the latter have turned out to be armed and have retaliated resulting in deaths.

Interviewees described the way that while some markets are relatively stable and peaceful (including different drug selling groups co-existing peacefully in unsaturated markets where supply is meeting demand), instability from a range of sources – including enforcement activity, the arrival or departure of new drug selling groups or other territorial disputes, drug dealer robberies and revenge attacks – can heighten the risks of (further) violence. Two interviewees described efforts to mitigate the disruption caused by police operations, which they acknowledged was a risk.

One interviewee described the way 'it feels the marketplace is more volatile and violent than it has ever been' in their region and described the way police operations against drug dealers now routinely require tactical firearms advice and cover, which wasn't the case previously. Looking to the future, another interviewee expressed concerns about what might happen to violence trends in the case of wholesale supply shocks, given the number of people currently involved in drug supply and the likely implications for market saturation and competition (again, particularly with reference to crack and heroin).

There were also suggestions that at times violence 'at home' in metropolitan hubs may be related to disputes arising within 'county lines' markets, and violence involving those engaged in 'county lines' activities may not be directly related to drug dealing, for example relating to reputation issues linked to personal relationships (discussed further below). One such example concerned a 'county lines' drug dealer being involved in the kidnap and assault of someone who disrespected his girlfriend.

Finally, interviewees' accounts also suggested that the levels of organisation in drugs markets vary regionally. For example, one interviewee contrasted the way OCGs are closer to 'county lines' originating from one metropolitan area where the 'supply chain is shorter', with the more diverse and fragmented picture in another metropolitan area in which OCGs are less visible (or at least the picture is more fragmented and complex).

### Fewer insights into other drug types: cannabis and 'spice'

Within the constraints of one-hour interviews it wasn't possible to explore an exhaustive list of drug types and their respective markets; nevertheless, violence related to drugs other than powder cocaine, crack and heroin did arise. Several interviewees described OCGs involved in cannabis cultivation in their areas, and signs of co-operation between the same two ethnic groups were described (independently) in at least three parts of the country. Violence is linked to attempts to seize mature cannabis crops by force (in one region described as often involving local criminals) and evidence of 'modern slavery' was also mentioned, with individuals working in the 'farms' to pay off debts. Few insights were offered on cannabis markets more generally, although one interviewee suggested that in their region the 'market hadn't changed' beyond it now being 'more online', and another suggested cultivation in their predominantly rural force was 'linked to upstream suppliers' in a major

city.

Prison-based drug markets, particularly for 'spice', were mentioned by a couple of interviewees as being accompanied by considerable violence, although it seems there may be regional variations in the degree to which spice features in the prisons estate, and that it may be a particular issue in local prisons. One interviewee described prison corruption as a 'massive and growing problem' while another from the same region noted that 'we don't see OCGs fighting over spice', which might suggest for example that overall profits are relatively low. Violence involving spice users and user/dealers in a city centre market, predominantly serving the local rough sleeping community, was mentioned, reportedly associated with local variations in levels of drug availability and strength.<sup>82</sup>

### Violence arises at the social/criminal interface and 'bleeds out' beyond drugs markets

While the connection between drugs markets and violence is in some cases proximate and therefore obvious, for example relating to drug dealer robberies and drug debt enforcement, wider influences on social relations and violence were described, such as where norms of reputation, revenge and weapon carrying within drugs economies spill out into wider social settings and influence local social norms, and conversely where wider social norms influence behaviours within drugs markets.

We saw above in section (6) that drug dealers are at risk of predation by other criminals, and of debt defaults by those who owe them money, and in both cases – given the illegality of drug dealing and in the absence of legally-enforceable contracts – having a reputation as someone 'not to be messed with' is a strategy drug dealers use to mitigate these risks. Developing such a reputation, however, generally involves the use of overt and even gratuitous violence.

These systemic illicit market factors necessarily interact with wider social norms about reputation, status, 'respect' and revenge such that it may be difficult to unpick the specific contribution of the drug selling status of an individual from other motivations for violence. For example, in a social setting such as a party an individual may perceive that they have been disrespected in front of an audience and feel the need to retaliate both for personal and social reasons, but also because they have a reputation to uphold in respect of their criminal activities as well, where signs of weakness may be ruthlessly exploited by others. In the event that they are a member of a gang or other identifiable group, it may further be the case that dynamics relating to collective responsibility and revenge kick in – for example if they take revenge not against the person who they perceived disrespected them, but against one of their associates.

This is where the backgrounds of many (but not all) of those involved in the crack and heroin trade – which as discussed relies on an expendable, often vulnerable and largely disadvantaged urban workforce to undertake the most risky roles such as actually conducting sales – may be significant in explaining the differential levels of violence seen relative to, for example, powder cocaine markets: the likelihood of violence is raised for both criminal and social reasons, which interact and compound each other.<sup>83</sup>

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<sup>82</sup> By a police contact outside of the interviews reported here, but in the context of this work.

<sup>83</sup> See for example, Hales, G. (2015) *Making sense of "senseless" youth violence*. Police Foundation blog, 9 December. <http://www.police-foundation.org.uk/2015/12/making-sense-of-senseless-youth-violence/>



In this way, violence may ‘bleed out’ from drugs markets, and several interviewees described a process by which norms around violence and weapon carrying in cities like London are exported into ‘county line’ locations and impact on local communities. One, for example, described observing a progression from ‘county lines’ dealers bringing knives into communities, to knives being carried by drug users, and then knife carrying becoming increasingly common among the ‘wider community’, while another described a progression in the types of bladed weapons being seen; both referred to these processes as ‘arms races’.

These trends serve to blur significantly the relationship between drugs markets and violence and make quantitative assessments of the links – addressing the question of what proportion of violence is linked to drugs – highly problematic. It is clear this is something a number of forces and regions are currently attempting to get to grips with, but almost all of those described by interviewees seem to be in the very early stages of doing so. One analyst described it as ‘the thing we find most challenging’, while another highlighted the way that motives for violence are often unclear, especially with less serious violence, including because many victims refuse to co-operate with police investigations; they further noted that requiring busy frontline police officers, particularly in response roles, to determine and record the motivation for violence and note any suspected links to drugs markets (for example, by flagging crime records) would generate data of questionable reliability.

### The role of technology

In the case of crack and heroin dealing, notably in the form of ‘county lines’, social media is reportedly used as a recruiting ground for new dealers, and interviewees described recruiters using imagery of material wealth (‘wedges of cash and fast cars’) to attract the interest of potential new recruits, and even payments being offered for ‘introducing a friend’. Tracking technology is then reportedly used as a supervision tool, allowing handlers to know where their workers are at any time, even from another part of the country (one interviewee described ‘county lines’ in their region being ‘run by nominals in prison’). Bulk texts or other platforms are used to market drugs to the community of local drug users for which the controller of a deal line has contact details, with additional contact lists obtained from local drug users in exchange for free drugs. Contact details are reportedly often stored ‘in the cloud’ and also in some cases on cloned SIMs to ensure that the loss of a phone/SIM card, for example following a police operation, does not stop dealing taking place; one interviewee suggested such tactics ‘allow business to be restored within four hours’. The use of encrypted phones by low-level dealers is also reported to be increasingly common, reflecting their more widespread use by OCGs.

In discussions with police officers and others outside of the interviews reported here, it was also reported that SIM cards and contact lists may be targeted by rival dealers or groups – reportedly including in a case of a double murder linked to the robbery of a SIM card – and there are examples of deal lines being sold on or rented out (the latter mentioned by an interviewee). In effect, the contact lists and deal line brands are themselves valuable commodities, just as in legitimate business.

Reflecting the complex overlaps between drug market activity and the wider social context within which they are situated, technology has also served to catalyse social disputes and both facilitate and accelerate conflict, particularly where social media is involved. One interviewee, for example, described the way that the naïve use of location data by young people can put them at risk, giving the example of a teenager who enabled location



services on an app so his friends could find him, but which was also visible to rivals whose contact details were also stored in his phone, who immediately found and attacked him. More generally, platforms such as YouTube allow threats and challenges, for example in music lyrics, to be viewed tens or even hundreds of thousands of times, amplifying social challenges and increasing the pressure for a reaction.<sup>84</sup>

In other respects, however, it seems likely that technology may serve to mitigate the likelihood of violence, most notably in the case of 'dark web' technology that serves to separate markets from places, uses customer reviews as a guarantor of trust, does away with sales 'on tick' (on credit) and the handling of cash, and renders deals largely invisible unless they are detected in the postal/fast parcel system or through other enforcement operations. One interviewee described 2,000 previously unknown dark web customers in their region having been revealed by an international operation to close one dark web marketplace, but despite these numbers none of the interviewees mentioned or could recall any violence connected to dark web markets, including one interviewee who had been involved specifically in a 'dark web investigation team'.<sup>85</sup>

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<sup>84</sup> For a detailed consideration of the relationship between social media and violence, see Irwin-Rogers, K. and Pinkney, C. (2017) *Social Media as a Catalyst and Trigger for Youth Violence*. Catch-22. <https://www.catch-22.org.uk/social-media-as-a-catalyst-and-trigger-for-youth-violence/>

<sup>85</sup> Another interview referred to the 'higher number of niche drugs' such as 'xanax and fentanyl' available on the dark web, marking dark web markets out as quite distinct.

## 8. Conclusions

Reflecting on the totality of the evidence presented above, we can identify a broad narrative arc regarding the relationship between drug market and violent crime trends in England and Wales in recent years.

Principally, the increased international and national supply of cheaper and purer cocaine has driven the expansion of markets for both powder and crack cocaine, the latter typically sold with heroin and targeted at existing heroin users. Market expansion in relation to crack and heroin has in many cases been facilitated by the recruitment (often but not always involving exploitation) of urban youths to conduct drug sales and the use of smart phone technology to market drugs and arrange deals, and in many (but not all) places has been accompanied by increasing levels of violence including with weapons (mainly knives and machetes).

This violence is a consequence of market competition and the illicit nature of drug dealing, which operates outside of legal safeguards. It also seems to result from the broader social and economic contexts within which crack and heroin dealing and use take place and from which those engaged in sales are drawn – significantly, the overlaps with other offending behaviours and forms of social conflict including those played out on social media.

Along with other factors including the local nature of many crack and heroin markets and competition for a relatively small number of prolific and dependent or problematic users, this seems likely to account for the much more visible relationship between crack and heroin dealing and violence than is seen for other drugs including powder cocaine – about which those interviewed for this research had relatively little to say. It must be acknowledged, however, that current approaches to understanding and policing drug markets view the world through a distinctly ‘county lines’ shaped lens at present – not least given the resources that have been invested in and through the National County Lines Co-ordination Centre – which may be serving to narrow the focus to the exclusion of other drug types and markets.

Related to this latter point, the interviews also highlighted significant gaps in the degree to which police forces and law enforcement have a strategic understanding of drug market structures, both in respect of the middle market but also cross-border markets in relation to crack and heroin, and perhaps including down to retail level for many other drug types. While this is starting to be addressed, at least in respect of crack and heroin, it seems to reflect the relative de-prioritisation in general of illicit drugs and drug markets over the last decade, the general lack of attention given to drugs markets where violence doesn’t feature, a failure to go upstream of retail drugs markets during investigations and police operations, and the challenges to intelligence sharing and operational activity that arise from the 43 force structure and the interface with Regional Organised Crime Units and the National Crime Agency (NCA).

The scale of the challenge confronting policy makers, police forces and the NCA was set out by one interviewee with a national view, who remarked that ‘county lines’ represent ‘both a volume crime problem, but one that is also complex and serious’. Given the gaps identified above in terms of organisation, remits and

intelligence it seems the challenge is a long way from being met.

## **Crest's programme of work on serious violence**

Funded by The Dawes Trust, Crest is undertaking a two-year programme of work over 2019/20 designed to investigate the drivers of serious violence. This has been informed by priorities set by the Home Office, and will conclude with a suite of practical policy recommendations for government and policing leaders.

<https://www.crestadvisory.com/post/crests-two-year-violence-research-programme>

This working paper was used to inform the second publication from Crest's serious violence work, entitled 'What is driving serious violence: drugs'. The report draws on a range of sources and is available at

[https://b9cf6cd4-6aad-4419-a368-724e7d1352b9.usrfiles.com/ugd/b9cf6c\\_5aad01b7fa2743d8b5508fb85faf2aa4.pdf](https://b9cf6cd4-6aad-4419-a368-724e7d1352b9.usrfiles.com/ugd/b9cf6c_5aad01b7fa2743d8b5508fb85faf2aa4.pdf)

## **About Crest**

We are crime and justice specialists - equal parts research, strategy and communication. From police forces to public inquiries, from central government departments to tech companies we have helped all these organisations (and more) have their own part to play in building a safer, more secure society. For more information please contact [harvey.redgrave@crestadvisory.com](mailto:harvey.redgrave@crestadvisory.com).

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## **About the author**

Gavin Hales has more than 17 years' experience as a researcher and policy analyst working on crime, policing and justice issues, including studies of gun crime, drugs markets, the policing of cannabis, police effectiveness, reoffending, police governance and police misconduct. Gavin also has extensive experience of critically analysing crime and policing data and is a regular commentator on crime and policing trends and policy, including on Twitter ([@gmhales](https://twitter.com/gmhales)). He can be contacted at [gavin\\_hales@yahoo.co.uk](mailto:gavin_hales@yahoo.co.uk).