Drug Market and Crime workbook

France

2015 National report (2014 data) to the EMCDDA by the French Reitox National Focal Point

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The EMCDDA is investigating how the submission of the workbooks could be made easier through the use of technology. In the first instance, a pilot using templates in Word with defined fields to distinguish the answers to questions is being tried. The outcome of the pilot will be to evaluate the usefulness of this tool and establish the parameters of any future IT project.

Templates have been constructed for the workbooks being completed this year. The templates for the pre-filled workbooks were piloted in the EMCDDA.

1. The principle is that a template is produced for each workbook, and one version of this is provided to each country, in some instances pre-filled.
2. Answers to the questions should be entered into the "fields" in the template. The fields have been named with the question number (e.g. T.2.1). It will be possible to extract the contents of the fields using the field names.
3. Fields are usually displayed within a border, and indicated by "Click here to enter text". Fields have been set up so that they cannot be deleted (their contents can be deleted). They grow in size automatically.
4. The completed template/workbook represents the working document between the NFP and the EMCDDA. Comments can be used to enhance the dialogue between the EMCDDA and the NFP. Track changes are implemented to develop a commonly understood text and to avoid duplication of work.

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T0. Summary

Please provide an abstract of this workbook (target: 500 words) under the following headings:

- National profile

Given France's geographic position at the heart of Western Europe, it is a transit area for the main illegal substances (cannabis, cocaine, heroin and synthetic drugs) produced worldwide. Like many developed countries, where the population has strong purchasing power, France is also a country where there are significant levels of use (for some of these substances), making it a strategic market for drug traffickers, from wholesalers to user-dealers. In recent years, the major changes in terms of supply have concerned cannabis, cocaine and MDMA/ecstasy. These changes notably provide insight into why the levels of prevalence for use of these three substances are showing such a significant increase, as supply dynamics are partly able to explain the dynamics of demand.

- Trends

Over the past few years, the cannabis market in France has been in upheaval, like other European countries, with herbal cannabis increasingly competing against cannabis resin produced in Morocco. While the cannabis resin market is still superior, the herbal cannabis market is becoming increasingly dynamic, driven by protagonists sharply contrasting with the usual profiles. Hence, alongside home-grown cannabis growers with a marginal role on the market, herbal cannabis factories have emerged, cultivating hundreds or, indeed, thousands of plants. Among the latter, two types of groups can be distinguished. Vietnamese criminal gangs, long having specialised in this illegal segment, particularly in Britain, who are becoming established in France, drawn by the dynamic market and prospects in terms of profit (Weinberger 2011), and private individuals, *a priori* not connected to the traditional criminal scene, who are turning to large-scale illegal commercial cultivation for the same reasons. A third group is in the process of emerging, also made up of "housing estate" dealers, specialising in the resale of cannabis resin and moving into production more suited to the new reality of demand. These changes in the cannabis market can be seen in seizures by the law enforcement services in France (police, customs, *Gendarmerie*). This reconfiguration of the French market could partly explain the growing tendency for the settling of scores between resin dealers located in "working class" districts, faced with a narrowing market; this trend is exacerbating the well-known competition between rival points of sale.
The second largest illegal market, cocaine, has also been affected by changes in supply. This change does not concern those involved in importing the substance into France, whether traditional organised crime networks (Corsican and North African) or the lower spheres of minor trafficking, or "small-time drug runners" in police jargon. The changes observed supposedly affect major trafficking channels, notably with the increasing role of French overseas departments such as French Guiana and Martinique (Lesser Antilles), both as developing zones and secondary markets, for cocaine produced in Colombia. Furthermore, the port of Le Havre is increasingly serving as a major gateway for cocaine to the French and European market. In 2014, the largest cocaine seizure ever in metropolitan France (1.4 tonnes) took place there. This phenomenon, which started to grow in amplitude from 2011, should be connected with the recent reopening of cocaine routes in the Caribbean headed to the United States and Europe, further to the security crisis in Venezuela which has become a major transit country for Colombian cocaine.
Lastly, the MDMA/ecstasy market has experienced renewed dynamism as before its shortage in 2009. The availability of powder and crystal forms has increased with high purity levels, while the tablet form has been on the rise since 2013, particularly in the recreational setting, with high MDMA/ecstasy potency. Furthermore, dealers' attention to tablet appearance (bright colours, 3D forms, etc.) has boosted their appeal to young users.

- New developments

No new developments.

T1. National profile

The purpose of this profile is to provide a commentary on the drug supply chain within your country.

T1.1 Drug market

The purpose of this section is to summarise the basic structure of the drug market in your country. Namely it should provide a commentary on:

- Sources of drugs in your country: international sources of the drug, trafficking routes, domestic production/cultivation
- Information available on the wholesale drug market
- Information available on the retail drug market
- The numerical data submitted through ST11, ST13, ST14, ST15, ST16

Note: Please focus on the main/most important drugs in your country.

Please structure your answers around the following questions.

T1.1.1 Please describe any domestic production of drugs within your country by drug.
For synthetic drugs please include also processing stages such as tableting operations.

Herbal cannabis is the only illegal substance for which production is seen in France. Although herbal cannabis has mainly been cultivated by individuals at home and on a very small scale, the situation has begun to change. Starting in 2011, “cannabis factories” began to appear. These factories are overseen by organised crime and use the investment of individual people in commercial cultivation.
All of these phenomena were confirmed in 2014, providing a fairly precise overview of the French herbal cannabis supply. In terms of production, the main players can be classified as follows:

- Small growers, whose number is estimated to be 80 000 persons (OFDT 2013), who produce for themselves or for their immediate circle.
- Individuals getting involved in relatively large-scale commercial herbal cannabis production (several dozen plants)
- Criminal groups implementing real production units (“cannabis factories”) with up to several thousand plants (Weinberger 2011). Involvement of groups coming from so-called “sensitive” suburban areas that originally were specialised in importing and distributing cannabis resin has emerged.

In 2013, as part of the TREND (Emerging Trends and New Drugs) scheme, based on ethnographic surveys, the Toulouse site reported on amphetamine production in the rural areas of south-west France. This production supposedly involves private individuals rather than professionals, and is said to resemble a form of small-scale amateur production based on the *kitchen lab* model for methamphetamines in the United States.

T1.1.2 Please comment on any available information on the routes of trafficking for drugs imported into your country whether in transit or not.
Information relevant to this answer includes:

- origin
- most recent country prior to your country
- any other information on trafficking routes as well as the mode of transport

Cannabis
The cannabis resin smoked in France comes from Morocco and usually transits through Spain.
The herbal cannabis comes mostly from the Netherlands: in 2013, 58% of herbal cannabis for which the origin was known came from this country (OCRTIS data, 2013).
The routes for cannabis resin destined for the European and French market have been changing over the past two years. Hence, dealers taking advantage of the collapse of the state are said to be increasingly using Libya as a transit country, as evidenced by the scale of seizures in the eastern Mediterranean in 2014. In June 2014, this region saw the largest ever ship seizure, with 42 tonnes.
To a more marginal extent, France is seeing the emergence of markets for cannabis resin from Afghanistan and herbal cannabis from Albania, the latter becoming a major producer of this substance in Europe.

Cocaine
The cocaine used in France mainly comes from Colombia, the second largest producer worldwide. It mainly passes through the south via Spain and the north via the Netherlands (Rotterdam) and Belgium (Antwerp). Over the past few years, the port of Le Havre appears to be becoming a major gateway for cocaine to France. In 2014, it was the site of the largest seizure ever in France, amounting to 1.4 tonnes. These changes are explained by the connections between the Antilles port of Fort-de-France and Le Havre in a context where the French West Indies are becoming a major developing zone for cocaine destined for France and Europe (Gandilhon 2014a). The substance leaves Colombia, passes through Venezuela (Weinberger 2013), and reaches Martinique via the Caribbean sea.

Heroin
The heroin used in France mainly comes from Afghanistan and passes *via* the Balkans (Turkey, Greece, Albania). White heroin originating from the Golden Triangle (Thailand, Myanmar and Laos) is also imported; however, this phenomenon is unclear due to its marginal nature.
Over the past few years, some Afghan heroin has been passing through African countries (Chad, Niger, Mali) and reaching the port of Dakar, Senegal, before directly arriving in France.
The Netherlands, ahead of Belgium, is the main platform which supplies French dealers.

Amphetamines/MDMA/ecstasy
Synthetic drugs (MDMA/ecstasy, amphetamines) used in France mainly come from the Netherlands, the leading production zone in Western Europe. France is also a transit country for dealers particularly targeting the United Kingdom and Spain.

New psychoactive substances (NPS)
NPS, which circulate on the French market *via* the web, are mainly produced in Asia, particularly in China and India.

T1.1.3 Please comment on any available contextual information on trafficking within your country.
Information relevant to this answer includes:
- range and relative importance of different products
- size of transactions
- smuggling methods
- organisation

The cannabis and cocaine markets are the two biggest illegal drug markets in France, achieving sales of about two billion euros combined (Ben Lakhdar 2012; Ben Lakhdar *et al.* 2007). The wholesale and semi-wholesale levels of these drug markets are controlled by major organised crime networks. In 2014, the police departments highlighted the stranglehold of the North African scene (specialising in cannabis resin) on cocaine trafficking, to the disadvantage of the Corsican-Marseille scene. This can be linked with the fact that a large part of the cocaine targeting the European and French market passes through West and North Africa to be stored in southern Spain where French criminal gangs are well established. Another factor is the increasing demand in France and the multiplicity of the social circles of cocaine users. Over the past few years, networks located in certain neighbourhoods with a high proportion of social housing and specialised in cannabis resin, are targeting working-class groups.
Alongside these "large" networks exist a myriad of small trafficking channels run by user-dealers, directly supplied by the Netherlands and Belgium.
The law enforcement services have observed an increase in postal cocaine trafficking originating from French overseas departments such as Guiana and the French West Indies (Guadeloupe and Martinique).

The heroin market in France is controlled by Turkish and Albanian organised crime networks. Reflecting the situation with cocaine, user-dealer micro-networks, supplied by the Netherlands and Belgium, play an important role in explaining the availability of the substance in France.

T1.1.4 Please comment on available information on the wholesale drug and precursor market.
Information relevant to this answer includes:

- range and relative importance of different products
- size of transactions
- common prices
- product transformation
- adulteration
- the nature and organisation of buyers, sellers and intermediaries

As France is not a zone in which the production of synthetic drugs takes place, problems related to chemical precursors are marginal (Gandilhon 2014b). In 2014, 5 seizures of phenylacetone (precursor of methamphetamine) were reported, amounting to a total of 2 kilos.

Regarding the issue of wholesale markets, the most important point is the control of the cocaine market by organised crime networks which import cannabis resin (OCRTIS data).
In 2014, the median price per kilogram of cocaine reached 35,000 euros (€), i.e. a €5,000 increase compared to previous years. Furthermore, a wholesale cocaine market also exists, notably in the French West Indies, where dealers obtain supplies at prices ranging from €6,000 to €9,000 per kilogram.
The price per kilo of cannabis resin was about €2,200, compared to approximately €15,000 for heroin.

T1.1.5 Please briefly comment on available information on the retail drug market.
Information relevant to this answer includes:

- nature and organisation of buyers, sellers and intermediaries
- range and relative importance of different products
- size of transactions
- common prices
- purity of products
- market locations and settings

Two main types of organisations control the retail market for illegal drugs:

- so-called “housing estate” networks, which are established in neighbourhoods located at the periphery of major cities; these networks deal either in wholesale or in retail sales.
- user-dealers of varying reach.

In 2013-2014, as regards the retail market for the main illegal drugs, the ethnographic data collected by the TREND scheme report changes in dealer practices, in their attempt to offset problems arising from the impoverishment of an incessantly growing number of users belonging to the middle classes. These developments are particularly apparent due to the availability of increasingly fractionated doses, irrespective of substance, to be sold at more accessible prices, in a context in which the price of the main illegal substances (cannabis, cocaine, ecstasy and heroin) is tending to increase after years of decline. Cocaine hydrochloride, the use of which among many users is associated with a certain form of social "success", has been particularly affected by the development of this form of discount or low cost market. This is even more so the case after years of regular decline in the average price − this has more than halved in 20 years, from €150 a gram in the early 1990s to €60 in 2010 −, it is now rising significantly and is becoming increasingly unaffordable, even among more or less well-off populations. Consequently, fractionation of doses (0.1, 0.2 or 0.5 grams) is increasingly reported by the TREND scheme. This trend is affecting both the alternative scene (free parties, raves) and the commercial dance-event setting (clubs, discotheques). This phenomenon is also observed for substances such as MDMA/ecstasy crystal, which has experienced certain popularity in recent years, despite a relatively high price, particularly among young users in the recreational scene. Hence, this substance is often sold by dealers, who themselves are often users, in “parachute” form (rolled in a sheet of cigarette rolling paper and then swallowed), containing small quantities, the price of which does not exceed €10.

Cannabis
According to law enforcement (OCRTIS 2013), the median price for herbal cannabis in 2014 was approximately €8.50 per gram and ranged from €7.50 to €10 per gram (see table below). This price was up compared with previous years (€6.50 in 2009, €7 in 2010, €7.50 in 2011 and €8 in 2012). This rise in price may reflect the fact that an increasing percentage of users appear to display a marked preference for what they perceive as “high-quality” substances.
The median price of cannabis resin increased from €6 in 2013 to €6.50 in 2014.
Average cannabis resin potency tripled in ten years, to reach 21% in 2014, whereas that of herbal cannabis, at 13%, is at its highest in 15 years (STUPS© file data).

Heroin
According to the OCRTIS, like in 2013, the 2014 median price for a gram of brown heroin was approximately €35, down more than 10% compared with 2010.
Brown heroin samples seized by the police are 15% pure on average, which confirms the rise in purity levels reported since 2012 (STUPS© file data). This phenomenon can be explained by the fact that heroin shortage is over, as observed in other European countries.

Cocaine
The price per gram of cocaine hydrochloride was €65 in 2014. It remained stable compared with 2013, the year in which there was a rise in the previously stable price observed over the last five years (€60).
The average purity of samples seized in the street (< 10 g) corresponds to 41% (43% in 2013), after having stabilised between 30 and 35% in the previous 10 years.

Table: Change in median drug prices (in euros) since 2000

	TREND*				OCRTIS**		
	2000	…	2012	2013	2012	2013	2014
Heroin	59		43	47	35	35	35
Cocaine	84		71	77	60	65	65
Ecstasy (tablets)	15		10	8	7.5	7.5	8.5
Cannabis resin	na		7	7	6	6	6.5
Herbal cannabis	na		10	10	8	8.5	8.5
Amphetamines	15		14	14	na	na	na
LSD (blotter)	8.5		10	10	na	na	na

Source:
*: Half-yearly TREND (OFDT) price analysis for heroin, cocaine, ecstasy tablets, cannabis resin and herbal cannabis; TREND ethnographic observations for amphetamines and LSD.
**: OCRTIS Price Barometer
na: not available

Ecstasy
It is necessary to indicate the galenic form in which the substance is sold: tablets, powder or crystal.
According to the OCRTIS, the 2014 price of a tablet of ecstasy was €8.50, indicating a relative increase compared with previous years. However, this retail price does not fully reflect the reality of the retail market since users tend to buy several dozen tablets at a time to lower the unit price. By doing so, consumers can lower the unit price of a tablet to €2.50.
In 2013, the price per gram of MDMA/ecstasy in crystal form was about €55. Since 2010, there has been a regular downward trend in prices.
For the past three years, although the average potency of MDMA/ecstasy has remained stable (36% in 2014), tablet mass has increased, and, consequently, so has the quantity of MDMA/ecstasy. Tablets contain 120 mg of MDMA/ecstasy on average (some tablets contain more than 200) compared to 50 to 60 mg in the 2000s (Néfau *et al.* 2014).
The average purity level measured in MDMA/ecstasy crystal seizures is 65%.

New psychoactive substances (NPS)
In 2014, there were 1,243 seizures or checks[1] (*versus* 1,076 in 2013) related to 131 different NPS[2]: a third concerned NPS not classified as narcotics or psychotropic molecules. Most of them were cathinones, ahead of phenethylamines, which outstripped synthetic cannabinoids (classified in early 2015 – see T1.1.3 in the Legal Framework workbook) for the first time in 2014 (see figure below).
As in 2013, the molecules most frequently found in seizures were three cathinones (3-MMC, methylone, 4-MEC) and a phenethylamine (4-FA).

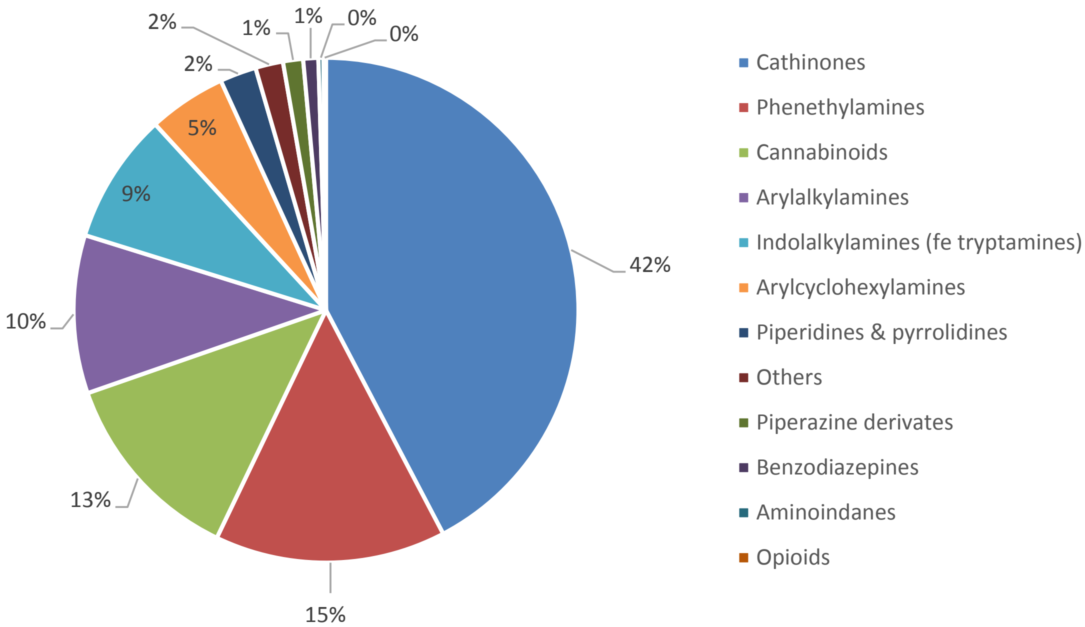
Cathinones are mainly supplied in powder form[3] (75%). Chloromethcathinone (1,200 kg for 2 cases), alpha-PVP (56 kg for 14 cases) and mephedrone (31 kg for 7 cases) were the molecules with the highest representation in terms of weight[4]. However, all cases representing more than 1 kg had a destination other than France.

In 2014, alpha-PVP had greater visibility. Although alpha-PVP use to be a secondary substance associated with other cathinones, it has been identified on numerous occasions as being sold on its own via street trafficking, in south-west France, as a substitute (not disclosed by the drug dealer) for conventional stimulants. Despite its supply on the actual market, the

molecule has a very limited presence on websites and forums monitored by I-TREND. NPS users do not search for it.
It has been the subject of 15 seizures by the French law enforcement services (customs and police):
- 13 seizures of small quantities destined for French users;
- 1 seizure amounting to 1 kg from persons in transit through France;
- 1 seizure amounting to 50 kg (two parcels) destined for Spain on 16 December 2014 (originating from China).

Unlike cathinones, phenethylamines are supplied in various forms: liquids, tablets and blotters represent 65% of reported seizures and checks. The powder form (19%) mainly corresponds to large seizures of 2C-I (104 kg)[5].

Figure: Proportion of different categories in checks and seizures of NPS in France in 2014



Source: SCL and STUPS© national database

Cathinones thus represent the main category (14 in 2014 *versus* 4 in 2013) whereas until then they were lower than synthetic cannabinoids (which showed 13 new molecules in 2014 as in 2013). Lastly, phenethylamines remained stable in 2013 (9 in 2014 *versus* 8 in 2013).

As regards synthetic cannabinoids, the supply remains split into two categories: commercial supply with commercial packaging copying conventional cannabis forms (herbal or resin) and more specialist supply, in powder form, exclusively with chemical names. These two types of supply have their own distribution channels and also aim at different user profiles.
There is no street trafficking. Unlike previous years, synthetic cannabinoids with commercial packaging have disappeared from postal freight and yet are observed in use practices.
Online purchases carried out in the context of I-TREND showed that even if the product is displayed on the website in commercial packaging, it is delivered in simple plastic or metallic bags: for the past few months, only the appearance of the substance enables commercial supply to be distinguished from specialist supply.
As cannabis is the most widely used illegal substance in France, synthetic cannabinoids may be more experimented than other NPS, due to the expected similarity of the effects. However, substances reported as being tried by lifetime users (in general population surveys) hardly correspond to those preferred by more informed users. In forums, even the most "popular"

substances among seasoned users (JWH018, AM-2201, UR-144 and 5F-AKB-48) ultimately have a negative image in comparison with natural cannabis.
2014 as a whole and early 2015 showed strong forum activity on synthetic cannabinoids in e-liquid form. Furthermore, between April 2013 and May 2014, 21 seizures, concerning 12 synthetic cannabinoids, in the context of simple use or local trafficking, took place in Mayotte and in La Réunion (Roussel *et al.* 2015). Drug-dealers had access to cannabinoids in powder form, which they were repackaging in cigarettes, an unusual presentation for synthetic cannabinoids.

Among rarer NSP categories, a single molecule is often predominantly found in seizures and checks. Thus, 85% of the tryptamine seizures correspond solely to DMT (for a total of 7 molecules identified). Also, benzodiazepine analysis (beyond their categorisation as NSP) correspond to etizolam (a molecule considered as a NPS and not marketed in France) in 83% of cases (for a total of 6 molecules identified). Benzodiazepines represent a small number of seizures (1% to 2.5% of seizures and checks), but are higher in terms of the number of tablets (3,042) than cathinones (2,839) and phenethylamines (2,275), the NPS groups most frequently observed in this form.

[1] When a molecule is not classified as a narcotic, this involves a check and not a seizure.
[2] The data presented concern synthetic substances and exclude plants or extracts perceived as NPS. If these were taken into account, they would exceed synthetic substances in qualitative terms, notably given the extent of khat circulation between the Netherlands and the United Kingdom. Other than khat, other plants catalogued as NPS and identified in France in the context of trafficking are harmine, kratom and ibogaine.
[3] Out of the total number of seizures and checks, 45% are not quantified (by weight or by volume). However, it is highly likely that these cases primarily involve very small quantities.
[4] The quantities are not stated for 10% of seizures or checks related to cathinones.
[5] The quantities are not stated for 15% of seizures or checks related to phenethylamines.

T1.2 Drug related crime

The purpose of this section is to provide a commentary on the context and possible explanations of drug law offences within your country.

Please structure your answers around the following questions.

T1.2.1 Please comment on drug law offences data.
Please structure your response around supply data (if possible distinguish between trafficking, cultivation/production, wholesale/ retail, and other supply offences) and possession/use data.

Since 2010, national statistics no longer provide details of arrests according to substance. Roughly 140,000 arrests were recorded in 2010 for narcotic use, 90% concerned simple cannabis use, 5% heroin use and 3% cocaine use. Eight out of ten arrests for drug-related offences involved the use of illegal narcotics (all substances combined). In 2014, arrests related to use, slightly higher (3.7%) than in 2013, were still the number one offence (83%) reaching 176,700 cases. Law enforcement services (police and *gendarmerie*) recorded 32,500 cases of use-dealing and trafficking-resale without narcotic use, not including arrests for use only.

In 2013, convictions handed down for drug-related offences represent 9% of all convictions recorded in criminal records, i.e. 56,700 convictions (Ministère de la justice *et al.* 2014). These offences are broken down as follows: illegal use (59%), possession, acquisition (23%), commerce-transport (12%), import-export (2%), dealing and selling (4%), aiding and abetting, which may comprise incitement to use and facilitation of use (34 cases) and other (141 cases). Prison sentences without remission or partial sentence suspension concern nearly 27% of convictions for drug-related offences. Other than for sentences handed down by the courts, criminal records also list lighter procedures such as fixed penalty notices. In 2013, one out of ten offences for narcotic use was handled by the State prosecutor in the context of a fixed penalty notice. Nearly 8,800 fixed penalty notices for drug-related offences were implemented in 2013, nearly all of which (98%) for illegal narcotic use. Alternative sentences were more widely used than fines, 5,000 versus nearly 3,800.

T1.2.2 ***Optional***. *If possible summarise any available data on drug related crime outside of drug law offences (i.e. possession/supply), e.g. money laundering, crimes undertaken under the influence of drugs (e.g. driving under the influence of drugs) or as a result of the use of drugs, crimes committed to fund drug use, crimes between drug market actors (e.g. violent crime, including homicide).*

Driving under the influence of narcotics has been an offence in France since 2003. These prosecutions only represent 3% of all offences stated in criminal records (8% of road safety offences), but are constantly on the increase (5,200 in 2007, 11,200 in 2009 and 21,800 in 2013). To compare, convictions relating to driving under the influence of alcohol account for 48% of road safety offences and 21% of all offences. Overall, 137,400 records for driving under the influence of alcohol were registered in 2013

T1.3 Drug supply reduction activities

The purpose of this section is to summarise the drug law enforcement activities for drug supply reduction.

Please structure your answers around the following questions.

T1.3.1 Please comment on drug supply reduction activities within you country.
Please structure your response in terms of

a) the key priorities of supply reduction
b) areas of activity of supply reduction
c) organisational structures/co-ordinating bodies

Please note that information on specialist drug law enforcement (eg. drug squads) is part of a separate focused data collection.

The 2013-2017 Government Plan for Combating Drugs and Addictive Behaviours (MILDT 2013) includes a line of action for stepping up measures against trafficking, with the following objectives:

- Acting at pre-trafficking stages: notably by strengthening international cooperation and capabilities for control, and by sharing information;
- Adapting the public response to the scale of narcotic trafficking: trafficking involving minors, trafficking at local level in "priority safety zones" (PSZ), in the prison setting, and trafficking on an international scale;
- Reinforcing anti-money laundering measures and an asset-based approach to legal investigations;
- Acting on major emerging trends in terms of production and supply: step up measures against cannabis growing, contraband tobacco, synthetic drugs and diversion of chemical precursors;
- Promoting targeted anti-narcotics trafficking action overseas

As regards operational aspects, given the nature of the drugs market in France, law enforcement services focus on dismantling criminal organisations which import cannabis resin and cocaine. This priority objective was reaffirmed by the French Prime Minister, Manuel Valls, during his visit to Marseille in February 2015 due to the established presence and control of certain areas of France by trafficking organisations, particularly in social housing neighbourhoods. One of France's main priorities is to cut off international cannabis and cocaine trafficking routes in the Mediterranean and Caribbean sea. To do so, France

has joined international cooperation organisations, such as the MAOC-N (*Maritime Analysis and Operation Center for Narcotics*) and CECLAD-M (Mediterranean anti-drug coordination centre). As regards the Caribbean sea, in 2014 the French government created the "Caribbean" branch of the OCRTIS, which has been set up in Fort-de-France. Like its metropolitan counterpart, this is an interministerial organisation, made up of representatives from the *gendarmerie*, the French Navy, customs and police, together with liaising officers from three foreign countries (Great Britain, United States and Spain). This branch notably works with other anti-trafficking organisations, such as the JIATF-S (*Joint Inter-Agency Task Force South*), based in Key West, Florida, a North American interministerial anti-trafficking entity which covers the Caribbean sea, the West Pacific and a large part of the Atlantic. Given the essentially sea-based nature of trafficking, the French Navy is the major operational armed branch for operations out at sea.
The other line of action against drug trafficking is the seizure and confiscation of criminal assets accumulated by dealers. In 2010, France therefore created an Agency for the Recovery and Management of Seized and Confiscated Assets (AGRASC).

T2. Trends

The purpose of this section is to provide a commentary on the context and possible explanations of trends in drug markets and crime within your country.

Please structure your answers around the following questions.

T2.1 For the most important drugs in your country, please comment on the possible explanations of short term trends (5 years) in the following aspects of the drug market:
- seizures (by weight bin if possible)
- price (wholesale and retail if possible)
- purity (wholesale and retail if possible)

Examples: changes in police practices, patterns of drug use, interruptions to the supply of drugs or the emergence of substitutes or alternatives.

Cannabis

Like in the rest of Europe, the cannabis market in France is undergoing a major upheaval. This is notably expressed by the increased production of herbal cannabis on French soil, driven by private individuals or organised crime networks. Although, in 2014, cannabis seizures (herbal cannabis and cannabis resin) were at their lowest since 2007, these overall data mask conflicting developments: major drop in resin seizures and record herbal cannabis seizures, reaching more than 10 tonnes. Moreover, the growing importance of the herbal cannabis market in France is corroborated by the scale of plant confiscations, with 158,000 being seized in France in 2014, the highest level ever to have been observed. The nearly 50% decline in cannabis resin seizures could be explained to a lesser extent by the reported drop in production in Morocco (Chouvy and Afsahi 2014) than by the emergence of new trafficking routes, including transit via Libya, and new techniques, mainly from Spain, involving more discreet, fragmented convoys of resin (*go slow vs. go fast*). The other key event is the very strong growth in THC levels in cannabis resin and herbal cannabis, which is explained by the cultivation of hybrid cannabis varieties, in both Europe and Morocco.

Cocaine

The cocaine market, driven by regularly growing demand over the past twenty or so years, is highly dynamic. After years of remaining stable, retail prices have been rising over the past three years. The two key events in recent years are the stranglehold of organised crime networks which import cannabis resin onto this market, and the diversification of cocaine routes with the emergence of the French West Indies as a developing zone and secondary wholesale market.

Heroin
The heroin market is relatively limited given the small number of users. However, it is still present, notably sustained by dynamic cross-border small-time drug runners. The "quality" of the substance in circulation in France is somewhat poor, which causes certain users to switch to opioid medications such as morphine sulphates (Cadet-Taïrou and Gandilhon 2014a) and/or buprenorphine (Subutex®). Heroin seizures have once again reached high levels, despite regularly declining since 2010. The relative shortages in Western Europe, in 2011 and 2012, due to the dismantling of major trafficking organisations, now appear to be in the past.

Synthetic drugs
The synthetic drugs market is still dominated by MDMA/ecstasy. However, major changes have been observed with the development of the "crystal" form which is popular among younger generations. Furthermore, after years of decline, the use of tablets, driven by substances with higher dosage strengths, is making a significant comeback in the recreational setting. Ecstasy tablet seizures are at their highest in six years, which attests to the dynamic nature of the market, although this form faces competition from MDMA/ecstasy in powder or crystal form.
The ethnographic observations in the context of the TREND scheme reveal greater availability of amphetamines (speed) in the alternative recreational setting, which can be explained by an effect of the recession affecting the country since 2008. Some users are giving up cocaine, considered too expensive and with its price rising, in favour of amphetamines which, in this context, represent the cocaine of the poor (Cadet-Taïrou *et al.* 2014b).

Table: Quantities of drugs seized (in kilograms), from 2008 to 2014 and changes from 2013 to 2014 (in %)

Drugs seized	2010	2011	2012	2013	2014	Change from 2013 to 2014
Cannabis: resin	52,795	55,641	51,118	70,918	36,917	- 47.9
Cannabis: herbal	4,564	5,450	3,270	4,758	10,073	+ 111.7
Cannabis: seeds	22	na	13	25	na	na
Cannabis: plants	54,728	73,572	131,307	141,374	158,592	+ 12.2
Heroin	1,087	883	701	570	990	+ 73.7
Cocaine	4,125	10,834	5,602	5,612	6,876	+ 22.5
Crack	14	13	14	7	19	+ 172
Amphetamines	176	601	279	474	260	- 45.1
Ecstasy (tablets)	663,595	1,510,500	156,337	414,800	940,389	+ 126.7
LSD (blotter)	28,411	3,136	4,135	58,344	2,390	- 95.9
Ketamine	14	0.1	7.2	14.6	na	na

Source: OSIRIS (OCRTIS)
na: not available

T2.2 ***Optional****. For the most important drugs in your country, please comment on the possible explanations of long term trends (greater than 5 years) in the following aspects of the drug market:*
- *seizures (by weight bin if possible)*
- *price (wholesale and retail if possible)*
- *purity (wholesale and retail if possible)*

Examples: changes in police practices, patterns of drug use, interruptions to the supply of drugs or the emergence of substitutes or alternatives.

*T2.3 **Optional**. Please comment on the possible explanations of long term trends and short term trends in any other drug market data that you consider important.*

T2.4 Please comment on the possible explanations of short term trends in the following drug law offences data:
- supply (if possible distinguish between trafficking, cultivation/production, wholesale, retail, and other supply offences)
- possession/use

Examples: changes in law enforcement practices, government priorities, patterns of drug use, sources of drugs.

*T2.5 **Optional**. Please comment on the possible explanations of long term trends in the following drug law offences data:*
- *supply (if possible distinguish between trafficking, cultivation/production, wholesale, retail, and other supply offences)*
- *possession/use*

Examples: changes in law enforcement practices, government priorities, patterns of drug use, sources of drugs.

*T2.6 **Optional**. Please comment on the possible explanations of long term trends and short term trends in any other drug related crime data that you consider important.*

T2.7 Please indicate notable trends or important developments in the organisation, coordination and implementation of drug supply reduction activities in your country over the past 5 years.

T3. New developments

The purpose of this section is to provide information on any notable or topical developments observed in drug market and crime **since your last report**.

T1 is used to establish the baseline of the topic in your country. Please focus on any new developments here.

If information on recent notable developments have been included as part of the baseline information for your country, please make reference to that section here. It is not necessary to repeat the information.

Please structure your answers around the following questions.

T3.1 Please report on any notable new or topical developments observed in the drug market and crime in your country since your last report.

Although production laboratories (only processing and packaging sites) had no longer been observed in France since 1996 (Colombié *et al.* 1999), some signs - which have yet to be confirmed – and practically pure collected substances (MDMA/ecstasy and heroin) suggest the presence of these laboratories in France. These would be the result of user-dealer micro-networks which aim to control the content of the substance rather than to make large profits.
At the same time, monitoring of discussions on the Internet as part of the I-TREND project shows that topics on the home-production of synthetic drugs was the second most widely consulted topic on forums in the first semester of 2015, after e-liquids containing synthetic cannabinoids.

T4. Additional information

The purpose of this section is to provide additional information important to drug market and crime in your country that has not been provided elsewhere.

Please structure your answers around the following questions.

*T4.1 **Optional**. Please describe any additional important sources of information, specific studies or data on drug market and crime. Where possible, please provide references and/or links.*

*T4.2 **Optional**. Please describe any other important aspect of drug market and crime that has not been covered in the specific questions above. This may be additional information or new areas of specific importance for your country.*

T5. Notes and queries

The purpose of this section is to highlight areas of specific interest for possible future elaboration. Detailed answers are not required.

Please structure your answers around the following questions.

Yes/No answers required. If yes please provide brief additional information.

T5.1 Within each country there may be specific seizures or other law enforcement activities that are considered important, e.g. a drug new to the country, a new method of concealment, a new trafficking route, or an example of successful law enforcement action. Does the National Focal Point have access to descriptions of such activities? If so, please describe.

"YES" or "NO"?	

T6. Sources and methodology

The purpose of this section is to collect sources for the information provided above, including brief descriptions of studies and their methodology where appropriate.

Please structure your answers around the following questions.

T6.1 Please list notable sources for the information provided above.

Sources

The main source of information is data from law enforcement services (police, customs and *gendarmerie*), which are centralised on an annual basis by the Central Office for the Repression of Drug-related Offences (OCRTIS). This report indicates, among other things, the quantities of illegal drugs seized in France, the prices and any information on the structure of the trafficking networks.
Additionally, the TREND scheme provides qualitative information on methods for gaining access to substances and on micro-trafficking.
Online sales of new psychoactive substances, whether classified in France or not, gives rise to different forms of traffic. Their documentation requires additional information sources to contribute. The Customs Joint laboratories department (SCL) and the French National Forensic Science Institute (INPS) are the main bodies collecting information on the number of seizures, the quantities seized, and the identification of the substances seized.
Two further information sources are used by the OFDT to document the composition of substances in circulation:

- Analyses are performed on substances seized by law enforcement services. These data are supplied by law enforcement laboratories and are grouped together in the report from the OCRTIS.
- Analyses are also performed on drug user data collected as part of the OFDT's SINTES system.

Analyses of seizures by law enforcement laboratories provide the main source of information on the composition of illegal substances in France. The OCRTIS provides a summary of all of the data on the composition of illegal substances seized and analysed by all French law enforcement services during the year for the whole country. The data represents the results of analyses of seizures without regard for the volume of each seizure, with the exception of cocaine, for which a distinction is made between airport seizures and street seizures.
The content of the main psychoactive substance is determined; with few exceptions, the other substances in the product are simply identified.

T6.2 Where studies or surveys have been used please list them and where appropriate describe the methodology?

Methodology

Prices
Two resources make it possible to collect unit sale prices of illegal substances:

- A periodic OCRTIS survey based on data collected at 69 sites throughout metropolitan France records the median semi-wholesale and retail prices of certain illegal substances (heroin, cocaine, cannabis and ecstasy).
- The TREND network, based on qualitative questionnaires completed by CAARUD low threshold structures and staff operating in the techno/party scene on each site involved in the scheme. For each substance under consideration (whether illegal drugs or misused legal medications), the retail price and an estimate of the lowest price, the highest price and the usual price are requested. In 2011, at the request of the MILDECA (ex MILDT), the collection of information on prices was reinforced by data collected from the seven TREND sites every six months (every year since 2012). The illegal substances in question were cannabis (herbal, resin), heroin, MDMA/ecstasy (tablets, powder, crystal) and cocaine (for which the prices were collected in both urban areas and on the party scene).

SINTES: National Detection System of Drugs and Toxic Substances
French Monitoring Centre for Drugs and Drug Addiction (OFDT)

The SINTES scheme is based on collecting samples of illegal and legal substances directly from drug users. The products collected are forwarded to one of the 4 forensic laboratories working in partnership with OFDT, to determine their composition. At the same time, drug users are asked to complete a questionnaire on the context of use for the substance and its purchase price. This makes it possible to directly correlate the price and purity of a given substance. The SINTES questionnaire has three sections:

- The *observation* section provides an annual overview of the composition of a particular illegal substance. The SINTES observation scheme relies primarily on the French TREND network.
- The *monitoring* section comes under the health alert system. It is based on the TREND network sites as well as sites outside of this network that have signed agreements. The contributions made in this section are limited exclusively to the identification of newly circulating molecules and up-to-date information on the composition of certain substances at a given moment and in a given location.
- Since 2010, SINTES has been exploiting the Internet to monitor for new psychoactive substances (NPS) and document them.

TREND scheme: Emerging Trends and New Drugs

French Monitoring Centre for Drugs and Drug Addiction (OFDT)

The aim of the TREND scheme, which was established in 1999, is to provide information about illegal drug use and users, and on emerging phenomena. Emerging phenomena refer either to new phenomena or to existing phenomena that have not yet been detected by other observation systems. The observations are conducted in two social settings chosen due to the high likelihood of finding new or not as yet observed phenomena, even though these do not necessarily reflect the entire reality of the drug use in France:

- urban areas, as defined by TREND, mainly cover low-threshold structures (CAARUDs) and open sites (street, squats). Most of the people met and observed in these settings are problem users of illegal drugs living in particularly precarious conditions.
- Techno party settings refer to places where events are organised around techno music. These include so-called “alternative” techno settings (free-party, teknivals) and techno events in clubs, discothèques and private parties.

The system is based on data analysed by seven local coordinating sites (Bordeaux, Lille, Marseille, Metz, Paris, Rennes and Toulouse) that produce site reports, which are then extrapolated to a national level:

- continuous qualitative data collection by the local coordination network, which has a common data collection and information strategy
- the SINTES scheme, an observation system geared towards detecting and analysing the toxicological composition of illegal substances
- recurring quantitative surveys, particularly among CAARUD clients (ENa-CAARUD)
- partner information system results
- thematic quantitative and qualitative investigations that aim to gather more information about a particular subject

STUPS© national database

French National Forensic Science Institute (INPS)

Created in 1986, the French National Register of Drug Seizures (FNDS) initially focused on heroin analyses; from 1990, cocaine samples were also studied, before being extended to all drugs, as part of the STUPS© (harmonised narcotics processing system) database, initiated in 1999.

Five national forensic science institutes (Lille, Paris, Lyon, Marseille, Toulouse) and the Forensic Sciences Institute of the French *Gendarmerie* (FSIFG) add their analyses to this database, accompanied by photos, logos, etc. in order to identify the substances in circulation.

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