2018

Drug market and crime workbook

France

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Herbal cannabis is the only illegal substance for which production is seen in France. It is mainly cultivated by individuals at home and on a very small scale, but, starting in 2011, "cannabis factories" overseen by organised crime has begun to appear.

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. This is also the case due to its overseas departments on the American continent (Guadeloupe, Martinique and French Guiana) close to the major cocaine production and transit zones (Colombia, Venezuela).

Cannabis resin smoked in France comes from Morocco and usually transits through Spain while herbal cannabis comes mainly from Spain, Belgium and Netherland. New trafficking routes emerges, through Lybia for cannabis resin and from Albania for herbal cannabis.

The cocaine used in France mainly comes from Colombia. It mainly passes through the south via Spain and the north via the Netherlands (Rotterdam) and Belgium (Antwerp). Over the past few years, cocaine, transiting through Venezuela then via the French West Indies, has been entering the European continent through the port of Le Havre. There has also been a major increase in air trafficking by mules between Guiana and mainland France.

The heroin used in France mainly comes from Afghanistan (brown heroin) and passes *via* the Balkans (Turkey, Greece, Albania). The Netherlands, ahead of Belgium, is the main platform which supplies French dealers. Synthetic drugs (MDMA/ecstasy, amphetamines) used in France also mainly come from the Netherlands.

  - **National drug law offences (main drugs linked to offences; distinguishing between possession/use, trafficking, cultivation/production) (a summary of T1.2)**

In 2017, the total number of persons accused of narcotic use in France is about 164,000 against less than 160,000 in 2016. In 2017, 8 out of 10 people accused of a drug-related offence corresponded to simple use. The number of people implicated in trafficking offences (14,570), and user-dealers (17,700), increased by 7% compared to 2016. In 2010, 90% concerned simple cannabis use, 5% heroin use and 3% cocaine use.

  - **Key drug supply reduction activities (summary of T1.3)**

The new national action plan on addiction (2018-2022) emphasises the importance of a genuine national strategy based on better coordination between the various services involved (police, customs, Gendarmerie, justice). Money laundering, a key issue in a dynamic French drug market, is a major priority. The challenge of international cooperation, in particular, has also been placed at the forefront, notably the important role of French overseas departments (Guiana, Martinique and Guadeloupe, together with the French overseas territory Saint-Martin) in supplying the mainland market with cocaine. Lastly, emphasis is placed on prevention to stop young people, especially minors becoming involved in local trafficking, firmly established in large cities.

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.

In 2016, the main producers can be classified as follows:

- Small growers, whose number is estimated to be 80,000 persons (OFDT 2015), who produce for themselves or for their immediate circle and are strictly sticking to this method of supply.
- 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 (Masson and Gandilhon in press), with an increasing involvement of groups coming from so-called “sensitive” suburban areas that originally were specialised in importing and distributing cannabis resin.

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

Owing to its geographical position at the heart of Western Europe, France is a transit area for certain illegal drugs. The South-to-North route is used for the transit of cannabis resin, produced in Morocco and transiting via Spain (where it is stored and redistributed), notably destined to supply Northern European markets. The North-to-South route is used for the transit of synthetic drug shipments through France (ecstasy, MDMA), produced in the Netherlands and Belgium, destined for Spain or Italy. This is also the case for heroin, stored in the Netherlands (Rotterdam, Maastricht, etc.), in transit to Spanish and Italian markets.

Cannabis

The cannabis resin smoked in France comes from Morocco and usually transits through Spain. In 2017, of the 54.1 tonnes of resin seized by the police (80% of total seizures), almost 60% came from Spain. It may also arrive directly from Morocco notably via the Tangier-Marseille sea route.
Herbal cannabis seized in France, besides that produced on the national territory, mainly originates from Spain, and to a lesser extent the Netherlands and Belgium.
Since 2013, other routes for cannabis resin destined for the European and French market have appeared, notably from Libya. 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 (Europol 2017). 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 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. This change is 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; Gandilhon and Weinberger 2016). The substance leaves Colombia, passes through Venezuela (Weinberger 2013), and reaches Martinique via the Caribbean sea. French Guiana is increasingly establishing itself as a major source of cocaine destined for France or, indeed, the European market.
There has been a major increase in air trafficking by mules between Guiana and mainland France.

Heroin

The heroin used in France mainly comes from Afghanistan (brown heroin) 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 and 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, cocaine and heroin markets are the three largest illegal drug markets in France. In 2015, the global sales of illegal drugs (cannabis, cocaine, heroin, MDMA/ecstasy, amphetamines) was estimated at 2.34 billion euros (Ben Lakhdar *et al.* 2015).
The cannabis market (herbal cannabis and cannabis resin) has reached a consumed annual volume of approximately 154 tonnes with sales of 1.12 billion euros, i.e. nearly half the total illegal drug sales in France. The second largest market, the cocaine market, apparently reached approximately fifteen tonnes with estimated sales of 0.90 billion euros. The heroin market is the third largest market. The quantities consumed apparently reached between 5.1 and 8.2 tonnes for an estimated turnover of 266.5 million euros.

The wholesale and semi-wholesale levels of these drug markets are controlled by major organised crime networks. The police departments highlighted the stranglehold of the North African scene (specialising in cannabis resin) on cocaine trafficking, to the detriment of the Corsican-Marseille scene. The explanation resides in the fact that a part of the cocaine destined for European and French markets arrives via West and North Africa. It is stored in southern Spain where French criminal gangs have a firm foothold, notably via their investments in the property sector. Police observations also report the growing importance of Barcelona, as a large secondary market for cannabis resin in French organised crime.
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. In Marseille for instance, cocaine is present and available in all points of sale located in the northern districts of the city specialising in the resale of cannabis resin and herbal cannabis.
Alongside these "large" networks exist a myriad of small trafficking channels run by user-dealers, directly supplied by the Netherlands and Belgium.

A recent analysis of the situation in French departments in the Americas (DFA: Martinique, Guadeloupe and French Guiana) offers an up-to-date perspective on international trafficking, although the developments described do not only cover 2015 and are the result of prior changes.
Martinique and Guadeloupe are not only areas of freebase cocaine (crack) consumption, but now play an increasingly important role in supplying the metropolitan market. The police services, in fact, estimate that between 15% and 20% of annual seizures throughout French could originate from these two departments.
Cocaine trafficking is intensifying in French Guiana, a department bordered by Suriname and Brazil, with a long coastline running along the Atlantic. The topography of the department has numerous advantages for traffickers, especially an extremely dense river network and equatorial forest which covers nearly 90% of the surface area of the territory. As for Martinique and Guadeloupe, cocaine trafficking destined for Europe slowly developed from the beginning of the 1990s, and has literally rocketed in the past five years. This appeal has been confirmed by the substantial and consistent increase in seizures conducted both locally and in metropolitan France.
These developments can be explained by two key changes. Firstly, at the end of the 1990s, the emergence of the West African route to Europe via French Guiana, aiming to circumvent the security systems set in place by the European Union. Secondly, the intensified control of the air route connecting Paramaribo, the capital of Suriname, and Amsterdam. Owing to more vulnerable security systems, French Guiana represents a strategic point for organised crime in Suriname, in terms of cocaine exports, via Cayenne and its international airport.

Nevertheless, in the past few years, criminal gangs in French Guiana have become more empowered. They recruit French "mules" to travel to Paris, so as to set down roots in small and medium-sized metropolitan cities. The cocaine which passes via French Guiana is of equivalent quality (at least 70% purity) but half the cost (5,000 euros per kg on average) as that purchased in the West Indies or in the Dominican Republic. In view of the price and

poverty faced by the inhabitants, Guyanese channels could increase in scale in the next few years (Gandilhon and Weinberger 2016). Similar phenomena to those observed in Martinique currently in play, with the emergence of a local market and bartering of cannabis resin for cocaine.
Furthermore, the port of Le Havre, owing to its connection with the port of Fort-de-France in Martinique and its status as a leading French port for container traffic, is increasingly used as a major doorway for cocaine into the French and European markets, like other major ports in northern Europe, such as Rotterdam and Antwerp.
The law enforcement services have observed an increase in postal cocaine trafficking originating from French overseas departments such as French Guiana and the French West Indies (Guadeloupe and Martinique). Nevertheless, the preferred vector is still "mules" carrying small quantities of the substance in their bodies.

The heroin market in France is controlled by Turkish and Albanian organised crime networks. As for the developments concerning cocaine, user-dealer micro-networks, sourcing their supplies in the Netherlands and Belgium, play an important role in explaining the availability of the heroin in France, particularly in the north-east of the country with extensive use in rural and periurban areas (Gandilhon and Cadet-Taïrou 2015). The past few years has seen the significantly strong presence of criminal Albanian gangs in the Lyon region, operating in both the wholesale and retail market. They tend to take root also in other regions such as Auvergne and Brittany.

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).
Regarding the issue of wholesale markets, the most important point is the growing control of the cocaine market by organised crime networks which import cannabis resin.
In 2016, the median price per kilogram of cocaine is 34,000 euros (€). Furthermore, a wholesale cocaine market also exists, notably in the French West Indies, where prices are lower as dealers obtain supplies at prices ranging from €6,000 to €9,000 per kilogram.
In 2016, the price per kilo of cannabis resin is about €2,000, the price per kilo for herbal cannabis is €3,000 and approximately €15,000 per kilo for heroin (OCRTIS 2017 data).

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.

Nevertheless, in recent years, the supply of drugs in France has been affected by several phenomena: the creation of priority safety zones (ZSP)[1] in 2012, which led to dispersed trafficking with different organisation methods, and the emergence of the deep web with a constantly growing supply of substances on the Internet (see T2.1).

Cannabis

According to the OCRTIS (Central office for the repression of drug-related offences), the median price for herbal cannabis in 2016 was approximately €9 per gram and ranged from €7 to €10 per gram. The median price of cannabis resin is now €7 (see table in T2.1).

As regards the price of cannabis reported as part of the OFDT TREND (Emerging Trends and New Drugs) scheme, the price of herbal cannabis per gram apparently remained stable, in the region of €10 in 2017. However, the price of cannabis resin has decreased, from €7 in 2016 to €5.40 in 2017.

Average cannabis resin potency reached 23% in 2017 in seizures, whereas that of herbal cannabis is 12% (STUPS© file data). 21 samples of cannabis have been collected by OFDT SINTES scheme (16 in the form of resin and 5 as herbal), the THC content average was 25% for resin and 8% for herbal cannabis.

Cocaine

According to the OCRTIS, the price per gram of cocaine hydrochloride was €65 in 2016. According to the TREND scheme, this price was around €80 in 2017 against €85 in 2016. In 2017, the average purity of samples seized in the street (< 10 g) corresponds to 59%. The average purity of cocaine samples collected by the SINTES scheme (n=92) is much higher (68 %).

Heroine

In 2016, the median price for a gram of brown heroin was approximately €35 according to the OCRTIS. In 2017, this price was €40 on average according to the TREND scheme.

In 2017, samples seized by the police in the street (<10g) are 14% pure on average and those collected through SINTES (n=49) are 16% pure.

MDMA/ecstasy

It is necessary to indicate the galenic form in which the substance is sold: tablets, powder or crystal.

According to the OCRTIS, the 2016 average price of one gram of crystal/powder was €54 and €10 for a tablet of ecstasy, although 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 price per unit. By doing so, consumers can lower the unit price of a tablet to €2.50.

According to the TREND scheme, in 2017, the average price of an ecstasy tablet reached €10, whereas the price per gram of MDMA was close on €49, i.e. its lowest level since 2010.

In 2017, the average purity of MDMA in samples crystal/powder seized by the police in the street (<10g) was 72% and the one from the collected samples through SINTES was almost the same, 78%. About the tablet form called ecstasy, the average amount of MDMA for those seized by the police was 128 mg and was 89 mg for those collected through SINTES.

In 2014, a specific investigation evidenced great variability in the mass of tablets (ranging from 186 mg to 457 mg) and in the amount of contained MDMA/ecstasy (from 50 mg to 280 mg) (Néfau *et al.* 2015).

New psychoactive substances (NPS)
In 2017, there were 1,216 seizures or checks[2] related to 154 different NPS[3]. The cathinones category is the most widely represented (1,111 seizures concerning 54 molecules), ahead of synthetic cannabinoids (346 seizures with 27 different molecules identified) and third, the pipéridines and pyrrolidines (240 seizures) with mostly ethylphenidate. Lastly, a large number of seizures concerned arylcyclohexylamines (185), but also mainly ketamine and, to a lesser extent, methoxetamine.

Cathinones and cannabinoids account for the most seizures in the past three years, competing with arylcyclohexylamines primarily due to ketamine seizures. Piperidines with ethylphenidate are a class of compounds which have been regularly seized since 2017.

As regards the various substances, 3-MMC is still the most widely seized compound (342 seizures), ahead of ethylphenidate (225), then 4-MEC (192). These are followed by ketamine (156 seizures) and a synthetic cannabinoid, JWH-210 (114 seizures). DMT also features among the widely seized substances, with 66 seizures amounting to 95 kg in total. The NPS market appears to be very stable, with the highly evident presence of cathinones since 2015, along with hallucinogenic substances such as ketamine and tryptamines. Lastly, 2017 is characterised by the massive increase in ethylphenidate seizures, from 84 in 2016 to 225 in 2017.
In decreasing order of the number seizures, synthetic cannabinoids include JWH-210, 5F-ADB (5F-MDMB-PINACA) and AB-FUBINACA.

It should be noted that a large number of these seizures were from postal freight; however, most of the letters and parcels were not destined for France but were only in transit. Hence, the number of seizures is not necessarily representative of the French market, as shown by the number of khat seizures in plant form. In 2017, there were 393 seizures corresponding to a total weight of 4,143 kg; however, most of the parcels intercepted were destined for the United States or the United Kingdom.

[1] The ZSP cover areas with high criminality rates, with a particularly strong presence of the law-enforcement services.

[2] A substance, when not classified as a narcotic, may nonetheless be removed from postal/express freight in order to limit its diffusion. In this case, this act is perceived as a control and is not counted as a seizure.

[3] The data presented concern synthetic substances and exclude plants or extracts perceived as new psychoactive substances (NPS) by the EMCDDA.

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.

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.

In 2017, the total number of persons accused of narcotic use in France (metropolitan France and overseas) is about 164,000. Aside from these drug use offences (82% of the total), the police services and French *Gendarmerie* accused 17,714 individuals of drug use-resale and 14,570 of trafficking-resale without the use of narcotics. In 2010, (since 2010 national statistics no longer provide details of arrests for each substance), 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 2016, convictions for drug-related offences represented 11% of all convictions registered on the national criminal record, i.e. around 65,500, predominantly for illegal use and possession/acquisition (see T3.2 of the Legal Framework workbook). Fixed penalty notices issued are about 8,659.

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 4% of all offences stated in criminal records (10% of road safety offences), but their numbers keep on increasing (almost 20,500 in 2015 against 5,200 in 2007). To compare, in 2015 convictions relating to driving under the influence of alcohol account for 44.3% of the 263,029 road safety offences.

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 2018-2022 national action plan on addiction (see Policy workbook) (MILDECA 2018) includes a major line of action for stepping up measures against trafficking, with the following objectives:

- Strengthening the coordination of services which combat drug trafficking
- Diversifying the strategies for combating trafficking, notably by increasing the criminal analysis capacity of police criminal investigation departments
- Strengthening international cooperation
- Reinforcing anti-money laundering measures and an asset-based penalties of legal investigations
- Developing prevention, particularly among young people to stop them being drawn into trafficking (Gandilhon 2016).

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. 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 2004 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 also works with other anti-trafficking organisations, such as the JIATF-S (Joint Inter-Agency Task Force South), a North American interministerial anti-trafficking entity which notably covers the Caribbean sea.
Given the essentially sea-based nature of trafficking, the French Navy is the major operational armed branch for operations out at sea. The Interministerial Training Center for the Fight Against Drugs (CIFAD), based in Fort-de-France, is responsible for training agents and improving international cooperation in the fight against trafficking, notably via information sharing with other Caribbean and Latin American countries. It brings together representatives of the French public authorities involved in combating drugs (Customs, French *Gendarmerie* and police, justice and health).

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), a body designed to assist members of the Judiciary to efficiently fight the underground economy. The support fund, consisting of the proceeds from the sale of assets confiscated as part of criminal narcotics proceedings, reached a total of €12.78 million in 2017.

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.

T2.1 For the most important drugs in your country, please comment on the possible explanations of short-term trends (5 years) and/or 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.

In recent years, the supply of drugs in France has been affected by several phenomena: the creation of priority safety zones (ZSP) in 2012, which led to dispersed trafficking with different organisation methods, and a constantly growing supply of substances on the Internet via the deep web.

Regarding the first aspect, highly visible in Metz and Paris, the dismantling of major dealing sites has generated changes in the networks, in addition to the recognised displacement phenomena. These adapt by partly breaking with the sales point model, structure based on the lookout/tout/drug dealer trio, in which the drug user approaches the seller. They now favour individual contact via mobile phone. Clients are often chased up by text messages, and the separation between the supplier and drug dealer thus means that this type of network is very complicated for the police forces to dismantle. In Paris, this practice not only affects cocaine, since drug users may also be offered crack, as some drug dealers travel to deliver "rocks". In Metz, ethnographic observations indicate the emergence of real trade based on the resale of SIM cards, the market value of which is proportional to the amount of potential client numbers. The difference with the capital city lies in the fact that this trafficking affects a more destitute clientele and mainly concerns heroin.

The stronger military and police presence in the public space related to the state of emergency set in place in France further to the November 2015 attacks has undoubtedly contributed to the development of services to deliver drugs to users (Cadet-Taïrou *et al.* 2016).

Regarding the emergence of the Internet as a favoured vector for trafficking, the law-enforcement services (police, French *Gendarmerie*) and drug users themselves describe the growing use of this form of trafficking, although it is harder to observe a phenomenon confined to the private sphere. The latter does not only concern NPS, but also affects substances such as cocaine, MDMA/ecstasy, heroin, and even methamphetamine (Cadet-Taïrou *et al.* 2015).

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. In 2017, herbal cannabis seizures reached a record level at more than 20 tonnes. Herbal cannabis now accounts for almost 23% of total cannabis seizures, compared to 6% in 2012. The French herbal cannabis market is becoming increasingly affected by the situation in Spain which is on its way to becoming a major herbal cannabis producer in Western Europe. Hence, out of nearly 15 tonnes in total intercepted by the police services, more than 54% originated from Spain. The growing importance of the herbal cannabis market in France is corroborated by the scale of plant confiscations, with more than 137,000 being seized in France in 2017, a very high level. The other key event is the very strong growth in THC levels in cannabis resin and herbal cannabis in the last 10 years, which is explained by the cultivation of hybrid cannabis varieties, in both Europe and Morocco (Afsahi and Chouvy 2015; Stambouli *et al.* 2016). This growing use of hybrids probably explains, given the price of the seeds and higher production costs, the retail prices of herbal cannabis in France, which has never been so high (€10 *vs.* €7.50-€8 in 2011). This increase in herbal cannabis price is also due to the fact that an increasing percentage of consumers appear to display a marked preference for "high-quality" substances.

Cocaine

The cocaine market, driven by regularly growing demand over the past twenty or so years, is highly dynamic. In 2017, seizures of cocaine have reached a record average (unprecedented in France), with 17.5 tonnes. The three key events in recent years are the stranglehold of organised crime networks which import cannabis resin onto this market; the proliferation of vectors that dispatch cocaine in France (postal parcels, "mules", container ships, Internet, etc.) (see T1.1.3) and the diversification of cocaine routes with the emergence of the French West Indies and French Guiana as a developing zone and secondary wholesale market. Albanian networks, already having a strong presence on the heroin market in certain regions, have been steadily emerging in the field of cocaine trafficking in the past two years.
Crack seizures reached more than 8 kg in 2016, corresponding to the average levels reached since the start of 2010. The price per gram of cocaine hydrochloride remained stable.

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 from the Netherlands and Belgium (more than 40% of seizures in 2017). Heroin seizures have substantially declined compared to 2016, marked by a rare seizure of 260 kg originating from Turkey: falling from over a tonne to 658 kg.

The "quality" of the substance in circulation in France was somewhat poor, which caused certain users to switch to opioid medications such as morphine sulphates (Cadet-Taïrou and Gandilhon 2014) and/or buprenorphine (Subutex®). In 2017, the purity of brown heroin in seizures below 10 g (data from the STUPS© file) reached 14%, i.e. a relatively stable level compared to previous years.

Synthetic drugs

The synthetic drugs market is still dominated by MDMA/ecstasy. However, for the past few years, major changes have been observed with the development of the "crystal" form, which has attracted strong interest from younger generations (under 25s) in the recreational setting; this phenomenon transcends both cultural affiliation and social class. Furthermore, after years of decline, there has been a resurgence in the use of tablets in the recreational setting, whether in the commercial scene (clubs, discotheques) or the alternative scene (free parties, teknivals, etc.). This re-emergence goes hand in hand with a genuine marketing strategy by producers with larger, more potent, 3D tablets. Although a slight increase in the average content of MDMA per tablet has been observed, it is primarily the larger tablet mass since 2013 (from 279 mg to 316 mg in 2015) which has caused the increase in the quantity of MDMA per tablet (128 mg *vs.* 83 mg in 2013).

Moreover, the supply network is organised via user-dealer micro-networks who obtain supplies in Belgium and the Netherlands where most of the European production units are based. The high level of seizures of ecstasy tablets in 2017 (see Table 1) clearly confirms the dynamics of this market whose strong demand keeps the price of the tablet at a high level (in contrast to the "crystal" form for which the price per gram has rather tended to fall since 2010).

Methamphetamine is very scarce on the French market due to the lack of structured supply. It is distributed within tightly restricted social circles. In 2014 and 2015, however, this substance was identified in the Bordeaux (Aquitaine) region via the SINTES scheme. According to user claims, it originates from purchases on the deep web, where it sells for between 20 and 30 euros as capsules, and between 80 and 120 euros per gram.

New psychoactive substances (NPS)

The number of new molecules identified felt again compared to previous years, despite a steady rise between 2008 and 2014 (with a major increase from 2011). Thus, only 15 new molecules were identified in 2017 compared to 45 in 2016 and 58 in 2014 (highest level reached). Given the limited hindsight in terms of the surveillance of NPS circulation, these data are currently difficult to interpret.

The market seems to be gradually structuring itself around molecules with a particularly strong presence over several years. Continuity of retail market trends are observed (small quantities destined for the end user), for instance predominantly involving cathinones, through 3-MMC and 4-MEC (see T1.1.5).

On the other hand, other molecules which were frequently observed in the past two years have suddenly disappeared from view in seizures and controls, such as 4-fluoroamphetamine (4-FA: 90 seizures in 2013, 89 in 2014 and 12 in 2015) and methoxetamine (MXE: 34 seizures in 2013, 35 in 2014 and 13 in 2015). The explanation, for 4-FA, could reside in the changes to the online supply of the main sales sites based in the Netherlands and targeting the French-speaking market, and, for MXE, in its European-wide classification.

Table 1: Quantities of drugs seized (in kilograms), from 2014 to 2017 and changes from 2016 to 2017 (in %)

Drugs seized	2014	2015	2016	2017	Change 2016-2017 (%)
Cannabis: resin	36,917	60,790	52,735	67,359	+ 28
Cannabis: herbal	10,073	16,835	18,206	20,220	+ 11

Cannabis: plants	158,592	153,895	126,389	137,074	+ 8
Heroin	990	818	1,080	658	- 39
Cocaine	6,876	10,869	8,532	17,500	+ 105
Crack	19	14	8.3	na	na
Amphetamines	260	385	274	238	- 13
Methamphetamines	61	101	78	122	+ 56
Ecstasy (tablets)	940,389	1,325,305	1,236,649	1,130,839	- 9
LSD (blotter)	2,390	4,478	9,447	na	na

Source: OSIRIS (OCRTIS)
na: not available

Table 2 : Change in retail median drug prices (in euros) since 2000

	TREND*				OCRTIS**		
	2000	…	2016	2017	2014	2015	2016
Heroin	59		42.5	39.7	35	35	35
Cocaine	84		85	79.4	65	65	65
Ecstasy (tablets)	15		10	10	8.5	10	10
Cannabis resin	na		7	5.4	6.5	7	7
Herbal cannabis	na		10	10.2	8.5	10	9
Amphetamines	15		15	15	na	15	15
LSD (blotter)	8.5		10	na	na	10	10

Source:
**: TREND ethnographic observations*
***: OCRTIS Price Barometer*
na: not available

*T2.2 **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.*

TREND data show that, although sale of synthetic cannabinoids was observed, this is limited to small closed circles of individuals specifically seeking this type of substance. Aside from these rare cases, local attempts to deal are mainly observed, although these do not appear to persist for more than a few months.
The NPS market in France has thus remained somewhat confined to the private sphere despite sporadic appearances on the street market or around recreational settings. However, one exception should be noted: in Mayotte, a French department in the Indian Ocean (Cadet-Taïrou and Gandilhon 2018). Since 2011, a new substance, known locally as "*la chimique*" or "chemical tobacco" (a mixture of synthetic cannabinoids, tobacco and alcohol) has emerged on the street market and is overwhelmingly affecting vulnerable young men. The substance has spread from a group of regular users, made up of socially integrated individuals who order it on the Internet, to the population mainly via young gangs. Although Mayotte had somewhat escaped the scourge of traditional criminal networks due to its geographical location away from the main trafficking routes, the Internet has found a way to overcome its isolation.

T2.3 Please comment on the possible explanations of short- and/or long-term trends in the following drug law offences data: supply (if possible distinguish between trafficking, cultivation/production, wholesale, retail, and other supply offences) and possession/use
Examples: changes in law enforcement practices, government priorities, patterns of drug use, sources of drugs.

*T2.4 **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.*

In terms of narcotics, the control of demand is a major aspect of law-enforcement service (police) activities. Hence, the majority of accused individuals are drug users, mainly for cannabis (as an indication, arrests currently represent less than 4% of the estimated number of active cannabis users). Between 2010 and 2016, the total number of individuals accused of narcotic use in France (metropolitan France and overseas) increased from nearly 142,300 to 164,000. Narcotics use is a type of offence that is especially susceptible to the intensity of police efforts, since it constitutes an offence "revealed" by police activity. It could therefore be worthwhile for police to target these drug use offences, which are cleared as soon as they are recorded, thus enabling a higher clearance rate to be easily achieved (Obradovic 2015).

T2.5 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.

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.

Cocaine was a striking phenomenon in 2016-2017, passing a new milestone in terms of availability and accessibility. These findings of the TREND network (Cadet-Taïrou *et al.* 2017) are corroborated by data obtained from the law-enforcement services with unprecedented seizures in 2017, and a substance circulating on the retail market with the highest purity since the start of the 2000s.

France is clearly affected, through its overseas departments (Martinique, Guadeloupe, Guiana), by the marked expansion of cocaine production in Colombia (UNODC 2018). The most noteworthy finding in this respect is the dramatic rise in trafficking originating from Guiana, evidenced both by the five-fold increase in the number of mules arrested in Guiana and mainland France since 2011, and by the growing proportion of cocaine originating from Guiana seized in France. A significant proportion of the French cocaine market is thought to be supplied by this overseas department. There are several types of traffickers: Surinamese criminal organisations who attempt to circumvent the security measures at Paramaribo airport by transiting via Cayenne, and local traffickers who exploit their links with the Guyanese diaspora in mainland France to supply the market in medium-sized towns in the French provinces.

Furthermore, this year once again confirms the role of the French Antilles as the nerve centre for the transit of Colombian cocaine destined for mainland France, namely via container ships between the ports of Fort-de-France (Martinique) and Le Havre, France's largest commercial port. Cocaine seizures there have been steadily increasing, reaching 3.5 tonnes in 2017 *versus* 1.5 tonnes in 2016 and 643 kg in 2015. In 2017, approximately 6 tonnes of cocaine in total were seized in French ports, and nearly 90% of seizures from container ships were in Le Havre.

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.

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.*

The OSIRIS study was initiated by the OFDT in 2016 in partnership with OCRTIS and MILAD to conduct the most in-depth possible review of heroin trafficking. A report is expected to be published in September 2018.

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. Sources and methodology.

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

T5.1 Please list notable sources for the information provided above.

Afsahi, K. and Chouvy, P.-A. (2015). Le haschich marocain, du kif aux hybrides. Drogues, enjeux internationaux. OFDT (8).

Ben Lakhdar, C., Lalam, N., Weinberger, D., Spilka, S. and Janssen, E. (2015). Estimation des marchés des drogues illicites en France : synthèse. Institut National des Hautes Etudes de la Sécurité et de la Justice (INHESJ), Paris. Available: https://bdoc.ofdt.fr/doc_num.php?explnum_id=21396 [accessed 08/08/2018].

Cadet-Taïrou, A. and Gandilhon, M. (2014). L'usage de sulfate de morphine par les usagers de drogues en France : tendances récentes (2012-2013). Note 2014-9 (10 juillet 2014) du dispositif TREND de l'OFDT à destination de l'ANSM [Morphine sulphate consumption by French drug users. Recent trends (2012-2013)]. OFDT, Saint-Denis.

Cadet-Taïrou, A., Gandilhon, M., Martinez, M. and Néfau, T. (2015). Substances psychoactives en France : tendances récentes (2014-2015). Tendances. OFDT (105).

Cadet-Taïrou, A., Gandilhon, M., Martinez, M., Néfau, T. and Milhet, M. (2016). Substances psychoactives, usagers et marchés : les tendances récentes (2015-2016) [Psychoactive substances, users and markets: recent trends (2015-2016)]. Tendances. OFDT (115).

Cadet-Taïrou, A., Gandilhon, M., Martinez, M., Milhet, M. and Néfau, T. (2017). Substances psychoactives, usagers et marchés : les tendances récentes (2016-2017) [Psychoactive substances, users and markets: recent trends (2016-2017)]. Tendances. OFDT (121).

Cadet-Taïrou, A. and Gandilhon, M. (2018). L'offre, l'usage et l'impact des consommations de « chimique » à Mayotte : une étude qualitative. OFDT, Saint-Denis. Available: https://www.ofdt.fr/publications/collections/rapports/rapports-d-etudes/rapports-detudes-ofdt-parus-en-2018/loffre-lusage-et-limpact-des-consommations-de-chimique-mayotte-une-etude-qualitative/ [accessed 08/08/2018].

Europol (2017). How illegal drugs sustain organised crime in the EU. Available: https://www.europol.europa.eu/publications-documents/how-illegal-drugs-sustain-organised-crime-in-eu [accessed 07/08/2018].

Gandilhon, M. (2014a). Les Antilles françaises (Martinique, Guadeloupe, Saint-Martin) et la Guyane au coeur du trafic international de cocaïne. Note n°2014-9. OFDT, Saint-Denis.

Gandilhon, M. (2014b). Les précurseurs chimiques, dimension méconnue du marché mondial des drogues illicites. Drogues, enjeux internationaux. OFDT (7).

Gandilhon, M. and Cadet-Taïrou, A. (2015). Les usages de drogues en espace rural. Populations, marchés, réponse publique. Tendances. OFDT (104).

Gandilhon, M. (2016). Les jeunes dans les trafics de drogues illicites. In: Beck, F. (Ed.), Jeunes et addictions. OFDT, Saint-Denis.

Gandilhon, M. and Weinberger, D. (2016). Les Antilles françaises et la Guyane : sur les routes du trafic international de cocaïne [French Antilles and Guiana: on the international cocaine trafficking routes]. Drogues, enjeux internationaux [Drugs, international challenges]. OFDT (9).

Masson, C. and Gandilhon, M. (in press). État des lieux du marché de l'herbe de cannabis et de la cannabiculture en France. OFDT, Saint-Denis.

MILDECA (2018). Alcool, tabac, drogues, écrans : Plan national de mobilisation contre les addictions 2018-2022. Mission interministérielle de lutte contre les drogues et les conduites addictives, Paris.

Néfau, T., Martinez, M., Cadet-Taïrou, A., Gandilhon, M., Réseau Trend and Dispositif Sintes (2015). What is new on ecstasy in France? Shapes, rates and user perceptions. Poster presented at the Lisbon Addictions Conference. OFDT, Saint-Denis. Available: http://www.ofdt.fr/BDD/publications/docs/p_ecstasy_Lisbon2015.pdf [accessed 17/07/2017].

Obradovic, I. (2015). Trente ans de réponse pénale à l'usage de stupéfiants. Tendances. OFDT (103).

OFDT (2015). Drogues, chiffres clés (6e édition). OFDT, Saint-Denis. Available: http://www.ofdt.fr/ofdtdev/live/publi/dce.html [accessed.

Stambouli, H., El Bouri, A. and Bouayoun, T. (2016). Évolution de la teneur en Delta9-THC dans les saisies de résines de cannabis au Maroc de 2005 à 2014. Toxicologie Analytique et Clinique 28 (2) 146-152.

UNODC (2018). World drug report 2018. United Nations Office on Drugs and Crime, New York. Available: https://www.unodc.org/wdr2018 [accessed 08/08/2018].

Weinberger, D. (2013). Le Venezuela : un épicentre du trafic régional et mondial de cocaïne. Drogues, enjeux internationaux. OFDT (6).

Besides these bibliographic references, 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). These data indicate, among other things, the quantities of illegal drugs seized in France, the prices and 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, give 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.

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.
The analyses performed within the SINTES scheme contribute to the knowledge on the composition of the substances (see methodology below).

T5.2 Where studies or surveys have been used please list them and where appropriate describe the methodology?

Methodology

Data on 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, the collection of information on prices was reinforced by data collected from 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.

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.

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

- continuous qualitative data collection in urban settings and the party scene, 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