Drug market and crime workbook

2020

France

Contributors

Michel Gandilhon, Magali Martinez, Caroline Protais, Victor Detrez (OFDT)

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Supervision: Julien Morel d'Arleux

Coordination and editorial: Marc-Antoine Douchet

Contribution to the workbooks
1. *Drug Policy*: Cristina Díaz-Gómez, Marc-Antoine Douchet
2. *Legal Framework*: Caroline Protais, Marc-Antoine Douchet, Cristina Díaz-Gómez
3. *Drugs*: Olivier Le Nézet, Magali Martinez, Clément Gérome, Michel Gandilhon
4. *Prevention*: Carine Mutatayi
5. *Treatment*: Christophe Palle, Anne-Claire Brisacier
6. *Best Practice*: Carine Mutatayi, Anne-Claire Brisacier, Christophe Palle
7. *Harms and Harm Reduction*: Anne-Claire Brisacier, Cristina Díaz-Gómez, Magali Martinez
8. *Drug Market and Crime*: Michel Gandilhon, Magali Martinez, Caroline Protais, Victor Detrez
9. *Prison*: Caroline Protais, Anne-Claire Brisacier, Christophe Palle, Julien Morel d'Arleux
10. *Research*: Isabelle Michot, Maitena Milhet

Proofreading (French version): Julien Morel d'Arleux (OFDT); Nicolas Prisse, president of the Interministerial Mission for Combating Drugs and Addictive Behaviours, and the project managers of the MILDECA.

Proofreading (English version): Anne de l'Eprevier

Bibliographic references: Isabelle Michot

Legal references: Anne de l'Eprevier

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Domestic drug market (summary of T1.1.1 & T1.1.2)

Herbal cannabis is the only illegal substance for which production is seen in France. While growing herbal cannabis in metropolitan France was mainly the work of small, self-sufficient growers, the situation began to change at the start of the 2010s with the emergence of cannabis factories run by organised crime groups and with individuals investing in its commercial production.

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 Guiana) close to the major cocaine production (Colombia, Bolivia, Peru) and transit zones (Venezuela, Brazil, Suriname).

Cannabis resin used in France comes from Morocco and usually transits through Spain while herbal cannabis is imported mainly from Spain, the Netherlands and Belgium.

The cocaine used in France is produced mainly in Colombia. It mainly passes via sea routes through the south via Spain (Algesiras) and the north via the Netherlands (Rotterdam), Belgium (Antwerp) and to a lesser extent Germany (Hamburg). In recent years, cocaine, transiting in particular through Brazil and 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 since 2011.

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 (summary of T1.2)

In 2019, the total number of persons accused of narcotic use in France is 151 300 against about 161,300 in 2018. 8 out of 10 people accused of a drug-related offence corresponded to simple use. The number of people implicated in trafficking offences (17 041) increased by 10% compared to 2018, and user-dealers (18 096), increased by 1%. In 2010, 90% of the arrests concerned the simple use of cannabis, 5% simple heroin use, and 3% simple cocaine use (since 2010 national statistics no longer provide details of arrests for each substance).

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

The National Plan for Mobilisation against Addictions (2018-2022) emphasises the importance of implementing 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.

In February 2020, the Ministry of the Interior officially announced the creation of OFAST (Anti-Narcotics Office), which succeeds OCRTIS (Central Office for the Repression of Drug-related Offences). This creation corresponds to the State's desire to increase cooperation between the various services in charge of law enforcement: police, customs, military police [*gendarmerie*] and justice. OFAST is organised into three divisions, "strategy", "intelligence" and "operations", to respond to the three missions "understand", "target" and "act". They are headed respectively by a customs administrator, a military police [*gendarmerie*] colonel and a divisional commissioner. At a territorial level, OFAST has eleven regional offices, five territorial detachments and plans to set up 28 operational drug intelligence units (CROSS).

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.

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 in mainland France, the situation is changing. At the start of the 2010s, “cannabis factories” began to appear. These factories are overseen by organised crime and use the investment of individual people in commercial cultivation.

The main producers of herbal cannabis can be classified as follows:

- Small growers, whose number is estimated between 150,000 and 200,000 persons (OFDT 2019), who produce for themselves or for their immediate circle of friends or family.
- 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 (Gandilhon *et al.* 2019), 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 almost exclusively from Morocco and usually transits through Spain. In 2018, of the 85.3 tonnes of resin seized by the police, almost 84% came from Spain (OCRTIS 2019a). 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 (Weinberger *et al.* 2019).

Cocaine

The cocaine used in France mainly comes from Colombia, the largest producer worldwide (UNODC 2019). To reach France, once the European continent has been reached, it mainly passes through the south via Spain (Algesiras) and the north via the Netherlands (Rotterdam) and Belgium (Antwerp). Over the past few years, the port of Le Havre became 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. The shipping line between the port of Santos in Brazil and Le Havre also seems to play an increasing role in supplying the French market. Therefore, in 2018, for the second consecutive year, Brazil was the first country of origin for cocaine seized in France. Guiana is increasingly establishing itself as a major source of cocaine destined for France or, to a lesser extent, for the Netherlands. There has been a major increase in air trafficking by “mules” between Guiana and mainland France since 2010.

Heroin

The heroin used in France mainly comes from Afghanistan (brown heroin) and mostly 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.

In recent years, some of the Afghan heroin has been trafficked on African routes, passing through East Africa (Kenya), or even South Africa. By 2018, South Africa was the fourth largest source country for heroin of known origin (OCRTIS 2019a). 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). Given the sharp increase in cocaine prevalence in the general population since 2014, this estimate is definitely outdated, as is the increase in daily cannabis use. 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 of 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.

In 2020, the OFDT published a new estimate of cannabis revenue in France based on the 2017 expenditures of 18-64-year-old and 17-year-old cannabis users. This would amount to at least 1.2 billion euros, an increase of 72% compared to 2010 (Spilka and Legleye 2020).

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 lies in Spain's major role as a gateway and rebound area for cocaine destined for the rest of Western Europe, where French criminal gangs are well established. It is in the south of the Iberian Peninsula that they wholesale trade resin from metropolitan wholesalers and launder the money made from trafficking. 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.

The French drug market is increasingly influenced by the three overseas departments located near cocaine production areas, particularly Colombia.

Latin America and the West Indies supply mainland France through two main means: maritime and air.

Maritime supply is by far the most prominent. Almost 57% of cocaine seizures made in 2018 are reported to be carried out through this means, with containers playing a major role, which remain traffickers' preferred concealment method (OCRTIS 2019a).

Martinique and Guadeloupe are no longer only areas where free base cocaine is used (crack) but it now plays an increasingly important role in supplying the mainland market through maritime routes (Obradovic 2020). In this respect, given its status as France's leading port for container transportation, linking it to the French West Indies and Latin America, the port of Le Havre is an important gateway for cocaine on the French and European markets, as are other major ports in northern Europe, such as Rotterdam, Antwerp and to a lesser extent Hamburg. However, based on the cocaine seized in these three ports, Le Havre remains much less affected than the Dutch and Belgian ports. In 2018, for example, 2.5 tonnes of cocaine were intercepted compared to 50 tonnes in the port of Antwerp and 20 tonnes in Rotterdam (OCRTIS 2019a).

The second major trafficking means is by air transport, representing about 19% of seizures in 2018. At the centre of air routes, Guiana's role continues to grow. The increase in air traffic control between Paramaribo, the capital of Suriname, and Amsterdam is probably the main reason for Guiana's increasing role in supplying cocaine to mainland France. 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 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. In 2018, police services recorded an increasing collaboration of these networks with the criminal community that controls the cocaine and crack market. The cocaine which passes via 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 this price and given the 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.

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). Nevertheless, the preferred vector is still "mules" carrying small quantities of the substance in their bodies or luggage.

Heroin trafficking in France is highly fragmented and relatively diversified. In addition to Turkish criminal organisations, there are small groups from the outskirts of the metropolitan areas that supply the Netherlands. 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 Auvergne-Rhône-Alpes region, operating in both the wholesale and retail market. They tend to take root also in other regions such as Bretagne and Nouvelle-Aquitaine.

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 2018, the median price per kilogram of cocaine is €31 000 against €34 000 in 2016, i.e. a 9% decrease. A wholesale cocaine market 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 Guiana, the kilogram of cocaine is around €5 000.

In 2018, the price per kilo of cannabis resin is about €2 000, the price per kilo for herbal cannabis is €3 000 and €15 000 per kilo for heroin (OCRTIS 2019a). All these prices are stable compared to 2016.

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.

Cannabis

According to the OCRTIS (Central office for the repression of drug-related offences), the median price for herbal cannabis in 2018 was approximately €10 per gram and ranged from €7 to €10 per gram. The median price of cannabis resin is €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 remained stable, in the region of €9.5 in 2018, against €10 in 2017. However, the price of cannabis resin has slightly increased, from €5.5 in 2017 to €6 in 2018 (Gérome *et al.* 2018).

The average potency of cannabis resin seized (data from the STUPS© file) reached its highest level ever, recorded at 28%. In terms of the OFDT's SINTES scheme, the average potency of the analysed samples (31) was 26%. However, in recent years, the THC content of herbal cannabis has tended to stabilise at around 11 % (INPS 2019)

Cocaine

According to the OCRTIS, the price per gram of cocaine hydrochloride was €70 in 2018. According to the TREND scheme, this price was around €71.5 in 2018 against €78 in 2017.

The average potency of seized cocaine (retail, semi-wholesale and wholesale markets) was 65,82 % in 2019, slightly down compared to 2018 (66.31%) with a maximum level of 100% (INPS 2019). The average potency of cocaine seized in the street (<10%) in 2019 was 60,3 %. This data is comparable to the data relating to the samples (127 samples, 106 quantifications) sent to SINTES: 67.1% except that this data is more a reflection of the retail market.

Heroin

In 2018, the median price for a gram of brown heroin was approximately €35 according to the OCRTIS. In 2018, this price was €40 on average according to the TREND scheme.

The average potency of seized brown heroin in 2019, i.e. 19,31 % was higher than in 2018 (16,47 %). This is the highest rate recorded in 9 years (INPS 2019). The average potency of heroin seized in the street (<10%) in 2019 was 21,9%. The samples collected as part of the SINTES scheme had an average potency of 21,4% (70 samples, including 58 quantifications) compared to 13,5% in 2019.

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 2018 average price of a tablet of ecstasy was €10, 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 2018, 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.

There was a very sharp increase in the quantities of MDMA in ecstasy tablets collected through the SINTES scheme in 2018. While the total amount of MDMA in a tablet averaged at 89 mg in 2017, samples collected in 2018 contained an average of 185 mg of active ingredient with a maximum potency of 275 mg (16 samples, including 13 quantifications). For powder or crystal forms, the average potency observed decreased from 78% in 2017 to 64% in 2018 (low number of samples: 7, including 6 quantifications). Data obtained from police seizures in 2019 gives an average MDMA tablet content of 33.36% (INPS 2019).

New psychoactive substances (NPS)

In 2019, there were 1 255 seizures or checks[1] related to 111 different NPS[2] (against 1 199 seizures or checks in 2018 related to 110 NPS). The cathinones category is the most widely represented (442 seizures concerning 35 molecules), ahead of arylcyclohexylamines (282 seizures concerning 7 molecules) and mainly ketamine (251 seizures), followed by synthetic cannabinoids (250 seizures with 19 different molecules identified).

[1] 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.

[2] The data presented concern synthetic substances and exclude plants or extracts perceived as new psychoactive substances (NPS) by the EMCDDA. However, they include products that are old and do not fit well with the idea of "novelty" in the European definition, such as ketamine, DMT or GBL.

The NPS market continues to be characterised by the presence of cathinones and hallucinogenic products from various families, the latter gradually taking precedence over synthetic cannabinoids over the last two years. Ketamine, 3-MMC, 4-MEC and DMT have consistently been among the 10 (or even 3) most seized substances since 2014. For example, the top four seizures in 2019 are relatively homogenous, both in terms of number of seizures and kilograms: 3-MMC (304 seizures, 25 kg and 213 tablets seized) comes first, followed by ketamine (265 seizures, 154 kg), DMT (83 seizures for 88 kg) and GHB (58 seizures, 53 of which were liquid form, totalling 5.5 litres). Apart from this hard core, the cannabinoids JWH-210, JWH-122, 5F-ADB (5F-MDMB-PINACA) and 2C-B and GHB remain among the top 10 NPS seized since 2014. In addition, JWH-018 (one of the very first synthetic cannabinoids to have been visible on the market and which had disappeared since 2013) is visible again (31 seizures for just over 1 kg).

Also noteworthy are the particular quantities of psychedelics seized this year, although their number is small (7 seizures for more than 700 kg).

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 2019, the total number of persons accused of narcotic use in France (metropolitan France and overseas) is about 151 330. Aside from these drug use offences (80% of the total), the police services and French *Gendarmerie* accused 18 096 individuals of drug use-resale and 17 041 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.

In 2018, according to the Ministry of Justice, DLO convictions for main offences (single or multiple) represented 12% of all criminal record convictions, i.e. around 66 800. These offences can be broken down as follows: illicit use (52%), possession-acquisition (44%), supply and sale (2.4%), trade-transport (0.7%), import-export (53 cases), helping others use (52 cases) and other DLOs (228 cases). In the majority of possession-acquisition offences, offenders were sentenced to prison (85%), while using offences were mainly sanctioned by fines (72%). The number of successful fixed penalty notices amounted to 8 558.

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 16% of road safety offences, but their numbers almost doubled between 2013 (18 827) and 2018 (35 435). To compare, in 2018 convictions relating to driving under the influence of alcohol account for 42% of 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.

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 Plan for Mobilisation against Addictions (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 one foreign country (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).

In March 2019, in order to deal with the significant increase in cocaine trafficking from Guiana, the Ministry of Justice, Overseas Ministry, Ministry of Health and Ministry of the Interior, as well as French Customs, signed a protocol implementing the interministerial action plan to combat the phenomenon of "mules" coming from Guiana. The aim of this protocol is to improve and better coordinate the efforts of the different departments of all the signing ministries, both in mainland France and Guiana. The protocol particularly provides for creating an OCRTIS branch at Orly airport in September 2019, increasing the number of customs staff at Orly airport responsible for checking for smugglers from Guiana, increasing the number of staff from the gendarmerie research brigade in Saint-Laurent du Maroni, creating new hospital rooms in Cayenne, making it possible to double the number of in corpore mules who are treated, and more generally, improving and increasing controls and adopting a targeted approach in Guiana and mainland France. This action plan has been incorporated under measure No. 20 of the interministerial plan to combat narcotic drugs presented on 17 September 2019, a measure piloted by the Ministry of Justice. A half-yearly review is drawn up to measure the progress made and to decide how it should be continued. The first half of 2020 was marked by the health crisis linked to the Coronavirus and the drastic drop in air traffic between Guiana and mainland France from March onwards. The action plan should be extended into the second half of the year, making it possible in particular to assess the impact of the installation of millimetre-wave scanners at Cayenne airport in a context of gradual recovery of air traffic. Furthermore, CIFAD [Interministerial Training Center for the Fight Against Drugs] also became a service of OFAST as of 1 April 2020.

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 €25.67 million in 2019.

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[3]), 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 (see T2.1). The wave of attacks that occurred in Paris, particularly from 2015 onwards, and the resulting increased presence of law-enforcement services in public places has led to "new" forms of trafficking developing. Therefore, in recent years, "central purchasing offices", also known as "Cocaine Call Centres", have appeared in the Paris region, which provide home delivery through texts and messaging systems such as WhatsApp. In 2017, 2018 and 2019, it seems that this phenomenon is also developing in other major cities.

This development has led some observers to speak of a kind of "uberisation" of trafficking (EMCDDA 2018). This would be based on two phenomena: the emergence of new key figures in the drug market and using new information and communication technologies (ICT). However, it is important to remain weary. Firstly, because there is no third party between customer and seller, i.e. an intermediary set up as a platform that would benefit from putting them in contact with each other. Secondly, because it seems that the criminal

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

groups in France that are behind the creation of central purchasing agencies are in no way atypical and are rather part of the circles that have been at the heart of trafficking for decades in France. Given this, the undeniable use of ICT is not enough to evoke a massive "uberisation".

Regarding the emergence of the Internet as a favoured vector for trafficking, the law-enforcement services (police, French *Gendarmerie*, Customs) 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 development of customs seizures in postal or express freight packages shows that narcotic drugs have been sold and purchased online since 2013. More recently, the disbanding of French-speaking or international sales platforms has also demonstrated the sustainability of this market. In France, online operations are carried out by the National Intelligence and Customs Directorate (DNRED) in collaboration with the Central Office for combatting Crime related to Information Technology and Communications (OCLCTIC) of the Central directorate of the judicial police (DCPJ). This does not only concern NPS, but also affects substances such as cocaine, MDMA/ecstasy, heroin, and even methamphetamine (Cadet-Taïrou *et al.* 2015).

Cannabis

As is the case in the rest of Europe, the cannabis market in France is changing, playing an ever-increasing role in users using herbal cannabis (Gandilhon *et al.* 2019) and in supplying criminal networks. In 2018, herbal cannabis seizures reached a record level at almost 30 tonnes. Herbal cannabis now accounts for almost 26% 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. Therefore, nearly 90% of the herbal cannabis seized in France comes from Spain. When the destination is known, a significant amount is not destined for the French market. Other European countries are targeted by Spanish herbal cannabis (Germany, Italy, United Kingdom, the Netherlands, etc.). The growing importance of the grass market in France is corroborated by the scale of plant confiscations carried out by the national police and military police [*gendarmerie*], 183,034 plants of which were seized in the country in 2019, the highest level ever reached in France. In 2019, OFAST reports a significant increase in indoor cultivations of more than 300 plants. (OFAST 2020).

While a significant proportion of these seizures occurred in the overseas territories in French Polynesia, large plantations were also disbanded in mainland France, both indoors in the north and outdoors in the Mediterranean hinterland.

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 2019, seizures reached more than 15.7 tonnes (OFAST 2020) compared to 16.3 tonnes in 2018. This level, although falling slightly, remains high above the average level observed between 2011 and 2018, i.e. 10.2 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 growing implication of the French West Indies and Guiana as a secondary wholesale market and a sourcing zone. 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, as well as Guiana networks.

In 2018, crack cocaine seizures reached one of their highest levels with over 20kg. This substance is mainly trafficked in Paris and the Parisian region. Manufacturing and reselling crack is carried out by small-scale dealers from Senegal that have been involved in this market for around 30 years. The cocaine supplied to these networks is believed to originate mostly from West Africa, via drug mules using the commercial airborne route. A supply chain from Guiana would also emerge. The price per gram of cocaine hydrochloride has been declining steadily since 2016.

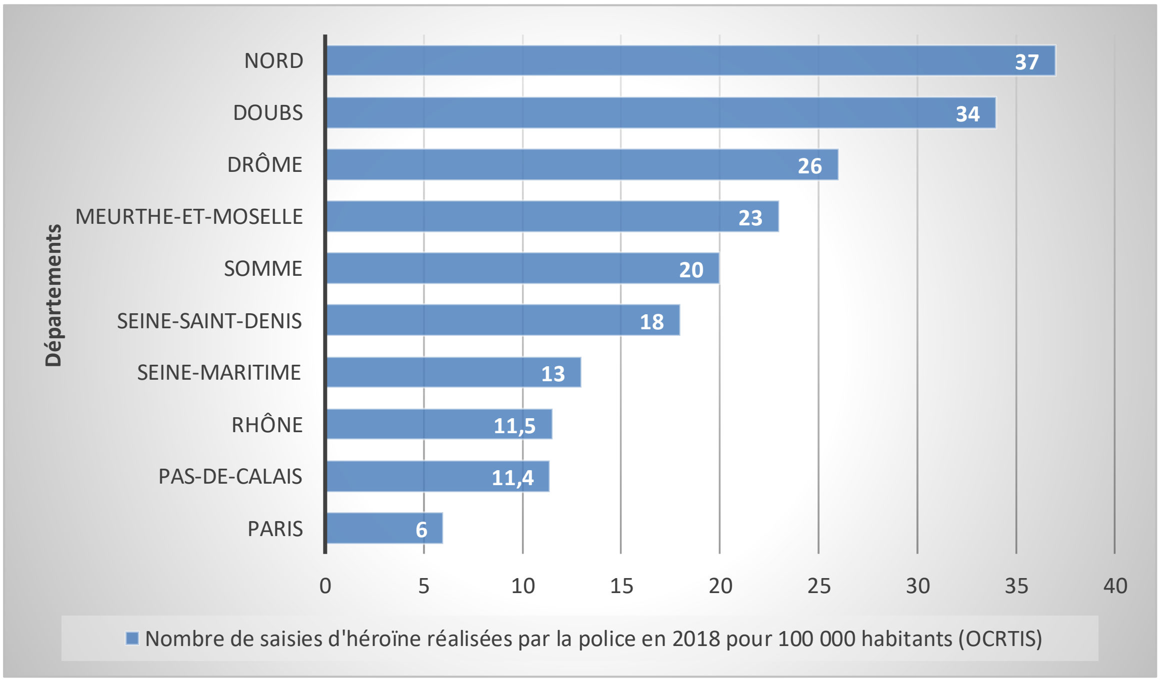
Heroin

The heroin market, based on the proportion of annual users in the population aged 18-64, is much smaller than the cocaine market (0.2% for heroin *vs.* 1.6% for cocaine). However, it is one of the largest markets in Western Europe.

In 2017, Afghanistan's 9,000 tonne opium production records, (UNODC 2018) and the disbanding of eight heroin laboratories in the Netherlands (EMCDDA 2019), which is the main source of supply for the French market, suggested that there would be a surge in supply in France. This seems to have been the case. Seizures in 2019 reached their third highest level in history with more than 1 tonnes (*vs.* 1.1 tonnes in 2018), while the purity of the substance, measured by the samples analysed by INPS, was the highest in 10 years.

With regards to availability, OCRTIS noted an increase in the amount of heroin in the territory, while highlighting the great regional disparities in this area. Therefore, due to the proximity of the Netherlands and Belgium, northern (Nord-Pas-de-Calais, Somme) and eastern France (Doubs, Meurthe-et-Moselle) were greatly affected. It seems that in 2018, the Lille metropolitan area experienced an increase in trafficking and that it is becoming a national centre for the wholesale resale of heroin for the French networks. When they are located in the south of the country, they would tend to favour northern France over Spain.

Number of heroin seizures made by the police in 2018 per 100,000 inhabitants, in several departments of metropolitan France



Source: OCRTIS

The OFDT's TREND scheme, through its network of sites, reported that there are heroin dealing spots in Bordeaux and Toulouse, while the Lyon site confirms that Albanian networks have settled in the Auvergne-Rhône-Alpes region (Drôme, Rhône).

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 mainland 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.

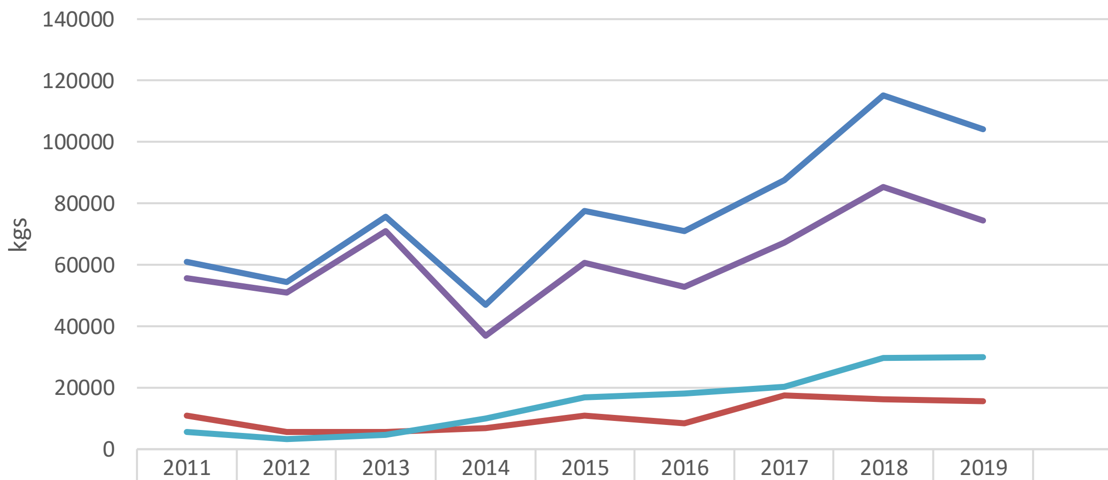
New psychoactive substances (NPS)

The number of identifications of new molecules has seen a slight upward trend, whereas it has been in drastic decline since 2014, when it peaked (57 identifications compared to 16 in 2018). Thus, 25 new molecules were identified in 2019, with, as in 2018, a greater presence of benzodiazepines than in the past (4 identifications) and, above all, an increase due to the discovery of new synthetic cannabinoids in e-liquids (see workbook on Drugs).

The market continues to be structured around molecules that have been present for several years, but with a decrease in the retail market (small quantities for the end consumer) and the emergence of a "semi-wholesale" market for the most observed molecules. These are molecules known to be related to chemsex practices (3-MMC and GHB), but which also correspond to recreational practices in clubbing contexts, and products that more usually concern the alternative festive setting. It is thus possible that older molecules such as DMT and 2C-B are gradually becoming better known by new generations of users, while ketamine is objectively observed in areas of consumption, which until now, were not previously its own.

It should also be noted that Pregabalin and Phenibut have higher visibility in seizures, with 22 and 50 kg respectively (compared to 9 and 33 kg in 2018).

Quantities seized in France between 2011 and 2019



	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cannabis	61091	54388	75676	46990	77625	70941	87579	115175	104292
Cocaine	10834	5602	5612	6876	10869	8540	17500	16357	15761
Cannabis (resin)	55641	51118	70918	36917	60790	52735	67359	85354	74340
Cannabis (herbal)	5450	3270	4758	10073	16835	18206	20220	29821	29952

Cannabis Cocaine Cannabis (resin) Cannabis (herbal)

Table 1 : Quantities of drugs seized (in kilograms), from 2016 to 2019 and changes from 2018 to 2019 (en %)

Drugs seized	**2016**	**2017**	**2018**	**2019**	**Evolution 2018-2019 (%)**
Cannabis: resin	52 735	67 359	85 354	74 340	- 13
Cannabis: herbal	18 206	20 220	29 800	29 952	+ 0.5
Cannabis: plants	126 389	137 074	138 561	183 034	+ 32
Heroin	1 080	658	1 100	1 073	- 2.4
Cocaine	8 532	17 500	16 400	15 761	- 3.8
Crack	8,3	na	20	na	
Amphetamines	274	238	208	na	
Methamphetamines	78	122	126	na	
Ecstasy (tablets)	1 236649	1 130 839	na	1 699 848	
LSD (blotter)	9447	794	2 979	na	
Ketamine	126	277	249	na	

Source : OSIRIS (OCRTIS-OFAST)
na: not available

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

	TREND*				OCRTIS**		
	2000	2016	2017	2018	2015	2016	2017-2018
Heroin	59	42.5	40	40	35	35	35
Cocaine	84	85	80	71.5	65	65	70
Ecstasy (tablets)	15	10	10	10	10	10	10
Cannabis resin	na	7	5,5	6	7	7	7
Herbal cannabis	na	10	10	9.5	10	9	10
Amphetamines	15	15	15	12	15	15	15
LSD (blotter)	8.5	10	10	na	10	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.*

Contrary to previous years, the consumption of e-liquid containing synthetic cannabinoids is no longer a reality that can only be observed through the forums. Their resale on the physical market is demonstrated on a geographical crescent including north-western France. The first signals appeared in 2018, with the Brest region as the epicentre. (Roussel *et al.* 2018). Synthetic cannabinoids are sold as e-liquid refills, on the outskirts of high schools, sometimes with fancy names in the west (e.g. PTC for "pète ton crâne" [crack your skull]) or presented as CBD (cannabidiol). Young people are rarely aware of what they are consuming and their experience with the product is generally negative, with unconsciousness, headaches, vomiting, anxiety attacks and dizziness. (Fosse *et al.* 2019; Salle *et al.* 2019). More than 100 cases have been identified, without being biologically or analytically documented. Their number is undoubtedly largely underestimated, because the generally mild nature of the symptoms leads the professionals supervising the young people or the health professionals receiving them to not investigate further, nor to assume that they are taking synthetic cannabinoids. Similar facts, also documented to varying degrees, have been reported in the United States, Germany and Great Britain.

The French department of Mayotte located in the Indian Ocean is also characterised by a specific practice of consumption of synthetic cannabinoids. (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. 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. In 2019 this practice seems to have been sporadically exported, in the context of consumption of adulterated cigarettes and fraud in the city of Roanne (a city in the north of the Auvergne-Rhône-Alpes region).

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)
- 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 2018, the total number of individuals accused of narcotic use in France (metropolitan France and overseas) increased from nearly 142,300 to more than 150 000. 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. It is not necessary to repeat the information.

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.

Concerning the New Psychoactive Substances (NPS), hallucinogens were present in significant quantities in 2019, with phenethylamines representing 770 kg in blotting paper (25B-NBOMe, 1P-LSD, ALD-52), tablets (mainly 2C-B with 4 586 capsules) and then DMT and GHB in liquid form (23 and 5.5 litres respectively). This presence is also visible in common narcotics such as LSD. This year, customs also reported many products not considered as NPS but atypical in nature or packaging. There is a significant presence of methamphetamine and fentanyl (in transit through the territory), benzodiazepines with a marketing authorisation (MA), amphetamine cut with two former synthetic cannabinoids, including UR-144 (found sporadically in cocaine in recent years).

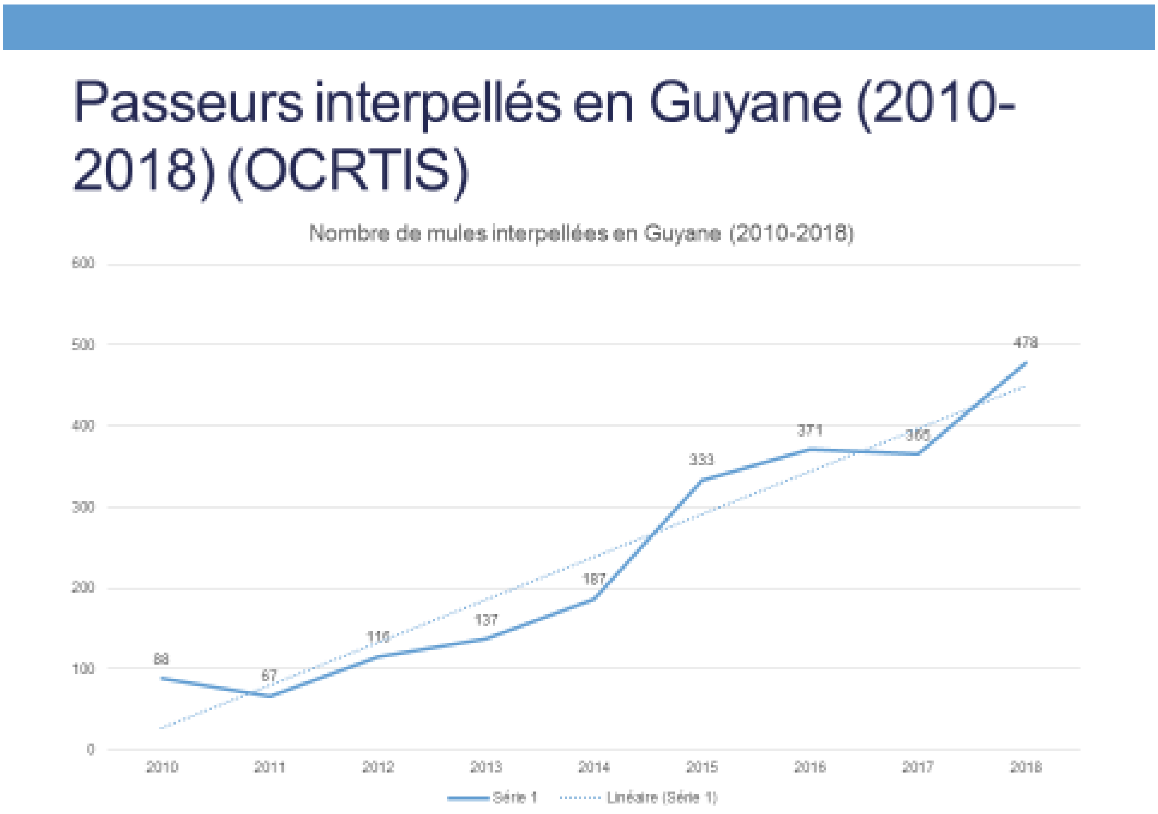
With regard to synthetic opioids, apart from the particular seizure of 10 kg of fentanyl destined for Scotland, there has been a clear backlash with a single seizure of Ocfentanil, cut with degrading UR-144.

It should be noted that the large amount of methamphetamine seized in the country (approximately 500 kg) is primarily due to a seizure of 391.4 kg from a truck travelling between Spain and Germany.

In 2019, as in the two previous years, the key phenomenon is the increase in the availability and accessibility of cocaine. These findings of the TREND network (Cadet-Taïrou *et al.* 2017) are corroborated by data obtained from the law-enforcement services 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).

Number of "mules" arrested in Guiana (2010-2018)

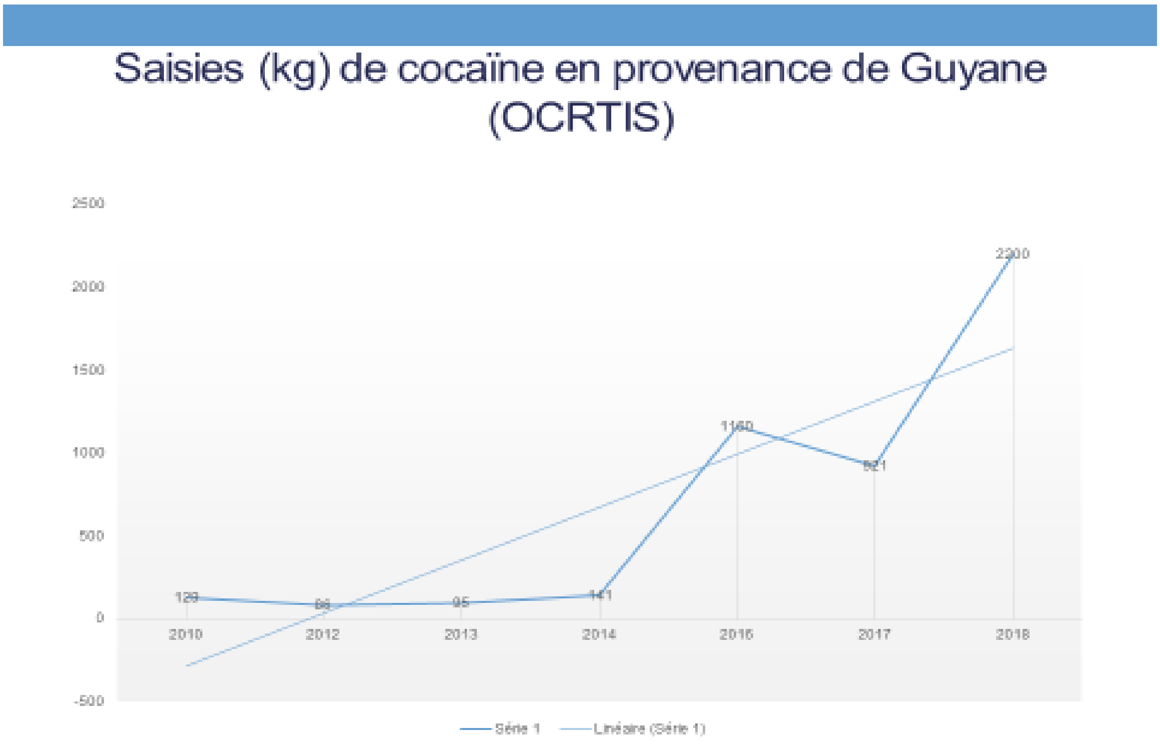


Source: OCRTIS

In 2018, mule trafficking from Guiana increased further. The number of smugglers arrested in French Guiana and mainland France increased by 122%, going from 608 to 1 349 (OCRTIS 2019b). The quantities seized amounted to 2.2 tonnes, compared to 921 kg in 2017.

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. The new phenomenon in 2018 is the links that Guyanese industries seem to be forging with the metropolitan cocaine networks, as they want to procure wholesale supplies for lower prices than those recorded in Europe.

Seizures (kg) of cocaine from Guyana



Source: OCRTIS

The other striking phenomenon, highlighted by the TREND scheme in 2018 and 2019, lies in the profound changes observed in the organisation of trafficking in certain areas of social housing in major French cities. The development of home resale does not mean the end of the traditional model of direct resale targeting the most precarious populations or those from suburban areas, who continue to obtain their supplies there. Trafficking in suburban areas is constantly evolving and adapting, particularly to cope with repression and/or to increase its profitability. In recent years, the TREND scheme has seen the adoption of methods specific to the contemporary organisation of work, namely: the *outsourcing* of certain functions such as product transportation, which is increasingly reserved for specialised teams; *zero stock*, intended both to overcome storage problems and to cushion the effect of large seizures; the *flexibility* of work through the use of day work, with the phenomenon of "disposable" dealers, or shift work when the place of resale is open 24 hours a day and the sellers take turns.

When it comes to recruiting a flexible workforce, criminal networks draw from the pool of young people living in precarious situations on the outskirts or in the heart of metropolises. The sites in Lille, Paris and Rennes have paid particular attention to the recruitment of minors who have dropped out of school. Another strategy used by traffickers is to recruit "staff" not living at the actual resale sites, which they hire using applications such as Snapchat. In Marseilles, to ensure the continuity of trafficking, during the summer, it is not uncommon for this recruitment to involve young people from the Paris region. (Duport in press). This adaptability and innovation of drug sales networks has shown some effectiveness during the period of lockdown linked to the COVID-19 epidemic between March and May 2020. Faced with the confinement of their customers, many networks have been able to maintain, via social networks and applications, a link with the most socially and economically integrated fraction of their customers by developing home delivery (Gérome and Gandilhon 2020) and thus limiting economic losses.

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 OFDT has published a mission report on drug use on Reunion Island. (Gérome and Cadet-Taïrou 2020). This report shows that the discrepancies with mainland France in terms of the use of psychoactive products and the health consequences of such use can be explained in part by different situations regarding their availability and accessibility.

Réunion is indeed characterised by the rarity (or even absence) of certain products which have become considerably more widespread in mainland France over the last fifteen years. This is particularly the case for cocaine and MDMA. Ketamine, which has been spreading rapidly in dance-event settings in mainland France since 2015, seems to be particularly rare on the island. The situation is similar for heroin or crack. Compared to mainland France, sales prices are systematically doubled or even tripled These trends can be explained in particular by the geographical position of the island, which is far from the production areas (South America for cocaine, Afghanistan for heroin and the Netherlands and some Eastern European countries for MDMA) as well as from the main trafficking routes. According to the professionals, there are no places for dealing in public (where a sale is made conspicuously to a customer, during extended time slots, as is the case in some working-class neighbourhoods in mainland France). The sale of psychoactive products (except cannabis) in dance-event settings remains rare on the island and is limited to alternative events such as free parties or certain large-scale events. Most of the time, users obtain information from users/dealers they know before going to the site of the party.

However, there are signs of a gradual rapprochement of Réunionese patterns of use with those of mainland France. For example, local cannabis (known as "zamal") tends to compete with hybrid Dutch strains as well as with cannabis resin imported from mainland France. The availability of products consumed in festive event settings (primarily MDMA and to a lesser extent cocaine) is also increasing significantly. Two factors explain this increase: the intensification of purchases on the Internet by users/dealers on the one hand, and the multiplication of "mules" from mainland France on the other.

Lastly, cannabis is the only product that is easily accessible and available in Réunion, being produced locally without difficulty because of an island climate that is favourable to its cultivation. This is due to the existence of large-scale plantations (several hundred plants) in the island’s rural and steep areas. This production is intended for sale on the spot (many home cultivations, the limited production of which is resold and consumed within a limited circle of users) or for export to neighbouring islands. It enables growers/traffickers to earn sometimes comfortable incomes.

Two other reports on the situation in Guiana and on crack cocaine in the Paris region were produced by the OFDT on behalf of the local Regional health Agency and INSERM. They should be out by the end of 2020. In particular, they will make it possible to provide information on the current state of drug use in Guiana and cocaine trafficking, taking into account the various channels and their organisation, as well as the regional context (Colombia, Suriname, etc.). Profiles of crack users in Paris and the Paris region, as well as trafficking channels (dealer profiles, organisation, etc.), will also be documented.

In 2020, the illicit drug market in France was also heavily impacted by the measures taken by the State and the European Union to contain the COVID-19 epidemic. In a report published on 15 June, OFAST estimates, on the basis of quantitative (seizures, arrests for drug offences) and qualitative (regional estimates) indicators, that trafficking activities have fallen by almost 40%. (OFAST 2020).

In terms of demand, the lockdown period of the population from 16 March 2020 has resulted in a decrease in the number of people visiting large drug outlets, leading to a decrease in trafficking activity.

On the supply side, the closure of the European Union's internal and external borders has particularly affected a market that is highly dependent on countries outside Western Europe. That is particularly the case with regard to trafficking in cannabis resin produced in Morocco, which is affected by the double closure of borders in that country and in Spain, which is the main crossing point for that substance to enter the French and European markets. In normal times, it is teams specialising in transport that are responsible for supplying French retailers by road in convoys of large saloon cars: the famous go-fast, or go-slow, which reach the major French cities via motorway routes (65% of seizures in 2018). These strategic routes were cut off between March and the end of June, as France and Spain no longer allowed passenger vehicles to pass, or exceptionally for border workers or tourism vehicles, while checks were further tightened on back roads in France. Thus, according to OFAST, in March, *“departures of vehicles in usher and carrier convoys of the go-fast type have all been cancelled or postponed as a precautionary measure”.* For example, cannabis seizures on the French market fell by almost 50% in March and April 2020 (5.6 tonnes) compared with the same period a year earlier (11 tonnes).

The large so-called "city" outlets (direct resale established in some neighbourhoods), dependent on just-in-time supply, which according to some police estimates only allow them autonomy of around ten days, quickly ran out of product. A situation aggravated by the fact that in the days before the introduction of the lockdown period on 16 March 2020, many consumers had come to the points of sale to build up on their stocks. While many of them continued to operate, there was a very significant slowdown in activity: *"Even in some very active cities (Vénissieux, Lyon West and Centre), the number of visitors to sales outlets has fallen by more than half. In some of the cases monitored in Paris, the level of orders is falling by -90% compared to the period before lockdown.”* The observations carried out as part of the OFDT's TREND (Recent Trends and New Drugs) scheme in major French cities have largely confirmed this observation. (Gérome and Gandilhon 2020).

Thus, in the week following the implementation of lockdown, certain sites of the scheme, such as Lille, Paris and Marseille, reported a more or less significant drop in the number of visitors to drug-selling areas and a clear decrease in trafficking activity, although this did not disappear completely. In Marseille, outlets in some cities, which were traditionally open for 15 or 16 hours, had to reduce their opening hours considerably. The situation is the same in the suburbs of Lyon, while in Seine-Saint-Denis, police officers noted a clear decrease in demand. On the supply side, the shortage was reflected from the end of March onwards by increases in the wholesale and retail prices of cannabis resin of between +40 and +60% per kilogram. (OFAST 2020). For example, in the Paris region, the TREND site reported that in some cities in the Yvelines area, the price of cannabis resin was doubling, while in Paris it was becoming more expensive than grass. In the Toulouse and Lyon region, retail prices have risen sharply by between 50% and 300%.

The price stability observed at certain sales outlets did not, however, mean that the market was operating as normal. Thus, in Marseille, Rennes or Toulouse, a form of rationing was at work, since the quantities served, for a price similar to that before lockdown, were lower. In this tense context, herbal cannabis, the consumption of which has risen sharply in recent years in France, (Gandilhon *et al.* 2019) has been unable to provide a real alternative to the shortage of cannabis resin, except perhaps in northern France, where industrial cannabis cultivation has increased significantly.

The cocaine market was hit by a double shock. There was firstly a shock in terms of demand with the lockdown measures and the temporary cancellation of festive events. However, there was also a shock in terms of supply, as airlines with Guiana were suspended and it was, due to the closure of the borders with Belgium, more difficult for the trafficking networks to obtain supplies in the Netherlands where the main wholesale market for cocaine in Western Europe is located. As a result, the first month of lockdown led to price increases in all regions, except in the north of France where the Lille market continued to be partially supplied from the Netherlands. In Bordeaux and Rennes, the most common price rose from 60-70 to 80-100 euros, while in Lyon the increases were slightly more significant, with the retail price per gram rising in some cities from 60-70 to 80-90 euros or even to 100 euros. (Gérome and Gandilhon 2020). However, the lack of data on the contents of the products in circulation makes it impossible at the moment to fully assess the real supply of cocaine on the French market because dealers, faced with smaller quantities available, were able to resort massively to cutting the product. This seems to have been the case in Marseille where the few rare analyses carried out within the framework of the OFDT's SINTES system showed a significant decrease in levels in a general context where "scam" cases were multiplying. In Toulouse and Rennes or also in Paris, rumours were circulating about the product being cut.

With respect to the heroin market, there are many more data gaps, both from law enforcement and from the TREND scheme. It can be assumed, however, that it was deeply affected by the closure of both the external and internal borders of the European Union in a context where Iran and Turkey (obligatory stages in the circulation of heroin produced in Afghanistan) had also closed their borders. As with cocaine, difficulties in accessing the secondary redistribution market in the Netherlands for criminal groups and small user-dealer networks have led (with the possible exception of the Lille area) to great tensions in the market in terms of availability, which have been reflected in price increases of varying degrees. According to OFAST, retail prices of heroin have increased on average by +30%.

*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). Available: https://www.ofdt.fr/BDD/publications/docs/efdxkav2.pdf [accessed 31/07/2020].

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 08/08/2019].

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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). The OCRTIS changed its name into OFAST in 2020. 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.

Analyses resulting from collections from drug users within the framework of the OFDT's SINTES system complete the knowledge of the composition of the products.

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.

National Criminal Record [*Casier judiciaire national*]

Ministry of Justice, Sub-Directorate for Statistics and Studies (SDSE)

Data from the National Criminal Record makes it possible to describe the punishable offences, the court order procedures, the diversity of responses provided by the courts (convictions imposed, but also alternatives to prosecution, fixed penalty notices, dismissal, etc.), the nature and quantum of sentences and the socio-demographic profile of people who have been convicted since 1984 (when the record was automated). The Criminal Record is based on a detailed classification, grouping around thirty offences into seven classes that are different from the police categories (regarding drug law offences (DLO)): use, possessing-procuring, trafficking, transport, supply and sale, helping others use and other DLO. Since 2017, the system for using the National Criminal Record and recording data has been undergoing a revision in order to improve the quality of conviction statistics. This revision concerns the determination of the main offence (a convicted person may be convicted of more than one offence), which is what the statistics are based on. The Ministry of Justice has been suggesting their data be revised since 1995 on this new basis.

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.