Drug market and crime workbook

2021

France

Contributors

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

2021 National report (2020 data) to the EMCDDA by the French Reitox National Focal Point

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, Margaux Blanchon
3. *Drugs*: Olivier Le Nézet, Magali Martinez, Clément Gérome, Michel Gandilhon, Eric Janssen
4. *Prevention*: Carine Mutatayi
5. *Treatment*: Christophe Palle, Anna Ndiaye, Clément Gérome
6. *Best Practice*: Anna Ndiaye, Carine Mutatayi
7. *Harms and Harm Reduction*: Anna Ndiaye, Christophe Palle, Magali Martinez
8. *Drug Market and Crime*: Michel Gandilhon, Magali Martinez, Caroline Protais, Victor Detrez
9. *Prison*: Caroline Protais, Anna Ndiaye, Julien Morel d'Arleux
10. *Research*: Maitena Milhet, Isabelle Michot

Proofreading (French version): Julien Morel d'Arleux, 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: Margaux Blanchon, Anne de l'Eprevier

Table of contents

The text highlighted in blue is new compared to the 2020 WB.
This file is intended solely for EMCDDA staff experts.
Please do not disseminate this working version.

T0. Summary

National profile

- o Domestic drug market (domestic production/cultivation; trafficking routes for imported drugs) (a summary of T1.1.1 & T1.1.2)
- o National drug law offences (main drugs linked to offences; distinguishing between possession/use, trafficking, cultivation/production) (a summary of T1.2)
- o Key drug supply reduction activities (a summary of T1.3)

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 2020, the total number of persons accused of narcotic use in France is 131 400 against about 144 903 in 2019. 8 out of 10 people accused of a drug-related offence corresponded to simple use. The number of people involved in trafficking offences in 2020 in mainland France was 14 791, down slightly on 2019 (16 102), while the number of user-dealers was 14 844 (compared to 17 154 in 2019). 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. France's international actions are mainly based on the networks of internal security attachés, customs attachés and liaison magistrates in the main production and transit countries. 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 and five territorial detachments. As of 30 September 2020, 103 operational drug intelligence units (CROSS) were deployed throughout the country.

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 (INHES and MILDT 2009).

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 2019). It may also arrive directly from Morocco notably via the Tangier-Marseille sea route.
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 2020). 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 2019). 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 2019).

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 2019).

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 (average purity of about 65% in 2017) 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. 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 2020, the median price per kilogram of cocaine is €33 500 against €31 000 in 2017-2018. 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 2020, the wholesale price of cannabis resin reached €3 500 per kg and €4 800 for herbal cannabis. These levels demonstrate a very sharp increase compared to 2017/2018, (+16.5%) and (+90%) respectively. The wholesale price of heroin, on the other hand, is falling, from €15 000 in 2017/18 to €13 625 in 2020 (OCRTIS 2019).

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 OFAST (Anti-Narcotics Office), the median price for herbal cannabis in 2020 was approximately €10 per gram and ranged from €7 to €12 per gram. The median price of cannabis resin is €8 (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 2019 as in 2018. However, the price of cannabis resin has slightly increased, from €6 in 2018 to €6.5 in 2019 (Gérome *et al.* 2018).

The average potency of seized cannabis resin (STUPS© data) is slightly lower in 2020, 26.7% compared to 28.7% in 2019. In terms of the OFDT's SINTES scheme, the average potency of the analysed samples (31) was 26%. The average THC content of herbal cannabis is also decreasing and is at 13% in 2020 compared to 13.5% in 2019 (INPS 2019).

On developments in the cannabis market:
The central Customs laboratory noted a 38% increase in their seizures of cannabis, mainly due to so-called 'wellness' products (oil, gum, etc.). While this phenomenon has been perceived in the European Union for almost two years (EMCDDA 2020), it was in 2020 that this phenomenon became so significant in France. The legal status of CBD in the country may have hindered its development (See T.3.1 of the 2021 Policy and Legal framework workbooks).

Other changes include:

- Since the end of 2020, there has been the development of a concentrated resin offer, reported by the Rennes and Lyon sites and the online discussion forums. Rather than varieties with a high THC content, it is more a question of resins obtained by repeatedly passing through several increasingly fine sieves, or of artisan techniques allowing the maximum amount of THC to be extracted (Ice-O-lator, Rosin, 3x...). This offer is available at prices higher than on the traditional resin market.
- It should be noted that herbs with low (or no) THC levels are in circulation. Within this category, there are two types, one involving cannabis plants of a CBD-friendly variety, with relatively high levels of CBD, and another with virtually no phytocannabinoids present. Several hypotheses have been considered to explain the circulation of this cannabis:
    - Some of the seizures of so-called CBD cannabis are made in the vicinity of Switzerland and may originate from the Swiss market, and may correspond to crops that have been found to have a THC content of 1% or more, which is the threshold for illegality of the product in Switzerland (where the legal THC content must be strictly below 1%).
    - The market for cannabis from Albania could also be involved in this supply, regardless of cannabinoid levels.
    - Some of these low-grade types of cannabis could also be the result of the development in France of products obtained by extraction (i.e. BHO-Butane Hash Oil- products generating *wax*, *shatter*, or highly dosed resins, which are still not very common in France. Once the plant heads have been penetrated by the substance used for extraction, they may continue to appear visually intact.
- Finally, the circulation of cannabis that has a low level of natural cannabinoids and containing synthetic cannabinoids is also common, most often MDMB-4in-PINACA. Although this product has been identified in several regions at the beginning of 2021, (Detrez 2020) it is primarily concentrated around the Rhône basin.

Cocaine

According to the OFAST, the price per gram of cocaine hydrochloride was €66 in 2020 compared to 67 € in 2019 and 70 € in 2017/2018. According to the TREND scheme, this price was around €70 in 2019 against €71.5 in 2018.

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 g) 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. In 2020, the average content of samples analysed by the National Forensic Science Institute is 63.5% compared to 66% in 2019 (SNPS 2021).

Heroin

In 2020, the median price for a gram of brown heroin was approximately €33 according to the OFAST. In 2019, this price was €40 on average according to the TREND scheme.

The average potency of seized brown heroin in 2020, i.e. 20.3% was higher than in 2019 (19.5%). This is the highest rate recorded in 10 years (INPS 2019). The average potency of heroin seized in the street (<10 g) 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.

In 2020, according to OFAST, the average price for an ecstasy tablet is stable at 10 euros, compared to previous years. 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 2019, the average price of an ecstasy tablet reached €10, whereas the price per gram of MDMA was 47.5€, 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). The data obtained from the seizures of drugs analysed by the National Forensic Science Institute in 2020 give an average content of MDMA tablets amounting to 33.3%, the same level as in 2019 (SNPS 2021).

New psychoactive substances (NPS)

In 2020, the OFDT exceptionally does not have the figures from the national police and the gendarmerie. However, the number of seizures continues to rise, with 1 666 seizures or checks[1] linked to 126 different NPS[2] (compared to 1 255 seizures and checks in 2019 for 111 NPS).

The top three of the most frequently observed families has changed slightly. While cathinones are still the most represented (485 seizures involving 27 molecules), cannabinoids are now ahead of arylcyclohexylamines, which had not been the case since 2015 (471 seizures involving 25 molecules and 334 seizures involving 7 molecules respectively).

Ketamine (303 seizures, 728 kilos), 3-MMC (305 seizures for 5 kilos), and DMT (29 seizures for 24.5 kilos) remain in the top 10 seized substances since 2014. 4-MEC disappears from the ranking and other molecules appear for the first time, or reappear, such as GHB (33 seizures, for 5 litres), JWH-210 (223 seizures, 16 kilos) and 2C-B (32 seizures for 2 022 tablets).

The top ranking of the most frequently seized substances shows some discrepancies with the top ranking of the substances seized in the largest volumes, as is the case for NPS in the strict sense, such as 3-CMC (28 seizures, 9 kilos), euthylone (12 seizures 3.7 kilos), alpha-PHP (14 seizures 3.1 kilos) and MDMB-4in-PINACA (14 seizures 2.7 kilos), a cannabinoid particularly involved this year in important signals on the territory (See A T.1.2.4 of the 2021 'Drugs' workbook).

Classification is also made difficult by the 'tablet' form, which was very common in 2020 (it is then counted in units and not kilos), as is the case for 2C-B, but also for 1cP-LSD (12 seizures, 307 units), 3-MMC again (22 seizures, 250 units), or mephedrone (4-MMC, 203 units in 1 seizure) - which has hardly been observed for several years.

It is mainly medicines (otherwise monitored by the EMCDDA), such as promethazine (used in the manufacture of 'lean'), drug-derived NPS, such as flualprazolam (derived from the legally marketed benzodiazepine alprazolam), or medicines without a marketing authorisation (such as carisoprodol), which considerably change the nature of the most important seizures in terms of quantities (see T3).

[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.

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 2020, the total number of persons accused of narcotic use in France (metropolitan France and overseas) is about 131 400. Aside from these drug use offences (80% of the total), the police services and French *Gendarmerie* accused almost15 000 individuals of drug use-resale and the same number 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 fixed penalty notices amounted to 7 766 in 2019 (Obradovic *et al.* 2021).

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 (22 162) and 2018 (40 170). To compare, in 2018 convictions relating to driving under the influence of alcohol account for 42% of road safety offences.

In 2019, the amount of criminal assets apprehended in connection with drug offences increased to almost €78.5 million, compared with almost €63 million in 2018.

The amount of the *Fonds de concours* ("Narcotics" support fund), consisting of the proceeds from the disposal of property confiscated in criminal proceedings in drug cases, amounted to 19.8 million euros in 2020.

Since March 2021, the French Ministry of Justice has deployed territorial branches of the Agency for the Recovery and Management of Seized and Confiscated Assets (AGRASC) in Lyon and Marseille to increase its effectiveness.

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 your 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 T.1.1.1 of the 2018 Policy workbook) 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. It was replaced in 2020 by an OFAST antenna. 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.

The Interministerial Training Center for the Fight Against Drugs (CIFAD), based in Fort-de-France, formerly a public interest group of the MILDECA, also became a service of OFAST in 2020.

Given the predominantly maritime nature of trafficking, the French Navy is the major operational arm for operations on the high seas.

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/OFAST 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.

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.

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.

Over the past 20 years, the supply of drugs in France has undergone major changes due to the wide diversification of the products on offer and a much more competitive market. This leads to a growing diversity of actors involved in the supply side, while the development of new information and communication technologies (ICTs) favours a renewal of the ways in which networks and new relationships with users are organised.

The level of seizures shows that the quantities intercepted have risen sharply over the last twenty years, although the rates of increase differ according to the substance.

Table 1: Average annual quantities seized in France by decade (OFDT/OFAST)

	1991-2000	**2001-2010**	**2011-2019**
Cocaine (kg)	1 841	5 387	10 883
Heroin (kg)	446	738	876
Ecstasy (tablets)	657 220	1 254 725	1 202 812
Cannabis (herbal + resin) (kg)	49 175	69 577	77 084
Ratio herbal/cannabis (%)	5.5%	5.6%	20%
Cannabis resin (kg)	46 465	65 642	61 685

Several phenomena explain the more visible use of ICTs over the past decade. On the one hand, urban renewal policies in certain peripheral neighbourhoods of large metropolises have aimed not only to renovate the buildings, but also to reduce the deal areas. These developments have led many networks to build up customer files in order to maintain contact with users and thereby ensure the sustainability of the deal. Home deliveries have also been developed, notably with "cocaine call centres" and/or central purchasing offices. In the Paris region, the phenomenon has developed considerably in Seine-Saint-Denis, where the drug squad dismantles several dozen purchasing offices each year. Their activity is not limited to cocaine. Cannabis (in its resin or herb form) and ecstasy may also be offered. Most of these central purchasing offices are extensions of the activities of the points of sale within deprived neighbourhoods, which are clearly adapting to the needs of inner-city customers in a more competitive market. The phenomenon is developing in most French cities. In addition to home deliveries, the use of the Internet is also encouraging postal drugs trafficking. More recently, the dismantling of French 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).

The development of door-to-door sales does not mark the end of the traditional model of direct resale established in working-class neighbourhoods. It is constantly adapting to the changing aspirations and profiles of consumers. Therefore, the single-product model is disappearing. Even if some traffickers still focus on cannabis resin, the transition to a multi-product offer based on two main products: cannabis resin and cocaine, which are more and more systematically combined, is reflected in:

- the *outsourcing* of certain functions such as product transportation, which is increasingly reserved for specialised teams;
- the multiplication of storage locations, or even "*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, 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 large pool of young people, sometimes with an immigrant background, living in precarious situations on the outskirts of metropolises. The TREND 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 instant messaging applications.

Cannabis

As in the rest of Europe, the cannabis market in France is changing, with an increasing share of herbal cannabis in consumption and supply, with Spain becoming a major producer of herbal cannabis. For example, in 2019 almost 90% of the herbal cannabis seized in France came from Spain. The Covid-19 crisis seems to have further accelerated trends with the shortage of cannabis resin, noted by law enforcement in the first half of 2020 and the influx of herbal cannabis from Spain. In 2020, cannabis resin seizures decreased by more than 32%, while herbal cannabis seizures increased by 54% to reach an unprecedented level of 46 tonnes after the record of almost 30 tonnes reached in 2018. Herbal cannabis accounted for almost 48% of total cannabis seizures in 2020 (up from 6% in 2012), although this level is largely the product of the exceptional circumstances associated with the Covid-19 epidemic.

The closure of Morocco's borders for much of 2020 and the border between Spain and France has obviously complicated the activities of cannabis resin trafficking networks. For instance, 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 "suburban outlets" (points of sale within deprived neighbourhoods), dependent on just-in-time supply, which according to some police estimates only allow them to be self-sufficient for around ten days (OFAST 2020), quickly ran out of product. A situation aggravated by the fact that in the days before the introduction of the lockdown period on 15 March 2020, many consumers had come to the points of sale to build up on their stocks (OFAST 2020). The observations carried out as part of the OFDT's TREND scheme in major French cities have largely confirmed this observation (Gérome and Gandilhon 2020a). Therefore, in the week following the implementation of lockdown, certain sites within the scheme, such as Lille, Paris and Marseille, reported a more or less significant drop in the number of clients to drug-selling areas and a clear decrease in trafficking activity, although this did not disappear completely.

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 confinement, were lower.

In this tense context, herbal cannabis, the consumption of which has increased significantly in recent years in France (Gandilhon *et al.* 2019) has not been able to provide a real alternative to the shortage of cannabis resin, except perhaps in the north of France where industrial cannabis culture has developed. On the other hand, the lifting of the first lockdown has led to a strong resumption of trafficking between Spain and France, illustrated by seizures that reached a record level in 2020 (OFAST 2020).

Cocaine

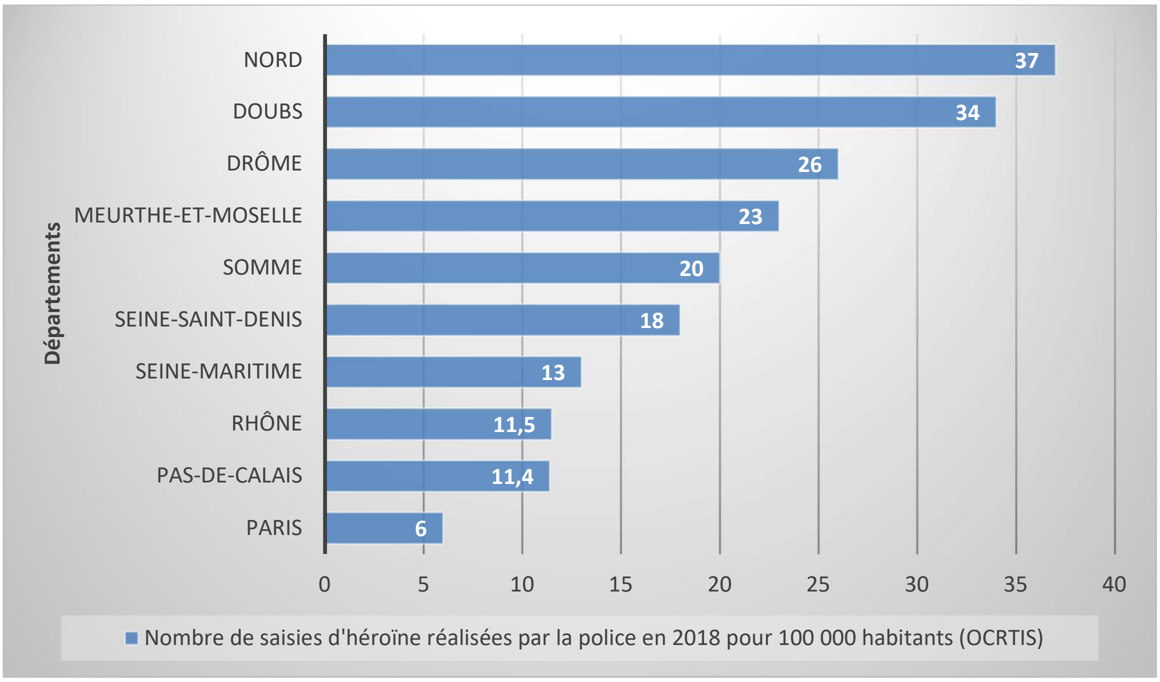
The cocaine market, driven by a steady increase in demand over the last twenty years and a more recent growth in supply, is very dynamic. In 2020, the lockdown measures affected the functioning of the market, with the banning of party events, the suspension of airlines to French Guyana and the closure of the border with Belgium (making it more difficult for the trafficking networks to supply the Netherlands, where the main wholesale cocaine market in Western Europe is located). In the first lockdown, in April 2020, cocaine seizures fell by 93% compared to the same month in 2019 (OFAST 2021a). 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 by the Netherlands. In Bordeaux and Rennes, the most common price rose from 60/70 euros 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 euros to 80/90 euros or even 100 euros (Gérome and Gandilhon 2020b). However, the lack of data on the levels of the products that were circulating does not allow for a full assessment of the actual level of cocaine supply at this time.

In 2020, for the third consecutive year, cocaine seizures are down to over 13 tonnes compared to 15.7 tonnes in 2019 and 16.4 in 2018 (OFAST 2021b). However, this level remains well above the average level observed between 2011 and 2019, i.e., 10.8 tonnes. 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 cocaine 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 (Cadet-Taïrou *et al.* 2021).

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. With regards to availability, OCRTIS/OFAST 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 in 2018 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).

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 steps in the circulation of heroin produced in Afghanistan) had also closed their borders. Compared to seizures carried out in April 2019, seizures carried out in the same month in 2020 have fallen by 92% (OFAST 2021b). 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% (OFAST 2021b).

The strong recovery of the market at the end of the first lockdown period, expressed by a tenfold increase in seizures between May and November, resulted in the highest level of seizures ever recorded in France, at 1.1 tonnes. The average purity of the product, as measured by the samples analysed by the National Forensic Science Institute (INPS now SNPS) in 2020, is the highest it has been for 10 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 2) 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 been stable between 2019 and 2020, whereas it has been in drastic decline since 2014, when it peaked (57 identifications compared to 16 in 2018). Thus, 23 new molecules were identified in 2020 (25 in 2019), with a classic over-representation of cathinones, cannabinoids and hallucinogenic NPS (indolalkylamines, arylxyclohexylamines, others...).

If in terms of volumes, whether in kilos, litres or units, the most important products remain DMT, ketamine, GHB, 2C-B, 3-MMC and JWH-210 (a product whose recurrence of visibility over the last 4 years is all the more remarkable, as it has not subsequently been evidenced in the territory); the usual classification is strongly modified by particular medicinal substances, such as Gabapentin, Pregabalin, etc. (see section T3). (see section T3. New developments).

Table 2: Quantities of drugs seized (in kg), from 2017 to 2020 and changes 2019-2020 (in %)

Drugs seized s	2017	2018	2019	2020	Evolution 2019-2020 (%)
Cannabis: resin	67 359	85 354	74 340	50 248	- 32
Cannabis: herbal	20 220	29 800	29 952	46 277	+ 54,.
Cannabis: plants	137 074	138 561	183 034	115 365	- 37
Heroin	658	1 100	1 073	1 132	+ 5.5
Cocaine	17 500	16 400	15 761	13 145	- 16.6
Crack cocaine	na	20	na	na	
Amphetamines	238	208	na	na	
Methamphetamines	122	126	na	na	
Ecstasy (tablets)	1 130 839	na	1 699 848	1 227 876	- 27.8
LSD (blotter)	794	2 979	na	na	
Ketamine	277	249	na	na	

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

Table 3: Change in retail median drug prices (in euros) since 2000

	TREND*				OCRTIS**		
	2000***	2017	2018	2019	2017-2018	2019	2020
Héroïne	76	40	40	40	35	30	33
Cocaïne	108	78	71.5	70	70	65	70
Ecstasy (comprimés)	19	10	10	10	10	10	10
Résine de cannabis	na	5.5	6	6.5	7	8	8
Herbe de cannabis	na	10	9.5	9.5	10	9	10
Amphétamines	19	15	12	15	15	15	15
LSD (buvard)	8.5	10	na	na	10	10	10

*Source : * TREND ethnographic observations / ** OCRTIS Price Barometer / *** The prices shown for the year 2000 have been converted into constant euros / 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.*

The spread of e-liquids containing synthetic cannabinoids, described in previous reports (see T.2.2 of the 2020 'Markets and Crime' workbook) and also discussed in the 2021 'Drugs' workbook, has continued since 2018, and now concerns the south of the country. This spread is more low-key, seen through police cases or SINTES collections, rather than through local health agencies, as was previously the case.

Their number in 2020 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.

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 2020, the total number of individuals accused of narcotic use in metropolitan France decreased from nearly 138 000 to 131 000. Therefore, in the recent period, user arrest is on a downward trend (-4% per year on average between 2014 and 2020). 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. This development can be linked to the official abandonment of the 'policy of numbers' (from 2013) in police stations in order to meet performance targets. The gradual implementation of the criminal fixed fine in the course of 2020 may also be an element in explaining the phenomenon over the past year (Obradovic *et al.* 2021).

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.

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. The most visible impact occurred during the first lockdown from 17 March to 11 May 2020, during which seizures of the main drugs (resin, herbal cannabis, cocaine, heroin) fell sharply compared to March-April 2019 (OFAST 2020). In a report published on 15 June 2020, OFAST estimates that activities linked to trafficking have fallen by around 30 to 40% (OFAST 2021b) on the basis of quantitative indicators (seizures, arrests for drug offences) and qualitative indicators (regional estimates). By May 2020, the drug market was back on track with a sharp increase in seizures in France compared to the same month in 2019. The second lockdown from 29 October to 1 December 2020, which was less severe than the first, seems to have affected the market less.

In the end, in 2020, illicit drug seizures remained at a very high level except for cannabis resin. Apart from the mobilisation of the Spanish police, trafficking seems to have suffered most from the closure of the borders between Morocco and the European Union. In contrast, seizures of herbal cannabis and heroin reached unprecedented levels in France, while cocaine seizures remained high. The main lesson of this particular sequence, in view of the observations of the law enforcement services and the TREND scheme, is the high level of adaptability certain traffickers have, which has been expressed by the acceleration in home delivery of illicit drugs, even if this particular activity is difficult to quantify.

The year 2020 has seen an increased focus on the design and aesthetic appeal of the objects surrounding the practice of inhalation, or the purchase of cannabis, including the sale of resin or herbal cannabis in colourful sealed pouches. This trend was observed as early as 2010-2011 on online sites, most often Anglo-Saxon and offering synthetic cannabinoids, but the first resale on the physical market using this mode of presentation was only reported to the OFDT in September 2020, following messages from consumer associations concerning the possible resale of herbal cannabis adulterated with synthetic cannabinoids. In France, little stand-up pouches with zipper are merchandised with visuals used by some of the country's best known rap groups (PLN, KTM, Jul...). Other products are also offered, such as stickers with the names of specialities, which are stuck on the street to indicate points of sale.

Medicines or related substances (derived molecules, substances that have lost their marketing authorisation or have one outside France), whether or not monitored in the framework of the EDND, were the subject of an unusual number of seizures in 2020. As such, these seizures have been reported by Customs to the EWS.

Some substances have been reported for the first time by Customs, such as carisoprodol, a muscle relaxant whose metabolite was officially used in France to accompany alcohol withdrawal up until 2012 (48 333 tablets in 1 seizure).

Also of note are olanzapine, an antipsychotic marketed under the brand name Zyprexa in France (690 units), prazepam (a benzodiazepine, 2 700 units in one seizure), as well as oxymorphone, the metabolite of oxycodone, which does not have a marketing authorisation in France (260 units), or even atomoxetine, previously used in the treatment of attention deficit disorder and withdrawn from the market in 2012 (380 units).

Other known drugs considered as new psychoactive substances by the EMCDDA (i.e., substances that are known to be used for recreational purposes without being banned internationally) include tramadol (13 000 units in 10 seizures) and promethazine, the antihistamine used to make the so-called 'Purple Drank' or 'lean' mixture. It was withdrawn from over-the-counter sales in 2019 and is being monitored under the EDND (1 seizure, 8 828 tablets). These two substances have not previously been reported to the EWS.

This unusual presence of medicines, or similar, in EWS seizures should be interpreted with caution, as although the rise of online pharmacies over the past few years has made it easier to obtain them, their circulation may have been in response to sporadic demand, linked to the strict lockdown from March to May 2020. France was the country of destination for these seizures. In all cases, even if contextual data are missing, it has been confirmed that the distribution of these substances was taking place outside the legal framework of circulation.

Finally, the last atypical fact, 25 kilos of MAPA (methyl alpha-phenylacetoacetate) were seized in 8 different times (20 kilos were destined for Belgium). It is a recent precursor, created specifically for the manufacture of amphetamine or methamphetamine, listed in November 2020 in Table I of the 1988 Convention.

In addition, 105 kilograms of 4-methylpropiophenone (an unclassified precursor of 4-MMC, which is otherwise legal) were seized at one time, bound for Ukraine.

	NPS without market authorisation (pure NPS, medicines that have lost their market authorisation...)
	NPS with market authorisation
	Medicines or former medicines not considered as NPS

Molecule	Unit of measurement	Number of entries	Quantities
Atomoxetine	units	1	380
Clonazolam	units	6	64
Flualprazolam	units	7	233
4-Fluoromethylphenidate	units	5	127
x-Fluoromethylphenidate	units	3	100
3F-Phenmetrazine	units	3	56
Tianeptine	kg	1	0.108
Bupropion	units	2	120
Bupropion	kg	1	0.186
Gabapentin	units	1	120
Gabapentin	kg	1	10.745
Modafinil	units	3	120
Oxazepam	kg	3	5.2
Phenylpiracetam	units	1	180
Pregabalin	kg	5	6.759
Promethazine	units	1	8 828
Tramadol	units	10	13 000
Zolpidem	units	11	332
Carisoprodol	units	1	48 333
Fenproporex	units	1	400
Methadone	units	1	70
Methylphenidate	units	10	1 920
Morphine	units	1	35
Olanzapine	units	1	690
Oxymorphone	units	1	260
Phentermine	units	2	25
Prazepam	units	1	2 700
Tapentadol	units	1	82
Temazepam	units	1	30

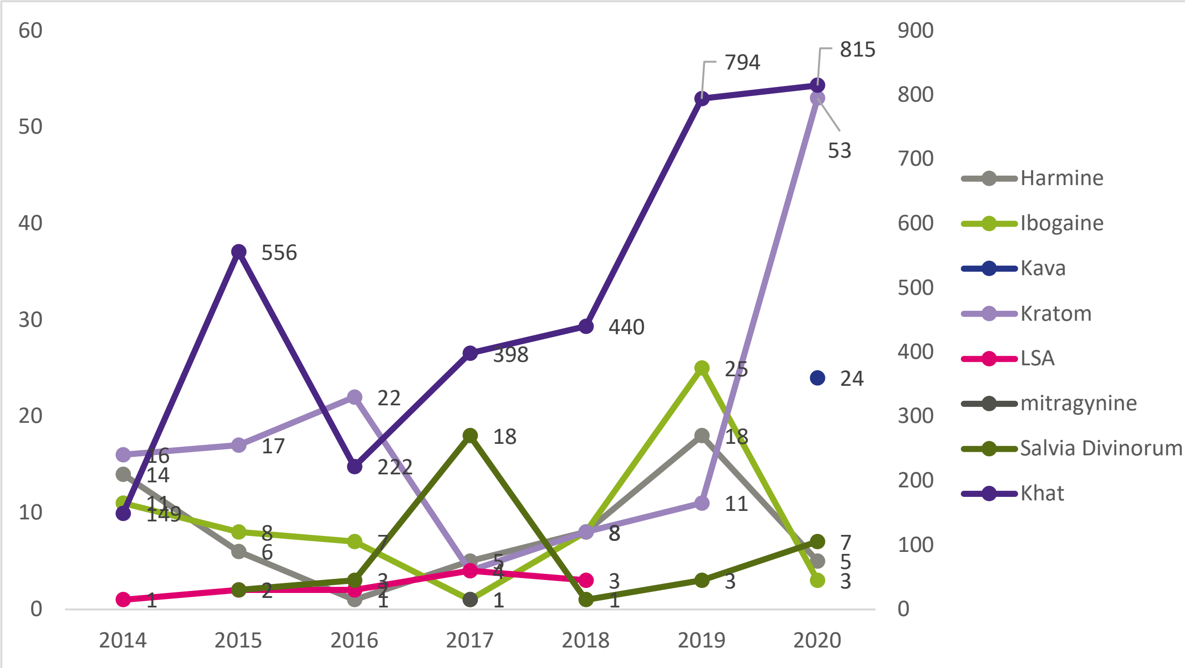
T4. Additional information

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.*

It should be noted that in 2020, seizures of plants considered by the EMCDDA as New Psychoactive Substances (NPS) have risen sharply since 2014, mainly driven by Khat. But this year's increase is also underpinned by 53 seizures of Kratom, a product classified as a narcotic in 2020, and for the first time, seizures of Kava.

Evolution of the annual number of seizures of plants considered as new psychoactive substances (NPS) by the EMCDDA (Khat, Kratom, LSA...)



Source: Compilation by the OFDT of data on seizures, as transmitted by the Customs Joint Laboratories Department (SCL) and the forensic laboratory in charge of the "STUPS" database, combining police and gendarmerie data

Apart from the plants monitored by the EMCDDA, there were also 119 seizures of psilocybin and psilocin (including two seizures in the form of chocolate), whereas it was only in 2016 that an equivalent number was seized (around 133), albeit in a much larger volume (around 30 kg compared to 6 kg in 2020).

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.*

In 2019, as part of a partnership with INSERM, and on behalf of the Ile-de-France Regional Health Agency and the MILDECA/Prefecture of Ile-de-France, the OFDT took part in a study on the crack market in Ile-de-France (Cadet-Taïrou *et al.* 2021).

Crack trafficking in the Paris region began in the late 1980s and has continued ever since. One of its characteristics is the continuity of the players who are at the heart of this trade and the dominance of networks from Senegal. With no real known hierarchy, very small in size and not very violent, they have a virtual monopoly on the supply of crack cocaine in Paris.

The second significant player in drugs trafficking in the Île-de-France region is the housing estate networks, particularly in the Seine-Saint-Denis department. Although the resale of crack cocaine, compared to cannabis resin or cocaine, is still marginal, it is likely to increase in the future given the strong growth in cocaine use over the last ten years, particularly among a more socially integrated population.

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.

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 21/07/2021].

Cadet-Taïrou, A., Gandilhon, M., Martinez, M. and Néfau, T. (2015). Substances psychoactives en France : tendances récentes (2014-2015) [Psychoactive substance use in France: recent trends (2014-2015)]. Tendances. OFDT (105). Available: https://www.ofdt.fr/BDD/publications/docs/eftxacvc.pdf ; http://en.ofdt.fr/index.php?cID=303 [accessed 21/07/2021].

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 21/07/2021].

Cadet-Taïrou, A., Jauffret-Roustide, M., Gandilhon, M., Dambélé, S. and Jangal, C. (2021). Synthèse des principaux résultats de l'étude Crack en Île-de-France. Note de résultats d'enquête 2021-03. OFDT, Paris. Available: https://www.ofdt.fr/BDD/publications/docs/eisxac2b1.pdf [accessed 15/06/2021].

Detrez, V. (2020). Circulation d'herbe de cannabis adultérée avec des cannabinoïdes de synthèse. Note SINTES du 19 octobre 2020, mise à jour le 05/02/2021. OFDT, Paris. Available: https://www.ofdt.fr/BDD/sintes/ir_19102020_Cannabis.pdf [accessed 21/07/2021].

EMCDDA (2020). Low-THC cannabis products in Europe. Publications Office of the European Union, Luxembourg. Available: https://www.emcdda.europa.eu/publications/ad-hoc-publication/low-thc-cannabis-products-europe_en [accessed 21/07/2021].

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 21/07/2021].

Gandilhon, M. (2014a). Les Antilles françaises (Martinique, Guadeloupe, Saint-Martin) et la Guyane au cœur du trafic international de cocaïne. Note 2014-9. OFDT, Saint-Denis. Available: https://www.ofdt.fr/BDD/publications/docs/eisxmgu6b.pdf [accessed 21/07/2021].

Gandilhon, M. (2014b). Les précurseurs chimiques, dimension méconnue du marché mondial des drogues illicites. Drogues, enjeux internationaux. OFDT (7). Available: https://www.ofdt.fr/BDD/publications/docs/efdxmgub.pdf [accessed 21/07/2021].

Gandilhon, M. and Cadet-Taïrou, A. (2015). Les usages de drogues en espace rural. Populations, marchés, réponse publique. Tendances. OFDT (104). Available: https://www.ofdt.fr/BDD/publications/docs/eftxmgvc.pdf [accessed 21/07/2021].

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. OFDT (9). Available: https://www.ofdt.fr/BDD/publications/docs/efdxmgw7.pdf ; https://en.ofdt.fr/BDD/publications/docs/efdamgw7.pdf [accessed 21/07/2021].

Gandilhon, M., Spilka, S. and Masson, C. (2019). Les mutations du marché du cannabis en France. Produits, approvisionnements, nouvelles pratiques. OFDT, Paris. Available: https://www.ofdt.fr/BDD/publications/docs/epfxmgz7.pdf [accessed 21/07/2021].

Gérome, C., Cadet-Taïrou, A., Gandilhon, M., Milhet, M., Martinez, M. and Néfau, T. (2018). Substances psychoactives, usagers et marchés : les tendances récentes (2017-2018) [Psychoactive substances, users and markets: recent trends (2017-2018)]. Tendances. OFDT (129). Available: https://www.ofdt.fr/BDD/publications/docs/eftxcgyc.pdf ; https://en.ofdt.fr/index.php?cID=349 [accessed 21/07/2021].

Gérome, C. and Gandilhon, M. (2020a). Substances psychoactives, usagers et marchés : tendances récentes (2019-2020) [Psychoactive substances, users and markets. Recent trends (2019-2020)]. Tendances. OFDT (141). Available: https://www.ofdt.fr/BDD/publications/docs/eftxcg2ac.pdf ; https://en.ofdt.fr/BDD/publications/docs/eftacg2ac.pdf [accessed 21/07/2021].

Gérome, C. and Gandilhon, M. (2020b). Evolution des usages et de l'offre de drogues au temps du COVID-19 : observations croisées du dispositif TREND [Drug use, drug supply and professional practices in France at the time of COVID-19: qualitative cross-observations of the TREND scheme]. Bulletin TREND COVID-19. OFDT (2). Available: https://www.ofdt.fr/BDD/publications/docs/Bulletin-TREND-COVID-2.pdf [accessed 15/06/2021].

INHES and MILDT (2009). La culture illicite du cannabis en France. INHES, Paris.

INPS (2019). Bilan STUPS 2018. Institut national de police scientifique, Ecully.

Obradovic, I. (2020). Drogues et addictions dans les Outre-mer. État des lieux et problématiques. OFDT, Paris. Available: https://www.ofdt.fr/BDD/publications/docs/epfxio2a6.pdf [accessed 21/07/2021].

Obradovic, I., Protais, C. and Le Nézet, O. (2021). Cinquante ans de réponse pénale à l'usage de stupéfiants (1970-2020). Tendances. OFDT (144). Available: https://www.ofdt.fr/BDD/publications/docs/eftxio2b4.pdf [accessed 21/07/2021].

OCRTIS (2019). Prix et disponibilité des stupéfiants en France : tendances 2018. Note DEASRI. (04/2019 du 9 avril 2019).

OFAST (2020). L'impact du Covid-19 sur les trafics de stupéfiants. Note n° 2020-01. Pôle stratégie du 15 juin 2020. Office anti-stupéfiants, Nanterre.

OFAST (2021a). Bilan d'une année de crise sanitaire sur le trafic de stupéfiants. Note n° 2. Office anti-stupéfiants, Nanterre.

OFAST (2021b). Saisies de stupéfiants en France en 2020. Office anti-stupéfiants, Nanterre.

OFDT (2019). Drogues, chiffres clés (8e édition) [Drugs, Key Data 2019]. OFDT, Paris. Available: https://www.ofdt.fr/publications/collections/periodiques/drogues-chiffres-cles/drogues-chiffres-cles-8eme-edition-2019/ [accessed 21/07/2021].

SNPS (2021). Application Stups : bilan 2020. Ministère de l'Intérieur, Service national de police scientifique, Paris.

Spilka, S. and Legleye, S. (2020). Chiffre d'affaires du cannabis en 2017. Une nouvelle estimation directe par la dépense [Cannabis sales revenue in France. A new direct estimate by expenditure]. Tendances. OFDT (137). Available: https://www.ofdt.fr/BDD/publications/docs/eftxss2a3.pdf ; https://en.ofdt.fr/BDD/publications/docs/eftass2a3.pdf [accessed 21/07/2021].

UNODC (2020). World drug report 2020. United Nations, New York. Available: https://wdr.unodc.org/wdr2020 [accessed 21/07/2021].

Weinberger, D. (2013). Le Venezuela : un épicentre du trafic régional et mondial de cocaïne. Drogues, enjeux internationaux. OFDT (6). Available: https://www.ofdt.fr/BDD/publications/docs/efdxdwtc.pdf [accessed 21/07/2021].

Weinberger, D., Gandilhon, M., Shah, J. and Lalam, N. (2019) Illegal cannabis cultivation in Europe: new developments. EchoGéo (48), https://doi.org/10.4000/echogeo.17704.

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.

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.