Drug market and crime workbook

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France

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T0. Summary

National profile

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

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

The illicit drug market in France is structured around four main substances: cannabis (resin, herbal), cocaine, heroin and MDMA/ecstasy. There are also secondary markets - amphetamines, new psychoactive substances (NPS) but, given the low consumption levels of these products among the general population, the supply is difficult to quantify. 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. While almost all illegal psychoactive drugs consumed in France are produced abroad, herbal cannabis is subject to significant cultivation activity, both in metropolitan France and in the overseas territories. More generally, the cannabis market in France remains characterised by the significance of cannabis resin but this share has been decreasing in the past decade in favour of herbal cannabis. Cannabis resin comes almost entirely from Morocco, one of the main worldwide producers along with Afghanistan.

For roughly ten years, France has been particularly affected by cocaine trafficking, partly due to the geographical proximity of its overseas territories (French Antilles, French Guiana) to the main production areas located in South America. A significant share of the cocaine imported across the French territory goes through French Guiana or the French Antilles and crosses the Atlantic to be unloaded at the main French commercial ports such as Le Havre, Dunkirk, Saint-Nazaire and Marseille. Another route towards France leaves from the Port of Santos in Brazil which is playing an increasingly large role in the supply of the European market. In addition to the maritime routes, the airways have gained significance in the last few years with the key role played by French Guiana.

Like the cocaine market, the psychoactive drug market is expanding, as demonstrated by the combined increase in the seized quantities of MDMA/ecstasy and amphetamine.

Finally, the heroin market is also characterised by a certain vitality which reflects the extent of the seizures. 2022 was the 5th consecutive year where seizures exceeded one tonne (1.4 tonnes). The heroin consumed in France mainly comes from Afghanistan, the leading global producing country, and travels through the Balkans. As with cocaine and psychoactive drugs, the Netherlands and Belgium are significant providers of the French market since they are home to the wholesale or retail markets where criminal or user-dealer networks come to get their supplies and then redistribute the product across mainland France.

National drug law offences (summary of T1.2)

In 2022, the total number of people charged for the use of narcotics in France was around 251 000. Most of the people prosecuted for drug offences were charged for simple use (almost 90%). The number of people arrested for trafficking offences is way lower (49 000 in 2022). As of September 2020, simple use violations can be sanctioned by a criminal fixed fined. In 2022, the Interior Ministry's statistics department made a list of more than 143 000 criminal fixed fines, thus demonstrating the significant growth of this measure to tackle drug use (particularly those of cannabis). However, these progressions are very contrasting geographically. Most of the fines relate to the use of cannabis (almost 98%), far ahead of cocaine (less than 2%), with other products accounting for virtually no share.

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

Combating narcotics trafficking is based on the National Plan for Mobilisation against Addictions (2018-2022) which encourages the implementation of a national strategy founded on a better coordination of law enforcement services (police, customs, gendarmerie, justice system) and a governmental anti-national drug trafficking strategy (formalised in 2019) which, among 55 operational measures, has created an Anti-Narcotics Office (OFAST) responsible for being the sole leader in the fight against narcotics trafficking. In addition, in accordance with the strategy of the national anti-narcotics plan which aims to develop the seizures of criminal assets, the resources of the Agency for the Recovery and Management of Seized and Confiscated Assets (AGRASC) have been enhanced to such an extent that, in 2022, the asset seizures reached a record level of 771 million euros. Combating trafficking is also based on the interaction between customs and the justice system which takes place within the National Jurisdiction Against Organised Crime (JUNALCO). In order to enhance the efficiency of the fight against drug trafficking, the government has developed more targeted actions addressing, for example, the places of the arrival of cocaine: thus, in 2022, a coordination body in charge of combating drug trafficking was created at the Port of Le Havre which is under the authority of the public prosecutors of Paris, Douai and Rouen. This plan is part of the enhancement of cooperation in terms of combating trafficking within European ports and protecting port infrastructures. Finally, specialised inter-regional jurisdictions (JIRS) (8 created between 2004 and 2022) also participate in the fight against narcotics by having enhanced technical resources to successfully carry out their investigations. Many other players take part in combating trafficking, including the Minister of Europe and Foreign Affairs and the Ambassador Extraordinary of the fight against terrorism and organised crime.

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 main illegal substance leading to a domestic production in France, even though a portion of the volumes consumed come from other European countries, mainly Spain, the Netherlands, Belgium and Albania. Given the volumes of plants seized by the law enforcement services (customs, police, gendarmerie) in certain parts of the national territory (76 807 plants seized in 2022), production proves to be very present in the overseas territories (French Polynesia, La Réunion) where 56% of the seizures have occurred. In Metropolitan France, local production remains present.

Domestic production of herbal cannabis is characterised by many recent changes: marked for a long time by its handmade dimension (since small producers grow some plants for their personal consumption or their family members' consumption), it has evolved since the 2000s, which has resulted in the appearance of cannabis factories managed by organised crime gangs (INHES 2009) but also in a more significant visibility of the plantations (of more diverse sizes) destined to supply a market which is no longer merely local. However, this production is not substantial enough to meet the growing demand for herbal cannabis which is satisfied most often by foreign production sources within the EU coming from Spain (the main European producer of herbal cannabis), in particular, or Albania.

Different producers of herbal cannabis can be distinguished in France:

- Small growers, 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.

In contrast, the cannabis resin smoked in France comes almost exclusively from Morocco and usually transits through Spain. Shipments leaving the Rif region in Morocco, after crossing the Mediterranean, reach Spain via speedboats or goods vehicles. Spain is the main transit country of cannabis resin transported to France, and is now in competition with other countries in the Eastern Mediterranean. France is also a point of transit enabling the supply of markets in the North (United Kingdom, the Netherlands, Germany etc.) and South (Italy) of Europe.

Conversely, the cocaine used in France is produced mainly in Colombia, Peru, and Bolivia. 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, Venezuela, and Equator, then via Guiana and the French West Indies, has been entering the European continent through the port of Le Havre. There has 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 mostly 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.

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 transit route is also reported for heroin, stored in the Netherlands (Rotterdam, Maastricht, etc.), in transit from North and South of France to Spanish and Italian markets. Finally, France appears to be a strategic cocaine transportation zone, given its overseas departments in the American continent (French Guiana, Guadeloupe, Martinique) near the main areas of production (Colombia, Bolivia, Peru) and cocaine transportation (Brazil, Venezuela and Suriname for cocaine, and Iran, Turkey and Albania for heroin), which represent departure points of cocaine towards Europe, but also due to its many ports which are used by the trafficking networks as a gateway into Europe for cocaine.

Cannabis

The supply of cannabis, in both France and the European Union, is essentially centred on two products, herbal cannabis and cannabis resin, even though other substances are observed on the market, such as the oil or derivatives of cannabis which are high in THC (butane hash oil, ice-o-lator or ice hash[1]). At the beginning of the 2010s, the French market, marked for a long time by the supremacy of cannabis resin imported from Morocco, experienced a change due to the increase in the consumptions of herbal cannabis (Obradovic 2016), imported from Spain or the Netherlands, or produced across the national territory (Gandilhon *et al.* 2019) particularly in the overseas departments (Obradovic 2020).

Cocaine

Behind cannabis (2.1 billion euros), cocaine represents the second illegal drug market in terms of sales and business turnover (1.7 billion euros).

[1] BHO and ice-o-lator are both resins with very high THC contents (in general, 60 to 80%) and extraction processes based on butane, on one hand, and iced water on the other hand, in order to obtain higher contents.

The cocaine used in France mainly comes from Colombia, the largest producer worldwide of coca leaves (UNODC 2022). 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) and more recently via French Guiana and its daily airport links to Paris. Most of the cocaine reaches France by sea (container ships or, less frequently, pleasure sailing boats) even though delivery by air is progressing. Over the past few years, the port of Le Havre has become 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 the West-Northern metropolitan area in a context where the French West Indies are becoming a major developing zone for cocaine destined for France and Europe. 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.

Because of its geographical position in the EU, France is particularly affected by cocaine trafficking (OFDT 2023). On the one hand due to its location in the heart of Western Europe which makes it a transit location connecting the Netherlands and Spain in particular; on the other hand, due to its proximity to the main areas of production in South America and in the French Antilles across the overseas territories. While the French Antilles are traditionally a rebound zone for the maritime transport of cocaine destined for the French market (Gandilhon and Weinberger 2016), French Guiana has played a significant role in the metropolitan market for about ten years. The Cayenne-Paris route, used by smugglers transporting merchandise in corpore and/or in their luggage, is strengthening as shown by the increase in the cocaine quantities and in the number of mules intercepted. Regarding intra-European routes, the Netherlands and Belgium, due to their importance as a secondary cocaine market for Western Europe, are a source of the cocaine consumed in France. The Dutch-Belgian hub therefore supplies criminal organisations or user-dealer micro networks which come to purchase the merchandise in Amsterdam, Rotterdam, Maastricht or Anvers. Given the significant role of the Netherlands and Belgium in the production of synthetic drugs such as amphetamines and MDMA/ecstasy, these cities are also the main sources in terms of importation of these products into the French market. France is also a passing point for the Southern European markets such as Spain, Portugal and Italy.

Heroin

The heroin market is also characterised by the extent of the seizures (1.4 tonnes in 2022, +8% compared to 2021). This was the fifth consecutive year where the heroin seizures exceeded one tonne.

The introduction of opioid substitution treatments (methadone, Subutex®) in the mid-1990s had the effect of breaking the dynamics of the distribution of heroin, which started in the 1980s, and marked the beginning of a clear fall in the following years, particularly through the very clear decrease in the number of seizures and arrests of users and traffickers. However, from the second half of the 2000s, the seizures faced another clear increase in quantities and numbers, thus confirming the persistence of a market which nonetheless remains insignificant compared to the cannabis or cocaine market. In addition, the heroin market, unlike the cocaine or cannabis resin markets, is characterised by strong regional variations. It is particularly in the suburban territories in the North East and East of France that this market remains the most persistent, particularly due to the proximity of the Netherlands, the main redistribution zone of heroin in Western Europe (EMCDDA and Europol 2019) but also the proximity of the end of the “Balkans route”. One of the noteworthy phenomena in terms of supply, in addition to the record heroin levels recorded in France these last few years, is the increasing role, which began almost ten years ago, of the Albanian branches in the Auvergne-Rhône-Alpes region (OCRTIS 2019).

The heroin used in France mainly comes from Afghanistan (brown heroin), the world's leading producer, and is transported *via* the Balkan route (Turkey, Greece, Albania/Bulgaria) through Iran. White heroin originating from the Golden Triangle (Thailand, Myanmar and Laos) is also imported. However, this phenomenon is unclear due to its marginal nature. The Netherlands, ahead of Belgium, is the main platform which supplies French dealers. As with cocaine and synthetic drugs, the Netherlands and Belgium are a significant secondary source of the French market. In these two countries, there are wholesale or retail markets where the criminal or user-dealer networks come, mainly via road vehicles, to get their supplies and they then redistribute the product across mainland France.

Amphetamines and MDMA/ecstasy

The synthetic drug market is expanding, as demonstrated by the increase in the seized quantities of MDMA/ecstasy (1 543 421 pills in 2022, +6% compared to 2021) and amphetamines (273 kg in 2022, +21% compared to 2021).

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. The amphetamine-type stimulants (ATS) market in France has been widely dominated by MDMA/ecstasy since the end of the 1990s. Certain territories, such as French Polynesia (Simon and Valiergue 2022), are particularly exposed to the circulation of amphetamines and methamphetamines. The significant changes observed on the markets are connected with the form of the product and the emergence of the powder and crystal form on the market at the start of the 2010s, in the context of the decline of the use of the “pill” form (Gandilhon and Néfau 2016).

New psychoactive substances (NPS)

NPS, which circulate on the French market via the web, are mainly produced in Asia, particularly in China and India. They all have legal applications in the industry or pharmacy.

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

In 2022, 156.7 tonnes of narcotics were seized, a historic level of interception by law enforcement services, thus showing the extent of the supply and the availability of illegal products. Most of the seizures are related to cannabis: in 2022, the seizures reached a record level of 128.6 tonnes (+15% compared to the previous year). The law enforcement services intercepted twice more cannabis resin (more than 87 tonnes in total) than herbal cannabis (41 tonnes). As for the other drugs, the seizures also increased in 2022: this was the case for both cocaine (27.7 tonnes in 2022, +5%) and heroin (1.4 tonnes, +8%). The seizures of synthetic drugs also increased considerably (+21% between 2021 and 2022), with 273 kg of amphetamines and methamphetamines, and more than 1.5 million ecstasy and MDMA pills.

The narcotic seizures are an important activity of the law enforcement services, particularly the customs services who seized 104 tonnes in 2022, which shows strong mobilisation towards the interception of illegal drugs, especially cannabis (66.25 tonnes seized in 2022), cocaine (17.86 tonnes), heroin (627 kg) and ecstasy (655 771 doses) (DGDDI 2023).

The cannabis, cocaine and heroin markets are the three largest illegal drug markets in France. In 2020, the global sales of illicit drugs (cannabis, cocaine, heroin, MDMA/ecstasy, amphetamines) was estimated at 4.2 billion euros (Cochard and Cuvilliez 2021). The market with the highest value is cannabis. According to the latest available estimation, the sales amounted to 1.2 billion euros in 2017 compared to nearly 700 million euros in 2010, an increase of around 72% (Spilka and Legleye 2020). This estimate, carried out by the OFDT, is based on the 2017 expenditures of users aged 18 to 64 and those aged 17. Other estimations suggest higher figures but identify the same market dynamic for cannabis (Ben Lakhdar *et al.* 2016; Ben Lakhdar and Massin 2021). The cocaine market's turnover nearly reached 1.7 billion euros in 2017 (Ben Lakhdar and Massin 2021), compared to 902.3 million euros in 2010 (Ben Lakhdar *et al.* 2016). This latest estimation puts the cocaine market's business turnover in a bracket of between 0.936 and 2.4 billion euros which rises to between 1.1 and 2.65 billion euros if crack cocaine is included. In France, the cocaine market has the second highest value after the cannabis market. Despite comparability limitations, the cocaine market allegedly doubled in France during the second half of the 2000s in both volume (going from 8.3 tonnes consumed in 2005 to 15 tonnes in 2010) and value (from 488 million euros in 2005 to 902 million in 2010), before continuing to progress (26 tonnes in 2017).

The French cocaine market is increasingly influenced by the three overseas departments located near coca 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. More than 75% of cocaine seizures made in 2022 are reported to be carried out through this means, with containers playing a major role, as they remain the preferred method of concealment for traffickers (OFDT 2023). The exit ports are generally located in Brazil and Ecuador, as the producer countries are being increasingly controlled. These maritime flows sometimes go through the French Antilles and French Guiana. Martinique and Guadeloupe are no longer only areas where free base cocaine (crack) is used 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 (OFDT 2023). Just like other European countries (especially Belgium, Spain and the Netherlands), some cocaine transformation laboratories have been demolished in France. The latter involve defendants linked to different South American organisations.

While sea transportation remains dominant for cocaine, air transportation progressed and represented 17.1% of the quantities seized in 2022 (i.e 3.7 tonnes) compared to 12.4% in 2021 (OFAST 2022). At the heart of the air routes, the role of French Guiana is central, to the point that the route from Cayenne to Metropolitan France is one of the main routes for bringing cocaine into France. The strengthening of air traffic control between Paramaribo, the capital of Suriname, and Amsterdam is probably one of the causes of French Guiana's growing role in the supply of cocaine to Metropolitan France. As the only airport with direct daily flights to France (and therefore Western Europe), French Guiana is also a strategic point for Surinamese organised crime to export cocaine via Cayenne and its international airport. In parallel with the predominant role of Surinamese drug traffickers, 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 "attractive" 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 also observed an increase in postal cocaine trafficking originating from French overseas departments such as Guiana and the French West Indies (Guadeloupe and Martinique). The customs figures show an increased use of postal and express freight for all “traditional” drugs: as well as cocaine, these transport vehicles are also reported for cannabis and heroin (DGDDI 2023).

The wholesale and semi-wholesale levels of drug markets are controlled by major organised crime networks. The police departments highlighted 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 a share of the money made from trafficking. Alongside these "large" networks exist a myriad of small trafficking channels run by user-dealers, directly supplied by the Netherlands and Belgium (Cadet-Taïrou *et al.* 2020). Heroin trafficking in France is highly fragmented and relatively diversified. In addition to foreign criminal organisations particularly Turkish, Georgian, and Albanian ones, 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, even though their numbers are declining in 2022 (Tissot 2023). 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

France is not a direct producer of synthetic drugs but is a precursor transit country, especially given the platform of Roissy, in a context where Europe, today, is one of the major production zones of synthetic drugs.

Regarding wholesale markets, one of the major events of 2022 was the control of the cocaine market by the criminal organisations importing cannabis resin, thus showing a merger of these two wholesale markets. The second significant development is the continuing fall in the wholesale price of cocaine: in 2022, the median price per kilogram of wholesale cocaine in metropolitan France is €32 000 (against €32 500 in 2021 and €33 500 in 2020). Since the peak of the 2010s was reached in 2014, the wholesale price has decreased by almost 9 %. A wholesale cocaine market exists, notably in the French West Indies and French Guiana, where prices are lower as dealers obtain supplies at €5 000 per kilogram in 2022.

The trend is different for cannabis. In 2022, the wholesale price of cannabis resin reached €3 000 against €3 500 per kg in 2021. The wholesale price of herbal cannabis was €4 500 against €4 250 in 2021. Since 2010, herbal cannabis and cannabis resin prices have increased by +20% and +63.5% respectively. The wholesale price of heroin has increased: €15 000 in 2022, against €14 500 in 2021 (Ministère de l'Intérieur and Police nationale 2022).

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

Three types of players are at the heart of the illegal drug street market. First of all, the so-called “city” networks, established in the popular peripheral districts of the large metropolises, invested either in the sales of different narcotic products, in wholesale or in retail. The most notable changes these last ten years particularly concern their growing dominance on the cocaine market, at the wholesale and retail level, and the increasingly frequent use of home deliveries or techniques comparable to direct marketing techniques (packaging, “best deals”, loyalty cards, etc.) through social media (Gérome and Gandilhon 2020). The second type of players are organised crime gangs, particularly Albanian and Georgian ones, which are very present on the heroin markets and the markets focused on the trafficking of opioid substitutes such as Subutex® (Balduc and Gandilhon 2020). The third one, finally, are the users-dealers at the head of micro-networks who get their supplies in the Netherlands or Spain in particular (Gandilhon 2007).

The change in price and purity of the circulating products in France has been measured by the OFDT via the SINTES scheme for more than 20 years. The average and median contents calculated from the SINTES analysis results are indicative and are not representative of the average contents of products circulating in French territory. As the SINTES collections were not carried out randomly, they observe specific collection patterns (selection bias). Moreover, the number of samples is too small to be representative. In order to express the statistical data in the most accurate way and to facilitate their understanding, the interquartile ranges are included. SINTES data should therefore be treated with caution like other data from epidemiological surveillance scheme.

Cannabis

According to the OFAST (Anti-Narcotics Office), the usual price for herbal cannabis in 2022 was approximately €10 per gram and ranged from €8 to €12 per gram, as compared to €8 for cannabis resin.

The average THC content of seized cannabis resin (data from the STUPS© file), at 30% in 2022, is the highest ever recorded (27.7% in 2021 and 26.5% in 2020).

In the OFDT's SINTES scheme, the average THC potency of the analysed resin samples was 25.2% (IQR: [23.0-32.0]). An increasing trend in the content, as compared to the previous year, has been reported, due to the end of the alert on cannabis adulterated with synthetic cannabinoids. The observation is consistent with herbal cannabis, with an average content of 8.2% (IQR: [3.0 –12]) for 13 samples with THC quantification performed.

Suspected adulteration is established when THC levels are low despite reports of adverse effects suggestive of acute cannabinoid intoxication.

On developments in the cannabis market, the Customs Laboratories Joint Service noted a 38% increase in 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.

Three of the trends identified in previous years are still relevant:

- the development of a concentrated resin supply (obtained by repeatedly passing through several increasingly fine sieves, or with artisan techniques allowing the maximum amount of THC to be extracted) available at prices higher than on the traditional resin market;
- herbal cannabis with low (or no) THC levels;
- and the circulation of herbal cannabis that has a low level of natural cannabinoids and containing synthetic cannabinoids, most often MDMB-4in-PINACA.

Cocaine

According to the OFAST, in 2022, after many years of decline, the current price of the cocaine chloralhydrate was stabilised at around €65, as compared to €66 in 2020, €67 in 2019 and €70 in 2017/2018.

The average seizure content (retail, semi-wholesale, wholesale) was 72% in 2022 versus 66.1% in 2021, up from 63.5% in 2020, with a maximum rate of 100% (SNPS 2022). The average content of the street seizures suggests a high availability of cocaine in mainland France.

Heroin

In 2022, the usual price for a gram of brown heroin was approximately €30 according to the OFAST, versus €33 in 2021. This was the lowest level since 2010 (€40).

The average potency of brown heroin seizures in 2022, 20%, was significantly higher than in 2021 (16.9%). The samples of brown heroin collected as part of the SINTES scheme had an average potency of 18.3% (73 samples, including 60 quantifications) compared to 21.3 % in 2021. The collections made via the SINTES scheme (n = 73) confirmed previous observations of low heroin levels in the samples, with a median level stable at 11% (IQR: [7.4 – 25.0]) (Cherki in press).

MDMA/ecstasy

Price and purity depend on the galenic form in which the substance is sold: tablet, powder or crystal.

In 2022, according to OFAST, the usual price for an ecstasy tablet is stable around 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.

In 2022, the average content of MDMA tablets was 28%, as compared to 32% in 2021 (SNPS 2022).

New psychoactive substances (NPS)

In France, the OFDT notified the identification of 26 NPS for the first time ever. These substances are mostly produced within the European Union, particularly in the Netherlands, but also in Belgium, Czech Republic and more recently in Germany and Spain. According to the latest available data (in 2020), there were 1 666 seizures or checks [2] linked to 126 different NPS[3] (compared to 1 255 seizures and checks in 2019 for 111 NPS). In 2022, the main noteworthy event regarding NPS was the amendment of the 3-MMC market following the Dutch classification in October 2021. 3-MMC was progressively replaced by other molecules of the same family, most often without the buyers' knowledge. Thus, many mis-sellings were successfully revealed following analyses that were part of the SINTES scheme (Cherki in press).

The most often observed families were cathinones, synthetic cannabinoids and arylcyclohexylamines. ketamine, 3-MMC and DMT have been among the 10 most seized substances since 2014.

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 2022, the Interior Minister's statistics department amended the data collection system, counting only the use and trafficking of narcotics. In 2022, the total number of persons accused of narcotic use in France was about 251 000. Aside from these drug use offences (almost 90 % of the total), the police services and French *Gendarmerie* accused around 49 000 individuals of drug trafficking. 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. As of September 2020, simple use violations can be sanctioned by a criminal fixed fined. In 2022, the Interior Ministry's statistics department made a list of more than 143,000 criminal fixed fines, thus demonstrating the significant growth of this measure to respond to consumers (particularly those of cannabis). However, these progressions are very contrasting geographically.

According to the latest available data, in 2021, according to the Ministry of Justice, drug law offence (DLO) convictions for main offences (single or multiple) represented 10.5% of all criminal record convictions, i.e. around 58 000. These offences can be broken down as follows: illicit use (43%), possession-acquisition (51%), supply and sale (4%), trade-transport (1%), import-export (40 cases), helping others use (46 cases) and other DLOs (348 cases). In the majority of possession-acquisition offences, offenders were sentenced to prison (84%) while using offences were mainly sanctioned by fines (72%). The number of fixed penalty notices issued for poisonous substance, narcotic and stimulant offences carried out in 2022, have risen to 3 801.

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,*

[2] .
[3] .

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 represent more than 26% of road safety offences, but their numbers almost tripled between 2013 (19 196) and 2021 (57 115). As a comparison, in 2021, convictions relating to driving under the influence of alcohol account for almost 32% of road safety offences. Driving after drug use is mainly punished by fines, which accounted for almost 54% of convictions for driving after drug use in 2021.

The revenue coming from the confiscation of goods from people convicted of drug offences are used to contribute to the MILDECA "narcotics" support fund. According to the 2020 activity report of the Agency of the Recovery and Management of Seized and Confiscated Assets[4] (AGRASC), 17.8 million euros were paid to MILDECA, compared to 22.9 million in 2019 and 12.6 million in 2018 (Première ministre 2022) (see T1.3.1). The increasing practice of seizures and confiscations is also the result of an increased awareness of the prosecutors, through the dissemination of a guide to seizures and confiscations which was completely remade and re-updated in January 2021 (Ascensi 2023). It is an educational, legal and technical tool of reference for all practitioners. In addition, since 2018, the appointment in each public prosecutor's office of a contact prosecutor dealing with criminal seizures and confiscations has guaranteed the distribution of best practices within the jurisdiction.

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 National Plan for Mobilisation against Addictions (2018-2022) (MILDECA 2018) emphasises the importance of implementing a national strategy based on better coordination between the various services involved (police, customs, Gendarmerie, justice). It states that the interventions carried out related to tracking, investigation and action, by the police, gendarmerie, customs and the navy (for the interceptions of narcotics in French waters) warrant an ad hoc cooperation strategy to respond to the significant resources of the traffickers and their adaptation strategies. As well as dismantling drug dealing points and trafficking networks operating internationally, a major priority is the fight against money laundering, a key issue in a dynamic French drug market. 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.

The governmental strategy regarding the fight against the national trafficking of narcotics was built in 2019 in a national anti-narcotics plan (Ministère de la Justice *et al.* 2019), which includes

[4] Created as part of the law of 9 July 2010, the AGRASC is responsible for the contribution to the "narcotics" supply fund.

55 measures aiming to meet 6 objectives: improve knowledge on trafficking; step up and rationalise field activities; enhance the fight against the underground economy and the drug trafficking laundering routes; reinforcing the seizure of criminal assets; develop international cooperation; strengthen the capacities of services. On the same model of the service reorganisation operated in France as part of the fight against terrorism, a new service has been created to guarantee the role of sole leader in the fight against drug trafficking: the Anti-narcotics Office (OFAST). In February 2020, the Ministry of the Interior officially announced the creation of OFAST, which succeeds OCRTIS (Central Office for the Repression of Drug-related Offences). This creation is one of the main operational adaptations of the national anti-narcotics plan. 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. The deputy head of the office comes from the judiciary. At a territorial level, OFAST has 14 regional offices and 5 territorial detachments. Since September 30, 2020, 104 operational drug intelligence units (CROSS) have been deployed throughout the country, one per department. One of their missions is to establish a map of the deal points located in the French territory and their evolution on a quarterly basis. In 2021, the government announced the creation of a reporting portal for citizens to provide the police and *gendarmerie* with information about narcotic trafficking and its actors. This information is then transmitted to the CROSS for processing. In addition, the extent of trafficking in ports and airports has led OFAST and Customs to create CROSS THEMATIQUES covering port, airport and postal activities.

In addition, in accordance with the strategy of the national anti-narcotics plan which aims to develop the seizures of criminal assets, the Agency for the Recovery and Management of Seized and Confiscated Assets (AGRASC) has been considerably enhanced with the increase in its staff members (83 agents in 2022 compared to 45 in 2020) and the creation of 4 regional offices in Marseille, Lyon, Rennes and Lille in 2021. In 2023, three new offices were to be set up in Bordeaux, Nancy and Fort-de-France. In 2022, the seizures increased to 771 million euros, a level which had never been reached since the AGRASC's creation in 2010, an increase of 6.3% compared to the previous year and 30% compared to 2020. The confiscations increased to 171 million euros, an increase of +13.9% compared to 2021 and +100% compared to 2020.

Combating trafficking is also based on the interaction between Customs and the justice system with the National Jurisdiction Against Organised Crime (JUNALCO). In addition, in 2022, France created a coordination body in charge of combating drug trafficking at the port of Le Havre which is under the authority of the public prosecutors of Paris, Douai and Rouen. This measure is part of the enhancement of cooperation in terms of combating trafficking within European ports and protecting port infrastructures.

The 8 specialised inter-regional jurisdictions (JIRS) created between 2004 and 2022 also participate in the fight against narcotics by having enhanced technical resources to successfully carry out their enquiries. Active in 8 regional metropolises (Paris, Lyon, Marseille, Lille, Rennes, Bordeaux, Nancy and Fort-de-France), these include prosecutors and investigating magistrates who have specific competence and experience in combating organised and financial crime.

Finally, many other players take part in combating trafficking, including the Minister of Europe and Foreign Affairs and the Ambassador Extraordinary of the fight against terrorism and organised crime.

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)

Over the past 20 years, the supply of drugs in France has undergone changes due to the diversification of the products on offer and a much more competitive market. The level of seizures shows that the quantities intercepted have risen sharply over the last twenty years, especially for herbal cannabis, cocaine and amphetamines and methamphetamines (see table 1).

Table 1: Average annual quantities seized in France by decade

	2001-2011	**2012-2022**
Herbal cannabis (kg)	4 074	23 630
Cannabis resin (kg)	64 747	64 524
Cocaine (without crack) (kg)	5 884	14 052
Heroin (kg)	802	985
Amphetamines and methamphetamines (kg)	238	474
Ecstasy/MDMA (tablets)	1 279 251	1 065 614

Source: OFDT/OFAST

These changes mask the recent expansion of the supply of certain products, measured with regard to the quantities seized such as cocaine (+101%) or, to a lesser extent, amphetamines (+21%) (see table 2).

Table 2: Quantities of drugs seized (in kg) in the last 5 years and changes 2021/2022 (in %)

<table>
<tr><th>Drugs seized</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>Evolution 2021/2022 (%)</th></tr>
<tr><td>Cannabis: resin</td><td>85 354</td><td>74 340</td><td>50 248</td><td>72 400</td><td>87 600</td><td>+21</td></tr>
<tr><td>Cannabis: herbal</td><td>29 800</td><td>29 952</td><td>46 277</td><td>39 500</td><td>41 000</td><td>+3.8</td></tr>
<tr><td>Cannabis: plants</td><td>138 561</td><td>183 034</td><td>115 365</td><td>101 771</td><td>76 807</td><td>-24.5</td></tr>
<tr><td>Heroin</td><td>1 100</td><td>1 073</td><td>1 132</td><td>1 300</td><td>1 400</td><td>+7.7</td></tr>
<tr><td>Cocaine</td><td>16 400</td><td>15 761</td><td>13 145</td><td>26 500</td><td>27 700</td><td>+101.5</td></tr>
<tr><td>Crack</td><td>20</td><td>na</td><td>na</td><td>na</td><td>na</td><td></td></tr>
<tr><td>Amphetamines</td><td>208</td><td>na</td><td>706</td><td rowspan="2">226*</td><td rowspan="2">273*</td><td>+20.8</td></tr>
<tr><td>Méthamphetamines</td><td>126</td><td>na</td><td>na</td><td></td></tr>
<tr><td>Ecstasy (tablets)</td><td>na</td><td>1 699 848</td><td>1 227 876</td><td>1 454 085</td><td>1 543 421</td><td>+6</td></tr>
<tr><td>LSD (blotter)</td><td>2 979</td><td>na</td><td>na</td><td>na</td><td>na</td><td>na</td></tr>
<tr><td>Ketamine</td><td>249</td><td>na</td><td>na</td><td>na</td><td>na</td><td>na</td></tr>
</table>

Source: OSIRIS (OFAST)
na: not available

* *Total amount of the amphetamine and methamphetamine seizures.*

Confirming the increased availability of products, the price of most illegal drugs has decreased in the recent period (heroin, cocaine, amphetamines) (see table 3).

Table 3: Change in retail median drug prices over 5 years (in euros)

	2018	**2019**	**2020**	**2021**	**2022**
Heroin	35	30	33	30	30
Cocaine	70	67	66	65	65
Ecstasy (tablets)	10	10	10	10	10
Cannabis resin	7	8	8	8	8
Herbal cannabis	10	9	10	10	10
Amphtamines	15	15	15	12.5	10
LSD (blotter)	10	10	10	na	na

Source: OFAST
Na: not available

According to the Ministry of the Interior, by the end of 2022, France, including its overseas territories, had 3 159 “dealing points”, defined as permanent and structured sales outlets located in the public sphere, compared to nearly 3 325 in 2021 and 4 034 in 2020 (Premier ministre 2022). This leads to a growing diversity of actors involved in the supply side, while the development of information and communication technologies (ICTs) favours a renewal of the ways in which networks and new relationships with users are organised.

Before differentiating the trends by product, some general factors may be mentioned to explain these developments. Several phenomena explain the expansion of the range of services on offer and the more visible use of ICTs over the past decade. 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.

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:

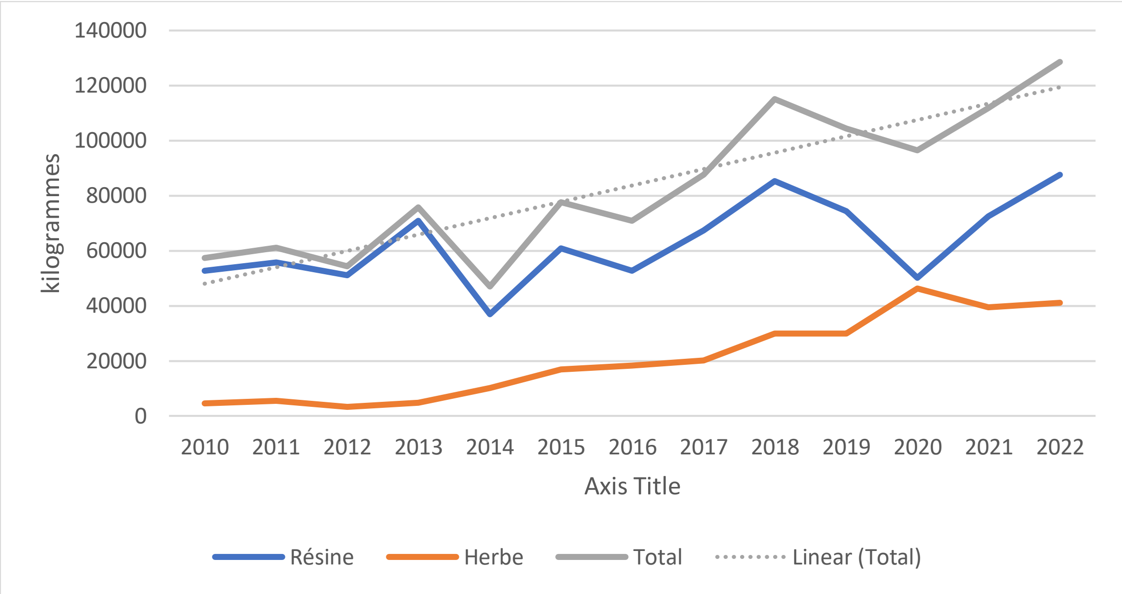
- the *outsourcing* of certain functions such as product transportation, which is increasingly reserved for specialised teams;
- the multiplication of storage locations, or even "*zero stock*", intended both to overcome storage problems and to cushion the effect of large seizures;
- the *flexibility* 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 increasingly recruit lookouts, dealers and, since 2020, team leaders, from outside the neighbourhood or even the city or region where the point of sale is located. The presence of women in networks also seemed to increase in 2020 and was no longer confined to subordinate functions (small supply missions, minders).

Cannabis

The changes in the French market can be spotted in the progressions of the intercepted quantities of cannabis resin and herbal cannabis throughout the national territory. While, in the 2000s, the average number of the annual cannabis resin and herbal cannabis seizures reached 65.6 and nearly 4 tonnes respectively, in the 2010s, the average was 60.5 tonnes for cannabis resin and 18.4 tonnes for herbal cannabis. In 2022, the herbal cannabis seizures reached the second highest level ever observed, with more than 41 tonnes compared to 39.5 tonnes in 2021. The cannabis resin seizures of 87.6 tonnes compared to 50.3 tonnes in 2020 (this year was marked by the closure of the borders between Morocco and the EU as a result of the Covid-19 pandemic) returned to significant levels which were 45% higher than the average of the previous decade. On the other hand, the number of cannabis plants seized in 2022, with 76 807, was the lowest since 2011[5]. Regarding this total, 56% of the plants seized were seized in the French overseas territories, first of all in French Polynesia: this production was exclusively destined for the local market.

[5] During the 2000s, an average of more than 53 000 plants were seized each year in France.

Figure 1: Quantities of cannabis seized (in kg) in France (2010-2022)



Source: OCRTIS/OFAST

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 and 2021, 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 and boosting postal freight traffic). But the effect of this containment was short-lived.

In 2022, cocaine seizures reached a historic record of 27.7 tonnes, as compared to 26.5 tonnes in 2021. This level is well above the average level observed between 2012 and 2022, i.e. 14 tonnes. Crack cocaine (or base form cocaine) seizures reached one of their highest levels. Traditionally based in the Paris region, the trafficking of this product has now been spotted in regional metropolises such as Lyon and Marseille, as well as in the main cities of the French Antilles and French Guiana. Produced from cocaine hydrochloride close to where it is consumed, trafficking in crack appeared at the end of the 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, they are very small in size, not very violent and 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 base use over the last ten years, particularly among a more socially integrated population.

Heroin

The heroin market, based on the proportion of annual users in the population aged 18-64, is much smaller than the cocaine market. However, it is one of the largest markets in Western Europe. With regards to its availability, OFAST noted an increase in the amount of heroin in the territory, while highlighting the great regional disparities in this area. Since 2018, the Lille metropolitan area experienced an increase in trafficking and is becoming a national centre for the wholesale resale of heroin for the French networks. Similar phenomena are also emerging in the main cities in the East of the country: Grenoble, Nancy, etc.

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 in 2022 at 1.4 tonne. The average purity of the product, as measured by the samples analysed by the National Forensic Science Institute (SNPS) in 2022, is the second highest it has been for 10 years.

Synthetic drugs

The synthetic drugs market is still dominated by MDMA/ecstasy. It is expanding:1 543 421 tablets seized in 2022 (+6% compared to 2021). 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.

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 2021 and 2022 (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 since2010).

The same upward trend is recorded for amphetamine seizures (273 kg in 2022, +21% compared to 2021). 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. On the other hand, a methamphetamine market has been developing in French Polynesia for the last ten years (Simon and Valiergue 2022).

The SINTES scheme collected 2 samples of methamphetamine in 2022 with levels respectively at 86.0% and 96.0%. Both samples came from products purchased on the darknet.

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 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. In 2022 the SINTES scheme collected 23 vaping liquids. This number is stable as compared to the previous year.

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 generally including synthetic cannabinoids, tobacco and alcohol) has emerged on the street market and is overwhelmingly affecting vulnerable young men. The still fragmented information on the structuring on the supply of "chimique" from the toxicological analysis suggest trafficking which is mainly supplied by sea. The "Chasse-Marée" study, launched in 2022, aims to document the composition of *la chimique* in Mayotte through many fundraising campaigns.

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 increased from nearly 138 000 to nearly 190 000. After a decrease between 2014 and 2020, they rose again, partly due to the entry into effect of the criminal fine procedure, and accounted for almost 103 000 suspects by the police and *gendarmerie* in 2021 and 143 200 in 2022.

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 has been 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). It seems that, in 2022, the market faced a strong dynamic given the record seizures of cocaine and heroin, and very high cannabis (herbal cannabis and cannabis resin) seizures carried out by the police, gendarmerie and customs across the national territory.

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.*

In 2022, the TREND scheme once more reported the growing visibility of 3-MMC at festive parties in clubs and discotheques (in Paris, Bordeaux, Marseille and Lyon, for example). Consumed by sniffing or ingestion, this synthetic cathinone with both euphoric and empathic effects is perceived by users as combining the effects of cocaine and MDMA/ecstasy for a price per gram (€20 to 40) that is lower than those of the above-mentioned substances. The use of 3-MMC was previously almost exclusively observed among men who have sex with men (MSM). Its spread would be favoured by its increased presence in the range of products available (resin, herbal cannabis, cocaine, MDMA, ketamine, etc.) in the context of home sales. As with GHB/GBL in 2018, this diffusion among other groups takes place at parties attended by both MSM familiar with the product and other drug users who are going to experiment with it (Gérome 2021).

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.

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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 Anti-Narcotics Office (OFAST). 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.

Internet sales of new psychoactive substances, whether classified in France or not, have given rise to different forms of flows. Their documentation has required the contribution of additional sources of information. The Customs Laboratories Joint Service (SCL) and the National Forensic Science Institute (SNPS) are the main bodies that collect information on the number of seizures, their quantities and the identification of the substances involved.

Analyses of seizures by law enforcement laboratories provide the main source of information on the composition of illegal substances in France.

The National Forensic Science Institute (SNPS) and the Forensic Sciences Institute of the French Gendarmerie (IRCGN) are the main bodies that provide information on the active ingredient content of the main substances circulating in France. The data collected by the

SNPS and the IRCGN are grouped in the STUPS© software (“*Système de Traitement Uniformisé des Produits Stupéfiants”* or Standardised Narcotics Processing System). An information and prevention tool, STUPS© provides not only information to investigators and magistrates but also to health services such as the French Monitoring Centre for Drugs and Drug Addiction (OFDT), particularly in the event of the discovery of a new product or a high dosage.

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

<u>*Data on prices*</u>

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

- A periodic OFAST 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 scheme, on the basis of interviews and observations with drug users, workers in harm reduction facilities (CAARUD) and workers in techno party settings of each site of the scheme. For each substance under consideration (illicit or diverted), the current retail price as well as the lowest and highest price observed are reported.

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* (IRCGN) 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 providing their data 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 harm reduction facilities CAARUD clients (the ENa-CAARUD survey);
- partner information system results;
- thematic quantitative and qualitative investigations that aim to gather more information about a particular subject.