

# BRIEFING

## THE SUPPLY OF ILLICIT DRUGS IN FRANCE IN 2023

### HIGHLIGHTS

- While the port of Le Havre is one of the main entry points for cocaine into Europe, enhanced port security measures implemented in 2023 led to a reduction in trafficking activity and volumes seized there.
- In 2023, there was a slight decrease in cannabis seizures in France to 124.7 tonnes, representing a 3% decline compared to the previous year. Average THC content in cannabis resin has risen by 82% in eleven years, from 15.9% in 2012 to 29% in 2023.
- In 2023, cocaine seizures in France totalled 23.2 tonnes, representing a 16% decrease compared to 2022. The typical retail price for a gram of cocaine was €66 in 2023.
- In 2023, heroin seizures in France saw a slight decrease to 1.1 tonnes, representing a 21% drop from the previous year. The average purity of heroin in 2023 was 16%, which is lower than in previous years. In 2023, the typical street price of a gram of heroin continued to fall.
- In 2023, seizures of MDMA/ecstasy rose significantly, representing an increase of 164% on 2022. It is important to note, however, that only 30% of these products were intended for sale within France, while 70% were in transit, destined mainly for Tunisia and the United Kingdom.

### TABLE OF CONTENTS

<b>Trends in the French illicit drug market</b>	<b>2</b>	<b>Supply of amphetamine-type stimulants (ATS) in France</b>	<b>8</b>
<b>Resin and herbal cannabis supply in France</b>	<b>4</b>	<b>Methodology</b>	<b>9</b>
<b>Cocaine supply in France</b>	<b>5</b>	<b>Bibliography</b>	<b>10</b>
<b>Heroin supply in France</b>	<b>6</b>		

# TRENDS IN THE FRENCH ILLICIT DRUG MARKET

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## Supply routes and methods constantly changing in France

### Maritime transport and adaptability of traffickers: the case of Le Havre in 2023

In France, maritime transport is the main route for cocaine entering the country, accounting for 75.4% of seizures in 2022. Air passenger transport, meanwhile, accounted for 17.1% of seizures. The port of Le Havre is the main entry point, with a considerable increase in seizures from 3.6 tonnes in 2018 to over 10 tonnes in 2021 and 2022. In 2022, Le Havre accounted for 78% of all cocaine seized in French ports. Its extensive maritime connections with South American and Caribbean countries make it particularly attractive to criminal organisations seeking to diversify their entry points into Europe, particularly as part of resource-sharing strategies for drug importation (OFAST, 2023).

In 2023, enhanced security measures at the port of Le Havre resulted in a decline in its use by drug traffickers as a point of entry for illegal substances into France. That year, only 55% of cocaine seizures were made on maritime routes, reflecting a 16% decrease in cocaine seizures compared to 2022. However, the authorities did note a rise in use of the drop-off technique, where consignments are offloaded at sea to circumvent the restrictions enforced in Le Havre. This has led to incidents of cocaine shipments washing up on beaches or being picked up at sea. In addition, the use of secondary ports also increased. Although these secondary ports have far less capacity than Le Havre, they are sometimes less secure and offer traffickers greater freedom of movement (Durain and Blanc, 2024; OFAST, 2024b). Preliminary data for 2024 points to a significant increase in seizures in Le Havre, suggesting that traffickers are making more use of this port once again, despite the security measures in place.

### The Cayenne-Paris route under heightened surveillance

The French Antilles are traditionally regarded as a maritime transit zone for cocaine destined for the market in metropolitan France, and play a strategic role through their ports, notably Fort-de-France in Martinique and the Jarry complex in Guadeloupe. In 2022, cocaine seizures in maritime facilities in the Antilles came to nearly 1.2 tonnes. Over the same period, seizures in commercial ports in mainland France on arrivals from the Antilles amounted to 6.7 tonnes (OFAST, 2023). While the Antilles thus facilitate maritime transport of cocaine, French Guiana stands out for its role in supplying the metropolitan market by air. The Cayenne-Paris route is used by smugglers transporting goods in corpore and/or in their luggage, and has gained importance in recent years. However, in November 2022, security measures at Cayenne airport were tightened, notably with the introduction of the “100% control” scheme under the “Mules Plan”, which has gone hand in hand with more effective interception of trafficking attempts. As of 31 January 2024, this operation had resulted in the interception of over 680 mules and the seizure of nearly one tonne of cocaine (Durain and Blanc, 2024). According to law enforcement authorities, these controls seem to have had a deterrent effect, although it would appear that in the face of this enhanced customs response in Cayenne, the traffickers have sought alternative routes, opting for flights to the Antilles followed by onward flights to mainland France, where checks are less systematic (OFAST, 2023).

## Illicit activities and crime linked to drug trafficking

### Trafficking in controlled medicines: more discreet and less hazardous than drug trafficking

In addition to illicit drugs, there is also trafficking in France in other classified substances, namely medicines classified as narcotics (narcotic medicines) or those subject to narcotics regulations (medicines assimilated to narcotics). These medicines are therefore either wholly or partly subject to the regulations on narcotics, and can only be dispensed with a secure prescription that meets precise technical requirements. They contain psychoactive substances which, if diverted from their medical use, can lead to abuse and dependence (PHARMAPRAT, 2022). According to the Command for Environment and Health (CESAN, 2024) at the Ministry of the Interior, more than 21 000 cases relating to the consumption, sale, or trafficking

of these narcotic and related medicines were recorded by the police and gendarmerie between 2017 and July 2024. Almost all of these cases (96%) concerned six main substances: pregabalin (Lyrica®), buprenorphine (Subutex®) and clonazepam (Rivotril®), which are medicines subject to narcotics regulations, and morphine (Skénan®), methadone and ketamine, which are medicines classified as narcotics. Since 2017, the annual number of investigations involving these substances has been on the rise, with the number of cases doubling between 2017 and 2023. Police seizures have also seen a marked increase, rising from 591 in 2017 to 2 355 in 2023, an increase of 298%. This growth can be attributed in part to greater awareness among law enforcement personnel regarding these specific substances (CESAN, 2024).

The breakdown of police seizures of these medicines has also changed significantly, with a marked increase in pregabalin seizures, rising from 9% in 2018 to 59% in 2023 (CESAN, 2024). Customs authorities have also reported growing misuse of pregabalin nationally, and seized this substance increasingly in 2023 (DGDDI, 2024). This confirms the findings of the TREND monitoring scheme, which point to greater availability of pregabalin on the street market, and a strong presence of points of sale in several urban areas, notably in the Paris and Lyon regions. In Île-de-France, the pregabalin market appears to be expanding following the arrival of new user profiles, particularly former consumers of Rivotril® (Juszczak et al., 2024). This market would appear to be supplied mainly via medical and pharmaceutical nomadism (involving forged prescriptions and networks of collectors), foreign channels (North Africa, Greece, Northern Europe), and thefts from wholesalers (CESAN, 2024; Juszczak et al., 2024). According to CESAN, collectors operate by obtaining forged prescriptions via social media and the internet (CESAN, 2024). Distribution of this substance is often linked to tobacco smuggling networks (DGDDI, 2024).

CESAN notes that medication trafficking networks are often run by former narcotics traffickers who are drawn to a trade that is more discreet, carries lower criminal penalties, and involves less violence between rival groups. This business remains profitable while requiring less investment in logistics, as production and distribution are handled by the pharmaceutical industry (CESAN, 2024).

### **Increasing trend in charges for drug trafficking**

According to data from the Ministry of the Interior, arrests for drug trafficking in France have risen considerably over the past ten years (Gerbeaux and Fabre-Verdure, 2021). However, it remains difficult to determine whether this reflects greater police activity or a genuine increase in trafficking. In 2022, figures from the French Ministerial Statistical Department for Internal Security (SSMSI) show that the national police and gendarmerie charged 49 000 individuals with drug trafficking across the country, compared with nearly 44 000 people a year between 2016 and 2020. The SSMSI highlights the marked territorial concentration of these offences: 90% of those charged with drug trafficking are concentrated in just 3.5% of French municipalities. These are not necessarily major cities, as the urban areas with the most charges for drug trafficking have populations of less than 100 000 (with the exception of Cayenne) (Gerbeaux and Poissonnier, 2023). According to 2022 data from the Ministry of Justice, drug-related offences account for 9% of all convictions nationally (around 50 000 cases). Nearly 54% relate to offences of possession or acquisition, the qualification that applies in trafficking cases. In such cases, 83% of sentences handed down are custodial, while offences of personal use are mostly punished by fines (71%) (Ministère de la Justice, 2024).

### **A surge in violence related to drug trafficking**

In 2023, there was a marked resurgence in violence related to drug trafficking, which can be attributed to territorial rivalries and competition among criminal organisations. Such violence includes score-settling, first-degree murder, attempted murders, abductions and illegal confinement. According to the Central Office for Combating Organised Crime (OCLCO), between 80 and 90% of score-settling incidents, murders and attempted murders among offenders are linked to disputes over drug trafficking (Durain and Blanc, 2024). In 2023, score-settling incidents rose by 38%, with a total of 418 victims (including collateral victims) compared to 303 the previous year, and 85 deaths versus 67 in 2022. Of the 8 000 weapons seized by police in 2023, nearly 300 were war-grade firearms, illustrating the scale of violence associated with drug trafficking. Young people, often minors or young adults recruited as lookouts or dealers, are particularly vulnerable to violence at drug dealing locations. One emerging trend is the recruitment of minors or young adults, often without any criminal record, as contract killers (Durain and Blanc, 2024).

# RESIN AND HERBAL CANNABIS SUPPLY IN FRANCE

## Cannabis supply indicators

### Cannabis seizures

In 2022, cannabis seizures in France reached a record high, with 128.6 tonnes intercepted. 2023 saw a slight decline, however, with 124.7 tonnes seized, down 3% compared to the previous year. These seizures comprised 87 tonnes of resin and 37.7 tonnes of herbal cannabis. Herbal cannabis is coming to represent an increasing portion of this market (see Figure 1). The share of herbal cannabis in total cannabis seizures has risen from 6% in 2013 to 30% in 2023.<sup>1</sup> According to OFAST, 82.7% of the herbal cannabis seized in France in 2023 originated from Spain. In 2023, seizures of cannabis plants showed a significant increase of 46% over the previous year, reversing a three-year downward trend. In total, 112 028 plants were seized, 68.2% of which came from overseas departments and territories (OFAST, 2024b).

### THC potency in cannabis

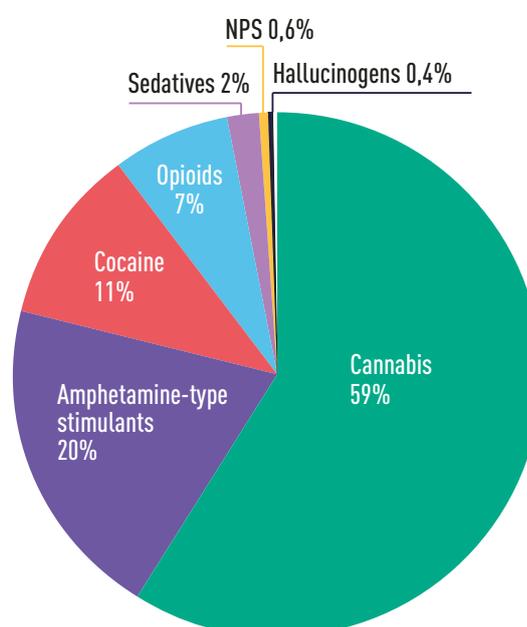
In 2023, the average THC content (the active compound in cannabis) was 29% for cannabis resin seizures, against 30% in 2022 (OFAST, 2024b). Since the early 2010s, the THC concentration in cannabis resin has risen steadily. Over eleven years, it has increased by 82%, from 15.9% in 2012 to 29% in 2023. For herbal cannabis, the average THC content was 14% in both 2022 and 2023 (OFAST, 2024b). This represents an increase of 27% since 2012.

### Retail and wholesale prices of cannabis

On the French market, the wholesale price of cannabis resin stands at €3 206 per kilogram. For retail sales in France, the typical price for resin is €8 per gram, though it can vary between €6 and €11 (OFAST, 2024a). The typical retail price for resin has increased from €6 per gram in 2012 to around €8 since 2019. This trend should be put into perspective, however, by considering fluctuations in the THC content of the product. The price per gram of pure THC has fallen by about 26% over this period, from €38 in 2012 to €28 in 2023. Furthermore, when inflation in France since 2012 is taken into account, the inflation-adjusted retail price shows only a moderate increase from €6 in 2012 to €6.52<sup>2</sup> in 2023.

Regarding herbal cannabis, wholesale prices on the French market stand at €4 852 per kilogram, while typical retail prices are around €10 per gram, with a range between €8 and €12 (OFAST, 2024a). The typical retail price of herbal cannabis has increased from €8 per gram in 2012 to around €10 since 2017. However, the price per gram of pure THC has seen a slight decline from €73 in 2012 to €71 in 2023. When adjusted for inflation in France since 2012, the inflation-adjusted price shows almost no change, edging up from €8 in 2012 to €8.15<sup>3</sup> in 2023.

Figure 1. Trends in the quantities of cannabis seized in France (2012–2023)



Source: OCRTIS/OFAST

1. Although the past decade has seen an increase in the proportion of herbal cannabis among seizures in France, this share has been declining since 2021, after peaking at 48% in 2020.

2. Price adjusted for inflation, 2012 base year.

3. Price adjusted for inflation, 2012 base year.

**Table 1. Cannabis supply in France: seizures, prices, and potency from 2021 to 2023**

	2021	2022	2023	Annual average 2013–2023
<b>Cannabis (resin and herbal)</b>				
Quantities seized (tonnes)	111.9	128.6	124.7	94.5
<b>Cannabis resin</b>				
Quantity seized (tonnes)	72.4	87.6	87	67.8
Average content (% THC)	27.7	30	29	25.4
Retail price (€/g)	8	8	8	7,3
Wholesale price (€/kg)	3 500	3 000	3 206	2 609.6
<b>Herbal cannabis</b>				
Quantities seized (tonnes)	39.5	41	37,7	26.7
Average content (% THC)	12.9	14	14	12.9
Retail price (€/g)	10	10	10	9.5
Wholesale price (€/kg)	4 250	4 500	4 852	3 809.3
Cannabis plants (units seized)	101 771	76 807	112 028	131 175

Source : OCRTIS/OFAST (seizures and prices); INPS/SNPS (purity levels)

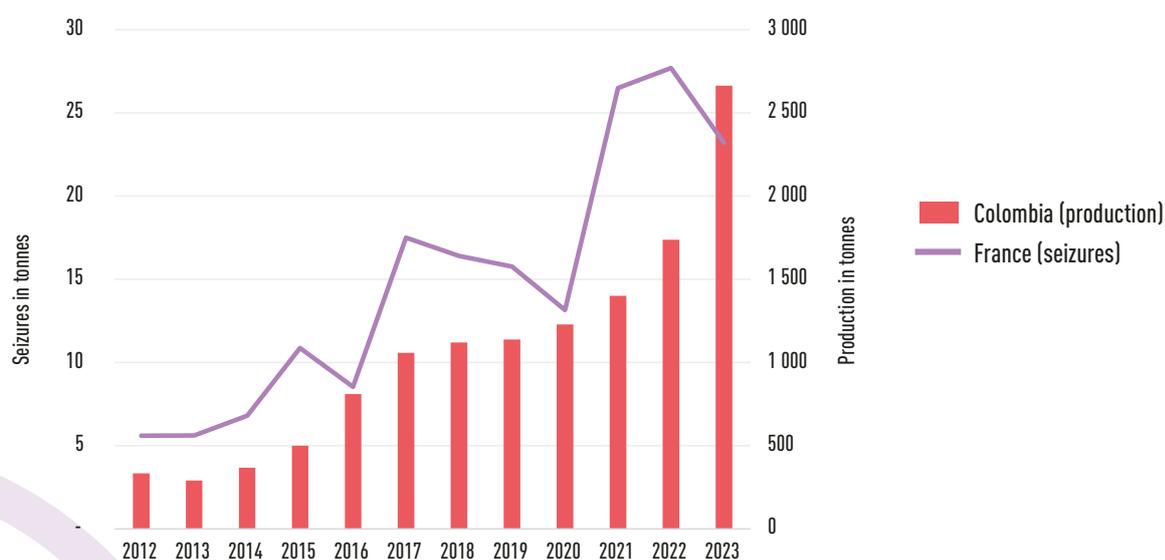
## COCAINE SUPPLY IN FRANCE

### Cocaine supply indicators

#### Cocaine seizures

In 2023, cocaine seizures in France amounted to a total of 23.2 tonnes, representing a 16% decrease from the record of 27.7 tonnes seized in 2022 (see Figure 2). Since 2021, the threshold of 20 tonnes a year has been exceeded systematically. Just over half of these seizures (55%) occurred during maritime transport, a significantly lower proportion than in previous years, particularly in 2022, when it accounted for 75% of seizures. This reduction is attributed to strengthened security measures at the port of Le Havre.

**Figure 2. Cocaine production in Colombia and quantities seized in France (2012–2023)**



Source: UNODC/OCRTIS/OFAST

Note for the reader: in 2023, 2 600 tonnes of cocaine were produced in Colombia, and 23 tonnes of cocaine were seized in France.

## Cocaine purity levels

In 2023, the average active ingredient content stood at 73%, a level that was stable compared to previous years (72% in 2022). This increase is part of a marked upward trend observed over the past decade, representing a 46% increase since 2012, when the average content was 50%. Analysis of cocaine samples collected under the National Identification System for Toxics and Substances (the SINTES scheme tracks the composition of psychoactive products collected close to drug users) over a 20-year period reveals two notable developments. Firstly, an increasing proportion of samples now display very high purity, with cocaine concentrations exceeding 90%. Secondly, there has been a significant decline in the use of cutting agents (Cherki, 2024).

## Wholesale and retail prices of cocaine

On the French market, the wholesale price of cocaine has reached €32 586 per kilogram, representing a slight increase compared to 2022. Regarding retail sales, OFAST reports that the average price for one gram of cocaine hydrochloride stood at €66 in 2023, compared with €65 in both 2022 and 2021 (OFAST, 2024a). Since the early 2010s, the street price has remained relatively stable, generally fluctuating between €65 and €66 per gram. Taking account of the significant rise in cocaine purity over the past decade and the relative stability of its retail price, the price of “pure” cocaine would appear to have fallen in France. In 2012, the price of one gram of “pure” cocaine was €130, compared to €90 in 2023, a fall of 30%. Furthermore, when taking account of inflation in France since 2012, the inflation-adjusted real price shows a decrease of 17%, from €65 in 2012 to €53.8<sup>4</sup> in 2023. In addition, the practice of splitting retail units has become widespread across the country. This has made cocaine more affordable, enabling users on low incomes to purchase quantities of less than one gram, such as half-gram portions (costing between €30 and €40), or even smaller units sold for €20 or as little as €10 (OFDT, 2023).

Table 2. Cocaine supply in France: seizures, prices, and purity levels in 2020 and 2021

	2021	2022	2023	Annual average 2013–2023
Quantities seized (tonnes)	26.5	27.7	23.2	15.6
Average content (%)	66.1	72	73	62.9
Retail price (€/g)	65	65	66	66
Wholesale price (€/kg)	32 500	32 000	32 586	32 644

Source: OCRTIS/OFAST (seizures and prices); INPS/SNPS (purity levels)

# HEROIN SUPPLY IN FRANCE

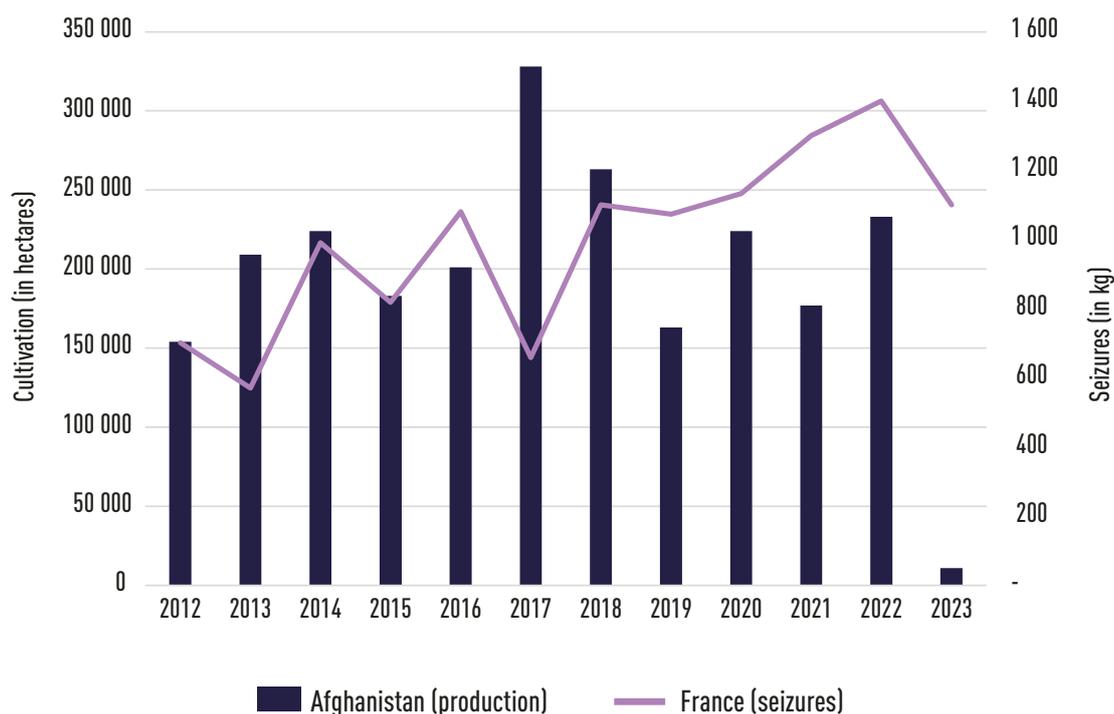
## Heroin supply indicators

### Heroin seizures

In 2022, heroin seizures in France reached a record level of more than 1.4 tonnes. In 2023, this figure declined slightly to 1.1 tonnes, down 21% compared to the previous year. However, this downturn should be viewed in the context of a general trend of consistently high seizure volumes (see Figure 3). 2023 was the sixth consecutive year in which heroin seizures exceeded 1 tonne (OFAST, 2024b).

4. Price adjusted for inflation, 2012 base year.

**Figure 3. Opium poppy cultivation in Afghanistan and heroin seizures in France (2012–2023)**



Source: UNODC/OCRTIS/OFAST

Note for the reader: in Afghanistan, in 2023, 10 800 hectares were given over to opium poppy cultivation, compared with 233 000 hectares in 2022. In 2023, 1 100 kg of heroin were seized in France, compared with 1 400 kg in 2022.

### Heroin purity levels

In 2023, analyses by the National Forensic Science Institute (SNPS) found that the average heroin purity stood at 16%, reflecting a decrease compared to previous years. Since 2017, purity levels have ranged between 17.1% and 20.3% (OFAST, 2024b). The heroin market in 2023 experienced some local disruptions, particularly in Île-de-France. Products sold as heroin displayed significant variations in their composition, with fluctuating concentrations of opioids and cutting agents. Synthetic opioids, such as nitazenes, were also detected in Occitanie, Auvergne-Rhône-Alpes and La Réunion, further contributing to market instability (Cherki, 2024).

### Retail and wholesale prices of heroin

On the French market, the wholesale price for a kilogram of heroin stands at €14 600 (OFAST, 2024a). According to OFAST, in 2023, the typical street price for a gram of heroin continued its downward trend, averaging around €28, compared to €30 in 2021 and 2022, and €33 in 2020. This marks the lowest level recorded since 2010 (€40) (OFAST, 2024a).

**Table 3. Heroin supply in France: seizures, prices, and purity levels from 2021 to 2023**

	2021	2022	2023	Annual average 2012–2022
Quantities seized (kg)	1 300	1 400	1 100	983.8
Average content (%)	16.9	20	16	16.8
Retail price (€/g)	30	30	28	32.8
Wholesale price (€/kg)	14 500	15 000	14 600	14 338

Source: OCRTIS/OFAST (seizures and prices); INPS/SNPS (purity levels)

# SUPPLY OF AMPHETAMINE-TYPE STIMULANTS (ATS) IN FRANCE

## ATS supply indicators

### Seizures of ATS in 2023

In 2023, seizures of MDMA/ecstasy rose sharply, with over four million tablets or their powder equivalent intercepted.<sup>5</sup> This marks an increase of 164% compared with 2022. It is worth noting, however, that only 30% of these substances were intended for sale within France, while 70% were in transit, destined mainly for Tunisia and the United Kingdom (OFAST, 2024b).

With regard to methamphetamines and amphetamines, seizures remained relatively stable in 2023, with a total of 265 kg. Half of the quantities seized were intended for the international market, thereby confirming France's role as a transit country for synthetic drugs (OFAST, 2024b).

### Purity levels of the main ATS

The price and purity of ATS fluctuate depending on their form, whether tablets, powder, or crystals. In 2023, the average active substance content in MDMA/ecstasy tablets was 30%, compared to 28% in 2022. These levels have remained relatively consistent over the past decade, ranging between 37% and 28%. However, a slight decline has been recorded since 2019. Between 2012 and 2018, the average content stood at 35%, whereas it dropped to 31% over the period from 2019 to 2023.

For amphetamine, purity levels recorded during seizures in 2023 stood at 24%, compared with 27% in 2022. This marks the end of the upward trend noted between 2016 and 2021, when purity peaked at 31% in 2021. Regarding methamphetamine, seizures in 2023 showed a purity of 74%, down from 78% in 2022.

### ATS prices

Since 2015, the retail price of an ecstasy tablet has remained steady at €10. However, this apparent stability should be viewed in the context of inflation of recent years. In fact, once adjusted for inflation, the real price has fallen from €9.83 in 2015 to €8.15 in 2023. It is also worth noting that this retail price does not fully reflect market reality, as users often purchase quantities of several dozen tablets, which drives down the price per unit. By contrast, the wholesale price of MDMA/ecstasy has not shown the same stagnation. A marked decline has been recorded, with prices falling from €2 500 for 1 000 tablets in 2012 to €1 500 for the same quantity in 2022, representing a 40% decrease.

As regards amphetamines, the wholesale price increased to €5 342 per kilogram in 2023 from €2 150 in 2022. At retail level, the price rose from €10 per gram in 2022 to €13 in 2023. For methamphetamine, the retail price saw a slight decrease to €27 per gram in 2023 from €28 in 2022.

5. The published data on MDMA/ecstasy seizures does not distinguish between tablets and powder, as quantities of seized MDMA powder are converted into tablet equivalents.

**Table 4. The supply of ATS in France: seizures, prices, and purity levels from 2021 to 2023**

	2021	2022	2023	Annual average 2013–2023
<b>Ecstasy/MDMA</b>				
Quantity seized (number of tablet equivalents)	1 454 085	1 543 421	4 072 704	1 465 083
Average content % (tablets)	31.7	28	30	33.4
Average content % (powder)	66	70.2	na	na
Retail price (€/tablet)	10	10	10	9.6
Wholesale price (€/tablet/1 000)	1 500	1 500	na	na
<b>Amphetamine/Methamphetamine</b>				
Quantity seized (kg)	226	273	265	408
Average amphetamine content (%)	31	27	24	26.5*
Average methamphetamine content (%)	76	78	74	71.4*
Retail price of amphetamine (€/g)	12.5	10	13	13.9*
Retail price of methamphetamine (€/g)	24	28	27	32.4*
Wholesale price of amphetamine (€/kg)	5 250	5 150	5 342	na

na: data not available \* average 2015–2023

Source : OCRTIS/OFAST (saisies et prix) ; INPS/SNPS (teneurs)

## Methodology

Producing an annual assessment of the supply of illicit drugs is a complex task, given that this market is, by its very nature, illicit. It relies primarily on indicators provided by law enforcement authorities. The key indicators, which are also used by the European Union Drugs Agency (EUDA), are as follows:

- The quantities of illicit drugs seized each year across national territory. These figures are published by the Home Affairs Department's Anti-Narcotics Office (OFAST). The indicator for seized quantities consolidates interceptions by customs, the gendarmerie, and the police.

- Average active ingredient concentrations in the main illicit drugs (cannabis, cocaine, heroin, MDMA/ecstasy). These figures are published annually by the National Forensic Science Institute (SNPS) of the Ministry of the Interior, which consolidates analysis results from the scientific laboratories of the police and the national gendarmerie. One limitation of this indicator is that it does not distinguish between major seizures (wholesale market) and those relating to the retail market.

- Each year, OFAST compiles wholesale and retail prices for the main illegal substances, based on a survey sent to local police and gendarmerie units. In parallel, the OFDT's TREND scheme produces an annual estimate of current street prices for each drug, drawing on intelligence reported by its regional coordinators. The TREND scheme monitors and analyses trends and emerging developments associated with illegal psychotropic substances, as well as pharmaceuticals diverted from their intended purposes.

- Drug-related offences are recorded annually by the police and gendarmerie, alongside the total number of individuals charged with drug use or trafficking. These figures are published by the French Ministerial Statistical Department for Internal Security (SSMSI) of the Ministry of the Interior, and do not currently allow for the figures to be broken down by specific substance. Data on convictions for drug-related offences (DLO) are compiled by the Statistics, Studies and Research Service (SSER) of the Ministry of Justice.

- The number of investigations into trafficking of medicines or substances classed as narcotics, along with the number of seizures of these substances, as recorded by CESAN (Command for Environment and Health) at the Ministry of the Interior. This year marks the first time this data has been analysed, providing an overview of the structure of this market.

Each of these key indicators, whether considered in isolation or year on year, only reveals its full significance when analysed in relation to the others. To provide a meaningful assessment of supply dynamics, they must be compared and contextualised over a sufficiently long timeframe.

These indicators are supplemented by qualitative data drawn from the TREND (Recent Trends and New Drugs) and SINTES (National Identification System for Toxics and Substances) schemes run by the OFDT. These schemes provide insight into the structure and organisation of trafficking, as well as emerging substances appearing on the French market.

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