



BRIEFING

SIZE OF ILLICIT DRUG MARKETS IN FRANCE (2010–2023)

ABSTRACT

- Estimating the size of the illicit drug market relies on a bottom-up methodology, reconstructing user expenditure on the basis of epidemiological surveys conducted in the general population (EROPP and ESCAPAD surveys by the French Monitoring Centre for Drugs and Drug Addiction – OFDT).
- In 2023, the French illicit drug market was estimated at an average of €6.8 billion – more than three times its 2010 level.
- The cocaine market is now the largest in value terms (€3.1 billion), ahead of cannabis (€2.7 billion), despite significantly lower quantities used (47 tonnes versus 397 tonnes).
- The cannabis market showed a very slight increase in volume, but its value rose sharply, driven by higher prices.
- Cannabis and cocaine alone accounted for approximately 90% of total turnover from illicit drugs in 2023.
- Strong growth in the value of the psychostimulants market has been observed since 2010, driven by ecstasy/MDMA (+637%) and amphetamines (+470%).
- It should be noted that these estimates are based on strong assumptions regarding frequencies of use, quantities used, and the impact of medicinal treatments such as opioid agonist treatment. The findings should therefore be interpreted as indicative trends, underlining the need to enhance data collection.

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INTRODUCTION

Revealing, or at the very least shedding light on the size of clandestine markets through scientific research – most notably the market for illicit drugs – is not an easy task, despite its multiple benefits. First, research and analyses provide a basis for defining and documenting various indicators: turnover, quantities used, imported or produced domestically, purchase prices, and any discounts or rebates offered to users¹. This data is collected on an ongoing basis and contributes to monitoring trends and dynamics in illicit markets. In this respect, such studies complement surveys of the general population designed to estimate the prevalence of use. They also complement surveys of more specific populations, such as those carried out among vulnerable and/or socially marginalised groups. However, research focusing on the supply side of illicit drugs has remained fragmented in France, even though it warrants as much attention as demand-side studies of the market.

In a second phase, these studies enable, on one hand, an evaluation of public policies regulating the markets – for instance, law enforcement seizures – and, on the other hand, the identification of any blind spots in our knowledge that might be detected.

The purpose of this note is to set out the methods and data sources as clearly as possible. To this end, it is structured as follows: the first section outlines the methodological foundations required to estimate the size of the various illicit drug markets. A general methodology is defined, paying attention to the specific considerations relating to the estimation of each substance. The following section presents the estimation results for 2023 in France, including details of the trends in these indicators since 2010. These results are analysed in the fourth section where the main limitations inherent to this type of exercise are pointed out. A final section concludes this methodological note.

1. “Discount” effects can be observed in the illicit drug market, resulting in lower retail purchase prices for larger quantities purchased. This phenomenon is particularly pronounced on the ecstasy/ MDMA market: the more pills purchased, the lower the price per pill.

GENERAL FRAMEWORK

Different methodological approaches can be used to estimate the turnover of illicit drug markets. These differ in the qualitative or quantitative nature of data collection, and in whether they approach the market from the supply or demand side.

We prioritise a bottom-up, demand-based method, which reconstructs the expenditure of illicit drug users using data from representative surveys of the general population. This approach can be considered quantitative due to the large sample size used to construct at least a portion of the estimates. It reconstructs respondents' expenditure based on their self-reported consumption quantities, methods of use, and means of obtaining illicit drugs. This method of estimating illicit drug market turnover is now the most widely used internationally (see, inter alia, Ben Lakhdar, 2012; Giommoni, 2014; Kilmer & Pacula, 2009; Legleye et al., 2008) and is considered to be the most methodologically robust technique on account of its reliance on representative survey data (Reuter & Trautmann, 2009)².

More specifically, this method consists in estimating the following equation:

$$D = p \left[(POP_{a,s} \times PREV_{a,s,st}) \times (\bar{\alpha}_{a,s,st} \times (\bar{I}_{a,s,st} \times \beta)) \right] \theta_{a,s,st}$$

where D represents users' expenditure on their consumption of illicit drugs in a given year for a given country. This expenditure is determined by:

Variable	Definition
p	Retail price of the substance in question
$POP_{a,s}$	Number of individuals in the population by age and sex
$PREV_{a,s,st}$	Prevalence of use of the substance in question by age, sex and intensity of use (occasional, regular, daily)
$\bar{\alpha}_{a,s,st}$	Average number of days of use in the past 30 days
$\bar{I}_{a,s,st}$	Average number of use occasions on a day of use (for example: number of joints smoked, cocaine doses or heroin injections)
β	Average quantity of substance in grams per use
$\theta_{a,s,st}$	Means of obtaining the substance in question: purchase, gift, home cultivation

Source: Legleye et al., 2008

This equation clearly represents an ideal type to be estimated. Some variables may be missing or poorly documented, requiring additional assumptions or adapted quantitative approaches according to the substance in question.

2. Other methods based on declared expenditure data (Spilka & Legleye, 2020) or on ancillary use-related materials such as rolling papers (Parey & Rasul, 2021) have emerged recently. Although of interest, these methods have the drawback of focusing solely on cannabis or only providing information on turnover, omitting the quantities used.

RESULTS

We begin by presenting the results of the estimates obtained for 2023, followed by the trends in these indicators since 2010.

Estimates of quantities used and turnover generated by the main illicit drugs in France in 2023

Table 7 presents estimates of market size by quantity and value for cannabis, cocaine, crack cocaine, heroin, ecstasy/MDMA, and amphetamines in mainland France in 2023. It excludes other illicit drugs that are more marginal in the market.

Table 7. Estimated quantities used and turnover for the main illicit drugs in France in 2023

	Quantities used (tonnes)			Turnover (millions of euros)		
	Low estimate	Central estimate	High estimate	Low estimate	Central estimate	High estimate
Cannabis*	261.1	397.4	533.6	1 791.6	2 734.9	3 678.2
Cocaine	22.2	47.1	72.0	1 466.4	3 109.4	4 748.4
Crack cocaine	4.0	4.7	5.5	267.0	311.1	362.4
Heroin	5.5	8.2	10.9	158.9	231.9	304.8
Ecstasy/MDMA**	20.7	65.6	110.0	97.2	312.5	527.7
Amphetamines	1.7	5.6	9.4	23.2	73.0	122.8

* that were the subject of a commercial transaction, i.e. excluding gifts and home cultivation.

** in millions of tablets.

After aggregating the turnover for each substance, the French market for the main illicit drugs was estimated at between €3.8 billion and €9.7 billion, with a central estimated value of €6.8 billion in 2023. Cannabis and cocaine alone accounted for approximately 90% of total turnover from illicit drugs in 2023. Cocaine represented the largest market in value terms, becoming the leading illicit drug in terms of revenue generated, despite far smaller quantities used than cannabis (47.1 tonnes on average versus 397.4 tonnes). The ecstasy/MDMA market overtook the heroin market, both in quantity and value terms.

Trends in quantities used and turnover since 2010

Estimated quantities of illicit drugs used in France between 2010 and 2023 rose markedly (Table 8). Aggregating the central estimates of tonnes of illicit drugs used in 2010 and comparing them with 2017 and 2023 gives the following respective totals: 247 tonnes (plus 11.3 million ecstasy/MDMA tablets), 421.6 tonnes (plus 35.9 million ecstasy/MDMA tablets), and 463 tonnes (plus 65.6 million ecstasy/MDMA tablets). In other words, the quantities used appear to be plateauing in terms of tonnage, although MDMA tablet use continues to rise.

Table 8. Trends in the estimated quantities of the main illicit drugs used in France between 2010 and 2023 (in tonnes)

	2010			2017			2023			Trend 2010-2023****
	Low estimate	Central estimate	High estimate	Low estimate	Central estimate	High estimate	Low estimate	Central estimate	High estimate	
Cannabis*	163.4	224.5	285.6	265.6	384.3	502.9	261.1	397.4	533.6	+77%
Cocaine	8.4	15.0	21.7	14.3	26.0	37.8	22.2	47.1	72.0	+214%
Crack cocaine	-	-	-	2.8	3.3	3.8	4.0	4.7	5.5	+42.4%
Heroin	5.1	6.7	8.2	3.4	5.0	6.6	5.5	8.2	10.9	+23.3%
Ecstasy/MDMA**	3.6	11.3	19.0	11.3	35.9	60.6	20.7	65.6	110.0	+480.5%
Amphetamines	0.2	0.8	1.4	0.9	3.0	5.0	1.7	5.6	9.4	+600%
Total***	177.1	247.0	316.9	287.0	421.6	556.1	294.5	463.0	631.4	+87.5%

* Subject to a commercial transaction, i.e. excluding gifts and home cultivation.

** In millions of tablets.

*** Excluding ecstasy/MDMA

**** Trend 2017-2023 for crack cocaine.

The dynamics are different for turnover (Table 9). The turnover of the illicit drugs market in mainland France almost tripled (+189%) between 2010 and 2023, from €2.3 billion to €6.8 billion (central estimates). It increased by 89% between 2017 and 2023, from €4.4 billion to €6.8 billion. At this rate, the turnover of the main illicit drug markets would appear to have almost doubled every five years since 2010.

Table 9. Trends in the estimated turnover of the main illicit drugs in France between 2010 and 2023 (in millions of euros)

	2010			2017			2023			Trend 2010-2023*
	Low estimate	Central estimate	High estimate	Low estimate	Central estimate	High estimate	Low estimate	Central estimate	High estimate	
Cannabis	809.7	1 117.3	1 424.8	1 335.1	2 106.0	2 877.0	1 791.6	2 734.9	3 678.2	+144.8%
Cocaine	503.7	902.3	1 300.8	936.9	1 707.6	2 478.3	1 466.4	3 109.4	4 748.4	+244.6%
Crack cocaine	-	-	-	185.1	215.7	251.3	267.0	311.1	362.4	+44.2%
Heroin	204.1	266.5	328.9	126.2	185.1	244.0	158.9	231.9	304.8	-13%
Ecstasy/MDMA	13.2	42.4	71.6	53.2	171.1	289.0	97.2	312.5	527.7	+637%
Amphetamines	3.7	12.8	21.9	12.7	39.8	67.0	23.2	73.0	122.8	+470.3%
Total	1 534.4	2 341.3	3 148.0	2 649.2	4 425.3	6 206.6	3 804.3	6 772.8	9 744.3	+189.3%

* Trend 2017-2023 for crack cocaine.

These overall trends mask dynamics specific to each drug, which warrant discussion, as well as many limitations that need to be outlined in order to fully understand these estimates.

LIMITATIONS OF THE EXERCISE AND KNOWLEDGE REQUIREMENTS

Given the many assumptions made, it is clear that these estimates suffer from a lack of robustness. Although the trends are presented at constant bias – since the main assumptions have been maintained consistently over successive exercises – it should be emphasised that the trends are more important than the absolute figures. This holds true, even though the ranges used serve to contextualise the phenomenon rather than to assign it a definitive value.

Despite the theoretical framework adopted, estimating the size of illicit drug markets remains subject to several structural limitations, highlighting the need for further scientific inquiry. Firstly, the data used is drawn primarily from general population surveys (such as the health barometer, ESCAPAD and EROPP), and does not provide a sufficiently detailed picture of drug-related behaviours: frequencies, quantities

per use occasion, contexts of use (for example, recreational, medical or self-medication), or the diversity of user profiles (occasional, regular, intensive), which remain partly unknown or, at the very least, insufficiently defined. This level of detail requires the creation of theoretical typologies based on sometimes outdated assumptions, which expose the results to a significant margin of error. It therefore seems essential to generate up-to-date ethnographic and quantitative data on actual drug use practices.

Secondly, the wide variety of substances, dosage forms (powder, tablet, crystal, paste, herbal, resin), and their purity present a major obstacle to the standardisation of measurement units. This heterogeneity prevents the precise conversion of quantities into standardised equivalents and hinders the analysis of potential substitution effects between substances. Yet these differences directly influence market value and patterns of use. Improved characterisation of the substances circulating on the market (composition, dosage, packaging) is therefore necessary, notably through seizure analyses and data from harm reduction programmes. Similarly, better knowledge of adulterants and additives, as well as their proportion in the substances, would help to estimate the quantities required to cut the substances available on the French market.

Finally, the pricing practices and commercial strategies employed by drug dealers, such as discounts, promotions and attractive packaging, remain difficult to quantify. Prices vary greatly according to the quantity, reputation of the substance, location and sales channel (darknet, delivery, direct resale) (G erome, 2023). In the absence of precise regional mapping of prices and distribution methods, turnover estimates rely on national averages that are not truly representative. It would therefore seem essential to broaden the systematic collection of data on actual prices, purchasing practices, and supply circuits in order to fine-tune the economic value of the different market segments. More robust representative surveys of the French general population, combined with reinforced monitoring of these topics under the TREND scheme, would undoubtedly improve the understanding and monitoring of the French illicit drug market economy.

CONCLUSION

This methodological note provides an estimate of the size of the main illicit drug markets in France in 2023, in both quantity and value terms, while documenting their trends since 2010. The findings indicate growth in total turnover, estimated at €6.8 billion on average in 2023 and corresponding to an almost threefold rise since 2010. While cannabis remains the most widely used drug by tonnage, cocaine now represents the leading market in value terms, reflecting a major shift in uses and economic flows. The growth of the ecstasy/MDMA and amphetamine markets also highlights the rising importance of psychostimulants.

Analysis reveals distinct substance-specific dynamics: stabilisation of cannabis, a surge in cocaine, a rapid increase in crack cocaine, a resurgence of heroin, and growing ecstasy/MDMA use. These trends have been shaped by price trends, drug use practices and contexts of use, but also by international supply, the organisation of distribution networks and dealers' commercial strategies.

Nevertheless, these estimates are subject to significant limitations. The lack of recent, detailed data on drug-related behaviours, local prices and the diversity of drug forms requires numerous assumptions to be made. This uncertainty makes the results more suitable for trend analysis than for the production of absolute figures. To improve understanding, research should focus on actual contexts and patterns of use, but also on the economic structure of illicit markets.

This work makes a key contribution to informing public anti-drug policies by providing an objective appraisal of the economic issues at stake. It also demonstrates the need to sustain and strengthen data production on these markets to gain a better understanding of the underlying mechanisms and anticipate future developments.

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