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Briefing paper

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BRIEFING

THE SUPPLY OF ILLICIT DRUGS IN FRANCE IN 2024

HIGHLIGHTS

- The international context was characterised by an upward trend in global production, whether for cocaine (over 3 700 tonnes produced in 2023) or synthetic drugs such as MDMA and amphetamines.
- In 2024, cannabis seizures in France amounted to 101 tonnes, down 19% compared to 2023, marking the second consecutive year of decline.
- In 2024, cocaine seizures in France totalled a record 53.4 tonnes, representing a 130% increase compared to 2023. In 2024, the port of Le Havre once again became a key entry point for cocaine into France, as evidenced by the sharp rise in quantities seized, from 5.3 tonnes in 2023 to 14.4 tonnes in 2024.
- After a steady increase in heroin seizures in France between 2018 and 2022, peaking at 1.4 tonnes in 2022, the quantities intercepted fell over the following two years, to 1.1 tonnes in 2023 and then 1 tonne in 2024.
- Seizures of MDMA/ecstasy in 2024 amounted to over 9 million tablets, representing an increase of 123% compared to 2023. However, 75% of these substances for which the destination was identified were in transit on their way to other countries.

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TRENDS IN THE FRENCH ILLICIT DRUG MARKET

Supply routes and methods constantly changing in France

French ports on the front line of cocaine trafficking

In 2024, the vast majority of cocaine seizures in France took place in maritime transport, accounting for 78% of the total, or 41.8 tonnes. This volume included 20.7 tonnes intercepted during compliance checks of vessels at sea (boardings), 16.8 tonnes seized in ports and 4.2 tonnes recovered during "drop-offs" or in other maritime contexts[1] (OFAST, 2025a). The main logistical channel used by dealers remains containerised maritime freight, which enables large quantities of cocaine to be transported by concealing them within licit goods flows. According to the French National Intelligence and Customs Directorate (DNRED), the "rip-on/rip-off" method, which involves placing illicit goods in legal containers, is increasingly being abandoned in favour of concealing them within commercial freight operated by companies set up specifically for trafficking or whose identity has been stolen. Criminal organisations are therefore seeking to increase the number of shipments of licit goods in order to overwhelm the authorities' compliance check capacities, before sending containers that actually contain illicit substances (DNRED, 2025).

For several years, the port of Le Havre has been identified as a major entry point for cocaine into France. However, the increased security measures and compliance checks implemented at the port of Le Havre[2] in 2023 led to a temporary reduction in its use by dealers during that year (Salhi, 2025). Despite these measures, criminal networks adjusted their operating methods in 2024 to circumvent the increased compliance checks. Le Havre port has once again become a key entry point for cocaine into France, as evidenced by the sharp rise in the quantities seized, increasing from 5.3 tonnes in 2023 to 14.4 tonnes in 2024 (OFAST, 2025b). Furthermore, the port of Dunkirk, France's third-largest seaport, is increasingly exposed. This vulnerability was demonstrated in March 2025 by the exceptional seizure of nearly 10 tonnes of cocaine concealed in a container from Guadeloupe, whereas only 157 kg of illicit drugs had been intercepted there in 2024. More broadly, the French Home Affairs Department's Anti-Narcotics Office (OFAST) draws attention to so-called secondary ports, such as Rouen, Nantes-Saint-Nazaire/Montoir-de-Bretagne or Gennevilliers, which are particularly vulnerable to trafficking due to a generally lower level of compliance checks. It also emphasises that certain bays that are far from commercial ports could be used to pick up cocaine after drop-off operations at sea (OFAST, 2025b).

A diversification in the origins of "mules"

In 2024, 1 640 "mules" (individuals transporting illicit drugs in corpore or concealed in their luggage on behalf of dealer networks) were apprehended on French territory. These arrests led to the seizure of a total of 6 tonnes of illicit drugs, including 3.2 tonnes of cocaine. Of those apprehended, 60% were from the West Indies and French Guiana (OFAST, 2025b). Traditionally, the Cayenne–Paris air route has been a major channel for trafficking by mules. This route is also used for exchanges of cannabis resin originating from Morocco for South American cocaine, by carriers travelling between mainland France and French Guiana (Longuet and Vassaux, 2025). The introduction of the so-called "100% compliance check" enhanced system in late 2022 at Cayenne airport has enabled more frequent interception of trafficking attempts departing from Cayenne. This increased enforcement has led to a significant decrease in the number of mules apprehended in Paris arriving from Cayenne, falling from 334 in 2022 to 120 in 2024 (OFAST, 2025b). Nevertheless, in response to this tightening, criminal networks have sought to circumvent compliance checks by redirecting their flows through the West Indies, favouring territories perceived as less closely monitored, such as Guadeloupe, Martinique and Saint Martin (Longuet and Tinval, 2025). Thus, in 2024, arrests of mules arriving from or departing for Martinique increased by 184% (OFAST, 2025b). In addition, a large number of mules arriving from Brazil were apprehended in French airports in 2024. This trend is confirmed by the fact that 55% of the mules apprehended at São Paulo airports were bound for France in 2024. OFAST also highlights the rise in

1. This method, which involves dropping bales of cocaine at sea attached to flotation devices fitted with geolocation beacons so that the cargo can be retrieved by small boats to reach the mainland and supply the trafficking networks, was used extensively in 2023 and 2024.

2. Security at the port of Le Havre relies in particular on the TCT system (Token Code for Trucker), which has been in force since March 2023. This code is generated when the exit authorisation is requested by the person responsible for road transport of the goods, is sent to the carrier, and must be presented at the terminal entrance to allow their access.

the trend of mules coming from Peru, particularly via the Lima-Paris air link. At the same time, flights from West Africa to Paris airports are regularly used by dealers to transport drugs via mules. This increased use of air transport to France can be partly explained by the use of Parisian airports as logistical hubs, enabling substances to be redistributed to other European countries (OFAST, 2025b).

In addition to air transport, OFAST and the Lille customs services have reported an increase in trafficking of drugs by coach. Seizures linked to this method of transport involve relatively small quantities, generally ranging from 10 to 15 kilograms. According to the TREND scheme in Hauts-de-France, substances are transported either in corpore, by concealing the substances on their person, or in unaccompanied luggage. The main routes detected run from Belgium and the Netherlands to Paris, with return flows from Spain for cocaine, synthetic substances and cannabis. Lille coach station serves as a transit point along these routes. Enhanced compliance checks since 2023 may account for improved detection of these practices, and do not necessarily reflect an actual increase in the phenomenon (Dutilleul and Hervé, 2025).

An illicit drug market characterised by its capacity to adapt

Sales methods that adapt to consumers' needs

The methods used to sell illicit drugs to consumers are becoming more diverse and are adapting to their constraints and expectations. Networks now combine several sales channels (delivery, postal dispatch, street sales, fixed or temporary outlets), while also incorporating practices inspired by the legal economy, such as the development of advertising and marketing tools, as well as loyalty strategies (Gérome, 2024). The intense competition that currently defines the illicit drug market encourages dealers to optimise the efficiency of their service and customer satisfaction. This is achieved in particular through guarantees regarding delivery times, their presence at party events, cultural or sporting occasions, the interpersonal skills of couriers, the adaptation of delivery slots according to traffic conditions or constraints, as well as by offering smaller sales units or, conversely, reduced prices for larger quantities (Gérome, 2024; Tissot, 2025). Payment methods have also diversified. Cash is no longer the only option, as some networks now accept bank transfers, online payment solutions or cryptocurrencies (Gérome, 2024; Klingelschmidt et al., 2025).

The use of digital tools for sourcing is no longer limited to socially integrated groups. Observations carried out in 2024 indicate that these practices are increasingly spreading among vulnerable individuals, who often resort to group purchases in order to reach the minimum order amounts.

Among the most frequently observed methods in 2024 was the "meet-up", which is pre-arranged at a specific time and location determined by the seller, and often communicated through secure applications. This arrangement makes it possible to group several transactions at a single location for lower risks, greater discretion and, in some cases, reduced prices (Duport et al., 2025; Klingelschmidt et al., 2025; Pavic, 2025). In addition, adaptive practices have been observed in response to law enforcement operations (such as Place Nette operations), with increased use of temporary or less conspicuous locations, including short-term rentals (Zieleskiewicz, 2025).

A reshaping of cannabis supply: diversification of substances and sources

The French cannabis market is characterised by a diverse supply structured around two main trends. First, there is a diversification in the varieties and quality offered for herbal cannabis and resin. Certain networks even go so far as to offer "discovery packs" containing several varieties of flowers and/or resin at attractive prices (Tissot, 2025). In addition, there has been a diversification in the types of THC substances available, with the emergence of non-smokable products such as THC-infused confectionery (edibles) or vaping products such as single-use electronic cigarettes (Puff) containing THC or associated liquids. This development may reflect an intention to target a non-smoking clientele (Srocynski and Yeghicheyan, 2025; Tissot, 2025). In 2024, a new trend is also emerging in the French cannabis market, with an increasing diversification in herbal cannabis sources. Whereas seizures of herbal cannabis have historically involved substances originating mainly from Morocco and Spain, an increasing share of intercepted volumes now comes from Thailand, the United States and Canada. These countries are notable for the existence of legal cannabis markets, following reforms allowing the supply of cannabis for medical or non-medical use. This shift is reflected in the seizures recorded in 2024, with 2.3 tonnes of herbal cannabis intercepted from the United States (compared to 1.2 tonnes in 2022) and 1.8 tonnes from Thailand (DNRED, 2025).

Illicit activities and crime linked to drug trafficking

An increase in the number of investigations related to medicines classified as narcotics and associated substances in 2024

In addition to illicit drugs, other substances classified as narcotics are also involved in trafficking activities within France: narcotic medicines and related substances. These medicines are either wholly or partly subject to the regulations on narcotics and can only be dispensed with a secure prescription that meets precise technical requirements. According to data from the Command for Environment and Health (CESAN) of the French Ministry of the Interior, 5 521 investigations[3] relating to narcotic medicines and similar substances were initiated in 2024 by the police and gendarmerie services, marking a 43% increase compared to 2023 (3 862 cases). This is the largest rise recorded in the past seven years (CESAN, 2025). This development can be at least partly explained by increased awareness among law-enforcement services regarding these specific substances (CESAN, 2024). The most commonly trafficked substances are ketamine, pregabalin, methadone and morphine, which together account for almost 80% of recorded incidents. The most significant increases concern ketamine (+82%) and methadone (+94%). There has been a particularly marked increase in the presence of ketamine in recent years, rising from fewer than 200 recorded cases in 2017 to more than 800 in 2023. This represents an increase of 380%. By contrast, methadone did not see any significant increase during the previous period. In fact, there was a 6% decrease between 2017 and 2023, before the rise observed in 2024 (CESAN, 2025).

Narcotic medicines and related substances are sold in a wide variety of formats, ranging from whole boxes to blister-packs and even individual capsules. In cities, the most frequently observed sales locations are railway stations and certain working-class neighbourhoods (Duport et al., 2025; Dutilleul and Hervé, 2025). Prescription drugs intended as opioid substitution treatment, particularly methadone and Subutex®, are sometimes resold near treatment centres where they are dispensed. These locations are frequented by potential users. In addition to methadone and Skenan®, other substances such as codeine, oxycodone, tramadol and benzodiazepine are also in circulation. The means of distribution vary, including delivery via applications, meet-ups and postal dispatch, without any lasting structure to street-level sales (Tissot, 2025). The prices observed (Table 1) vary greatly depending on the drug dealer, the buyer, the degree of competition and the time of day. A user experiencing withdrawal and not recognised by the seller is therefore likely to pay a significantly higher price (Dutilleul and Hervé, 2025).

Table 1. Number of investigations and current prices of main narcotic medicines or related substances

Substance	Number of investigations 2023	Number of investigations 2024	TREND current price (in euros)	
Ketamine	840	1 532	20 to 30	Per gram
Pregabalin	1 261	1 331	2 to 3	300 mg tablet
Methadone	437	847	5	60 mg vial
			3 to 5	40 mg capsule
Morphine	512	649	3 to 10	(100 or 200 mg capsule)
Clonazepam	357	467	NA	NA
Buprenorphine	296	404	2 to 5	8 mg tablet

NA: not available

Sources: CESAN, 2025; Gérome, 2025

3. This data is drawn from "Traitement des Antécédents Judiciaires" (TAJ), the French judicial records database, and corresponds to the number of investigations initiated for offences involving these substances, such as drug-related offences, theft or handling of stolen goods and drug-facilitated assault.

The trafficking of pregabalin (Lyrica®) differs from that of other drugs available on the streets due to its scale and supply methods, which are fuelled by imports from other countries. In addition to Lyrica®, blister-packs of Breika®, pregabalin originating from Greece, are regularly intercepted (Duport et al., 2025; Tissot, 2025). The international organisation of this supply chain was demonstrated in 2024 when the French National Anti-Fraud Office dismantled a pregabalin import network, following the seizure in October 2023 of more than 10 000 tablets carried by a passenger arriving from Greece (DGDDI, 2025). In addition, some of the pregabalin circulating in France originates from India (OFAST, 2025b).

A decrease in violence associated with drug trafficking in 2024

In 2024, according to OFAST, France recorded 367 murders and attempted murders between criminals[4]. Almost all these acts were allegedly linked to drug trafficking. They caused 110 deaths and 341 injuries over the year. Although a 12% decrease was observed from the exceptional peak of 418 incidents in 2023, the level of violence nevertheless remained high and exceeded that observed in 2022 (303 incidents) and 2021 (275 incidents). Between 2021 and 2024, the number of recorded incidents thus increased by 33%. This violence affects the entire country. In 2024, 173 municipalities were affected, compared to 161 the previous year. The largest cities remained the most affected, notably Marseille, Grenoble and Toulouse. However, the sharpest increase was seen in medium-sized towns, such as Villeurbanne (10 incidents compared to 1 in 2023) and Échirolles (9 compared to 2). In addition to homicides, law enforcement services noted an intensification and diversification of the violence linked to drug trafficking. This took the form of kidnappings, illegal confinement, mutilations (kneecappings), or even arson attacks. They were often carried out by individuals from outside the criminal network, recruited specifically for this purpose (OFAST, 2025b). In the Provence-Alpes-Côte d'Azur region, the city of Marseille was the main hotspot for violence linked to drug trafficking in 2023, due to a conflict between two criminal organisations. In 2024, this situation appears to have stabilised, particularly as a result of the arrest of key figures from both groups. This trend resulted in an 82% decrease in homicides and attempted homicides in the Bouches-du-Rhône and a 60% decrease in Marseille. OFAST recorded 45 incidents there in 2024, down from 86 in 2023, with 24 deaths in 2024 compared to 49 in 2023. This was accompanied by a significant decrease in firearms seizures in the department, falling from 319 weapons seized in 2023 to 209 in 2024, a drop of 34% (Duport et al., 2025).

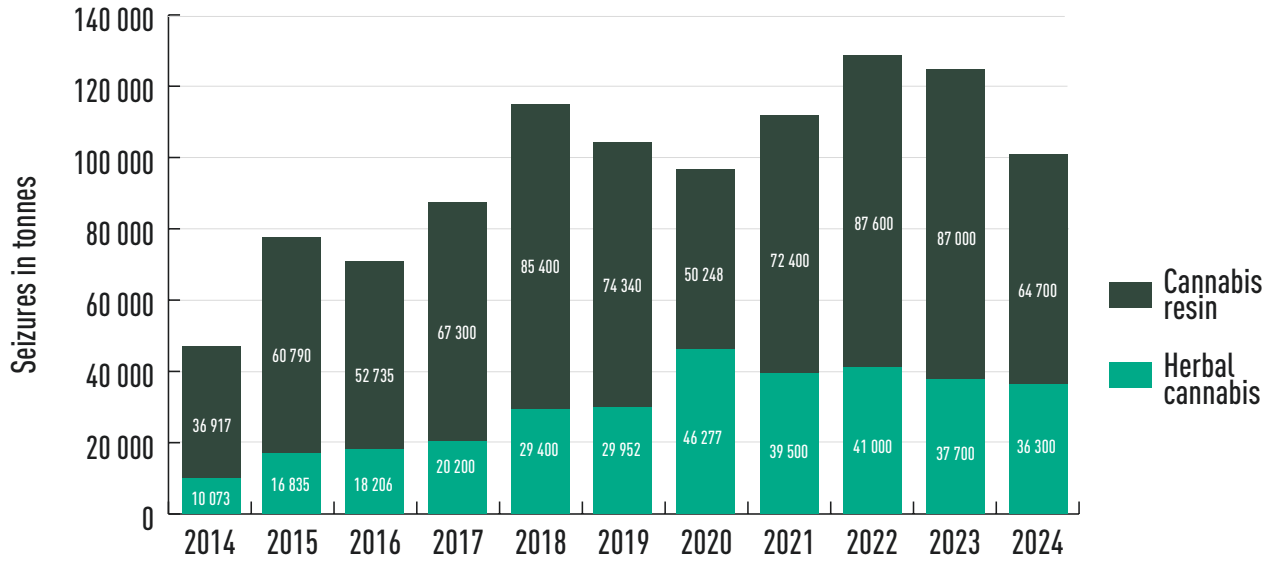
4. These incidents are recorded according to several criteria: the proven involvement of at least one of the parties in criminal or delinquent activity, the clear intention to kill, circumstances suggesting premeditation, the use of a firearm or explosives, and the absence of a private motive.

RESIN AND HERBAL CANNABIS SUPPLY IN FRANCE

Cannabis seizures

The year 2024 was marked by a decrease in cannabis seizures in France, with a total of 101 tonnes intercepted. This represents a 19% reduction compared to 2023, which had also seen an albeit less pronounced decline in such seizures. The 2024 decline is primarily due to a 26% decrease in seizures of cannabis resin, with 64.7 tonnes confiscated compared to 87 tonnes in 2023. Seizures of herbal cannabis also declined slightly, falling from 37.7 tonnes in 2023 to 36.3 tonnes in 2024, a decrease of 4%. Customs authorities also observed an increase in seizures of cannabis resin in recent years, rising from 5.6 tonnes seized by French customs in 2022 to 20.3 tonnes in 2024 (DNRED, 2025). In 2024, seizures of cannabis plants recorded a substantial decrease, down 40% compared to the previous year. In total, 67 607 plants were seized, 61% of which came from French overseas departments and territories (OFAST, 2025a). In that same year, the National Gendarmerie made 81% of the cannabis plant seizures conducted on French territory. Among these seizures, outdoor cultivation remained the most common, representing 41% of cases, against 25% for indoor cultivation[5]. In the overseas territories, large-scale farms are usually outdoors, taking advantage of favourable climatic conditions. In mainland France, the northern border departments are the most exposed to this type of industrial-scale cultivation. Large-scale cannabis farms exceeding 500 plants are generally set up indoors to reduce the risk of detection [contribution from the Central Criminal Intelligence Service of the National Gendarmerie dated 12/06/2025]. Road transport is the principal channel in the cannabis supply chains in France. This is reflected in the seizures: according to OFAST, 68% of the cannabis seized in France was transported by road (OFAST, 2025a).

Figure 1. Trends in the quantities of cannabis seized in France (2014-2024)



Source: OCRTIS/OFAST

THC in cannabis

In 2024, the average tetrahydrocannabinol (THC) content (the active ingredient in cannabis), was 29.6% for cannabis resin seizures (SNPS, 2025). Since the early 2010s, the THC concentration in cannabis resin has risen steadily. It has increased by 86% in twelve years, from 15.9% in 2012 to 29.6% in 2024. The phenomenon is thought to stem from the introduction of hybrid cannabis varieties produced in Europe and resold to Moroccan farmers (Afsahi and Chouvy, 2015). As for herbal cannabis, the average THC content was 14.3% in 2024, comparable to that recorded in 2023 (14.1%) (SNPS, 2025).

5. In 31% of cases, the cultivation method was not specified.

Retail and wholesale prices of cannabis

In 2024, the export price of cannabis resin in Morocco, the main producer country, was estimated at €645 per kilogram. In Spain, the main transit country for cannabis bound for France, the wholesale price of resin decreased from €1 943 the previous year to €1 831 per kilogram. This decrease is reflected on the French market, with the wholesale price falling to €3 100 per kilogram compared to €3 206 in 2023 (-3%). With regard to retail sales in France, the average price estimated by OFAST remained stable at around €8 per gram, with variations observed in 2024, between €7 and €9 (OFAST, 2025c). The average 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 substance. The price per gram of pure THC has fallen by about 28% over this period, from €38 in 2012 to €27 in 2024. Furthermore, when inflation in France since 2012 is taken into account, the inflation-adjusted price shows only a moderate increase from €6 in 2012 to €6.38[6] in 2024.

Regarding herbal cannabis, export prices in the main European producer country, namely Spain, are estimated to be falling, decreasing from €2 109 per kilogram in 2023 to €1 815 in 2024 (-14%). On the French market, the wholesale price of herbal cannabis is also estimated to have decreased, falling from €4 852 per kilogram in 2023 to €4 329 in 2024 (-11%). At retail level, the average price remained stable at €10 per gram, with a range from €8 to €11 (OFAST, 2025c). The average 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 declined slightly in recent years due to the steady increase in average THC content in seized herbal cannabis and the inertia of prices, falling for example from €73 in 2012 to €70 in 2024. When adjusted for inflation in France since 2012, the price shows almost no change, edging up from €8 in 2012 to €7.97[7] in 2024.

Finally, the TREND scheme reports that the price of specific substances with very high THC concentrations (for example: "wax", "dry", "three-times filtered") commands a higher price than that observed for herbal cannabis and resin, with prices ranging from €20 to €50 per gram (Gérome, 2025).

Table 2. Cannabis supply in France: prices and purity levels from 2022 to 2024

	2022	2023	2024	2014-2024 Annual average
Cannabis (resin and herbal)				
Quantities seized (tonnes)	128.6	124.7	100.9	96.8
Cannabis resin				
Quantities seized (tonnes)	87.6	87	64.7	67.2
Average content (% THC)	29.1	28.3	29.6	26.21
Retail price (€/g)	8	8	8	7.50
Wholesale price (€/kg)	3 000	3 206	3 100	2 686
Herbal cannabis				
Quantities seized (tonnes)	41	37.7	36.3	29.6
Average content (% THC)	13.8	14.1	14.3	13.05
Retail price (€/g)	10	10	10	9.64
Wholesale price (€/kg)	4 500	4 852	4 329	3 839
Cannabis plants (units seized)	76 807	112 028	67 607	124 469

Sources: OCRTIS/OFAST (seizures and pricing); INPS/SNPS (purity levels)

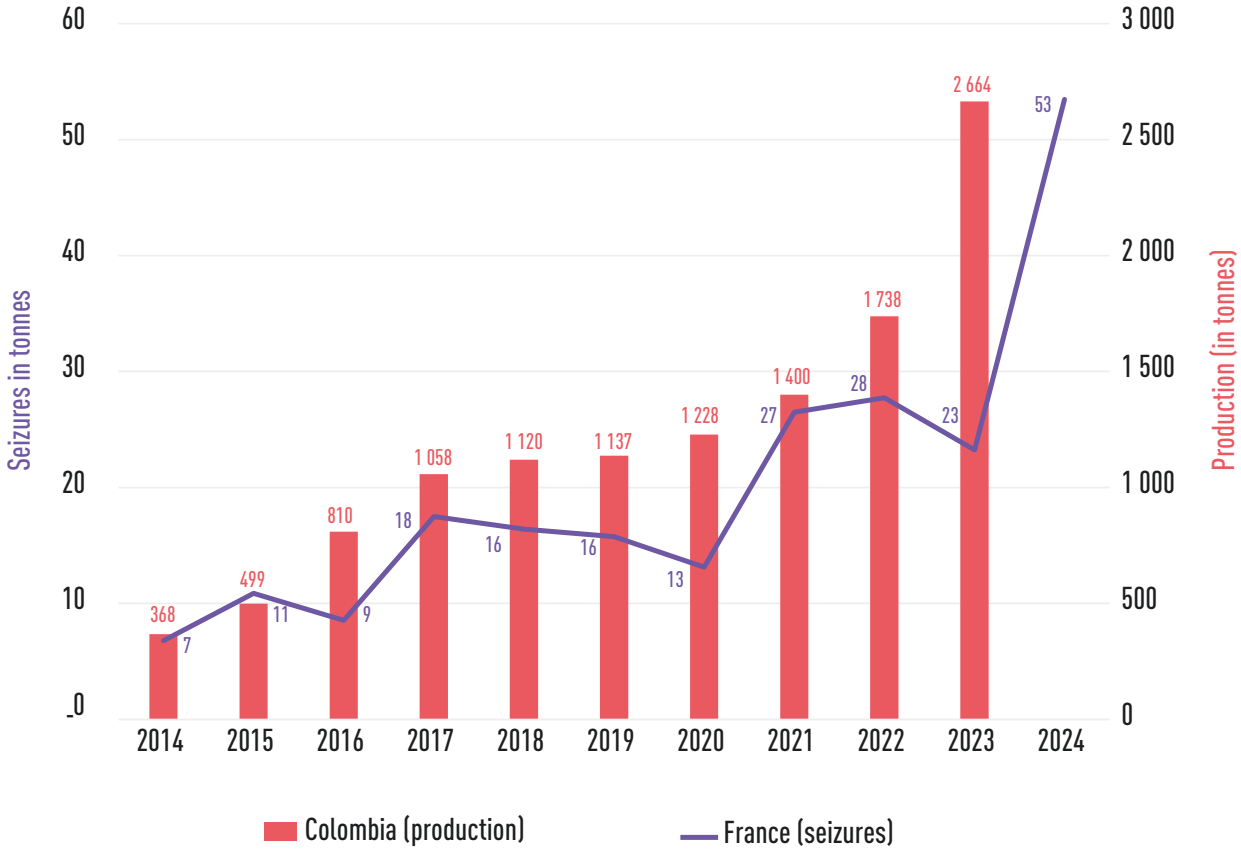
6. Price adjusted for inflation, 2012 base year
7. Price adjusted for inflation, 2012 base year.

COCAINE SUPPLY IN FRANCE

Cocaine seizures

In 2024, cocaine seizures in France amounted to a record 53.4 tonnes, representing a 130% increase compared to 2023 (Figure 2). Several factors account for this situation, including the increase in cocaine production (Figure 2) and France's strategic geographical position; the country serves both as a transit zone between countries such as the Netherlands and Spain, which host the main entry ports for cocaine in Europe, and is also close to major production areas in South America and the Caribbean through its overseas departments. Since 2020, the annual threshold of 20 tonnes has consistently been exceeded, with seizures in 2024 reaching an unprecedented level in France for this substance.

Figure 2. Cocaine production in Colombia and quantities seized in France (2014-2024)



Sources: UNODC/OCRTIS/OFAST
Note for the reader: in 2023, 2 664 tonnes of cocaine were produced in Colombia, and 53 tonnes of cocaine were seized in France in 2024.

Cocaine purity levels

In 2024, the average active ingredient content of seized cocaine stood at 74.3%, compared to 73.6% in 2023. This confirms the marked upward trend observed over the past decade, with an increase of 41% since 2014, when the average content was 52.6%. Furthermore, the French National Forensic Science Institute (SNPS) reports a decline in the use of cutting agents. In 2024, only 32% of the cocaine samples analysed contained cutting agents, compared to 34% in 2023 and 41% in 2022. Levamisole remains the most frequently identified cutting agent, although its occurrence continues to decline significantly (SNPS, 2025). These trends were also observed by the SINTES system (Cherki, 2024).

Wholesale and retail prices of cocaine

In 2024, the export price of cocaine in Colombia, the main producing country, was estimated at €950, representing a 5% decrease compared to the estimated price in 2023 (€1 000). By way of comparison, the export price of cocaine was estimated to be €2 871 per kilogram for Peru (an increase of 10% compared to 2023) and €2 136 for Bolivia (a decrease of 4% compared to 2023). On the French market, the wholesale price of cocaine was estimated at €29 800 per kilogram, representing a decrease of 9% compared to 2023. With regard to retail sales, according to OFAST estimates, the average price of a gram of cocaine hydrochloride decreased by an unprecedented 12% in 2024, reaching €58 compared to €66 in 2023 (OFAST, 2025c). This decrease in prices is also reported by the OFDT's TREND scheme, both at fixed retail outlets and through delivery, with current prices falling as low as €40-€50 per gram in major cities. Prices generally range between €60 and €70 per gram in outlying areas or during festive events. In certain specific contexts, such as ski resorts, prices may exceed €100 per gram (Tissot, 2025). Taking account of the significant rise in cocaine purity over the past decade, the price of "pure" cocaine would appear to have fallen all the more in France. In 2014, the price of one gram of "pure" cocaine was €130, compared to €77 in 2024, a fall of 37% in ten years. Furthermore, when taking account of inflation in France since 2012, the inflation-adjusted real price showed a decrease of 28%, from €64[8] in 2014 to €46[9] in 2024. Moreover, the practice of splitting retail units has become widespread across the entire country, making cocaine more affordable for low-income users (Gérome, 2025).

Table 3. Cocaine supply in France: seizures, prices and purity levels in 2022 and 2024

	2022	2023	2024	2014-2024 Annual average
Quantities seized (tonnes)	27.73	23.25	53.47	20.00
Average content (%)	71.6	73.6	74.3	65.15
Retail price (€/g)	65	66	58	65.41
Wholesale price (€/kg)	32 000	32 586	29 800	32 626

Sources: OCRTIS/OFAST (seizures and pricing); INPS/SNPS (purity levels)

8. Price adjusted for inflation, 2012 base year.
9. Price adjusted for inflation, 2012 base year.

HEROIN SUPPLY IN FRANCE

Heroin seizures

After a steady increase in heroin seizures in France between 2018 and 2022, peaking at 1.4 tonnes in 2022, the quantities intercepted fell over the following two years, reaching 1.1 tonnes in 2023 and then 1 tonne in 2024. However, this decrease should be put into perspective, as seizures have remained above one tonne for the seventh consecutive year, reflecting a persistently high level of heroin flows on French territory (OFAST, 2025a). France also serves as a transit country on heroin trafficking routes, particularly towards the United Kingdom: in 2024, 11% of the heroin seized on French territory was thought to be destined for other countries (OFAST, 2025b).

In 2023 and 2024, Belgium and the Netherlands were the main source countries for heroin intercepted in France. Road transport remained the preferred means of conveyance both at European and national level (DNRED, 2025). In addition, the National Intelligence and Customs Directorate (DNRED) reports a significant increase in seizures of heroin and opium derivatives originating from India, particularly by air, with volumes rising eightfold. These substances are thought to originate primarily from the pharmaceutical industry, with India ranking among the world's leading producers of legal opium(DNRED, 2025).

Heroin purity levels

In 2024, the average purity of heroin seized and analysed by the SNPS stood at 12.7%, representing a significant decrease compared to previous years (15.8% in 2023 and 18.6% in 2022). Almost all the base heroin samples that were analysed were adulterated (98.9%), with a combination of caffeine and paracetamol being by far the main adulterant observed on the French market (SNPS, 2025). The French heroin market continues to see significant fluctuations in purity levels, even within the same regions and distribution networks. Purity may be low, which can lead to shifts towards other substances, particularly opioid drugs and cocaine (including its base form), among individuals seeking stronger effects. Conversely, the occasional presence of heroin in higher concentrations can result in overdoses (Gérome, 2025).

In 2024, disruptions in supply were observed in certain areas, with users reporting difficulties in obtaining substances and instances of heroin being adulterated with synthetic cannabinoids (Klingelschmidt et al., 2025 ; Tissot, 2025). In Seine-Saint-Denis, the discovery of highly concentrated white heroin was reported. This substance contained no natural poppy alkaloids (or only traces) and no adulterants or only small amounts (Gérome, 2025; Klingelschmidt et al., 2025).

Retail and wholesale prices of heroin

In 2024, the export price of a kilogram of heroin from Afghanistan was estimated at around €1 908, while the wholesale price recorded in France was €16 031, an increase compared to previous years (€14 600 in 2023 and €15 000 in 2022) (OFAST, 2025c).

In retail, OFAST reports that in 2024 the average price per gram of heroin was €32, compared to €28 in 2023 and €30 in 2022 (OFAST, 2025c). However, observations from the TREND scheme highlight significant fluctuations in current prices depending on the area, the geographical zones within a region, the type of distribution network and the stated quality of the substance, with prices ranging from €10 to €60 per gram. Above €40 per gram, substances are generally presented as being "higher quality" (Tissot, 2025). In addition, sales of split formats (€10 or €20 per unit) remain common and have been reported in several regions, notably in Lille, Lyon, Brittany and Seine-Saint-Denis (Gérome, 2025).

Table 4. Heroin supply in France: seizures, prices and purity levels from 2022 to 2024

	2022	2023	2024	2014-2024 Annual average
Quantities seized (kg)	1 421	1 100	1 045	1 065
Average content (%)	18.6	15.8	12.7	16.9
Retail price (€/g)	30	28	32	32.6
Wholesale price (€/kg)	15 000	14 600	16 031	14 886

Sources: OCRTIS/OFAST (seizures and pricing); INPS/SNPS (purity levels)

SUPPLY OF AMPHETAMINE-TYPE STIMULANTS (ATS) IN FRANCE

Seizures of ATS in 2024

In 2024, seizures of synthetic drugs in France were overwhelmingly dominated by MDMA/ecstasy, with the quantity intercepted reaching an all-time high of over 9 million tablets (9 090 510). This represents an increase of 123% compared to the 4 072 704 tablets seized in 2023. This annual record is largely attributable to two exceptional operations, which resulted in the seizure of 2 168 000 tablets in May 2024 and 3 852 000 tablets in October 2024, destined for North Africa in both cases (OFAST, 2025a). This data confirms France's role as a transit zone for MDMA/ecstasy, mainly destined for North Africa and the United Kingdom. Transport relies on mules using air or sea routes, and on concealed compartments installed in vehicles travelling along road networks (OFAST, 2023). In 2024, 75% of MDMA/ecstasy seizures where the intended destination was known were destined for foreign countries, compared to 70% in 2023. Similarly, 22% of amphetamine and methamphetamine seizures for which the destination was identified were intended for markets outside French territory (OFAST, 2025a).

Seizures of amphetamines and methamphetamines have not followed a consistent trend in recent years, with volumes fluctuating significantly from one year to the next. However, 2024 stands out with a sharp rise to 618 kg seized, up from 265 kg in 2023, representing an increase of 133%. However, this one-off increase should be interpreted with caution, as there is no evidence of a sustained medium-term trend (OFAST, 2025a).

Purity levels of the main controlled substances

The price and purity of ATS fluctuate depending on their form, whether tablets, powder or crystals. In 2024, the average active ingredient content of MDMA/ecstasy tablets was 32.9%, compared to 30.7% in 2023. These levels have remained relatively consistent over the past decade, ranging between 37% and 28%. However, a slight decline has been recorded since 2019.

For amphetamine, whether in powder or paste form, the average purity observed in samples analysed in 2024 was 28%, compared to 24% in 2023. For methamphetamine, analyses conducted in 2024 show an average purity of 66%, down from 73% in 2023. For both substances, these results should be interpreted with caution due to the limited number of analyses serving as a basis for the calculations(SNPS, 2025).

ATS prices

Since 2015, the retail price of an ecstasy tablet has remained broadly stable at around €10. In 2024, however, OFAST reported a slight decrease, with the average price being €9. Nevertheless, this apparent stability must be put into perspective in light of inflation figures for the period. After adjustment, the real price per tablet declined, falling from €9.83[10] in 2015 to €7.17[11] in 2024. Moreover, this retail price only partially reflects purchasing practices, as users may obtain batches of several dozen tablets, resulting in a reduction in the unit price. The wholesale price of MDMA/ecstasy has shown more contrasting trends. After a significant decrease between 2012 and 2022, falling from €2 500 to €1 500 for 1 000 tablets (-40 %), in 2024 OFAST observed a rise in the average wholesale price to €1 957 (OFAST, 2025c) The TREND scheme also placed the current price of MDMA in powder or crystal form between €30 and €40 per gram, with lower prices when purchasing several grams (Gérome, 2025).

With regard to amphetamines, the wholesale price continued to rise, reaching €5 715 per kilogram in 2024, compared with €5 342 in 2023 and €5 150 in 2022. At retail level, the price per gram recorded by OFAST rose from €10 in 2022 to €12 in 2024. The TREND scheme reports that for "speed", a term referring to amphetamines often adulterated with caffeine and sold in dance-event settings, current prices range between €15 and €20 per gram, with lower prices observed at €10 (Gérome, 2025).

10. Price adjusted for inflation, 2012 base year.
11. Price adjusted for inflation, 2012 base year.

Table 5. The supply of ATS in France: seizures, prices and purity levels between 2022 and 2024

	2022	2023	2024	2014-2024 Annual average
MDMA/ecstasy				
Quantities seized (number of tablet equivalents)	1 543 421	4 072 704	9 090 510	2 253 784
Average content (tablets) (%)	28.2	30.7	32.9	33.62
Average content (powder, crystals, rocks) (%)	70.6	67.4	63.3	68.61
Retail price (€/tablet)	10	10	9	9.77
Wholesale price (€/tablet/1 000)	1 500	1 500	1 957	1 950
Amphetamine/Methamphetamine				
Quantities seized (kg)	273	265	618	419
Average amphetamine content (powder, paste) (%)	27	24	28.3	*26.65
Average methamphetamine content (%)	78	73	66.3	*70.81
Retail price of amphetamine (€/g)	10	13	12	*13.75
Wholesale price of amphetamine (€/kg)	5 150	5 342	5 715	**5 432

* Average 2015-2024
** Average 2017-2024

Sources: OCRTIS/OFAST (seizures and pricing); INPS/SNPS (purity levels)

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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