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TENDANCES

PSYCHOACTIVE SUBSTANCES, USERS AND MARKETS: TRENDS IN 2024

ABSTRACT

■ Observations from the Emerging Trends and New Drugs (TREND) scheme in 2024 indicate that many accounts operated by dealers on the Telegram application have migrated to other digital platforms and instant messaging services.
■ Despite the collapse in global heroin production, availability of the substance in France remains unchanged and supply disruptions are still limited.
■ The living conditions and health of drug users experiencing severe social deprivation continue to deteriorate due to a range of factors.
■ Use of free base cocaine continues to play a central role in the polydrug use of people experiencing severe social deprivation, to the detriment of opioids.
■ Some individuals engaging in chemsex experience significant difficulties in access to health care, despite a growing but still limited range of specialised health services.
■ Synthetic cannabinoids are used by individuals with diverse profiles, sometimes unaware of their composition, and are also employed as substitutes for or adulterants in other substances.

Changing patterns in the use of digital tools by trafficking networks

The Emerging Trends and New Drugs (TREND) scheme has been documenting the use of instant messaging applications (mainly Snapchat, Telegram, WhatsApp, Signal) by drug dealers since the mid-2010s. This practice has gradually become widespread across almost all trafficking networks in a highly competitive environment, where maintaining customer relations is a central concern [4]. The choice of application is determined by various criteria: dealers' interest in one or more specific features, level of guaranteed data encryption, user moderation policies, presence of a large number of potential customers and so on. A trafficking organisation will often use several different applications, employing one that specialises in photo or video sharing to showcase the substances on offer (appearance, prices, quantities available, etc.), and another that is regarded as more secure and efficient for communication to make contact with customers and arrange delivery.

In September 2024, the announcement of compliance checks on the Telegram application[1] and cooperation from its executives with the justice system led to the disappearance of numerous drug dealers' accounts on this platform. Those who remained on the platform removed all references to drug sales (leaving only limited visible information, such as opening hours, the address of the outlet or the telephone number for placing delivery orders, etc.) in order to evade moderation. Many redirected their followers to other applications. The Potato messaging app is similar in operation and design to Telegram, and appears to have frequently served as a fallback application[2], alongside WhatsApp and Signal, which were already widely used.

However, Telegram continues to be used for activities related to drug trafficking, as is the case with Potato. On both applications, channels (that is, broadcast groups allowing top-down dissemination of information to a large audience) serve as directories by listing the various active networks within a given area (city, department, etc.).

1. These compliance checks are carried out by moderator bots responsible for detecting posts containing photos, videos or keywords that may breach the legislation in force.
2. Some dealers have encouraged their clients to switch from Telegram to Potato by offering discounts or gifts for any purchase made through the new application.

Certain channels have several thousand, or even tens of thousands, of subscribers [5, 6], and set up a chat function enabling users to enquire about the availability of a substance in a given area and to be contacted by a dealer. Trafficking organisations use them to post job offers (couriers, fixed-location sellers, etc.), specifying the working conditions, the nature of the tasks required, the skills sought and so on. Advertisements for the sale of customer directories have also been observed. Finally, certain Telegram or Potato accounts sell services to dealers to refine their communication (creation of logos or flyers, packaging and promotional items) as well as equipment to facilitate the handling or packaging of substances (precision scales, nitrile gloves, etc.).

Diversification of the profiles of individuals involved in trafficking

In 2024, several TREND scheme coordinators reported a diversification of the profiles of individuals involved in local trafficking [5, 7]. This diversification has been reported since the late 2010s by law-enforcement services and the justice system, and has expanded as a result of the increasing use of instant messaging applications as recruitment platforms for dealers, who post detailed job advertisements there.

The search for new profiles by trafficking organisations serves several purposes. Its aim is to minimise the risk of disruption by law-enforcement services by relying on individuals who are less likely to attract police attention. Young women, non-racialised individuals or people who are relatively older — in their forties and fifties or even retired — than the youngsters usually recruited, and who look smart, are therefore recruited to transport products or deliver them to consumers. This diversification also reflects the growing need for expertise to manage trafficking activities. For example, students or young professionals are recruited for their skills in graphic design, digital tool management or communication. In many cases, these individuals become involved in trafficking on an occasional basis in order to earn additional income and supplement a salary, a pension, grants or benefits that they consider insufficient, or to repay a debt, finance a project and so forth.

The diversification of new recruits involved in trafficking also stems from individuals starting their own drug dealing activities. Many offer a range of substances, including ketamine or cathinones, which are rarely sold by larger networks. These "self-employed dealers" or small teams of two or three individuals, who are sometimes users themselves, also make use of digital applications to communicate with their clientele, which initially consists of acquaintances and then gradually expands. Drug dealing may constitute their sole source of income, be carried out intermittently or alongside paid employment, or be occasional or continue for several years.

However, the diversification of individuals involved in drug trafficking organisations should be put into perspective. Most of these individuals are still young men living in conditions of significant economic and social vulnerability.

Limited disruption to heroin trafficking

The TREND scheme is paying particular attention to the potential consequences of the sharp decline in global heroin production following the ban on opium poppy cultivation imposed by the Taliban regime in April 2022. The information gathered in 2023 did not reveal any significant impact of this decline on the French heroin market, the majority of which has historically come from Afghan poppy. On the contrary, the downward trend in retail prices and increased availability of the substance in certain areas of mainland France, which began in the 2010s, has continued [10].

However, disruptions have been reported (supply difficulties, wide variations in purity, adulteration of the substance with synthetic cannabinoids), leading to health incidents and the mobilisation of professionals and health authorities [11].

In 2024, the availability of heroin remained steady in areas where its trafficking was already well established (in Île-de-France, Grand Est, Auvergne-Rhône-Alpes and Hauts-de-France)[3].

Synthetic opioids: no organised trafficking and limited use

In recent years, heroin users who have experienced particularly intense effects or suffered symptoms of an overdose have frequently attributed these to the presence of fentanyl [13]. With rare exceptions, toxicological analyses do not indicate the presence of fentanyl or other synthetic opioids, but rather heroin with a high concentration. More broadly, investigations conducted by the TREND scheme do not identify any structured or sustained supply of synthetic opioids across mainland France. However, the resale of opioid agonist therapy (OAT) by certain clients experiencing economic hardship has been observed [14]. These treatments are primarily buprenorphine (available under the name Subutex®), methadone and, more rarely, morphine sulphate (available under the name Skenan®). The use of oxycodone or fentanyl and its derivatives outside a therapeutic protocol concerns only a very small number of individuals who obtain them through medical prescription[4] [13]. No large-scale trafficking has been reported, apart from a few exceptional cases[5]. This appears to be confirmed by the extremely rare seizures of these substances by law-enforcement services. Similarly, apart from a few isolated reports such as in Montpellier, the resale and use of substances from the nitazene family have not been observed. However, the increase in deaths linked to synthetic opioids in certain Northern European countries, such as the Baltic States and, more recently, the United Kingdom, is prompting French health authorities to exercise caution, as illustrated by a warning issued in mid-2024 regarding the growing circulation of opioids by the French Ministry of Health and the National Agency for Medicines and Health Products Safety (ANSM).

3. This continued availability of heroin, despite the sharp decline in global production, may be due to substantial stocks accumulated in France and across Europe.
4. In most cases, fentanyl is extracted from Durogesic® patches, a practice involving only a very small number of individuals, often of Georgian origin.
5. In 2024, the Central Office for Combating Environmental and Public Health Offences (OCLAESP) dismantled a trafficking network in Rennes involving around fifteen individuals who forged medical prescriptions to obtain boxes of fentanyl from pharmacies [15].

Increasingly precarious living conditions and worsening health problems

In 2024, all the coordinators of the TREND scheme reported a worsening of the already precarious living conditions of marginalised drug users. This increasing precarity is driven in particular by growing financial hardship, which leads to evictions and compels many individuals to spend long and exhausting hours begging for small amounts of money to fund their regular drug purchases [7, 9, 15]. In Rennes, Lyon and Bordeaux, evictions from housing and squats are compounded by a lack of access to emergency accommodation, owing to the shortage of available places and the fact that existing services are ill-suited to people's needs (for example, by refusing pets, prohibiting alcohol consumption or applying restrictive eligibility criteria, such as a recognised mental health condition). The digitalisation of administrative procedures and the difficulties involved in securing a face-to-face appointment hinder access to and continuity of social entitlements, especially for people without stable accommodation and who lack proficiency with digital tools [8]. Finally, in 2024, mental health and access to mental health care for vulnerable people who use drugs remained a particular cause for concern, according to accounts from many harm reduction professionals and those directly affected. Investigations carried out in the PACA, Grand Est and Aquitaine regions [7, 8] highlight the worsening of psychiatric comorbidity among certain marginalised drug users. These comorbidities often remain untreated due to a lack of available places, excessively long waiting times (particularly in psychiatric outpatient clinics), or as a result of discrimination against people with addiction by certain psychiatric institutions. The lack of cooperation and coordination between the public psychiatry sector and addiction medicine services (with the exception of hospital-based specialised drug treatment centres (CSAPAs) was also still reported in 2024.

Central role of free base cocaine, reduced visibility of opioids

As in the previous year [10], all coordination teams reported in 2024 a rise in free base cocaine use and a growing domination of daily life by the search for and use of the substance. Many people who use drugs and are homeless organise their days around repeated trips between selling points, places of use, their sleeping areas and the locations where they beg. These factors, combined with the worsening living conditions described in the previous section, are leading to a rapid deterioration in both social circumstances and health.

The diversification of free base cocaine user profiles seeking support from addiction support services is a notable finding from the investigations conducted in 2024. Many professionals, whose organisations are based in the towns and cities of mainland France, report an increasing number of people who are socially and economically integrated, sometimes in relationships and with children. Some individuals contact a drug-treatment centre (CAARUD or CSAPA), specifically to obtain equipment.

Most of them report occasional or more regular use and do not express any intention to reduce it. Others seek support from a specialised drug treatment centre, or turn to hospitals or private clinics for help with withdrawal.

For many of them, intensive use of free base cocaine develops following an event that triggers or exacerbates psychological distress and social or economic difficulties (the death or illness of a loved one, a relationship breakdown, loss of employment, etc.) [8].

Chemsex and drug use

Chemsex refers to the use of psychoactive substances specifically in the context of sexual intercourse between men who have sex with men (MSM). Its characteristics are as follows: drug use is combined with sexual activity in the aim of intensifying pleasurable sensations, eliminating fatigue, extending the duration of intercourse or facilitating certain sexual practices; consumption focuses mainly on new psychoactive substances (NPS) and GHB-GBL. Encounters between chemsex participants (chemsexers) are organised via social networks and dating apps, and take place primarily in private settings (at home or in specially rented accommodation). Data collected in 2024 focused in particular on the diversity of chemsexer profiles and the social and health issues faced by some of them.

In 2024, local TREND coordinators emphasised the considerable diversity among chemsexers in terms of age, social, cultural and economic capital, as well as their degree of involvement in the practice. Professionals from various organisations (community health associations, harm reduction facilities, specialised drug treatment centres, hospital services) supporting chemsexers in Marseille, Paris and Seine-Saint-Denis reported an increasing number of exiled individuals (mainly from the Maghreb, sub-Saharan Africa, the Horn of Africa or the Near and Middle East), some of whom had only recently arrived in France [8, 18]. In the Lyon and Lille areas, professionals highlighted the young age of some participants, including minors and young adults, whose first sexual activity had been in the context of chemsex [6].

All professionals interviewed emphasised the increasing social, economic and psychological vulnerability of chemsexers seen within their services, whether they were newly engaged or already receiving support, in some cases for several years. For many individuals, increasing difficulties in managing their use of psychoactive substances, particularly cathinones, were accompanied by physical exhaustion and psychological distress, which in some cases manifested as suicidal thoughts, episodes of depression, or anxiety. Some individuals had lost their jobs, or even their homes, accumulated debt and become socially isolated. The Paris, Marseille and Lyon coordinators reported cases of dependence resulting from chronic GHB/GBL use, sometimes requiring withdrawal in hospital due to the associated health risks[6].

The lack of skilled professionals and specialised facilities for this type of care leaves some individuals in considerable distress. Professionals from various urban areas (Bordeaux, Marseille, Lille, Lyon, Paris) also report deaths attributable to GHB/GBL.

Requests for care and support related to chemsex practice at addiction support and harm reduction services are reported to be on the rise. This is linked to chemsexers' greater awareness of such services and to the ongoing adaptation of professional practices and facilities in 2024, including the setting up of

6. Heavy and regular use of GHB/GBL can lead to severe dependence which, as with alcohol acting on the same GABA receptors, is accompanied by withdrawal symptoms if use is stopped or reduced. The severity of these symptoms (hallucinatory delirium, adrenergic syndrome, etc.) necessitates medical supervision of the patient, who is generally prescribed a high dosage of benzodiazepine.

dedicated counselling sessions led by specifically trained staff, the provision of lower-risk (heroin) injection support, the creation of discussion groups and various digital outreach initiatives.

Synthetic cannabinoids: a wide-ranging phenomenon

Synthetic cannabinoids (SCs) are synthetic molecules that bind to the same cannabinoid receptors as THC, but their effects are more potent than those of cannabis[7] [22]. Use of these substances in the form of e-liquids inhaled via electronic cigarettes has been regularly reported by the TREND and SINTES schemes since the late 2010s [23]. They mainly involve male minors or young adults and have been reported by various professionals following acute intoxications.

In 2024, these patterns of use and the associated health issues (faintness, hallucinations, paranoia, amnesia, spatiotemporal disorders, etc.) continued to affect the Hauts-de-France region in particular, where they were initially identified, but are now also observed throughout mainland France[8]. Many of these young people were unaware of the risks of adverse effects caused by the substance, as well as the necessary precautions to reduce them, particularly in terms of accurate dosing. They were also unaware of the actual composition of the inhaled liquid. In most cases, they purchased it via social media (at the current price of €10 for 10 ml) or from drug dealers as CBD or highly concentrated cannabis, sometimes under a commercial name (Pète-ton-Crâne, Buddha Blue, Spleen, etc.), with no mention of its molecular composition.

Other, older individuals (of the 25-30 age group), had some knowledge of synthetic cannabinoids and were able to control dosages and gauge their effects. Some obtained them online in powder form and prepared their own e-liquid, sometimes selling part of it to people around them, or even to a wider clientele [9]. However, this process remains complex due to the potency of the effects, which require accurate dosage down to a milligram, as well as the fact that these effects vary according to the SC compounds available.

In addition, the substance being undetectable through tests carried out by law-enforcement services was often cited as a reason for use by young adults living in rural areas [7]. These individuals use synthetic cannabinoids as a substitute for the cannabis they used previously, in order to avoid the risk of having their driving licence suspended or withdrawn. The consequences of such sanctions would be particularly detrimental to their socio-professional situation.

Since the late 2010s, use of synthetic cannabinoids has also been documented in Mayotte [24] and Reunion Island. The substance is consumed in the form of powder sprayed by dealers onto tobacco, a preparation known as “chimique” (synthetic cannabinoid-laced tobacco). In Reunion Island, regular use primarily concerns young men, many of whom live in conditions of social and economic precarity. The resulting health issues (development of addiction, psychiatric decompensation, etc.) and social problems (isolation, indebtedness, etc.) leave professionals at a loss. However, while the use of “chimique” remains present, particularly in the east of the island, it has declined significantly since 2022. In 2024, some individuals reported having stopped their use, while others had turned to free base cocaine or synthetic cathinones [25]. Similarly, some drug dealers reported having ceased “chimique” trading due to the problems caused by its adverse effects.

Finally, synthetic cannabinoids are used as cutting agents or as substitutes for other substances, most often without consumers being informed. Cases of heroin adulterated with synthetic cannabinoids have thus been reported since 2023 in Île-de-France and Auvergne-Rhône-Alpes by users who had obtained the substance from physical points of sale or via the darknet. Similarly, the coordinating teams based in Provence-Alpes-Côte d’Azur and Auvergne-Rhône-Alpes have reported the presence of CBD herb and resin (with a THC content below 0.3%) onto which powder-form synthetic cannabinoids had been sprayed. These cases of adulteration or substitution involving heroin or cannabis had resulted in significant adverse effects.

Conclusion

The trends observed under the TREND scheme in 2024 are in line with previous years’ findings. This is exemplified by the use of digital tools by trafficking networks, with 2024 characterised by the migration of numerous dealer-managed accounts from Telegram to other applications. Difficulties in accessing social entitlements and healthcare for people facing severe social deprivation, along with the central role of free base cocaine in their drug use (sometimes to the detriment of opioids), were a key finding of investigations carried out in 2024. These findings also indicate that a growing number of individuals with social and economic resources are experiencing difficulties in managing their free base cocaine use. These difficulties in managing use and their social and health consequences are also observed among certain chemsexers, who increasingly seek support from addiction support services.

Other substances, populations or practices are not covered here but have been examined in investigations conducted by the local coordinators of the scheme and covered by regional reports, which readers can consult on the website of the French Monitoring Centre for Drugs and Drug Addiction (OFDT). This is particularly true for the use of ketamine (the subject of a recent publication [26]) and synthetic cathinones among people attending techno parties, the non-therapeutic use of pregabalin (Lyrica®) and specific issues faced by women experiencing precariousness and addiction.

7. Fully synthesised in the laboratory, SCs are not derived from cannabinoids naturally present in the cannabis plant, unlike hemi- or semi-synthetic cannabinoids such as hexahydrocannabinol (HHC), which are not addressed in this section.
8. In 2024 and 2025, regional health agencies of Île-de-France and Occitanie issued warning messages following the use of synthetic cannabinoids that led to hospitalisations.

Prices of the main illicit drugs in 2024* (in euros, per gram unless otherwise stated)

Cannabis

	Herbal	Resin
Current	8-10 €	6-8 €
Low	5-6 €	5 €
High	15-20 €	10-12 €

Wide price variability depending on presumed quality and purchase context (point of sale, delivery).
Reduced price if several grams are purchased.
Substances with a higher THC concentration than herbal cannabis or resin, produced by specific extraction or preparation methods, have been reported: "wax", "dry", "three-times filtered", etc. Their prices are ranging from €20 to over €50/g.
In the Réunion island, the current price of resin is €20/g.

Cocaine

Current — 50-60 €
Low — 40 €
High — 70-80 €

Prices fluctuate according to the trafficking network, the quantities purchased (bulk discounts frequently available) and the method of purchase (more likely to be €60-70 on delivery and €50 at the point of sale).
Sales by the half-gram (€30-40) and in fractioned units (€20 or even €10) observed in points of sale in the eight metropolitan sites.
No price quotes for free-base cocaine, with the exception of Île-de-France region, where the current price of a rock of crack cocaine is €15

Heroin

Low — 10 €
High — 50-60 €

No current price because of major fluctuations depending on the region, the quantity purchased and the supposed quality.
Low prices (€8-10/g) reported in the Lille, Metz and Lyon metropolitan areas, stable prices in Occitanie, Brittany and Lyon (€20-30/g).
No fixed, permanent points of sale observed in the PACA, Nouvelle-Aquitaine and Occitanie regions, or in Paris.
Sales in fractioned units (€10-20) reported in Lille, Lyon, in Brittany and in Seine-Saint-Denis.

Resold opioid drugs

BHD (Subutex®)	Current price: 2-5 € (8 mg tablet)	Price stable overall. Between €15 and €30 per blister pack of seven 8 mg tablets. No price survey in PACA or Reunion Island.
Methadone	Current price: 5 € (60 mg vial) ; 3-5 € (40 mg capsule)	Price varies according to availability and may be as low as €10 in times of shortage. No prices reported in PACA or Reunion Island. Often bartered between users.
Morphine sulphate (Skenan®)	Current price: 3-10 € (100 ou 200 mg capsule)	Prices vary according to region and time of year. No prices recorded in Reunion Island, Occitanie or Hauts-de-France.

Amphetamines

Current — 15-20 €
Low — 10 €

Product is becoming less available, sales observed only in festive contexts.
Bulk discounts for purchases of several grams.
These prices apply to substances sold under the name amphetamine or 'speed' (the name given by users to amphetamines adulterated with caffeine).

Ketamine

Current — 20-30 €
Low — 10-15 €
High — 40 €

Lower prices.
Bulk discounts for purchases of several grams.
Increasing availability on digital applications and for delivery.

Ecstasy/MDMA

Powder/ crystal	Current — 30-40 €	Powder is less readily available than tablets. Bulk discounts for purchases of several grams. Sold for a "parachute" (a small quantity wrapped in cigarette paper ready to be ingested).
Ecstasy tablet	Current — 10 €	Stable unit price, decreasing with the purchase of several tablets. €20 per tablet in the Réunion island.

Synthetic cathinones

Current — 30 €
Low — 15-20 €
High — 40-50 €

The lowest prices apply to purchases made online, where a sliding scale is observed for bulk purchases of several grams.
Sold under the name 3-MMC, but may be another cathinone, often 2-MMC.
No price survey in Brittany.
In Reunion Island, the current price per gram ranges from €200 to €300.

LSD

Current — 10 €
(blotting paper or drop)

Stable price.
Reduced price for larger purchases.

Pregabaline (Lyrica®)

Current — 2-3 €
(300 mg tablet)

Price varies according to availability on the street market.
No prices recorded in Brittany or Réunion Island.

* Prices are reported for other substances, notably drugs such as certain benzodiazepines, but the small number of prices reported means that it is not possible to establish a current price (the most frequently reported price).

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