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Drug market and crime workbook

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When responding to the workbook, please be certain to use the fields associated with each question to allow the EMCDDA to identify the relevant parts.

T0. Summary

Please provide an abstract of this workbook (target: 500 words) including a summary of the following points:

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

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

The illicit drug market in France is structured around four main substances: cannabis (resin, herbal), cocaine, heroin and MDMA/ecstasy. There are also secondary markets - amphetamines, new psychoactive substances (NPS) but, given the low consumption levels of these products among the general population, the supply is difficult to quantify. Given France's geographic position at the heart of Western Europe, it is a transit area for the main illegal substances (cannabis, cocaine, heroin, and synthetic drugs) produced worldwide. France is also a production area for certain drugs, particularly cannabis. While almost all illicit psychoactive drugs consumed in France are produced abroad, herbal cannabis is subject to significant cultivation activity, both in mainland France and in the overseas territories, in addition to the volumes imported from EU countries, particularly neighbouring countries (such as Spain) or, more recently, from Thailand and North America. More generally, the cannabis market in France remains characterised by the significance of cannabis resin but this share has been decreasing in the past decade in favour of herbal cannabis. Cannabis resin comes almost entirely from Morocco.

Over the last ten years or so, like other EU countries with a coastline, France has been particularly affected by cocaine trafficking on container ships, partly because of the geographical proximity of its overseas territories (Antilles, French Guiana) to the major production zones (Colombia, Peru, Bolivia) and transit zones (Ecuador, Brazil, etc.) in South America. A significant share of the cocaine imported across the French territory goes through French Guiana or the French Antilles and crosses the Atlantic to be unloaded at the main French commercial ports such as Le Havre, Dunkirk, Saint-Nazaire and Marseille. The port of Le Havre had seen a decrease in cocaine flows in 2023 but returned to its central role as an entry point for this drug into mainland France in 2024. Another route towards France leaves from the Port of Santos in Brazil which is playing an increasingly large role in the supply of the European market. Couriers transporting the drug in their bodies or luggage are still widely used to bring cocaine into mainland France. Historically, Cayenne-Paris was one of the main routes, but tighter checks at Cayenne airport have led traffickers to adapt their strategies. They now favour alternative routes, notably via the French Antilles or on direct flights from South America to Paris, such as the São Paulo-Paris or Lima-Paris routes, which appear to be increasingly used in 2024. France has also seen an increase in cocaine flows from the Iberian Peninsula. This development could be explained by enhanced checks in the ports of the Northern Range, in particularly Antwerp and Rotterdam.

2025 saw a further increase in cocaine seizures, reaching a record level of 84.3 tonnes, compared with 53.5 tonnes in 2024. This represents a 58% rise. Seizures of cannabis also grew, with 126 tonnes seized compared to 101 tonnes in 2024, an increase of 25%. This included 81 tonnes of resin and 45 tonnes of herbal cannabis. Seizures of cannabis plants increased significantly as well (+55%), reaching 104 557 plants. In contrast, seizures of MDMA/ecstasy fell by 19% from the all-time high recorded in 2024, with 7.3 million tablets or powder equivalent seized. Despite this decline, the level remains exceptionally high compared with previous years. Meanwhile, the amphetamine and methamphetamine market recorded a significant increase, with 961 kg seized in 2025 compared to 618 kg in 2024 (+56%). This confirms France's role as a transit country for these substances. Lastly, heroin seizures continued their slight upwards trend, with 1.2 tonnes seized in 2025. This marks the eighth consecutive year in which seizures have exceeded 1 tonne.

National drug law offences (summary of T1.2)

Drug-related offences increased significantly in 2025, both for use, with 307 200 people charged (+6%), and trafficking, with 56 600 people charged (+8%) (SSMSI 2026). These increases confirm the growth recorded in 2024, which was partly attributable to the rise in the number of persons charged during July and August 2024, in connection with the exceptional mobilisation of domestic security forces for the Paris Olympic and Paralympic Games. They are part of an upward trend observed since 2020, with an average annual increase of 14% for drug use, driven by the introduction of criminal fixed fines (AFDs), and 7% for narcotic trafficking. In 2025, 7 out of 10 individuals charged with drug use received an AFD, whereas in 2021, this applied to only about 1 in 2. The proportion of AFDs has continued to increase since they were introduced in September 2020.

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

Action for combating drug trafficking is part of the 2023-2027 Interministerial Strategy for Mobilisation against Addictive Behaviours, which establishes the new strategic government policy framework, and the priorities for the coming years. This strategy highlights the importance of comprehensive and coordinated action between the different services involved, particularly cooperation between internal security forces and the judicial system to combat drug trafficking and organised crime. It also emphasises the need for public action to be underpinned by in-depth knowledge, promoting the dissemination of knowledge, the involvement of the scientific community, and continuous support for research. The strategy calls for strengthening European cooperation to prevent, deter, and disrupt drug-related crime, particularly organised crime. That includes police, customs, and judicial cooperation, exchanging intelligence, seizing and confiscating criminal assets, alongside combating corruption.

Between 2024 and 2025, France reinforced its legal framework to combat drug trafficking and organised crime more effectively. This resulted in two bills being tabled in the Senate in July 2024. The bills were presented jointly by senators from the Les Républicains and Socialist, Ecologist and Republican groups. They were based on the findings of a parliamentary report. The first bill was entitled *"Getting France out of the drug trafficking trap"*, and aimed to endow the State with new means to weaken criminal organisations. The second was for an organic law and concerned the creation and status of a public prosecutor specialising in organised crime. These bills were definitively adopted on 29 April 2025, following an agreement reached in a joint committee. The Constitutional Council approved the main provisions of these laws in its decision of 12 June 2025, although it did censor certain provisions. The laws were promulgated on 13 June 2025 and published in the Official Journal the following day.

The reform comprises several major measures. It provides for the creation of a national prosecutor's office dedicated to organised crime and responsible for handling the most serious cases. It also introduces a specific regime for high-level traffickers with stricter prison conditions. The informant system has been revised, and individuals who cooperate with the justice system can now benefit from a reduction of their sentence by up to two thirds, compared with one third previously. The system also includes other administrative measures. For example, traffickers may be evicted from social housing. Businesses suspected of money laundering may be closed by administrative decision. The organic law on the status of the specialised prosecutor has entered into force on 5 January 2026.

T1. National profile

The purpose of this profile is to provide a commentary on the drug supply chain within your country.

T1.1. Drug market

The purpose of this section is to summarise the basic structure of the drug market in your country. Namely it should provide a commentary on

- Sources of drugs in your country: international sources of the drug, trafficking routes, domestic production/cultivation

- Information available on the wholesale drug market
- Information available on the retail drug market
- The numerical data submitted through ST11, ST13, ST14, ST15, ST16

Note: Please focus on the main/most important drugs in your country.

T1.1.1. Please describe any domestic production of drugs within your country by drug. For synthetic drugs please include also processing stages such as tableting operations. Please use the table to provide the total annual number of dismantled sites.

Herbal cannabis is the main illegal substance leading to a domestic production in France, even though a portion of the volumes consumed come from foreign countries. Going by the volumes of plants seized by law enforcement (customs, police, gendarmerie) in certain parts of the country (104 557 plants seized in 2025), production is prevalent in the overseas territories (French Polynesia, Reunion island), which accounted for 66% of seizures in 2025 (OFAST 2026b). In 2025, the National Gendarmerie made 88% of the cannabis plant seizures on French territory. According to data from the Central Criminal Intelligence Service of the National Gendarmerie, outdoor cultivation accounted for 33% of cannabis cultivation cases[1] detected in 2025, compared with 29% for indoor cultivation. In terms of volume, however, the number of plants seized is higher in cases of outdoor cultivation, as these sites can be established in large open areas such as forests, fields or mountainous regions. This characteristic is particularly pronounced in the overseas territories, which account for 58% of outdoor cannabis cultivation sites detected nationwide in 2025. Small growers with between 1 and 10 plants accounted for around half of the cases recorded. Cultivation sites with 10 to 100 plants represented 32% of cases (Gendarmerie Nationale 2026).

Different producers of herbal cannabis can be distinguished in France:

- Small growers, estimated between 150 000 and 200 000 persons in the years 2010s, who produce for themselves or for their immediate circle of friends or family.
- Individuals getting involved in relatively large-scale commercial herbal cannabis production (several dozen plants).
- Criminal groups implementing real production units (“cannabis factories”) with up to several thousand plants, with an increasing involvement of groups specialised in importing and distributing cannabis resin.

France is mainly faced with clandestine laboratories known as “kitchen labs”. These facilities are used to produce small quantities of synthetic drugs or crack cocaine by local dealers. In 2025, 26 crack cocaine kitchens were dismantled in the Paris metropolitan area. The establishment of these kitchen labs is increasingly associated with the use of short-term furnished rentals (Airbnb, Booking.com, etc.). These types of accommodation provide dealers with discreet production sites. They reduce the risk of detection and surveillance by law enforcement. This phenomenon has been observed in the Paris metropolitan area, but also throughout the country. Among the substances produced in these laboratories, synthetic cannabinoids are predominant. They are marketed as vaping products, such as PTC (Pète Ton Crâne or Brainfuck). Easily manufactured from precursors available online, this substance was involved in several cases in 2025, mainly concerning sales in schools. We are also beginning to see production of synthetic cannabinoids in resin form. In December 2025, the first French laboratory producing synthetic cannabis resin from CBD was discovered near Toulouse. Its production capacity was estimated at 25 kg per day (OFAST data).

In 2024, France identified a methamphetamine production network on its territory for the first time. This followed the seizure of 215 kg of methamphetamine in the Var department in June 2024. The investigation established a link with an earlier seizure of 5.6 tonnes of precursors at the port of Le Havre in September 2023, as well as with another seizure of 8.8 tonnes of chemicals in Marseille in November 2024 (OFAST 2025b). In May 2025, investigations carried out on the basis of this evidence led to the discovery of a clandestine laboratory in a villa located in the Var. The facility was supplied with precursors from China and had an estimated production capacity of 400 kg of methamphetamine (Région de Gendarmerie de Provence-Alpes-Côte d'Azur (RPACA) 2025).

[1] The figures are based on an analysis of criminal investigation reports (CRPJ). They do not constitute official statistics.

In 2025, no new semi-industrial synthetic drug production laboratories were identified in France. With regard to cocaine, only two clandestine processing laboratories have been identified to date in France (OFAST data).

Site type (Production/ Storage/ Dump site)	**Drug(s) produced (Amphetamine, MDMA, Cocaine, Heroin, Cannabis, etc)**	**Number of sites**	**Details / Comments (Size of labs, type of process, precursors, indoor or outdoor - for cannabis, etc)**

T1.1.2. Please comment on any available information on the routes of trafficking for drugs imported into your country whether in transit or not. Information relevant to this answer includes:
- origin
- most recent country prior to your country
- any other information on trafficking routes as well as the mode of transport

Owing to its geographical position at the heart of Western Europe, France is a transit area for certain illegal drugs. The South-to-North route is used for the transit of cannabis and cocaine, transiting via Spain, notably destined to supply Northern European markets. The North-to-South route is used for the transit of synthetic drug shipments through France (ecstasy, MDMA), produced in the Netherlands and Belgium, destined for Spain, Italy or more recently for North Africa (OFAST 2023a). This transit route is also reported for heroin, stored in the Netherlands (Rotterdam, Maastricht, etc.), in transit from North and East of France to Spanish and Italian markets. Finally, France appears to be a strategic cocaine transportation zone, given its overseas departments in the American continent (French Guiana, Guadeloupe, Martinique) near the main areas of production (Colombia, Bolivia, Peru) and cocaine transportation (Brazil, Venezuela and Suriname for cocaine, and Iran, Turkey and Albania for heroin), which represent departure points of cocaine towards Europe, but also due to its many ports which are used by the trafficking networks as a gateway into Europe for cocaine.

Cannabis

The supply of cannabis, in both France and the European Union, is essentially centred on two products, herbal cannabis and cannabis resin, even though other substances are observed on the market, such as the oil or derivatives of cannabis which are high in THC (butane hash oil, ice-o-lator or ice hash[2]). The cannabis resin smoked in France comes almost exclusively from Morocco, transiting most often via Spain. Shipments leaving the Rif region in Morocco, after crossing the Mediterranean, reach Spain via speedboats or goods vehicles. Spain is the main transit country of cannabis resin transported to France, and is now in competition with other countries in the Eastern Mediterranean. France is also a transit zone supplying the markets of neighbouring countries, notably Germany, Belgium and Italy. 30.9% of the cannabis seized in 2024 on French territory (i.e. 31.2 tonnes) was destined for a foreign country (OFAST 2025b). Road transport is therefore very important in cannabis logistics chains in France, as reflected in the seizures: according to OFAST, 68% of the cannabis seized in France in 2024 was transported by road (OFAST 2025a).

The Spain-France route remains the main channel for trafficking cannabis resin into national territory. Since Spanish authorities intensified checks in the south of the country, criminal organisations have adjusted their routes. Entry points have gradually shifted towards the north-east of Spain, particularly in Catalonia and the Valencia region. “Go-fast” land convoys continue to be widely used for transportation to France. At sea, dealers also use “mother ships” as refuelling points (DNRED 2025). In addition to cannabis, the Spain-France axis is increasingly becoming a multi-substance logistical route, particularly for cocaine. Spain is consolidating its role as a storage and

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

redistribution hub for drugs destined for France, particularly towards the south-west, the Mediterranean arc, Île-de-France and the main regional metropolitan areas (OFAST data).

At the beginning of the 2010s, the French market, marked for a long time by the supremacy of cannabis resin imported from Morocco, experienced a change due to the increase in the consumptions of herbal cannabis (Obradovic 2016), imported from Spain or the Netherlands, or produced across the national territory (Gandilhon ***et al.*** 2019) particularly in the overseas departments (Obradovic 2020). In 2024, OFAST highlighted a new trend in the French cannabis market, with a diversification of the origins of herbal cannabis. Whereas cannabis seizures historically came mainly from Morocco, there is now a growing share of products imported from Asia and North America, notably from Thailand, the United States and Canada, where cannabis has been legalised in whole or in part (in half of the states in the United States and all of Canada).

In 2025, this trend was confirmed, with 6.5 tonnes of herbal cannabis seized from these regions, compared with 1.3 tonnes in 2024. Air transport was identified as the main channel for drugs from these areas in 2025, accounting for 67% of seizures made via this route (OFAST 2026b). In May 2025, a seizure of 1.2 tonnes of herbal cannabis was also made in the Paris region, after arriving via Roissy-Charles-de-Gaulle airport. For the first time in France, the operation revealed the activity of a structured Canadian criminal group in the transport and distribution of large quantities of herbal cannabis to France and other European countries. North American herbal cannabis is also widely distributed via individual orders placed on the internet and then delivered by post, often in small quantities (less than 10 grams) (OFAST 2025b).

Cocaine

The cocaine consumed in France comes mainly from Colombia, which remains the world's largest producer of coca leaf (UNODC 2022). Once it has arrived on the European continent, it passes via Spain and Portugal in the south, and via the Netherlands and Belgium in the north to reach France. Most of the cocaine reaches France by sea (mainly via containers but also sailing boats or even submersibles). In 2025, the vast majority of cocaine seizures in France took place in maritime transport, accounting for 71% of the total, or 59.5 tonnes. This volume included 43.4 tonnes intercepted during boardings at sea and 15.5 tonnes seized in ports (OFAST 2026b).

Over the past few years, the port of Le Havre has become a major gateway for cocaine to France. This change is explained by the connections between the Antilles port of Fort-de-France and Le Havre in the West-Northern metropolitan area in a context where the French West Indies are becoming a major developing zone for cocaine destined for France and Europe. The shipping line between the port of Santos in Brazil and Le Havre also seems to play an increasing role in supplying the French market. Increased security and checks at the port of Le Havre in 2023 reduced the use of this port by drug traffickers to bring their goods into France that year (Durain and Blanc 2024). Despite the tighter security measures, traffickers managed to adapt their methods in 2024 to continue using French ports, particularly Le Havre. According to OFAST, some resorted to sophisticated techniques such as clone containers or the fraudulent use of secure codes allowing the goods to be collected without arousing suspicion. The port of Le Havre, which had for a time seen a decline in cocaine shipments, has thus regained its central role as a gateway for this drug into mainland France. This trend was reflected in the sharp increase in volumes seized: 14.4 tonnes of cocaine were intercepted in 2024 compared with 5.3 tonnes the previous year (OFAST 2025b). One major operation illustrates this phenomenon: at the end of December 2024, more than two tonnes of cocaine were seized in a single operation by the Rouen gendarmerie (Hours 2025).

The port of Dunkerque, the third largest seaport in France, appears increasingly exposed to the activities of drug traffickers. 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. The port is also used as a departure point to the United Kingdom. OFAST also draws attention to so-called secondary ports, such as Rouen, Nantes-Saint-Nazaire/Montoir-de-Bretagne or Gennevilliers, which are particularly vulnerable to this type of activity due to a lower level of compliance checks. It also notes that certain bays that are far from commercial ports could be used to pick up cocaine after drop-off operations at sea (OFAST 2025b).

Because of its geographical position in the EU, France is particularly affected by cocaine trafficking (OFDT 2023). On the one hand due to its location in the heart of Western Europe which makes it a transit location connecting the Netherlands and Spain in particular; on the other hand, due to its

proximity to the main areas of production in South America and in the French Antilles across the overseas territories. The French Antilles and French Guiana traditionally play a central role as a transit area for cocaine trafficking to Europe. French Guiana is particularly exposed to transit of cocaine from Suriname, Brazil and Guyana. In the Antilles, trafficking is developing both in the zone between the islands of the Caribbean and through the arrival of shipments from other territories, notably by maritime means such as go-fast boats, fishing vessels or pleasure craft (OFAST 2025b). In 2024, seizures in ports in mainland France of narcotics arriving directly from the Antilles amounted 6.2 tonnes. A significant proportion of the cocaine entering Guadeloupe and Martinique transits via the Dominican Republic and Saint Lucia (OFAST 2025b).

The Cayenne-Paris air route has traditionally been used extensively by smugglers transporting goods in corpore and/or in their luggage. However, at the end of 2022, security measures at Cayenne Airport were strengthened, particularly through the introduction of systematic passenger screening ("100% control" system) for those departing for Paris. This system enabled more effective interception of trafficking attempts in Cayenne, which drastically reduced the number of mules arrested in Paris: the number of mules intercepted in Paris from Cayenne fell from 334 in 2022 to 120 in 2024 (OFAST 2025b). Nevertheless, it appears that the traffickers, faced with this strengthened customs response in Cayenne, have sought ways to bypass through the West Indies, opting for origins which are considered to be less monitored, such as Guadeloupe and Martinique. In 2024, there was a 117% increase in arrests of mules coming from Martinique (OFAST 2025b). In 2024, Brazil became a major departure point for mules intercepted in French airports, with 247 people arrested, up 53% on the previous year. Another indicator of this trend is that 55% of mules arrested at São Paulo airports in 2024 were bound for France. OFAST also highlights the rise in the trend of mules coming from Peru, particularly via the Lima-Paris route by air. In addition, flights to Paris airports from West Africa, and more specifically from Mali, Benin, Guinea, Côte d'Ivoire and Senegal, are regularly used for drug trafficking by mules. In total, 1 474 mules were arrested on French territory in 2024, with total seizures of 4.2 tonnes of substances, representing a 52% increase in the number of mules in one year. Among those apprehended, 60% came from the Antilles and French Guiana, with 3.3 tonnes of cocaine seized (OFAST 2025b).

The trafficking routes for cocaine to France have changed significantly since 2024. While the Netherlands and Belgium remain key hubs for the European cocaine market, increased checks at the ports of Antwerp and Rotterdam have led to a shift in routes towards the Iberian Peninsula. Spain has now established itself as a major entry point for cocaine in Western Europe and as a redistribution hub towards France. This development has led to an increase in traffic along the road routes connecting Spain to France, particularly via the Pyrénées-Atlantiques and Pyrénées-Orientales (OFAST 2025b). The routes taken now largely coincide with those used for cannabis trafficking. Law enforcement agencies in Occitanie have observed an adaptation of operating methods along these routes. In 2025, dealers favoured the use of light vehicles to transport large quantities of cocaine, increasing the number of convoys to minimise losses in the event of interception (Srocynski and Yeghicheyan 2026). This strategy has led to a major increase in seizures in the south-west of France. For example, in Nouvelle-Aquitaine, the quantities of cocaine seized rose from 37 kg in 2023 to 360 kg in 2024, then to almost 4 tonnes in 2025 (Perrin 2026).

At the same time, law enforcement agencies are observing the emergence of "reverse flows". From the Provence-Alpes-Côte d'Azur region, shipments of cocaine and synthetic drugs to North Africa, particularly Tunisia and Algeria were identified from late 2025 on. These trafficking operations use couriers travelling by air, as well as maritime routes leaving from the port of Marseille (Duport *et al.* 2026).

Lastly, France is also increasingly being used as a transit country for shipments of cocaine destined for Oceania and South-East Asia. Criminal organisations take advantage of the country's reputation as being less exposed to drug exports in order to minimise the risk of detection. Shipments are dispatched not only from mainland France but also from the overseas territories, particularly French Guiana (DNRED 2025).

Heroine

The introduction of opioid substitution treatments (methadone, Subutex®) in the mid-1990s had the effect of breaking the dynamics of the distribution of heroin, which started in the 1980s, and marked the beginning of a clear fall in the following years, particularly through the very clear decrease in the number of seizures and arrests of users and traffickers. However, from the second half of the 2000s,

the seizures faced another clear increase in quantities and numbers, thus confirming the persistence of a market which nonetheless remains insignificant compared to the cannabis or cocaine market. In addition, the heroin market, unlike the cocaine or cannabis resin markets, is characterised by strong regional variations. It is particularly in the suburban territories in the North East and East of France that this market remains the most persistent, particularly due to the proximity of the Netherlands, the main redistribution zone of heroin in Western Europe (EMCDDA and Europol 2019) but also the proximity of the end of the "Balkans route". One of the noteworthy phenomena in terms of supply is the increasing role, which began almost ten years ago, of the Albanian branches in the Auvergne-Rhône-Alpes region (OCRTIS 2019).

The heroin used in France mainly comes from Afghanistan (brown heroin), the world's leading producer, and is transported *via* the Balkan route (Turkey, Greece, Albania/Bulgaria) through Iran. White heroin originating from the Golden Triangle (Thailand, Myanmar and Laos) is also imported. However, this phenomenon is unclear due to its marginal nature. The Netherlands, ahead of Belgium, is the main platform which supplies French dealers. As with cocaine and synthetic drugs, the Netherlands and Belgium are a significant secondary source of the French market. In these two countries, there are wholesale or retail markets where the criminal or user-dealer networks come, mainly via road vehicles, to get their supplies and they then redistribute the product across mainland France. France is also a transit zone for heroin, particularly towards the United Kingdom. In 2024, OFAST estimates that 11% of the heroin seized on national territory was merely transiting on its way to other destinations (OFAST 2025b).

Customs authorities reported a significant increase in seizures of heroin and opium derivatives transported by air from India. Between 2022 and 2024, the volume of seizures increased eightfold. These substances are likely to be pharmaceutical preparations, originating from the Indian pharmaceutical industry (DNRED 2025).

Amphetamines and MDMA/ecstasy

The market for amphetamine-type stimulants (ATS) in France has been largely dominated by MDMA/ecstasy since the late 1990s. The synthetic drugs market is expanding, as evidenced by the significant increase in MDMA/ecstasy seizures since 2023. In 2025, 7 318 248 tablets or powder equivalent of MDMA/ecstasy were seized. This represents a decrease of 19% compared to the record set in 2024 (9 090 510 tablets or powder equivalent). However, the volume remains exceptionally high. Indeed, it is an increase of 80% compared to 2023 and a rise of 374% compared to 2022. Seizures of amphetamines and methamphetamines also saw a sharp increase in 2025, reaching 961 kg, which represents a rise of 56% compared to 2024 (618 kg) (OFAST 2026b).

Synthetic drugs used in France, such as MDMA/ecstasy and amphetamines, hail predominately from the Netherlands, the main production zone in Western Europe, and are mainly transported by land. France also serves as a transit country for traffickers, particularly to the United Kingdom and Spain, via the same channels. In addition, a share of these drugs are returned via express and postal freight to the American continent, Oceania, and less often, to Réunion. In recent years, France has become an important conduit for the Belgian-Dutch supply of MDMA/ecstasy to be shipped to North Africa, with mules trafficking via air or sea, and also via road transport in hiding places (OFAST 2023a). According to OFAST, 48% of the MDMA/ecstasy seized in 2025 for which the destination was known was intended for export, compared with 75% in 2024. 74% of the amphetamine/methamphetamine seized in 2025 for which the destination was known was intended for export (OFAST 2026b).

Some territories, such as French Polynesia (Simon and Valiergue 2022), are particularly exposed to circulation of amphetamines and methamphetamines. Importation of methamphetamine into French Polynesia is mainly by air. Daily flights operate between the archipelago and the cities of Los Angeles, San Francisco and Honolulu. Express and postal freight have also been identified, with parcels sent from the United States (OFAST 2025b). Customs authorities noted a diversification in the regions of origin of methamphetamine seized on national territory. Seizures originating from Nigeria and Mexico have increased, while direct flows from Afghanistan have also been identified. In addition, Germany and the United Kingdom, alongside France, are increasingly being established as major transit zones for shipments originating from Dutch storage platforms and destined for the Australian and New Zealand markets (DNRED 2025).

Ketamine

According to OFAST, ketamine seizures reached 2.45 tonnes in 2025, an increase of 176% compared with 2024 (889 kg). France remains primarily a transit country: 69% of the quantities seized were intended for export, mainly to the United Kingdom (56%), but also to Spain and Italy. Dealers favour road transport to move large quantities to the United Kingdom. Express and postal freight is also used for shipments to Australia and, more recently, to South Korea. Lastly, air couriers (mules) are also used to transport ketamine from France to the United States and Japan (OFAST data).

New psychoactive substances (NPS)

Synthetic drugs intended for the French market originate mainly from Europe. The emergence of makeshift laboratories within the national territory remains marginal. Dealers mainly use road routes, postal services and express freight to supply the French market. International coach services also represent a channel with limited checks between the Netherlands, Belgium and France. Online sales (websites hosted abroad, the dark web, social networks and encrypted messaging services) combined with postal dispatch continue to grow and mainly involve NPS, synthetic drugs, ketamine and diverted prescription drugs. Criminal organisations exploit the high volume of postal flows to overwhelm checking capacities (OFAST data).

Synthetic cannabinoids in France originate primarily from the Netherlands, which is the main source of seizures carried out in France according to the National Intelligence and Customs Directorate (DNRED). Switzerland is also emerging as a growing transit area. Trafficking occurs via road, rail, postal routes and express freight. Shipments from France are carried out almost exclusively by express and postal freight (DNRED 2025). Synthetic cathinones, mainly produced in Poland, also transit through France before being re-exported. Express and postal freight is the main route for shipments to Australia, New Zealand, the United States, Hong Kong and Japan. This confirms France's growing role as a transit country for these substances (DNRED 2025).

T1.1.3. Please comment on any available contextual information on trafficking within your country. Information relevant to this answer includes:
- range and relative importance of different products
- size of transactions
- smuggling methods
- organisation

2025 was marked by an exceptional level of drug seizures, particularly for cocaine. Cocaine seizures reached 84.3 tonnes, an increase of 58% compared to 2024. As in previous years, cannabis remained the most seized drug, with 127.3 tonnes in 2025, an increase of 26% compared to 2024 (101 tonnes). The majority of this was resin, with 81 tonnes seized, compared to 45 tonnes of herbal cannabis. Heroin seizures increased, reaching 1 214 kg, a raise of 16% compared to2024 (1 045 kg) (OFAST 2026b). For MDMA/ecstasy, more than 7 million tablets or powder equivalents were seized: a total of 7 318 248, a 19% decrease compared with the exceptional seizures of the previous year (9 090 510).

In France, the main segments of the illicit drug trade are cannabis, cocaine and heroin. In 2023, total turnover of the illicit drug market, including cannabis, cocaine, heroin, MDMA/ecstasy and amphetamines, was estimated to be €6.7 billion, with a range between €3.8 and €9.7 billion. The market is experiencing strong growth, as the previous estimate from 2017 was €4.2 billion. In 2017, cannabis represented the largest market by value at €1.2 billion, but cocaine overtook it for the first time in 2023. The estimated turnover for cocaine was €3.1 billion (between €1.4 and €4.7 billion), compared with €2.7 billion for cannabis (between €1.7 and €3.6 billion), despite an increase from €2.1 billion in 2017. Regarding other drugs, the heroin market was valued at €231 million (between €158 and €304 million), MDMA/ecstasy at €312 million (between €97 and €527 million), amphetamines at €73 million (between €23 and €122 million), and crack cocaine at €311 million (between €267 and €362 millions) (Ben Lakhdar and Massin 2025).

The French cocaine market is increasingly influenced by the three overseas departments located near coca production areas, particularly Colombia. Latin America and the West Indies supply mainland France through two main means: maritime and air. Maritime supply is by far the most

prominent with containers playing a major role, as they remain the preferred method of concealment for traffickers (OFAST 2025a). In 2025, 71% of the cocaine seized by the French authorities was during maritime transport, amounting to a total of 59.5 tonnes. Of these seizures, 43.4 were intercepted during boardings at sea and 15.5 tonnes in ports. In 2025, nine French ports reported cocaine seizures exceeding 50 kg (Calais, Dégrad-des-Cannes, Dunkerque, Fort-de-France, Le Havre, Marseille, Papeete, Pointe-à-Pitre and Sète). This geographical spread reflects the strategy of diversifying trafficking routes implemented by criminal organisations (OFAST data).

Ports in the French Antilles, particularly those of Fort-de-France (Martinique) and Jarry (Guadeloupe), as well as French Guiana, remain major transit hubs for cocaine from South America destined for mainland France. In 2025, 54.4% of the cocaine seized in France transited through the Antilles-French Guiana area (OFAST data). This function as a logistical hub was notably demonstrated by the seizure of 10 tonnes of cocaine in a container arriving from Guadeloupe at the port of Dunkerque in March 2025.

Given its status as France's leading port for container transportation, linking it to the French West Indies and Latin America, the port of Le Havre is an important gateway for cocaine on the French and European markets, as are other major ports in northern Europe, such as Rotterdam, Antwerp and to a lesser extent Hamburg (OFDT 2023). Just like other European countries (especially Belgium, Spain and the Netherlands), two cocaine transformation laboratories have been demolished in France, involving defendants linked to different South American organisations.

While maritime transport remains the main route for cocaine trafficking, trafficking by air continues to play a significant role. In 2025, 9 tonnes of drugs were seized at Paris airports, compared with 4.3 tonnes in 2024 (+110%). Cannabis (4.8 t) and cocaine (3.3 t) accounted for the majority of seizures. In 2025, cannabis became the leading substance intercepted via air transport, overtaking cocaine, which accounted for 65% of seizures at Paris airports in 2024 (OFAST data).

At the heart of the air routes, the role of French Guiana is central, to the point that the route from Cayenne to Metropolitan France is one of the main routes for bringing cocaine into France. In October 2022, security measures at Cayenne Airport were drastically strengthened, particularly through the introduction of systematic passenger screening for those departing for Paris. This control appears to have had a deterrent effect, according to law enforcement authorities. Faced with this strengthened customs response in Cayenne, traffickers have sought ways to bypass through the West Indies, opting for origins which are considered to be less monitored, such as Guadeloupe and Martinique (OFAST 2023b). Similar phenomena to those observed in Martinique are currently in play, with the emergence of a local market and bartering of cannabis resin for cocaine. The law enforcement services have also observed an increase in postal cocaine trafficking originating from French overseas departments such as Guiana and the French West Indies (Guadeloupe and Martinique). Express and postal freight is emerging as a main alternative to mules, with fake home removals or shipments of cocaine concealed in legal products, for example (OFAST 2025b). In 2022, this mode of transport represented 36% of cocaine seizures made by Roissy Fret customs services, originating from French Guiana (OFAST 2023b). The customs figures show an increased use of postal and express freight for all “traditional” drugs. In 2025, express and postal freight accounted for 28% of heroin and opiate seizures, 18% of synthetic drug seizures and 15% of cannabis seizures carried out by customs authorities (DGDDI 2026).

In fact, postal delivery is increasingly mentioned as a purchase method by illicit drug users. This choice offers a certain comfort to the latter because it does not involve any physical contact with the drug dealer or the delivery person. The speed of delivery, often guaranteed within 24 to 48 hours, is also a major factor of its appeal. Traffickers using this distribution method usually have a storage location, such as an apartment rented through *Airbnb,* which also serves as an order packing workshop. These apartments are often equipped with vacuum sealers to mask suspicious odours, and printers for labelling packages. People circulate these locations to collect orders and ship them at the nearest post office or pick-up point (Tissot 2024). The postal route was initially used mainly for trafficking substances in relatively small, often specific, quantities, such as cannabis concentrates or ketamine, and GBL or cathinones, ordered on specialised websites. However, users have increasingly resorted to using this delivery method for other, more widespread substances such as cannabis and cocaine, no longer via dedicated websites, but instead via trafficker accounts on applications and social networks.

In 2024, OFAST and Lille customs noted an increase in drug transport via coach. Although there were a large number of seizures, they involved relatively small quantities (10 to 15 kilos on average).

The TREND scheme in Hauts-de-France indicates that drugs are transported by "mules" who swallow bullets, but mainly by passengers carrying substances on them or in unconnected luggage. The main routes run from Belgium and the Netherlands to Paris, with returns from Spain for cocaine, synthetic products and cannabis. Lille coach station mainly serves as a transit point. Tighter checks since 2023 could explain the more effective detection of this phenomenon (Dutilleul 2025).

The wholesale and semi-wholesale levels of drug markets are controlled by major organised crime networks. The police departments highlighted Spain's major role as a gateway and rebound area for cocaine destined for the rest of Western Europe, where French criminal gangs are well established. In 2025, of the 84 tonnes of cocaine seized nationwide, 11 tonnes were seized from the Iberian Peninsula (OFAST 2026a). It is, in fact, in the south of the Iberian Peninsula that criminal networks buy resin in bulk from wholesalers in mainland France and launder some of the money generated by the trafficking. Alongside these "large" networks exist a myriad of small trafficking channels run by user-dealers, directly supplied by the Netherlands and Belgium (Cadet-Taïrou *et al.* 2020).

Heroin trafficking in France is highly fragmented and relatively diversified. In addition to foreign criminal organisations particularly Turkish, Georgian, and Albanian ones, there are small groups from the outskirts of the metropolitan areas that supply the Netherlands, the main destination country for the substance in Europe. What's more, so-called “cités” networks (housing estate networks within deprived neighbourhoods) have become increasingly involved in heroin trafficking in recent years. Micro-networks of user-dealers, sourcing from the Netherlands and Belgium, play an important role in explaining the availability of heroin in France, particularly in the north-east of the country, where use in rural and peri-urban areas is no longer confined to eastern France, as evidenced by TREND observations in the Grand-Est region (Bailly and Zieleskiewicz 2024; Tissot 2024). The involvement of networks “within deprived neighbourhoods” contributes to the expansion of the availability of heroin in the suburbs of many French cities. In 2025, as in 2024, heroin remained accessible in public places, notably via dealing points and after making contact by phone, by calling or by SMS. In Hauts-de-France, observations show particular use of SMS by people in situations of poverty, with or without a home, who have limited access to Internet and digital applications. The regular presence of dealers in public places has also been reported in several cities in the Auvergne-Rhône-Alpes region. Moreover, the supply of heroin deliveries is continuing to grow. The number of accounts offering this service is increasing in cities of various sizes. The range of such deliveries now extends beyond city centres and into surrounding towns and even rural areas located tens of kilometres from the hub of the network (Dutilleul 2025; Tissot 2025).

The past few years has seen the significantly strong presence of criminal Albanian gangs in the Auvergne-Rhône-Alpes region, operating in both the wholesale and retail drug markets. Whilst their visibility in the retail trade has decreased in metropolitan Lyon, they remain active in the more rural and cross-border areas of the region. Points of sale in central Lyon, once held by these groups, disappeared in favour of suburban networks which have taken over heroin trafficking in the city in recent years (Tissot 2024). The observations from the TREND scheme also indicate the increasingly widespread practice of fixed price sales in Lyon, Lille, and Rennes (€50, €20, or €10) for small quantities, which allows the most precarious users to access the product (Gérome 2023).

In August 2024, the arrest of the CEO of Telegram led to a reorganisation of drug trafficking networks on this platform. Traffickers started to favour the use of Signal, WhatsApp or SMS, while clearing some accounts of all explicit content and keeping only basic information (opening times, contacts). Several accounts migrated to Potato, another encrypted messaging service, and some were sold along with their client portfolios. Identity checks have also been stepped up, with new clients now having to provide proof of identity more systematically (Tissot 2025).

T1.1.4. Please comment on available information on the wholesale drug and precursor market. Information relevant to this answer includes:
- range and relative importance of different products
- size of transactions
- common prices
- product transformation
- adulteration
- the nature and organisation of buyers, sellers and intermediaries

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

Regarding wholesale markets, one of the major events of these last years was the control of the cocaine market by the criminal organisations importing cannabis resin, thus showing a merger of these two wholesale markets. In 2025, the average price per kilogram of wholesale cocaine in metropolitan France is €25 767, a decrease of 14% compared to €29 800 in 2024. Since the peak of the 2010s (reached in 2014 at €35 000), the wholesale price has decreased by 26%. A wholesale cocaine market exists, notably in the French West Indies and French Guiana, where prices are lower as dealers obtain supplies at €3 875 per kilogram in 2025.

A similar trend is observed for cannabis. In 2025, the wholesale price of cannabis resin reached €3 144 per kilogram, compared with €3 100 in 2024, a slight increase of 1.42. The price of herbal cannabis, meanwhile, stood at €4 377 per kilogram, compared with €4 329 in 2024. The wholesale price of heroin stabilised in 2025, following the increase recorded in 2024. It rose from €14 600 per kilogram in 2023 to €16 031 in 2024 (+9.8%), before declining slightly to €15 867 in 2025 (-1% compared to 2024). A similar trend was observed for the wholesale price of amphetamines. After an increase between 2023 and 2024, rising from €5 342 to €5 715 per kilogram (+7%), the price decreased in 2025 to €5 246 per kilogram. This represents a decline of approximately 8% compared with 2024. With regard to ecstasy tablets, the current wholesale price has continued to rise since 2023. It reached €2 539 per kilogram in 2025, compared with €1 957 in 2024, representing an increase of approximately 30% (OFAST 2026a).

2024 was marked by a historic record in drug precursor seizures. Customs recorded a total of 10.19 tonnes of precursors seized, an eighteenfold increase in volume compared to the previous year. This exceptional increase is largely explained by a major seizure of 8 tonnes of substances in October 2024, including 14 different precursors and pre-precursors (DGDDI 2025). In 2025, customs authorities reported the seizure of 1 273 kg of drug precursors (DGDDI 2026). These seizures confirm France's growing role as a transit zone to the main neighbouring producers of synthetic drugs, notably the Netherlands, Belgium and Spain. The 31 seizures carried out in 2025 mainly involved express freight, with GBL accounting for the majority (27 seizures). A single road seizure, involving 1 225 kg of phenylacetone, was carried out on a route linking Spain and the Netherlands (OFAST 2026a).

T1.1.5. Please briefly comment on available information on the retail drug market. Information relevant to this answer includes:
- nature and organisation of buyers, sellers and intermediaries
- range and relative importance of different products
- size of transactions
- common prices
- purity of products
- market locations and settings

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

Observations from the TREND scheme in 2025 confirm the coexistence and adaptation of the main supply modes for drugs. Delivery platforms, the surface web, the darknet, and points of sale in the street and within sensitive neighbourhoods remain the main access channels for substances. The use of delivery platforms through messaging applications and social networks (Telegram,

WhatsApp, Signal, Snapchat, Potato, and starting in the second half of 2025, Luffa) continues to expand. This offer is marked by an increasingly diverse range of substances, shorter delivery times and a wider variety of payment methods (cryptocurrencies, prepaid cards, dedicated applications), as well as the ongoing refinement of sales strategies. Networks are making use of digital tools through chatbots, mini-applications for placing orders, loyalty schemes, recruitment channels, and increasingly sophisticated promotional content. Telegram remains a key platform for commercial display, while TikTok is increasingly used for promotional purposes. At the same time, physical markets continue to evolve. Points of sale tailor their offerings to demand by providing low-value purchases (€10 or €20), making substances more accessible to the most vulnerable groups. Points of sale within sensitive neighbourhoods are also increasingly selling multiple substances and integrating digital tools into their operations (Lovera *et al.* 2026; Tissot 2026).

Postal delivery remains a significant channel, particularly for GBL, synthetic cathinones and, in certain cases, heroin. Dealers use concealment methods and split shipments to reduce the risk of detection. Deliveries are now carried out both via parcel collection points and automatic lockers, reducing contact between sellers and buyers (Lovera *et al.* 2026; Tissot 2026).

Observations from the TREND scheme in the Auvergne–Rhône-Alpes region highlight the continued use of drones for drug deliveries to several prison establishments in 2025. Specialised networks are now operating in several establishments. The substances transported are mainly cannabis, cocaine and nitrous oxide, sometimes accompanied by cigarettes. Prices in custody are significantly higher than those observed outside, reaching, for example, €100 per gram of cocaine, €50 per gram of “triple-filtered” cannabis resin, and €10 for a cartridge of nitrous oxide (Tissot 2026).

The change in purity of the circulating products in France has been measured by the OFDT via the SINTES scheme for more than 20 years. The average and median contents calculated from the SINTES analysis results are indicative and are not representative of the average contents of products circulating in French territory. As the SINTES collections were not carried out randomly, they observe specific collection patterns (selection bias). Moreover, the number of samples is too small to be representative. In order to express the statistical data in the most accurate way and to facilitate their understanding, the interquartile ranges are included. SINTES data should therefore be treated with caution like other data from epidemiological surveillance scheme. The SINTES scheme collected 742 samples in 2024 and 1 086 in 2025, representing a 31% increase in the space of one year. As in previous years, cases of deception frequently involved stimulant substances, particularly products purported to contain 3-MMC, which were often replaced with other synthetic cathinones. In addition, instances of adulteration and deception also involved cannabis and CBD-based substances, with an increased presence of unexpected substances in 2025, including opioids – particularly heroin, which was sometimes replaced or mixed with other substances – as well as other substances such as MDMA or ketamine. More specifically, several recent cases have involved tablets sold as oxycodone, purchased via the darknet, which were in fact synthetic opioids from the benzimidazole family, commonly known as “nitazenes”, as has also been observed in other European countries (Cherki and Feng 2026).

Cannabis

Cannabis retail prices appear to have been stable since 2020. In 2025, according to OFAST, the usual price for herbal cannabis is around €10 per gram. For resin, the usual price is €8 per gram (OFAST 2026b). The average THC potency of cannabis resin seized in 2025 was 31%, compared with 29% according to OFAST data (provisional data pending the consolidated figures from the SNPS report, which will be released later in the year). As for the herbal cannabis seized, its average potency increased, rising from 12% in 2024 to 14% in 2025 (OFAST 2026b).

In 2025, according to the OFDT's SINTES scheme, the median THC potency of the analysed resin samples was 32.4% (IQR: [15-38.3]) for 39 samples in which THC quantification was carried out. There is a trend towards an increase in content compared to the previous year. For herbal cannabis, the median potency was 11.7% (IQR: [5.1–15]) for 29 samples in which THC quantification was carried out. SINTES findings indicated a relative overall stability in the level of THC in herbal cannabis. In contrast, the range of values was wider, indicating increased heterogeneity among circulating substances, from batches with very low concentrations to others that were particularly potent.

In 2025, the SINTES scheme highlighted a diversification of forms in the collections of cannabis. The scheme’s 109 collections in 2025 were split between resin (N = 44) and herbal cannabis

(N = 39), which remain predominant, but also included edibles such as sweets/gummies (N = 14), cakes/cookies (N = 1), and e-liquids (N = 5). This development indicates a more diverse supply, particularly with processed or ready-to-use forms, which may alter patterns of use and health outcomes. Among the 15 edibles recorded by the SINTES scheme, nearly half were linked to serious adverse effects, and 10 substances were purchased through what was described as a "legal" source (physical or online CBD shop). In addition, 8 cases involved scams and 7 were instances of deception. These deceptions mainly involved situations where users believed they were purchasing a substance primarily composed of CBD (an authorised substance provided it complies with the current legal framework), whereas analysis revealed a significant presence of delta-9-THC, or even a different composition from what was expected (Cherki and Feng 2026).

Cocaine

According to OFAST, in 2025, the current price per gramme of cocaine hydrochloride continuee its downward trend, standing at €57, compared with €58 in 2024. As a reminder, these prices were €66 in 2023 and 2021 and €70 in 2017/2018 (OFAST 2026b). Observations from the TREND scheme highlight even lower prices depending on the context. For example, it was reported that certain points of sale within sensitive neighbourhoods in Seine-Saint-Denis (a department north of Paris) occasionally offer "weighed grams" for €40. In addition to the decrease in the relative cost of the substance, the resale of units smaller than one gram appears to be becoming more widespread. This trend is making cocaine more accessible, particularly for disadvantaged users. For example, in Seine-Saint-Denis once again, most points of sale within sensitive neighbourhoods offer "€20" deals of cocaine, and since 2025, "€10" deals as well (Lovera *et al.* 2026).

The average seizure content (retail, semi-wholesale, wholesale), according to OFAST data, was 75% in 2025 as in 2024 (OFAST 2026b). Cocaine remained the most frequently collected product in the SINTES system, confirming that supply and consumption of this product were considerable in 2025. The analyses carried out confirm a continuing trend of increasing potency, in line with previous years. In 2025, the median potency of cocaine hydrochloride reached 89.2%, representing an increase compared to 2023 (85.0%) and 2024 (84.0%). The interquartile range was between 80.0% and 93.5%, confirming that the values are concentrated at high potency levels. The lowest observed potency was 1.0%, while several samples reached 100%. Regarding cocaine in base form (crack cocaine/freebase), 14 samples were analysed in 2025, of which 12 could be quantified. Purity levels ranged from 8% to 98%, with a median of 84.5% and an average of 74.3%. The interquartile range [77.25%–93.75%] indicates that most values are concentrated at high levels, despite the presence of a low-strength sample. These findings confirm the circulation of highly concentrated substances in base form, although there is considerable variability in potency. This reflects greater heterogeneity than is observed for the hydrochloride form. This heterogeneity may be due to batch variability or differences in the method used to process the substance (basification by the user or purchase of cocaine already in base form) (Cherki and Feng 2026).

Analysis of cocaine composition in 2025 by the SINTES scheme highlights that the majority of samples did not contain any identified adulterant or additive, continuing the trends observed in 2023 and 2024. More specifically, out of the 140 cocaine samples collected in total, 94 samples (67.1%) were found to be chemically pure, while three (2.1%) contained only impurities with no added cutting agents. Therefore, in total, 69.3% of the samples showed no deliberate adulteration (Cherki and Feng 2026). Conversely, 48 collections (34.3%) contained at least one identified adulterant. In addition, 7 samples (5.0%) showed dilution. The profile of adulterant substances identified in 2025 changed compared with 2024: caffeine is now the most frequently reported adulterant, followed by procaine (which was more prominent in 2025), phenacetin (which decreased to 8 occurrences compared with 21 in 2024), paracetamol and levamisole (which dropped to 6 occurrences compared with 13 in 2024) (Cherki and Feng 2026).

Heroin

According to OFAST, the current price of a gram of brown heroin fell from €32 in 2024 to €30 in 2025 and the average purity of brown heroin seizures in 2025 was 13%, which is slightly higher than in 2024 (12%) (OFAST 2026b). The SINTES scheme analysed 68 samples of heroin in 2024 and 89 in 2025, in a context of enhanced monitoring due to several indicators suggesting changes in the global supply. 2025 was marked by heterogeneous potency levels, with a wide range in the distribution of potency (IQR: [5.75 – 35.75]). These findings indicate temporal and spatial fluctuations in supply chains, rather than a clear and widespread shortage. While low potency levels

remain prevalent, the broader distribution in 2025, with concentrations ranging from 1% to 95%, increases uncertainty for users and may heighten health risks. The median potency of base heroin in the substances collected rebounded in 2025, with a median potency of 19% compared with 6.5% in 2024 and 13% in 2023. This increase is attributable to the analysis of substances with high potency levels, which was not observed in the previous year. These results suggest volatility in the heroin market in France in 2025 (Cherki and Feng 2026). In line with observations recorded in 2023, several samples of heroin adulterated with synthetic cannabinoids were once again identified in 2024. Initially identified in Île-de-France, this phenomenon was also observed in collections taken from the Occitanie and Pays de la Loire regions in 2024. However, no similar collection was carried out in 2025 (Cherki and Feng 2026).

New synthetic opioids

According to the SINTES scheme, the circulation of new synthetic opioids appears to have remained limited within the national territory in 2024-2025, with the majority of supply sourced via the darknet. In 2025, among the 11 samples that identified the presence of new synthetic opioids, 8 indicated that they had been sourced via darknet markets. This finding is consistent with the ongoing phenomenon of counterfeit oxycodone tablets, which first emerged in 2024 and continued to be observed in 2025. Samples collected as part of drug checking in harm reduction measures identified four tablets obtained as oxycodone, which in fact contained a combination of metonitazene and protonitazene. In addition, several cases of heroin substituted or adulterated with synthetic opioids were documented. Two samples of heroin hydrochloride were found to be adulterated with metonitazene. In addition, methiodone, a compound structurally related to methadone, was also identified for the first time in Europe from a sample collected in 2024. Lastly, two cases of heroin adulterated with fentanyl were reported, one in 2024 and the other in 2025. Both were found in substances obtained via the darknet (Cherki and Feng 2026).

The heroin market in Île-de-France differs from the rest of the country, with what appears to be a rising trend in the circulation of high-concentrated white heroin. Among the 98 samples of white heroin collected by the “Analyse Ton Prod” drug checking scheme (ATP) Île-de-France in 2025, 34 had potencies ranging from 60% to 80% heroin. The average purity level of this category of heroin analysed by ATP Île-de-France increased from 30% in 2024 to over 51% in 2025. The majority of these samples originated from physical points of sale in the departments of Seine-Saint-Denis, Yvelines and Hauts-de-Seine (Lovera *et al.* 2026). Furthermore, the heroin market in the Île-de-France region was also marked in 2025 by a continued increase in the proportion of substances lacking natural poppy alkaloids (notably noscapine and papaverine). Thus, among the white heroin powders analysed by ATP Île-de-France, the proportion of samples not containing noscapine rose from less than 20% in 2024 to almost 45% in 2025. This phenomenon, combined with particularly high purity levels, appears to confirm the trend observed in 2024. A new heroin profile has emerged and become established alongside the so-called “brown” and “white” forms on the Île-de-France market, referred to as “hyper white” in 2024. One hypothesis put forward by the TREND scheme is that the absence of natural alkaloids in these samples of “hyper white” heroin could be explained by the diacetylation of pharmaceutical morphine (Lovera *et al.* 2026).

MDMA/ecstasy

Price and purity depend on the galenic form in which the substance is sold: tablet, powder or crystal. In 2025, as in 2024, according to OFAST, the current price for an ecstasy tablet decreased slightly to €9 compared to previous years when it had stabilised at €10. This retail price does not fully reflect the reality of the retail market since users tend to buy several dozen tablets at a time to lower the price per unit. By doing so, consumers can lower the unit price of a tablet to €2.50. In 2025, the average active ingredient content of MDMA tablets was 32%, compared to 33% in 2024 (OFAST 2026b).

SINTES analyses of MDMA confirmed high concentrations for the crystal form and significant variability for the tablet form. A total of 53 MDMA samples were collected in 2025. Tablet form remained by far the most prevalent (N = 33, including 9 whole tablets). MDMA crystals accounted for 15 samples. Among the 9 whole tablets collected in 2025, dosage ranged from 25 to 291 mg per unit, indicating considerable variability. By way of comparison, the highest dosage recorded in 2024 for this same pharmaceutical form (N = 6) reached 260 mg. For the tablet fragments that were analysed (N = 18), similar variability was observed. The median MDMA hydrochloride potency was

33.8%, with a range from 5.2% to 51.7%. Of the 15 samples of crystals collected by SINTES in 2025, 9 were able to be analysed. The results confirm previous trends: highly concentrated substances, with a median potency of 93% and a minimum potency of 82%. These levels are similar to those recorded in 2024, when the median potency of the 11 samples analysed reached 88.5% (Cherki and Feng 2026).

Ketamine

In 2025, the ketamine market was characterised by an increasing availability nationwide and a decline in retail prices. Sales patterns were varied: delivery (including by post), resale between users, sales in recreational settings and, more occasionally, at certain fixed points of sale (Pavic 2026; Tissot 2026). According to OFAST, the national average price per gram was €25 in 2025, compared with €27 in 2024 (OFAST 2026b). However, observations from the TREND scheme highlight significant regional disparities as well as differences according to supply mode. In Île-de-France, the current price ranged from €10 to €20 per gram during sales in party settings or through user-dealer networks, compared with around €30 per gram for deliveries. However, prices decreased significantly depending on the quantity purchased, in some cases falling to between €3 and €5 per gram for purchases ranging from 10 to 100 g (Lovera *et al.* 2026). In Nouvelle-Aquitaine, the current price was estimated at €20 per gram, with prices dropping as low as €10 per gram in areas of severe urban marginalisation (Perrin 2026). In Hauts-de-France, the current price ranged from €20 to €30 per gram, while in the Provence-Alpes-Côte d'Azur region it was generally between €10 and €15 per gram (Duport *et al.* 2026; Dutilleul and Hervé 2026). In Brittany, delivery prices were also low, ranging from €10 to €20 per gram, with reduced rates available for purchases of 5 g or more. However, sales in recreational settings in this region generally remained between €20 and €30 per gram (Pavic 2026).

Several forms of ketamine are circulating on the French market: powder (or “sugar”), crystals known as “shards”, “rocks”, or in “needle” form. The SINTES scheme was able to quantify the potency of 26 samples in 2024 and 31 in 2025. The purity levels recorded were very high for both years, with median values exceeding 95% in 2024 and approaching 100% in 2025. Overall, this data confirms that the majority of ketamine in circulation over both years was pure or nearly pure. Instances of deception or substitution were also identified. In 2024, there was one documented case. In 2025, four collections were found to involve deception. Ketamine is indeed sometimes found in replacement of cathinones or MDMA (Cherki and Feng 2026).

New psychoactive substances (NPS)

In 2024, the OFDT identified 15 NPSs for the first time, almost all of which originated from the SINTES scheme, with the exception of one customs seizure. This trend had been declining until 2024. However, the situation reversed in 2025, with 26 newly reported substances, including 4 from customs seizures and 21 identified through the SINTES scheme. This increase can mainly be explained by the diversification of semi-synthetic and synthetic cannabinoids (Cherki and Feng 2026).

Synthetic cathinones

In the cathinone market, 3-MMC is gradually being replaced by other structurally similar cathinones, most often without consumers' knowledge. This trend is accelerating in response to the tightening of Dutch regulations on cathinones. The Netherlands remains the main country of origin for these substances destined for the French market. For example, in the Auvergne-Rhône-Alpes region in 2025, 80% of samples sold as 3-MMC and analysed by the “Analyse Ton Prod” drug checking scheme (ATP) actually contained 2-MMC (120 analyses). Other substitutions were also observed, with the presence of alpha-PiHP, 4-MMC, NEP, alpha-PCyP, cocaine, MDMA, and MDPHP, and in some cases, even the absence of any active substance (Tissot 2026).

In 2024 and 2025, the SINTES scheme analysed an increasing number of collections containing cathinones. Indeed, the number of samples identified as containing at least one cathinone increased from 66 in 2024 to 97 in 2025. The most frequently identified cathinones in 2025 were N-ethylnorpentedrone (NEP) and 2-methylmethcathinone (2-MMC). Compared with 2024, there was a significant increase in NEP, rising from 12 to 35 identifications, and in x-MMC derivatives, which went from 31 to 42 identifications. Chlorinated derivatives (x-CMC) and pyrovalerones remained

present, although less frequent, while brominated derivatives, particularly 4-BMC, which were absent in 2024, were identified in 12 samples in 2025 (Cherki and Feng 2026).

Cases of deception remain common. In 2024, 39 SINTES collections were concerned. In 2025, this number rose to 59 collections, confirming a further intensification of substitution and adulteration practices. Most cases of deception involve substances purported to contain 3-MMC. In 2024, 29 collections revealed substitutions with other cathinones, mainly 2-MMC, but also NEP, 4-CMC (clephedrone) and other chlorinated derivatives. In 2025, 3-MMC remained widely involved. However, NEP has now become the main substitute identified, with a growing number of collections in which this was confirmed. Since summer 2025, several reports from across France have highlighted the rise in NEP being sold as 3-MMC, linked to unusual side effects, even among regular users. x-MMC and 2-MMC derivatives also remain common substitutes. Other cathinones, such as mephedrone (4-MMC), x-BMC derivatives and pentedrones (NEP, N-propylnorpentedrone, 4-MEAP), have also been detected in samples presented as other substances. This demonstrates that the phenomenon is not limited to 3-MMC (Cherki and Feng 2026).

With regard to supply, data from the SINTES scheme highlight a diversification of access channels for synthetic drugs, with digital platforms playing a significant role. In 2025, occasional physical points of resale, particularly in festive settings, became the primary mode of supply. Online purchases remained highly prevalent, with 10 collections linked to the surface internet and 9 to the darknet (Cherki and Feng 2026)

T1.2. Drug related crime

The purpose of this section is to provide a commentary on the context and possible explanations of drug law offences within your country.

T1.2.1. Please comment on drug law offences data. Please structure your response around supply data (if possible distinguish between trafficking, cultivation/production, wholesale/ retail, and other supply offences) and possession/use data.

Drug-related offences increased significantly in 2025, both for use, with 307 200 people charged (+6%), and trafficking, with 56 600 people charged (+8%) (SSMSI 2026). These increases confirm the growth recorded in 2024, which was partly attributable to the rise in the number of persons charged during July and August 2024, in connection with the exceptional mobilisation of domestic security forces for the Paris Olympic and Paralympic Games. They are part of an upward trend observed since 2020, with an average annual increase of 14% for drug use, driven by the introduction of criminal fixed fines (AFDs), and 7% for narcotic trafficking. In 2025, 7 out of 10 individuals charged with drug use received an AFD, whereas in 2021, this applied to only about 1 in 2. The proportion of AFDs has continued to increase since they were introduced in September 2020 (SSMSI 2026).

In 2024, the most recent year for which substance-specific data is available, cannabis was by far the main drug involved in offences, accounting for 78% of charges for trafficking and 92% of charges for drug use. It mainly concerned cannabis resin, accounting for more than 3 out of 4 individuals implicated in cannabis trafficking or use. In order, cocaine, heroin and ecstasy/MDMA accounted for the largest number of charges, after cannabis. At least one of these four substances, potentially in combination with others, was involved in 99% of charges for drug trafficking and almost all of those for use. Although the number of people charged with drug trafficking and use has been rising since 2016, trends vary significantly depending on the substance involved. Indeed, the number of those charged for cocaine or ecstasy trafficking has risen much more sharply than for cannabis or heroin trafficking. The number of individuals charged with the use of at least one of the three substances eligible for a criminal fixed fine (cannabis, cocaine and ecstasy/MDMA) is rising sharply, while a decrease was observed for heroin (Robert 2025).

In 2025, the classification used by the statistical department of the Ministry of Justice was revised, reducing the number of statistical categories of drug-related offences from seven (Use / Import-export trafficking / Possession, acquisition, use of drugs / Trade, transport of drugs / Supply and sale of drugs / Assisting others in drug use / Other offences) to two categories: Use / Trafficking. Anything that does not constitute use is classified as trafficking.

In 2024, 71 040 convictions recorded (entered in the criminal record) involved at least one drug-related offence, distributed as follows:

- 28 215 convictions for trafficking only;
- 32 892 convictions for use only;
- 9 933 convictions for use and trafficking.

A total of 148 900 offences related to drug use and/or trafficking were penalised.

Source: *Références Statistiques Justice*, 2025 edition (Ministère de la Justice 2026) (drug-related offences are in chapter 14.1), SG, SSER, statistical file of the National Criminal Records Register for Individuals.

Note: The 2024 convictions are provisional; 22% of those handed down by the courts for drug-related offences are estimates.

T1.2.2. If possible summarise any available data on drug related crime outside of drug law offences (i.e. possession/supply), e.g. money laundering, crimes undertaken under the influence of drugs (e.g. driving under the influence of drugs) or as a result of the use of drugs, crimes committed to fund drug use, crimes between drug market actors (e.g. violent crime, including homicide).

The revenue coming from the confiscation of goods from people convicted of drug offences are used to contribute to the MILDECA "narcotics" support fund. According to the 2024 activity report of the Agency of the Recovery and Management of Seized and Confiscated Assets[3] (AGRASC), 50.9 millions euros were paid to MILDECA in 2024, compared to 50.1 million in 2023 and 41.8 millions in 2022 (AGRASC 2025). The increasing practice of seizures and confiscations is also the result of an increased awareness of the prosecutors, through the dissemination of a guide to seizures and confiscations which was completely remade and re-updated in January 2021 (Ascensi 2023). It is an educational, legal and technical tool of reference for all practitioners. In addition, since 2018, the appointment in each public prosecutor's office of a contact prosecutor dealing with criminal seizures and confiscations has guaranteed the distribution of best practices within the jurisdiction.

According to a 2023 threat status report by the OFAST, drug traffickers use various sophisticated methods to launder the funds derived from their illegal activities. In French Guiana, they mainly channel cash sums from smugglers on return flights from Orly to Cayenne or via express or postal freight. The leaders of Albanian clans, who are often based in non-EU countries, prefer to transfer illicit funds to their home country, where these sums are invested into the local economy, particularly the property market. Road transport, using hiding places concealed within light vehicles, is also commonly used for these transfers. In 2023, a major laundering network, operating within disadvantaged neighbourhoods in the South of France, was dismantled. This network was using offsetting techniques, transferring the laundered funds to Algeria. Construction and public works companies collected cash and made offsetting transfers to shell companies, who then organised a vehicle purchase-resale circuit between Europe and Algeria. Over 40 million euros derived from drug trafficking is said to have been laundered in five years. Chinese criminal groups in France also play an important role in money laundering for French drug traffickers. They use various laundering methods, such as the physical transportation of money to non-EU countries, the purchase of luxury goods for others, and laundering via convenience stores such as PMU *bar-tabacs* (bar tobacconist's). These groups also practice offsetting, relying on networks of collectors from the diaspora, involving financial transfers across several countries (OFAST 2023b). On 18 December 2024, four individuals were indicted by the Paris public prosecutor's office for their involvement in a large-scale money laundering network linked to drug trafficking, using cryptoassets as financial vehicles. This case was monitored by the Ministry of the Interior's Cyber Command (COMCYBER-MI) and shows an international modus operandi based on complex financial flows. According to the initial findings of the investigation, funds from drug trafficking were collected in several European countries, including Spain, the Netherlands, the United Kingdom, Belgium and Italy, before being converted into cryptoassets, mainly stablecoins. The conversion and transfer operations were then organised between France, Dubai and the United States. One of the cryptoasset wallets identified

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

in this case is believed to have enabled the transfer of more than €248 million in stablecoins, illustrating the scale of the laundered sums and the technical sophistication of the mechanisms used (COMCYBER-MI 2025).

In 2024, France recorded 367 murders and attempted murders between criminals[4]. According to OFAST, almost all these acts were 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 now 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 (40 incidents), Grenoble (14) and Toulouse (12). However, the sharpest increase was seen in medium-sized towns, such as Villeurbanne (10 incidents compared to 1 in 2023), Échirolles (9 compared to 2) or Dijon (6 compared to 2). The overseas territories were not spared, such as in Guadeloupe where the number of incidents rose from 7 to 16. Regarding the profile of the perpetrators, among the 176 people imprisoned for murder or attempted murder between criminals in 2024, one quarter (25.6%) were under 20 years old, of whom 16 were minors. In addition to homicides, the security 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 (OFAST 2026a). These acts are often carried out by individuals recruited from outside the instigator's immediate network. The reported payments range from approximately €5 000 for acts of violence against a bad payer to €20 000 for the elimination of a network leader (OFAST data). OFAST also reported an intensification of intimidation practices by narcotic trafficking networks against institutions and the general public. These notably include written threats or graffiti specifically targeting police officers, and threats directed at magistrates during hearings or judicial proceedings, as well as acts of violence or intimidation aimed at local public figures, such as elected officials, social housing providers or shopkeepers (OFAST data). A significant case in 2025 was the murder, in November, of Mehdi Kessaci, brother of environmental activist Amine Kessaci, known for his commitment to combating narcotic trafficking in Marseille. This murder has been attributed to the DZ Mafia.

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 deadly conflict between two criminal organisations. In 2024, this situation appears to have calmed, notably thanks to sustained police pressure which led to 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 compared to 49. 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 2025).

Observations from the TREND scheme in Auvergne–Rhône-Alpes highlight continued tensions and violence associated with narcotic trafficking in 2025. Such acts of violence may occur between different neighbourhoods or within the same area. They are mainly linked to thefts of substances, attempts to regain control of points of sale, or disputes between rival groups. They take various forms: warning shots (fired into the air or towards homes and businesses), arson, kneecapping, abductions and unlawful detentions – sometimes over minor debts – as well as homicides, which may be carried out in broad daylight or staged. Witnesses to this violence are not limited to those involved in trafficking. Residents, passers-by and social workers report having witnessed knife attacks, machete threats or violence targeting young people they support. Both perpetrators and victims are predominantly aged between 20 and 30, although some incidents also involve minors, sometimes under the age of 15. For the most serious offences, particularly homicides and warning shots, two profiles of perpetrators are especially highlighted: young individuals recruited from outside the region through social media, and foreign nationals, notably former Colombian military personnel. These individuals are sometimes described as contractors engaged for specific missions. According to an investigator from the gendarmerie's research department, the use of operatives hired on a per-task basis, with no direct connection to the instigator, goes beyond the field of narcotic trafficking and reflects contemporary forms of organised crime (Tissot 2026).

[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.

T1.3. Drug supply reduction activities

The purpose of this section is to summarise the drug law enforcement activities for drug supply reduction.

T1.3.1. Please comment on drug supply reduction activities within you country. Please structure your response in terms of a) the key priorities of supply reduction b) areas of activity of supply reduction c) organisational structures/co-ordinating bodies
Please note that information on specialist drug law enforcement (eg. drug squads) is part of a separate focused data collection.

In March 2023, the French government adopted the 2023-2027 Interministerial Strategy for Mobilisation against Addictive Behaviours, which defines the strategic framework for the coming years. This strategy highlights the importance of comprehensive and coordinated action between the different services involved, notably cooperation between internal security forces and the judicial system to combat drug trafficking and organised crime. Moreover, the strategy emphasises the need for public action to be underpinned by in-depth knowledge, promoting the dissemination of knowledge, the involvement of the scientific community, and continuous support for research. Particular attention is given to the development of research on the illicit supply of narcotics through the development and management of an Interministerial Applied Research Programme to Combat Drugs (PIRALAD). This programme has allowed estimates of the French illicit drug market to be updated, in terms of volume used, value, and jobs generated by trafficking. Moreover, this programme sparked an international study on the environmental impacts of illicit drug production, in partnership with the UNODC, and an analysis on the impact of digital technology on drug trafficking developments. International cooperation is also emphasised, particularly in view of the crucial role played by the French overseas departments (Guiana, Martinique, Guadeloupe and Saint-Martin) in supplying cocaine to the mainland market. The strategy calls for strengthening European cooperation to prevent, deter, and disrupt drug-related crime, particularly organised crime. That includes police, customs, and judicial cooperation, exchanging intelligence, seizing and confiscating criminal assets, alongside combating corruption. To reduce the availability of narcotics, the strategy plans to impede their arrival from production areas, strengthen international cooperation, detect and prevent their movement within the national territory, and strip traffickers of their criminal assets. It also proposes the strengthening of technological and judicial means to combat organised crime and deconstruct the positive image of traffickers (MILDECA 2023b).

The governmental strategy regarding the fight against the national trafficking of narcotics was built in 2019 in a national anti-narcotics plan (Ministère de la Justice *et al.* 2019), which includes 55 measures aiming to meet 6 objectives: improve knowledge on trafficking; step up and rationalise field activities; enhance the fight against the underground economy and the drug trafficking laundering routes; reinforcing the seizure of criminal assets; develop international cooperation; strengthen the capacities of services. On the same model of the service reorganisation operated in France as part of the fight against terrorism, a new service has been created to guarantee the role of sole leader in the fight against drug trafficking: the Anti-narcotics Office (OFAST). In February 2020, the Ministry of the Interior officially announced the creation of OFAST, which succeeds OCRTIS (Central Office for the Repression of Drug-related Offences). This creation is one of the main operational adaptations of the national anti-narcotics plan. This creation corresponds to the State's desire to increase cooperation between the various services in charge of law enforcement: police, customs, military police [*gendarmerie*] and justice. OFAST is organised into three divisions, "strategy", "intelligence" and "operations", to respond to the three missions "understand", "target" and "act". They are headed respectively by a customs administrator, a military police [*gendarmerie*] colonel and a divisional commissioner. The deputy head of the office comes from the judiciary. At a territorial level, OFAST has 14 regional offices and 5 territorial detachments. Since September 30, 2020, 104 operational drug intelligence units (CROSS) have been deployed throughout the country, one per department. One of their missions is to establish a map of the deal points located in the French territory and their evolution on a quarterly basis. In 2021, the government announced the creation of a reporting portal for citizens to provide the police and *gendarmerie* with information about narcotic trafficking and its actors. This information is then transmitted to the CROSS for processing. In addition, the extent of trafficking in ports and airports has led OFAST and Customs to create CROSS THEMATIQUES covering port, airport and postal activities.

The “Narcotics” support fund is established every year and funded by the amounts permanently seized by a judicial authority from drug trafficking activities. In 2023, this fund amounted to 53.8 million euros, which is five times higher than 10 years ago. The allocation of the credits of this fund is as follows: 35% for the Police, 25% for the Gendarmerie, 10% for Customs, 20% for Justice, and 10% for preventive actions led by MILDECA. The objectives of this fund are to strengthen the means of combating drug trafficking, improve international coordination, support territorial actors in the prevention of addictive behaviours, and prevent risks for drug users and repeat offences among prison populations (MILDECA 2023a).

Combating trafficking is also based on the interaction between customs and the justice system which takes place within the National Jurisdiction Against Organised Crime (JUNALCO). Furthermore, in 2022, France created a coordinating body responsible for combating drug trafficking in the port of Le Havre, under the authority of the public prosecutors of Paris, Douai and Rouen. This measure is part of efforts to strengthen cooperation in the fight against trafficking in European ports and to protect port infrastructure.

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

In 2023, law no. 2023-610 of 18 July revised the legislative framework for customs action in depth, adapting the powers of customs officers to new digital realities and trafficking developments. This reform includes a review of the customs inspection right, detailing the terms and conditions of these operations to strike a balance between customs offences and respect for individual freedoms and privacy. The scheme for combating the funding of organised crime and terrorism was enhanced by the introduction of a temporary detention of cash amounts, thus enabling the detection of financial circuits derived from criminal activities within the territory. Customs money laundering offences have been broadened to include all offences pertaining to laws enforced by customs or affecting the European Union’s financial interests. This extension also covers digital assets, illicit activity committed abroad, and operations to raise and transport funds, specifically aiming to impede organised fund-raising networks. Customs officials now have increased powers and penalties set out in the Customs Code, to combat the use of non-scheduled chemical precursors in the manufacture of synthetic drugs. The law includes provisions aimed at modernising the monitoring and investigative capabilities of all customs services, and also affirming the non-invocability of professional secrecy to their investigations (DGDDI 2024).

In order to boost its operational capabilities, French customs is planning several technical and logistical developments to combat drug trafficking more effectively. In mainland France, the first deployments of low-intensity mobile scanners are scheduled for the main port platforms. These devices will enable enhanced and more systematic control of goods flows, while facilitating targeted operations. At sea, a strategic shift is underway, moving from a predominantly defensive stance focused on coastal surveillance (known as the "shield" posture) to a more offensive approach. This is based on real-time analysis of the surface situation, increased use of targeting tools, and the ability to carry out interventions offshore, including on the high seas. With this in mind, an order for a new vessel is planned. It will need to be able to operate up to 200 nautical miles off the Corsican coast, thus boosting customs' operational capacity in the Mediterranean. Similarly, the renewal of the fleet of sea interceptors is underway in the Antilles, an area highly exposed to drug flows from Latin America. Airborne resources are also being modernised, notably by equipping customs helicopters with the latest generation of multispectral cameras. These technologies significantly improve the detection and identification of targets at sea and on land, both day and night. In addition, efforts are underway to systematise checks on postal and express freight flows. The development of solutions enabling the automatic scanning of 100% of parcels aims to counter the rise of micro-trafficking via discreet shipments. On land, the fight against logistics networks is supported by the planned doubling of the number of automated number plate readers by 2027. These systems enhance the tracking and interception of vehicles linked to trafficking networks. As part of the fight against the proliferation of synthetic drugs, customs services now benefit from an extension of their operational powers. Officers are authorised to use special investigative techniques, such as controlled deliveries or home visits, in order to identify illicit production circuits and dismantle clandestine laboratories. At the same time, the fight against online crime continues to be stepped

up through the gradual roll-out of a network of specialised investigators in decentralised services. This enhanced territorial coverage enables better targeting of illicit activities carried out via digital channels. In this respect, in April 2024, the *Cyberdouane* [cyber customs] service of the National Intelligence and Customs Directorate (DNRED) dismantled "Cosa Nostra", a platform that was active on the darknet and dedicated to the illegal sale of narcotic substances. Since 1 May 2024, the National Anti-Fraud Office (ONAF) has replaced the Judicial Financial Investigations Service (SEJF). Staffed by customs and judicial tax investigators, it plays a central role in combating money laundering and terrorist financing, by identifying and seizing criminal proceeds and assets. Finally, there is a legal component that completes this range of measures. Reforms are underway to facilitate the seizure of criminal assets and increase application of the presumption of money laundering for customs (DGDDI 2025).

Since the end of 2023, a series of police and national gendarmerie operations have been carried out to combat drug trafficking, marking an intensification of public safety efforts. These operations were targeted to urban areas, medium-sized towns, and rural municipalities, in both Metropolitan and Overseas France, in order to respond to trafficking developments and traffickers' methods. The interventions included checks of common areas and cellars in block of flats, identity checks at the request of the public prosecutor, the use of drug and firearm detection dogs, checks of businesses, securing public transport, and the routine removal of abandoned vehicles. These overt and extended operations were prioritised in the problem areas of large cities and planned in collaboration with the National Directorate of Public Security (DNSP) and the National Directorate of Judicial Police (DNPJ) (Police nationale 2024).

In November 2023, the Senate launched an inquiry on the impact of drug trafficking in France and measures to address it. The committee began its hearings on 27 November 2023 and published its conclusions on 14 May 2024. This committee of inquiry auditioned numerous national actors and institutions involved in the fight against the trafficking and use of illicit drugs in France. Among the persons heard were representatives from police, gendarmerie, and customs services, the OFAST, as well as researchers, members of MILDECA, the OFDT, lawyers, and representatives from various relevant ministries. Mr. Bruno Le Maire, the then Minister of the Economy, Finance and Industrial and Digital Sovereignty, Mr. Éric Dupond-Moretti, the then Minister of Justice, and Mr. Gérald Darmanin, the then Minister of the Interior and Overseas, were also heard. This committee of inquiry's final report made several key recommendations. It encouraged increasing the priority of and resources allocated to combating drug trafficking, strengthening efforts to dismantle trafficking networks at the "upper end of the spectrum", and restructuring the action of services responsible for combating drug trafficking (Durain and Blanc 2024).

Between 2024 and 2025, France reinforced its legal framework to combat drug trafficking and organised crime more effectively. This resulted in two bills being tabled in the Senate in July 2024. The bills were presented jointly by senators from the Les Républicains and Socialist, Ecologist and Republican groups. They were based on the findings of the parliamentary report mentioned above. The first bill was entitled *"Getting France out of the drug trafficking trap"*, and aimed to endow the State with new means to weaken criminal organisations. The second was for an organic law and concerned the creation and status of a public prosecutor specialising in organised crime. These bills were definitively adopted on 29 April 2025, following an agreement reached in a joint committee. The Constitutional Council approved the main provisions of these laws in its decision of 12 June 2025, although it did censor certain provisions. The laws were promulgated on 13 June and published in the Official Journal the following day (Act No. 2025-532 of 13 June 2025 aimed at getting France out of the drug trafficking trap). The reform comprises several major measures. It provides for the creation of a national prosecutor's office dedicated to organised crime and responsible for handling the most serious cases (PNACO). It also introduces a specific regime for high-level traffickers with stricter prison conditions. The informant system has been revised, and individuals who cooperate with the justice system can now benefit from a reduction of their sentence by up to two thirds, compared with one third previously. The system also includes other administrative measures. For example, traffickers may be evicted from social housing. Businesses suspected of money laundering may be closed by administrative decision. The organic law on the status of the specialised prosecutor has entered into force on 5 January 2026 (Vie publique 2025).

Established by the law of 18 November 2016 (known as the Urvoas Law) and extended to drug use by the 2018-2022 Programming Act for Justice of 23 March 2019, the criminal fixed fine (AFD) was introduced to supplement the range of criminal justice responses to drug use, since its nationwide roll-out on 1 September 2020. Set at €200 (reduced to €150 and increased to €450 depending on

the payment period), this amount could rise to €500 according to the announcements made by the President of the Republic on 16 December 2025 in Marseille. This measure has been included in the RIPOST bill (see the Legal framework workbook).

France is taking part in the *European Ports Alliance*, launched in January 2024 by the Belgian Presidency of the European Union in cooperation with the Commission. This initiative aims to strengthen the fight against drug trafficking and organised crime in major European ports. Alongside other Member States, France contributes to information exchange, the development of good practices and the reinforcement of checks and coordinated investigations. This alliance is part of a process of enhanced cooperation, without replacing existing mechanisms, in order to improve the resilience of port platforms to criminal infiltration (MILDECA 2024).

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

T2. Trends

The purpose of this section is to provide a commentary on the context and possible explanations of trends in drug markets and crime within your country.

T2.1. For the most important drugs in your country, please comment on the possible explanations of short-term trends (5 years) and/or long-term trends (greater than 5 years) in the following aspects of the drug market:
- seizures (by weight bin if possible)
- price (wholesale and retail if possible)
- purity (wholesale and retail if possible)

Examples: changes in police practices, patterns of drug use, interruptions to the supply of drugs or the emergence of substitutes or alternatives.

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

Table 1. Average annual quantities seized in France by decade

	2005-2015	2015-2025
Herbal cannabis (kg)	5 614	32 761
Cannabis resin (kg)	58 253	71 228
Cocaine (without crack-cocaine) (kg)	7 199	27 042
Heroin (kg)	907	1 086
Amphetamines and methamphetamines (kg)	413	477
MDMA/ecstasy (tablets)	829 902	2 833 590

Source: OFDT/OFAST

Table 2. Quantities of drugs seized (in kg) in the last 5 years and changes 2024/2025 (in %)

Drugs seized	2021	2022	2023	2024	2025	Change 2024/2025
Cannabis: resin	72 400	87 600	87 000	64 700	81 000	+25%
Cannabis: herbal	39 500	41 000	37 700	36 300	45 000	+24%
Cannabis: plants	101 771	76 807	112 028	67 607	104 557	+55%
Heroin	1 300	1 400	1 100	1 045	1 214	+16%

Cocaine	26 500	27 700	23 249	53 473	84 300	+58%
Crack-cocaine	na	na	na	na	na	na
Amphetamines Methamphetamines	226*	273*	265*	618*	961*	+56%
Ecstasy (tablets)	1 454 085	1 543 421	4 072 704	9 090 510	7 318 248	-19%
LSD (blotter)	na	na	na	na	na	na
Kétamine	na	na	na	406	2 450	+503%

Source: OFAST
na: not available
* *Total amount of amphetamine and methamphetamine seizures*

Retail prices of herbal cannabis and resin have remained stable since 2020. The retail price of cocaine saw a significant decrease after several years of stability. The retail price of heroin decreased in 2025 after a downward trend in 2024. Finally, the price of an ecstasy tablet showed a decrease in 2024, a first since 2015 (see Table 3).

Table 3. Changes in current retail prices over 5 years (in euros)

	2021	**2022**	**2023**	**2024**	**2025**
Heroin	30	30	28	32	30
Cocaine	65	65	66	58	57
Ecstasy (tablets)	10	10	10	9	9
Cannabis resin	8	8	8	8	8
Herbal cannabis	10	10	10	10	10
Amphetamines	12,5	10	13	12	12

Source: OFAST 2026a

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

Before differentiating the trends by product, some general factors may be mentioned to explain these developments. Several phenomena explain the expansion of the range of services on offer and the more visible use of ICTs over the past decade. Urban renewal policies in certain peripheral neighbourhoods of large metropolises have aimed not only to renovate the buildings, but also to reduce the deal areas (Gérome 2023). These developments have led many networks to build up customer files in order to maintain contact with users and thereby ensure the sustainability of the deal. Home deliveries have also been developed, notably with "cocaine call centres" and/or central purchasing offices. In the Paris region, the phenomenon has developed considerably in Seine-Saint-Denis, where the drug squad dismantles several dozen purchasing offices each year. Their activity is not limited to cocaine. Cannabis (in its resin or herb form) and ecstasy may also be offered. Most of these central purchasing offices are extensions of the activities of the points of sale within deprived neighbourhoods, which are clearly adapting to the needs of inner-city customers in a more competitive market. The phenomenon is developing in most French cities as well as in medium-size cities. In addition to home deliveries, the use of the Internet is also encouraging postal drugs trafficking. In fact, delivery is increasingly mentioned as a purchase method by illicit drug users. This

choice offers a certain comfort, because it does not involve any physical contact with the drug dealer or the delivery person. The speed of delivery, often guaranteed within 24 to 48 hours, is also a major factor of its appeal (Tissot 2024).

The development of door-to-door sales does not mark the end of the traditional model of direct resale established in working-class neighbourhoods. It is constantly adapting to the changing aspirations and profiles of consumers. Therefore, the single-product model is disappearing. Even if some traffickers still focus on cannabis resin, the transition to a multi-product offer based on two main products: cannabis resin and cocaine, which are more and more systematically combined.

According to observations from the TREND scheme, the segmentation of the activities carried out by drug trafficking networks has been accentuated in recent years, leading to a specialisation of tasks and an occupational distribution. This organisation means pooling resources between networks, which can be observed at both regional and national level. A notable example is the pooling of resources for the import of drugs, where dedicated teams are responsible for transport and border crossing for many different networks. This tendency to specialise also implies a growing outsourcing of certain duties, such as product conveying, which is entrusted to dedicated teams. This phenomenon is often accompanied by a strict compartmentalisation of teams and individuals, who are generally not directly connected to one another. A small number of individuals act as intermediaries for specific logistics needs, such as the provision of lorries, the recruitment of staff, or border crossing. During the dismantling of networks, is it common to find that those arrested barely know each other, or not at all (Tissot 2024).

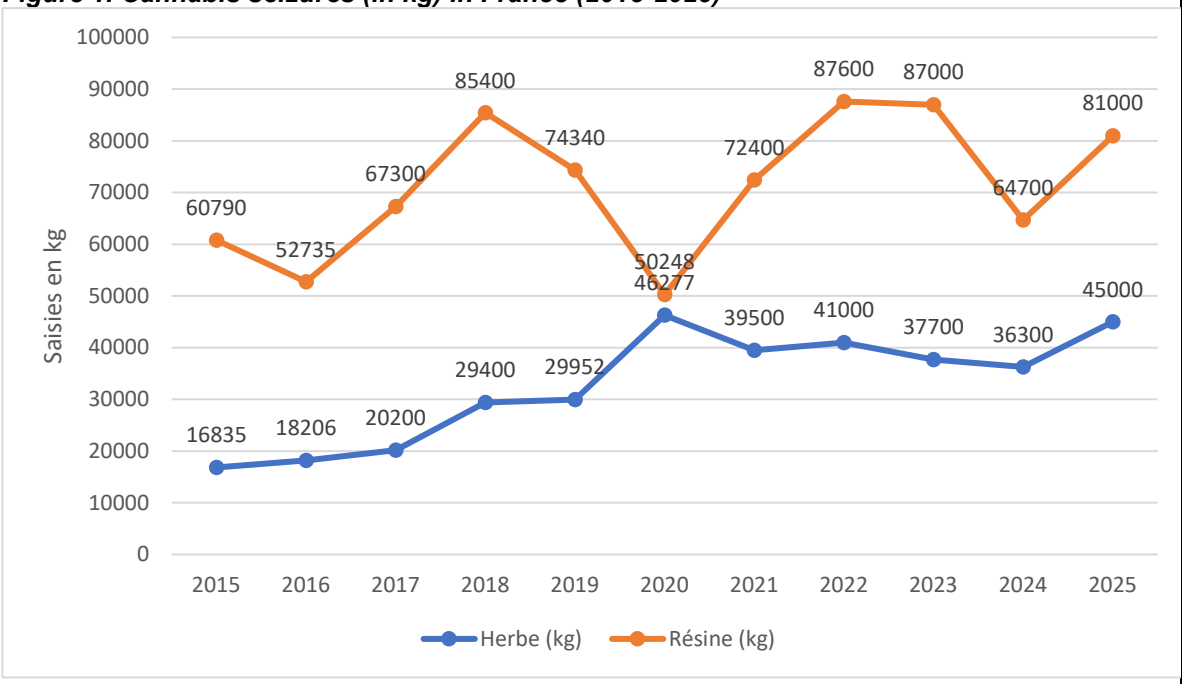
The trafficking networks are recruiting more and more adolescents, particularly those in precarious situations, and who have often recently immigrated, who live in the suburbs of metropolitan areas. Another strategy among traffickers involves recruiting lookouts, dealers, and, since 2020, team leaders, from outside of their home neighbourhood or region. The adolescents recruited are often under significant pressure to continue working, even though they want to stop, under threat from real or fictitious debts, and are exposed to frequent violence. They may also be perpetrators of routine violence themselves, especially when it is directed at people with whom they have little or no previous connections.

Moreover, women are becoming increasingly visible in trafficking activities, even though they remain in the minority. They are mainly recruited for their discretion, being less frequently monitored (Tissot 2024). Observations from the TREND scheme in Auvergne-Rhône-Alpes show that they may be found in vehicles transporting cannabis, cocaine, or heroin, often accompanied by men, to appear as a couple. They increasingly participate in retail delivery, working as a two, and concealing products during police interventions. Some women organise trafficking at a higher level, often in collaboration with a male partner in prison, in order to maintain their activity. They may also manage telephone lines and contact with clients and are traditionally recruited as minders. In fact, they appear increasingly often in promotional videos, playing different roles, involving packing or testing products (Tissot 2024).

Cannabis

The changes in the French market can be spotted in the progressions of the intercepted quantities of cannabis resin and herbal cannabis throughout the national territory. While, in the 2000s, the average number of the annual cannabis resin and herbal cannabis seizures reached 65.6 and nearly 4 tonnes respectively, in the 2010s, the average was 60.5 tonnes for cannabis resin and 18.4 tonnes for herbal cannabis. In 2025 126 tonnes of cannabis were seized, including 81 tonnes of resin and 45 tonnes of herbal cannabis. Cannabis seizures represented an increase of 25% compared to 2024 (Figure 1). The proportion of herbal cannabis in seizures saw a sharp increase at the beginning of the 2010s, rising from 6% in 2013 to 21% in 2014, then to 29% in 2019, reaching a peak of 48% in 2020. Since then, this trend has reversed slightly, but herbal cannabis remains a significant share of seizures, accounting for about a third of the total. In 2025, herbal cannabis made up 35% of total cannabis seizures (Figure 2). In 2025, 104 557 cannabis plants were seized, representing a 55% increase compared with 2024 (67 607 plants seized). Regarding this total, 66% of the plants seized were seized in the French overseas territories. (OFAST 2026b).

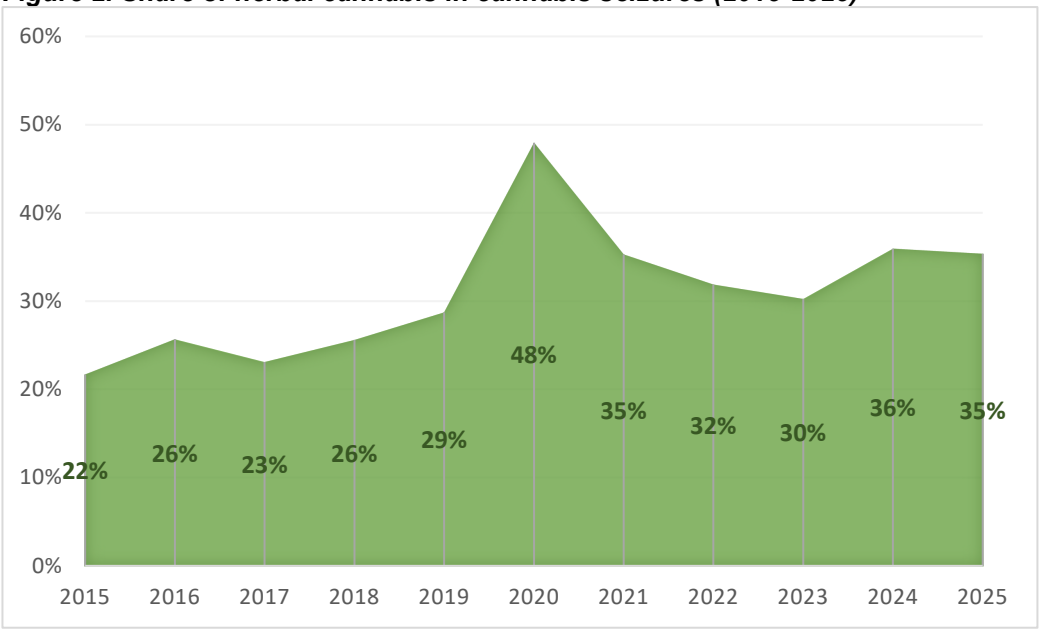
Figure 1. Cannabis seizures (in kg) in France (2015-2025)



Note: "Herbe" means herbal cannabis and "résine" is cannabis resin.

Source: OCRTIS/OFAST

Figure 2. Share of herbal cannabis in cannabis seizures (2015-2025)



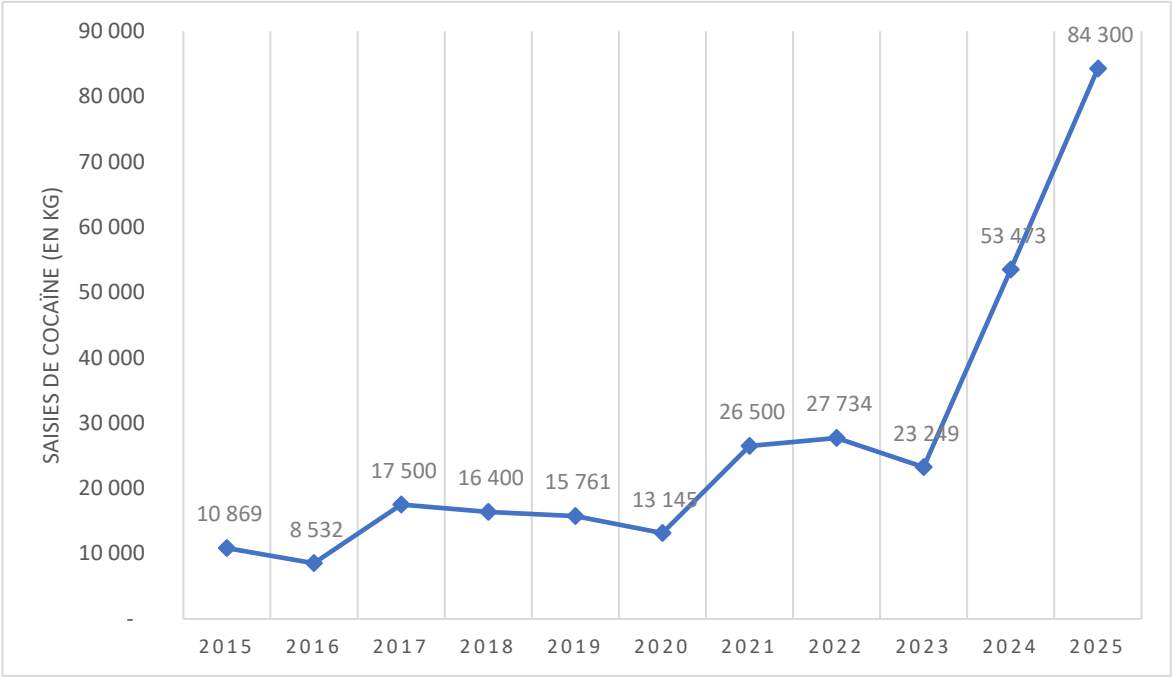
Source: OCRTIS/OFAST

Cocaine

The cocaine market, driven by a steady increase in demand over the last twenty years and a more recent growth in supply, is very dynamic. In 2020 and 2021, the lockdown measures affected the functioning of the market, with the banning of party events, the suspension of airlines to French Guyana and the closure of the border with Belgium (making it more difficult for the trafficking networks to supply the Netherlands, where the main wholesale cocaine market in Western Europe is located and boosting postal freight traffic). But the effect of this containment was short-lived.

In 2025, cocaine seizures in France reached a record level, with 84.3 tonnes seized, i.e. +58% compared to the record of 53.5 tonnes registered in 2024 (Figure 3). This sharp rise in the last few years is partly explained by France's strategic geographical position within the European Union. Located at the heart of Western Europe, France is a major transit zone linking the Netherlands and Spain, in particular. Its proximity to major production areas, notably in South America and the Antilles via the overseas territories, also contributes to this. However, according to OFAST, recent data from 2024-2025 shows that France no longer plays just a transit role. The country has become an important logistics platform for criminal groups, both domestic and foreign, serving as a place for storage, transit, and re-shipment to other countries in Europe and worldwide. This strategic shift is confirmed by several maritime trafficking cases where large consignments of cocaine were delivered to French ports such as Le Havre and Dunkerque, before being sent on to Northern Europe. Moreover, the intensified use of air transport to France is partly explained by the role of Paris airports as logistics hubs to supply other markets outside the national territory (OFAST 2025b).

Figure 3. Cocaine seizures (in kg) in France (2015-2025)

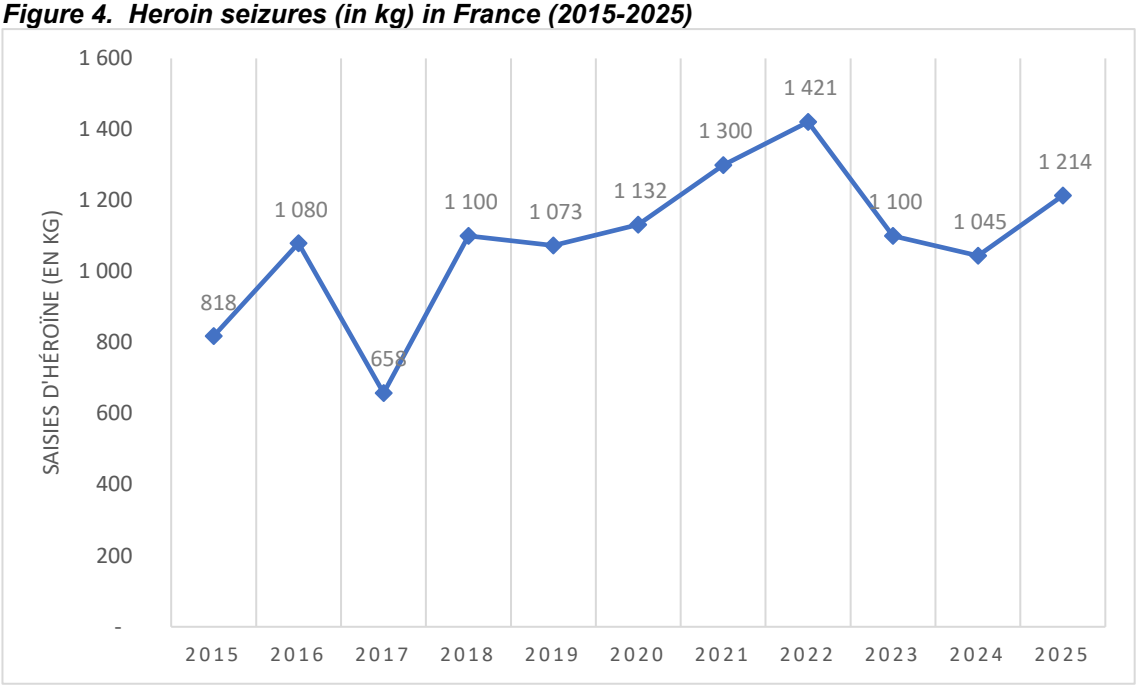


Source: OCRTIS/OFAST

Heroin

The heroin market, based on the proportion of annual users in the population aged 18-64, is much smaller than the cocaine market. However, it is one of the largest markets in Western Europe. Since 2018, the Lille metropolitan area experienced an increase in trafficking and is becoming a national centre for the wholesale resale of heroin for the French networks. Similar phenomena are also emerging in the main cities in the East of the country: Grenoble, Nancy, etc. After a steady increase in heroin seizures in France between 2018 and 2022, peaking at 1.4 tonnes in 2022, the quantities have then decreased, reaching 1.1 tonnes in 2023 and 1 tonne in 2024. In 2025, heroin seizures resumed their upward trend slightly, with 1.2 tonnes seized. This is the eighth consecutive year in which seizures have exceeded the symbolic threshold of one tonne.

Figure 4. Heroin seizures (in kg) in France (2015-2025)

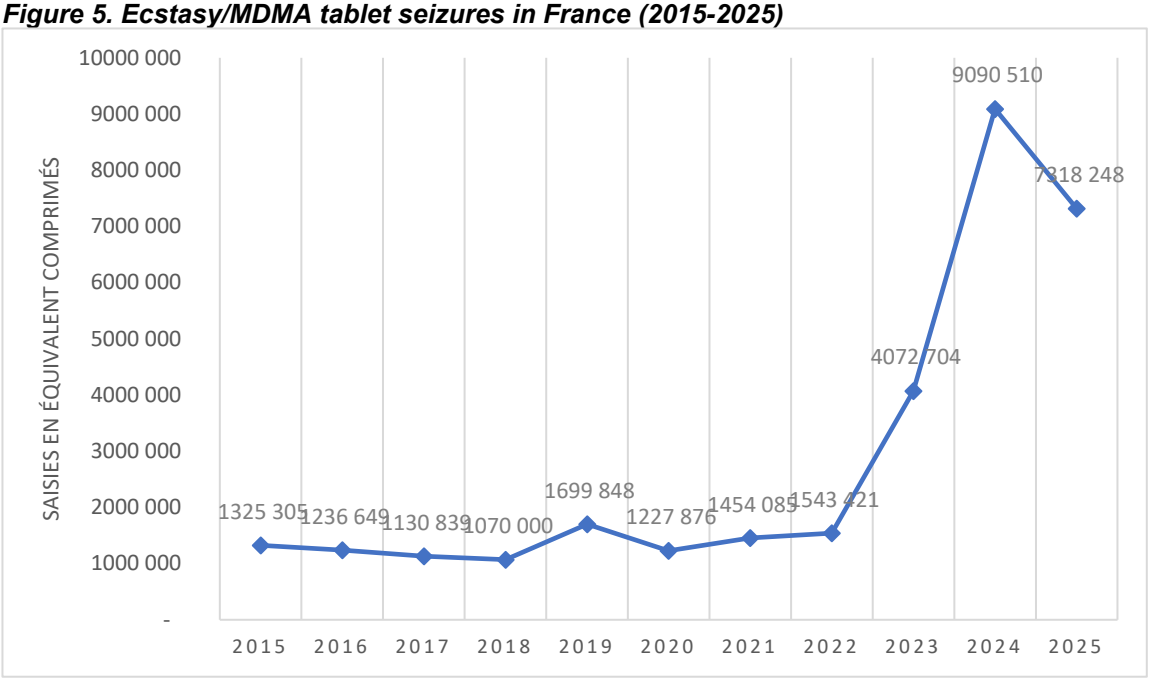


Source: OCRTIS/OFAST

Synthetic drugs

In 2025, the synthetic drug market in France remained largely dominated by MDMA/ecstasy. In 2025, seizures reached 7 318 248 tablets or powder equivalent, representing a 19% decrease compared with the record level recorded in 2024 (9 090 510 tablets). Despite this decrease, the quantities seized in 2025 remain exceptionally high compared with previous years (Figure 5). France thus confirms its role as a transit zone for MDMA, mainly destined for North Africa and the United Kingdom. Indeed, 48% of the quantities seized in 2025 were intended for export.

Figure 5. Ecstasy/MDMA tablet seizures in France (2015-2025)

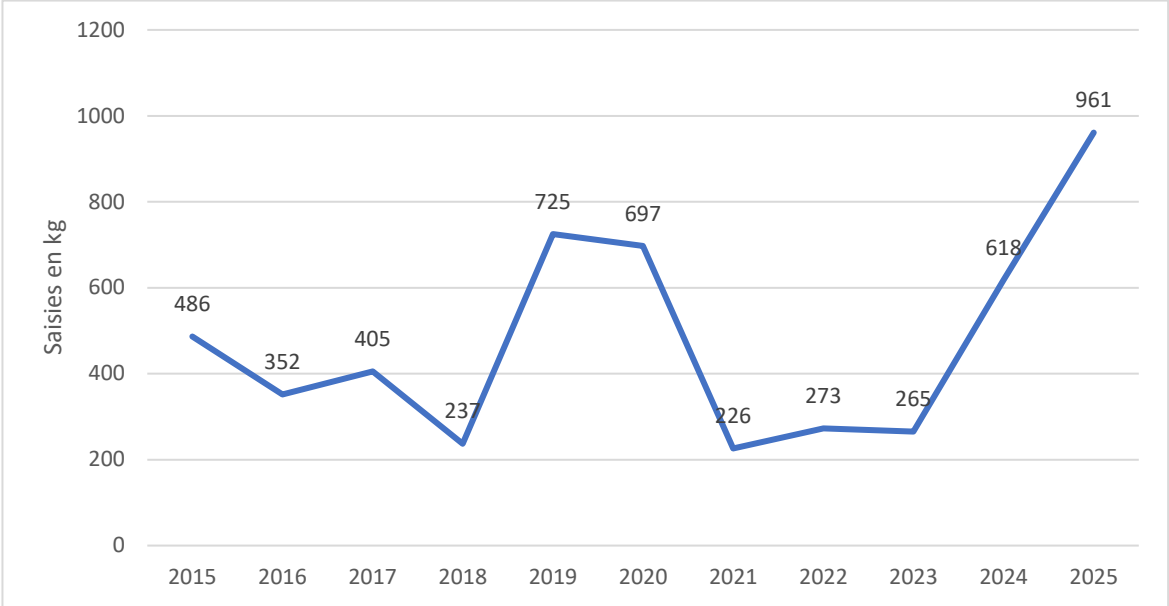


In addition, supply has been organised through micro-networks of user-dealers who obtain their supplies in Belgium and the Netherlands, where most of the European production units are located. The high level of seizures of ecstasy tablets is a clear indication of the dynamism of this market,

where strong demand is keeping the price per tablet high (unlike the “crystal” form, where the price per gram has been falling since 2010).

Seizures of methamphetamines and amphetamines in France have not shown a clear trend in recent years, with significant variations from one year to the next (Figure 6). However, 2025 stands out with a sharp rise to 961 kg seized, up from 618 kg in 2024, an increase of 56%. These seizures highlight France’s role as a transit country in the trafficking of synthetic drugs. Of the seizures for which the destination is known, 74% were destined for abroad. This one-off development should be interpreted with caution, in the absence of a regular trend over the medium term. Methamphetamine is very scarce on the mainland French market due to the lack of structured supply. It is distributed within tightly restricted social circles. In 2014 and 2015, however, this substance was identified in the Bordeaux (Aquitaine) region via the SINTES scheme. According to user claims, it originates from purchases on the deep web, where it sells for between 20 and 30 euros as capsules, and between 80 and 120 euros per gram. On the other hand, a methamphetamine market has been developing in French Polynesia for the last ten years (Simon and Valiergue 2022).

Figure 6. Amphetamine and methamphetamine seizures (in kg) in France (2015-2025)



T2.2. ***Optional****. Please comment on the possible explanations of long term trends and short term trends in any other drug market data that you consider important.*

T2.3. Please comment on the possible explanations of short- and/or long-term trends in the following drug law offences data:

- supply (if possible distinguish between trafficking, cultivation/production, wholesale, retail, and other supply offences)
- possession/use

Examples: changes in law enforcement practices, government priorities, patterns of drug use, sources of drugs.

An SSMSI study has highlighted that people charged with drug use or trafficking are not evenly distributed across the country. These offences are more frequent in highly urbanised areas, particularly in the catchment areas of large cities, where the rates per 1 000 population are the highest. Certain factors related to the characteristics of municipalities partly explain these differences. For example, the presence of a prison in a municipality is closely associated with a higher rate of people charged, whether with use or trafficking. Tourist activity, geographical location (notably coastal or border municipalities or those with an airport), as well as the presence of land transport infrastructure such as national roads or motorway service areas, also influence these rates. Municipalities with significant tourist activity or well connected to the road network tend to

record more incidents related to drug trafficking or use. Socio-economic inequalities also play an important role. Municipalities where the standard of living is lower and the unemployment rate higher are more exposed to these offences, especially regarding drug use. Finally, regional disparities persist regardless of the other measured factors. This is particularly the case in French Guiana, where a particularly high rate of people charged with trafficking is observed, but no similar trend is found for use (SSMSI 2025).

T2.4. ***Optional****. Please comment on the possible explanations of long term trends and short term trends in any other drug related crime data that you consider important.*

T2.5. Please indicate notable trends or important developments in the organisation, coordination and implementation of drug supply reduction activities in your country over the past 5 years.

T3. New developments

The purpose of this section is to provide information on any notable or topical developments observed in drug market and crime **since your last report**.
T1 is used to establish the baseline of the topic in your country. Please focus on any new developments here. If information on recent notable developments have been included as part of the baseline information for your country, please make reference to that section here. It is not necessary to repeat the information.

T3.1. Please report on any notable new or topical developments observed in the drug market and crime in your country since your last report.

Emergence of NEP on the cathinone market in France

In the cathinone market, 3-MMC is gradually being replaced by other structurally similar cathinones, most often without consumers' knowledge. This trend is accelerating in response to the tightening of Dutch regulations on cathinones. The Netherlands remains the main country of origin for these substances destined for the French market. For example, in the Auvergne-Rhône-Alpes region in 2025, 80% of samples sold as 3-MMC and analysed by the “Analyse Ton Prod” drug checking scheme actually contained 2-MMC (120 analyses). Other substitutions were also observed, with the presence of alpha-PiHP, 4-MMC, NEP, alpha-PCyP, cocaine, MDMA, and MDPHP, and in some cases, even the absence of any active substance (Tissot 2026). In 2024 and 2025, the SINTES scheme analysed an increasing number of collections containing cathinones. Indeed, the number of samples identified as containing at least one cathinone increased from 66 in 2024 to 97 in 2025. The most frequently identified cathinones in 2025 were N-ethylnorpentedrone (NEP) and 2-methylmethcathinone (2-MMC). Compared with 2024, there was a significant increase in NEP, rising from 12 to 35 identifications, and in x-MMC derivatives, which went from 31 to 42 identifications. Chlorinated derivatives (x-CMC) and pyrovalerones remained present although less frequent, while brominated derivatives, particularly 4-BMC, which were absent in 2024, were identified in 12 collections in 2025 (Cherki and Feng 2026).

Adulteration of hemp substances with synthetic cannabinoids

Data collected by the SINTES scheme highlights a growing presence of synthetic cannabinoids and semi-synthetic cannabinoids in various substances available to users. there was a significant development with the SINTES scheme documenting numerous adulterations involving synthetic cannabinoids, most often without the user’s knowledge, in substances available for retail sale (CBD shops, tobacco retail shops, automatic distribution machines) (Cherki and Feng 2026). Synthetic and semi-synthetic cannabinoids were identified in collections of herbal products and resin, often sold as CBD and, less frequently, as cannabis. To a lesser extent, they were also found in collections of so-called “chemical” tobacco and sweets.

In 2024, the SINTES system recorded 47 collections containing synthetic or semi-synthetic cannabinoids in substances intended for smoking. The following year, this figure rose to 106, against a backdrop of increasing cases of adulteration of substances sold in CBD shops, tobacco retail shops, or online. Herbal cannabis is the most frequently collected form (N = 18 in 2024; N = 60 in 2025), followed by resin (N = 10 in 2024; N = 32 in 2025). Concentrated forms (wax, oil, “distillate”; N = 2 in 2024 and N = 1 in 2025), as well as sweets (N = 4 in 2024 and N = 3 in 2025), were also identified to a lesser extent. The confectionery collected contained only semi-synthetic cannabinoids (HHC, delta-8-THC and H4-CBD). In 2024, among the 47 collections, six bore a designation referring exclusively to phytocannabinoids other than delta-9-THC, predominantly CBD. This number rose to 20 in 2025 (e.g. “RAF CBD”, “CBD resin”, “CBD hash”, “CBD flower”), substances marketed almost exclusively in CBD shops, either physical or online.

Several collections, mainly in 2025, explicitly mentioned a semi-synthetic cannabinoid in their commercial name (e.g. 10-OH-HHC, THC-P). Others, marketed under names that provide no information about their composition, were also analysed (“Tinky Winky”, “Magic Dream”, “HSD”, “X2", “VMAC”, “Exotic ND20”). Across 2024, 34 collections contained at least one semi-synthetic cannabinoid. No association between a synthetic cannabinoid and a semi-synthetic cannabinoid was observed. The SINTES scheme identified 11 different semi-synthetic cannabinoids, with four identified for the first time in France, and delta-9-THCP and HHC the most frequently detected.

According to the National Intelligence and Customs Directorate (DNRED), the addition of synthetic cannabinoids to CBD-based substances is intentional. This process can take place at various stages of the supply chain, either directly in shops or further upstream by suppliers, without retailers necessarily being aware. For example, synthetic cannabinoids are applied by spraying onto CBD flowers. Adulterated substances are mainly distributed through specialist retailers (CBD shops), which take advantage of regulatory loopholes regarding THC potency. Tobacco retail shops, where low-cost CBD flowers are sold after being sprayed with synthetic cannabinoids, represent another major channel.

These various distribution channels have been particularly highlighted in recent cases involving the seizure of adulterated CBD in the Bordeaux area. Indeed, the Bordeaux centre (CEIP) of the Network of Regional Abuse and Dependence Monitoring was alerted to the distribution in Gironde and Landes of adulterated cannabidiol (CBD), sometimes referred to as “HPE CBD”, containing synthetic or semi-synthetic cannabinoids (MDMB-PINACA, delta9-THC-C8/THC-JD and 10-OH-HHC) in specialist retailers or tobacco retail shops. The shops in the Bordeaux region involved in the sale of adulterated CBD sourced their goods mainly from suppliers based in Spain and Poland. Lastly, the darkweb is emerging as a key channel, with platforms such as GreenRelief offering enhanced substances at prices 30% lower than the legal market (2026 DNRED contribution).

Trafficking in narcotic pharmaceuticals and related substances

With regard to the trafficking of narcotic pharmaceuticals and related substances, preliminary data from the Command for Environment and Health (CESAN) indicates relative stability in 2025. As of 10 May 2026, 5 200 cases were recorded for 2025, compared with 5 520 in 2024. Cases involving ketamine (+15%) and pregabalin (+11.8%) continued to rise compared with 2024. Île-de-France accounted for more than 2 000 cases, representing nearly 40% of the national total. Ketamine, pregabalin, methadone and morphine alone accounted for 84% of cases recorded in 2025, compared with 79% in 2024 (CESAN 2026).

In response to the rising demand for codeine and tramadol on illicit markets, the National Agency for Medicines and Health Products Safety (ANSM) has tightened their regulation. Since 1 March 2025, medicines containing tramadol, codeine or dihydrocodeine must be prescribed on a controlled prescription. The validity period for codeine prescriptions has also been reduced to 12 weeks. These substances are now included among the medicines classed as narcotics listed by the National Chamber of Pharmacists. In 2025, tramadol and codeine featured in 562 investigations. This figure is similar to 2023 (almost 600 investigations) and 2024 (550 investigations). However, it should be interpreted with caution, as these medicines are not systematically identified or recorded in legal proceedings. The data available therefore reflects only part of the phenomenon of diversion and trafficking of these medicines (CESAN 2026).

T4. Additional information

The purpose of this section is to provide additional information important to drug market and crime in your country that has not been provided elsewhere.

T4.1. ***Optional****. Please describe any additional important sources of information, specific studies or data on drug market and crime. Where possible, please provide references and/or links.*

T4.2. ***Optional****. Please describe any other important aspect of drug market and crime that has not been covered in the specific questions above. This may be additional information or new areas of specific importance for your country.*

T5. Sources and methodology

The purpose of this section is to collect sources and bibliography for the information provided above, including brief descriptions of studies and their methodology where appropriate.

T5.1. Please list notable sources for the information provided above.

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T5.2. Where studies or surveys have been used please list them and where appropriate describe the methodology?

Methodology

Data on prices

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

- A periodic OFAST survey based on data collected at 69 sites throughout metropolitan France records the median semi-wholesale and retail prices of certain illegal substances (heroin, cocaine, cannabis and ecstasy);
- The TREND scheme, on the basis of interviews and observations with drug users, workers in harm reduction facilities (CAARUD) and workers in techno party settings of each site of the scheme. For each substance under consideration (illicit or diverted), the current retail price as well as the lowest and highest price observed are reported.

STUPS© national database

French National Forensic Science Institute (INPS)

Created in 1986, the French National Register of Drug Seizures (FNDS) initially focused on heroin analyses; from 1990, cocaine samples were also studied, before being extended to all drugs, as part of the STUPS© (harmonised narcotics processing system) database, initiated in 1999.
Five national forensic science institutes (Lille, Paris, Lyon, Marseille, Toulouse) and the Forensic Sciences Institute of the French *Gendarmerie* (IRCGN) add their analyses to this database, accompanied by photos, logos, etc. in order to identify the substances in circulation.

National Criminal Record

Ministry of Justice, Sub-Directorate for Statistics and Studies (SDSE)

Data from the National Criminal Record makes it possible to describe the punishable offences, the court order procedures, the diversity of responses provided by the courts (convictions imposed, but also alternatives to prosecution, fixed penalty notices, dismissal, etc.), the nature and quantum of sentences and the socio-demographic profile of people who have been convicted since 1984 (when the record was automated).

Since 2025, the national criminal record has been based on a revised classification system developed by the statistical department of the Ministry of Justice. The previous seven categories (Use, Possession/acquisition, Trafficking, Transport, Supply and sale, Assisting others in drug use, Other drug-related offences) have now been replaced by just two categories: Use and Trafficking; anything that does not constitute use is classified as trafficking.

SINTES: National Detection System of Drugs and Toxic Substances

French Monitoring Centre for Drugs and Drug Addiction (OFDT)

The SINTES scheme is based on collecting samples of illegal and legal substances directly from drug users. The products collected are forwarded to one of the 8 forensic laboratories working in partnership with OFDT, to determine their composition. At the same time, drug users are asked to complete a questionnaire on the context of use for the substance and its purchase price. This makes it possible to directly correlate the price and purity of a given substance.

The SINTES scheme has three sections:

- The observation section provides an annual overview of the composition of a particular illegal substance. The SINTES observation scheme relies primarily on the French TREND network.

- The monitoring section comes under the health alert system. It is based on the TREND network sites as well as sites outside of this network that have signed agreements. The contributions made in this section are limited exclusively to the identification of newly circulating molecules and up-to-date information on the composition of certain substances at a given moment and in a given location.
- Since 2010, SINTES has been exploiting the Internet to monitor for new psychoactive substances (NPS) and document them.

TREND scheme: Emerging Trends and New Drugs
French Monitoring Centre for Drugs and Drug Addiction (OFDT)

The aim of the TREND scheme, which was established in 1999, is to provide information about illegal drug use and users, and on emerging phenomena. Emerging phenomena refer either to new phenomena or to existing phenomena that have not yet been detected by other observation systems.

The system is based on data analysed by eight local coordinating sites in mainland France (Bordeaux, Lille, Lyon, Marseille, Metz, Paris, Rennes and Toulouse) that produce site reports, which are then extrapolated to a national level:

- continuous qualitative data collection in urban settings and the party scene, by the local coordination network, which has a common data collection and information strategy;
- the SINTES scheme, an observation system geared towards detecting and analysing the toxicological composition of illegal substances;
- recurring quantitative surveys, particularly among harm reduction facilities CAARUD clients (the ENa-CAARUD survey);
- partner information system results;
- thematic quantitative and qualitative investigations that aim to gather more information about a particular subject.