OBSERVATOIRE FRANÇAIS DES DROGUES ET DES TOXICOMANIES

thema OFDT

CHANGES IN THE CANNABIS MARKET IN FRANCE

SUMMARY

Michel Gandilhon
Stanislas Spilka
Caroline Masson

November 2020

Summary drafted by: Julie-Émilie Adès

Documentation: Isabelle Michot
Graphic design: Frédérique Million

Cover photo credits: © aleksandar kamasi / © Ademoeller / © jeremynathan - Fotolia.com

INTRODUCTION

This summary of the issue of *Théma* published by the OFDT in July 2019 is devoted to the changes in the cannabis market in France, particularly in relation to the increase in the use of herbal cannabis. These changes are taking place against a background of a significant increase in cannabis consumption over the last twenty years. Indeed, France is one of the countries in Europe with the highest consumption, especially in the youngest age groups. According to the latest available data (2017), 45% of 18-64-year olds and 39% of 17-year olds have experimented with the substance. In total, in 2017, there were 5 million users in the last year. Cannabis, the most commonly used illicit product, has tended to become normalised in public opinion. In 2018, 40% of those surveyed were in favour of people growing cannabis in small quantities for personal consumption. Almost two-thirds (63%) of those who have experimented with the substance have done so. The international context, marked since the 2010s by the progression of the legalisation of its use for medical and non-medical purposes, particularly in North and South America (Canada, Uruguay, United States), is likely to influence public perception, especially among those who have experimented with the product.

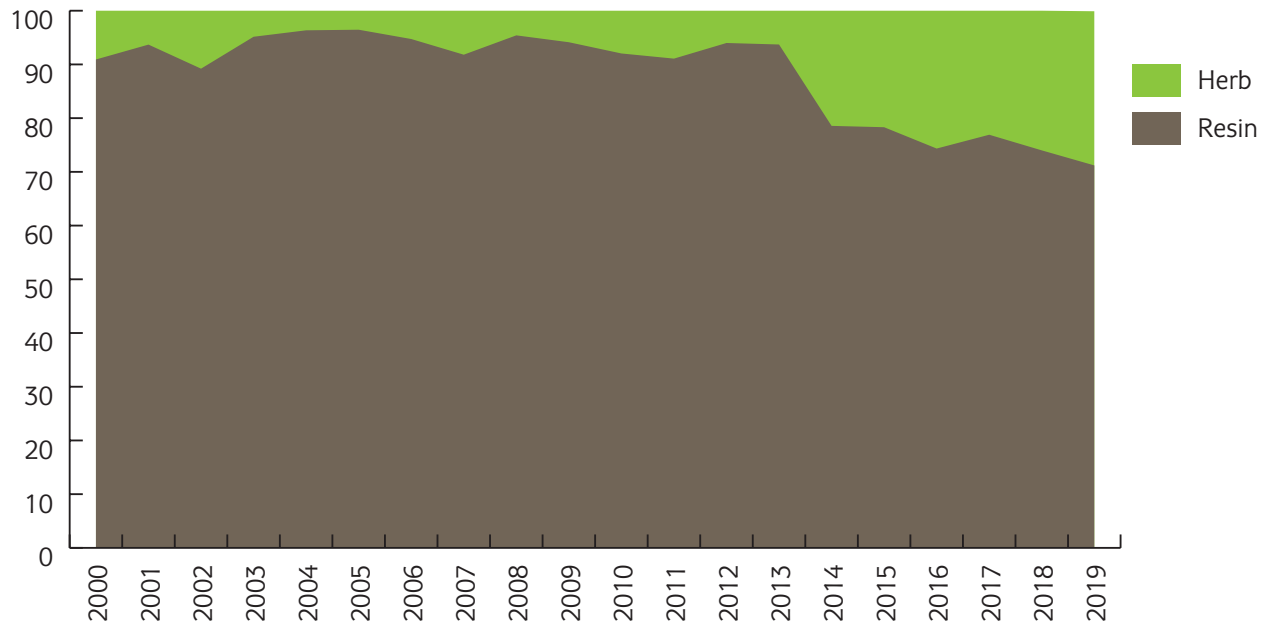
For this report on the state of play of market transformations, a set of qualitative and quantitative sources have been used to describe the changes at work. First of all, the data comes from the OFDT's multisite observation scheme (TREND-SINTES) but also from statistical surveys conducted by and with the OFDT among young people (ESCAPAD, ESPAD) or adults (Health Barometer of the National Public Health Agency). The data provided by OCRTIS (Central Office for the Repression of Drug-Related Offences), now OFAST (Home Affairs Department's Anti-Narcotics Office), at the beginning of 2020 on the organisation of seizures of cannabis plantations and products, has also been used. Finally, this analysis drew on the reports from the European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) and the United Nations Office on Drugs and Crime (UNODC) to place the information in an international context.

Resin *vs* herbal cannabis: towards a rebalance

Characterised in the 1990s by the almost complete hegemony of cannabis resin from Morocco, the French market has tended to diversify over the last fifteen years. One of the most important developments is linked to the boom in the consumption of herbal cannabis. The substance often enjoys a better reputation among users, among teenagers but also increasingly among adults, who consider it as "natural", allowing them to avoid products with cutting agents. Given the greater accessibility of cannabis resin in terms of availability and price, its consumers are often more disadvantaged, young and "heavy smokers" (regular, daily smokers). Herbal users, on the other hand, tend to be older and more socially integrated.

As a sign of these changes in demand, the quantities of herbal cannabis seized continue to increase: thus, while they never exceeded 4 tonnes before 2010, the volumes seized increased almost sevenfold between 2010 and 2019; a record was set in 2019 with almost 30 tonnes. In contrast, while resin accounted for more than 90% of total cannabis seizures throughout the 2000s, by 2019 this share is now close to 71%, a decrease of almost 19 percentage points.

Figure 1. Breakdown of cannabis seizures in France by product (%) (2000-2019)



Source: OCRTIS/OFAST

As France is also a transit country, not all of the herbal cannabis intercepted is destined for this market, but 55% of the herbal cannabis seized in 2016 was destined for the French market, the highest share ever recorded. Between 2000 and 2018, the average THC content in seized herbal cannabis more than doubled (from 4.7% to 11.2% THC). This increase is due to the growing use of hybrid varieties (Skunk, Amnesia, etc.) generally imported from the Netherlands and suitable for indoor cultivation. The variations observed in these THC levels (which overall tend to stabilise) are significant. In terms of median retail prices, the increase in the retail price of herbal cannabis was 30% in constant euros (from 7.6 to 10 euros) between 2010 and 2018.

The demand for herbal cannabis is mainly supplied by large-scale cultivation from the Netherlands and increasingly from Spain. Indeed, while Europe is one of the world's leading markets for cannabis use, it has also established itself since the 2000s as a production region. Local cultivation practices observed in the Netherlands have gradually spread to other northern European countries, including Belgium, Denmark, Finland and the United Kingdom. At the same time, herbal cannabis production is increasing in the Czech Republic, Germany, Ireland, Hungary, Poland, Slovakia and Norway. More recently, the most notable phenomenon concerns Spain and the Balkan region (primarily Albania, but also Serbia, Bulgaria and, to a lesser extent, Kosovo) where various major hot spots of production have been identified.

In addition to the increasing use of herbal cannabis produced in France's European neighbours (Spain, Netherlands, Belgium), there has been an increase since 2010 in cannabis plant seizures, which are an indicator of the evolution of production in a given country.

Since 2010, they have been multiplied by 2.5 in France to reach nearly 183 000 plants in 2019. Although plant seizures are mainly made in Overseas France, they are also increasing in northern France close to the Belgian border, in the south in the Mediterranean hinterland and in the west in the Brittany peninsula.

Home-grown and commercial cultivation

Cannabis cultivation takes various forms in France. The phenomenon of cannabis cultivation developed in France after 1968, with the arrival of young people moving from cities to the countryside, and has accelerated sharply in the last ten years with the growth of indoor cultivation permitted by hybrid varieties. Today, it seems that French production is dominated by small cultivations grown by "amateurs".

In 2017, 7% of recent cannabis users (within the last month) aged 18-64 years, or between 150 000 and 200 000 people, are estimated to have grown cannabis at home in the past 12 months, of which 3%, or about 65 000 people, would have been able to meet their needs without resorting to the market.

Table 1. Supply patterns in the past year among recent cannabis users (within the last month) by sex and age (%)

	All recent users	Men	Women	18-34 years old	35-64 years old
Purchasing without home cultivation	61	63	55	64	54
Home cultivation without purchasing	3	3	1	2	5
Purchasing and home cultivation	4	5	3	4	5
Other mode of supply (gift, sharing, etc.)	32	29	40	31	36

Source: Health Barometer 2017, Santé publique France, processed by the OFDT

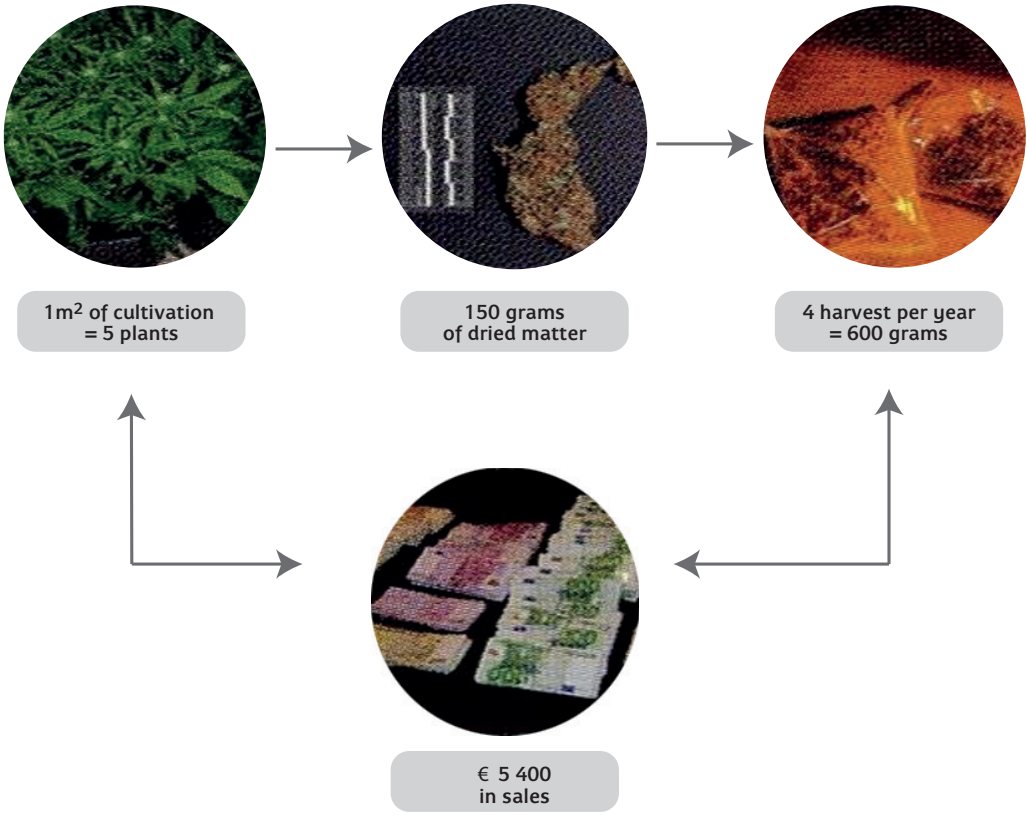
There is a strong sense of sharing and giving within these groups of users. The main objective is not money, but instead the sociable aspect and social recognition within a peer group. Coupled with these ideas, a distrust of the traditional supply of cannabis, monopolised by criminal groups, and an ethical dimension as well as a desire for autonomy (regaining control of the product and its supply through a local channel) are often highlighted by these users who grow their own herbal cannabis.

For these audiences, personal cannabis cultivation now seems relatively easy to implement: the necessary equipment is in fact available in grow shops that specializing in the sale of products for cultivating plants indoors. At the same time, the Internet makes it possible to order the necessary seeds and cuttings online and it is much easier to share expertise by using online forums and tutorials.

The tendency of some producers/users to favour self-production in order to better control the product they use, while avoiding the black market, currently only concerns herbal cannabis to a significant extent. However, since 2014, observations from the TREND sites, particularly in Bordeaux and Rennes, show a marginal trend: manufacturing highly concentrated products such as resin or oil from herbal cannabis, most often for personal use.

In parallel to the activities of these user-producers, commercially oriented cultivation has emerged in France since 2011. There are also cannabis growers tempted to move to the next level in order to supplement their income by selling part of their production. There is therefore a certain permeability between "non-commercial" and "commercial" cultivation, even if this is still marginal, given the organisational difficulties involved in increasing production and sales and the increased need for investment.

Figure 2. Estimated yields and earnings for five indoor plants



Source: OCRTIS

Since 2010, following similar situations in the Netherlands and the United Kingdom, a professionalised herbal cannabis supply has developed with real industrial plantations ("cannabis factories"), with hundreds or even thousands of plants, that are regularly shut down.

Some plantation shutdowns have highlighted the role of Dutch organised crime as a result of the extensive crackdown on cannabis production in the Netherlands following the establishment of cannabis task forces starting in 2006. This Dutch Government's policy has contributed to production units relocating abroad, particularly to France. In addition, the Netherlands, the

world's largest producer of cannabis seeds, continues to be a source of technical equipment and expertise. Since the late 2000s, cannabis cultivation by criminal groups of "Vietnamese" origin has also emerged. Despite their presence in the United Kingdom, where they play a key role in running "cannabis factories", as well as in the Netherlands, Germany, Hungary, the Czech Republic, Slovakia and Poland, these criminal organisations seem to be relatively limited in number in France. More recently, the shutdowns of plantations intended to feed so-called "city" trafficking (points of sale within deprived neighbourhoods), which are rather invested in selling cannabis resin, show that the spectrum of professional stakeholders in the herbal cannabis cultivation is constantly widening.

Resin traffickers adapting

All these changes are taking place in a context where the cannabis resin market is also changing rapidly. The stakeholders on the supply side located in "working-class" neighbourhoods, who control the bulk of the cannabis resin market in mainland France, are adapting to this increased competition to avoid users losing interest, whether at the production or distribution stage.

Increases in European and French herbal cannabis use and production have not, in fact, led to the permanent decline of Moroccan cannabis resin in traditional markets. In response to the rise in the "quality" of herbal cannabis, producers in the Rif have produced increasingly sophisticated resins from hybrids to meet the growing demands of European users who are now accustomed to products with a higher THC content and an increasingly diverse range of products.

Since 2010, in the Rif region, producers have partly turned to varieties with a higher THC content, generally imported from the Netherlands, against a backdrop of modernisation of agricultural techniques (irrigation, seeding in greenhouses, etc.) which temporarily ensure better yields, in a context of reduced cultivated areas.

These developments show that trafficking in cannabis resin, despite the rise of herbal cannabis on the European continent, remains a significant reality: 85.4 tonnes were seized in France in 2018, a level not seen since 2014.

CONCLUSION

Developments in the French cannabis market are taking place in the context of a change in use patterns, with the "relative" shift away from the traditional resin/tobacco mix, and an evolution in the profile of users, who are now more demanding, tending to favour home-grown and local products. Herbal cannabis, rightly or wrongly considered "organic", is, as in the rest of Europe, increasingly appreciated. These developments are contributing to a number of important changes in practices. The more frequent reliance on importing herbal cannabis produced in neighbouring European countries and the development of self-cultivation and commercial cultivation in France are linked to this. However, growing one's own herbal cannabis and buying resin are not contradictory and hashish retains a certain centrality. For reasons of taste and other pragmatic motives - the inability of many small cultivations to cover all domestic demand and to meet the regular and intensive uses of their owners - the two products coexist on the French market.

FOR MORE INFORMATION

OFDT References:

Cadet-Taïrou A., Gandilhon M., Martinez M., Milhet M., Néfau T. (2017) Psychoactive substances, users and markets: recent trends (2016-2017). Tendances, OFDT, no. 121, 8 p.

Gandilhon M., Martinez M., Lermenier-Jeannet A., Detrez V. (2019) Drug market and crime workbook. In: 2019 National report (2018 data) to the EMCDDA by the Reitox National Focal Point France, OFDT (Dir.). Paris, OFDT.

Obradovic I. (2017) Perceptions, motives and trajectories associated with drug use in adolescents. Tendances, OFDT, no. 122, 8 p.

Spilka S., Le Nézet O., Janssen E., Brissot A., Philippon A., Shah J., Chyderiotis S. (2018) Drug use in 17-year-olds: analysis of the 2017 ESCAPAD survey. Tendances, OFDT, no. 123, 8 p.

Spilka S., Richard J.-B., Le Nézet O., Janssen E., Brissot A., Philippon A., Shah J., Chyderiotis S., Andler R., Cogordan C. (2018) Levels of illicit drug use in France in 2017. Tendances, OFDT, no. 128, 6 p.

Weinberger D. (2011) Criminal networks and indoor cannabis in Europe: has the phenomenon reached France? Drugs, International Challenges, OFDT, no. 1, 5 p.

EMCDDA Reference:

EMCDDA, Freeman T., Groshkova T., Cunningham A., Griffiths P., Potter D., Craft S., Englund A., Lynskey M., Sedefov R. (2019) Developments in the European cannabis market. Luxembourg, Publications Office of the European Union, coll. EMCDDA Papers, 19 p.

OFDT - 69 rue de Varenne
CS 70780 - 75700 PARIS CEDEX 07
FRANCE

https://en.ofdt.fr/