

Drug Markets in the Time of Covid-19 in Europe and France: A Balance Sheet (Now Enriched)

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“There is what we know, and what we can assume.”

—Jean Dhondt

ABSTRACT

The following article is a first-hand assessment of the impact of Covid-19 on drug trafficking in Europe and in France. While it largely follows the same framework, it is considerably enriched in the light of new data and information that have emerged since the initial writing phase, which took place in April 2020 during the so-called containment period. Furthermore, while the first article was still based on hypotheses and prognoses, particularly in the part devoted to the possible consequences of the sudden drop in the illicit drug market on organized crime, this revision attempts to make an initial assessment, admittedly still very provisional, based both on the observations that have been made *in situ* in the trafficking zones and on the first data published by various national and international organizations. This work is therefore evolving and will be amended, completed, and corrected in the future, taking into account the erratic course of the epidemic and the equally erratic responses of public authorities throughout the world. As the reader will understand, humility is the order of the day.

“The owl of Minerva spreads its wings only with the falling of the dusk.”

Keywords: Drug, COVID, Crime

La decapitación como método característico del terrorismo yihadista desde Siria a Francia

RESUMEN

Los terroristas yihadistas han diversificado sus tácticas y ahora usan decapitaciones como su método de ataque característico. Bajo

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la influencia de la ideología yihadista, otros grupos yihadistas y actores solitarios en diferentes regiones han imitado las tácticas de ISIS y han estado involucrados en decapitaciones en un territorio geográfico más amplio que va desde Filipinas, Afganistán, Nigeria y Somalia hasta Siria y Francia. Su objetivo es llamar la atención, ganar reconocimiento, intimidar a las personas en sus territorios y sembrar el miedo y el pánico.

Palabras clave: Terrorismo, Decapitación, Yihad, Terrorismo

新冠疫情期间欧洲和法国的毒品市场：统计数据（补充版）

摘要

本文评估了新冠疫情对欧洲和法国的毒品贩运产生的影响。尽管在很大程度上按照与第一次发文（2020年4月封城期间）一样的框架进行，但本文补充了大量新数据和信息。此外，尽管第一篇文章基于一系列假设，尤其是关于非法药品市场暴跌对有组织犯罪产生的潜在后果的那部分，但本文试图对在贩运地区获得的观察和由不同国家机构及国际机构出版的第一手资料加以初步评估（不可否认，该评估仍然是暂时的）。因此，这项研究还在进行中，并将被修订、完善和纠正，同时将新冠疫情的不规则进程以及同样不规则的全球公共权威机构响应考虑在内。读者将明白，谦逊是惯例。

“密涅瓦的猫头鹰，只有在黄昏的时候才起飞。”

关键词：毒品，新型冠状病毒病，犯罪

At the time of writing (July 2020), the Covid-19 epidemic is in full swing, with a million new cases reported each week throughout the world,² particularly in America. The European Union, on the other hand, is reopening its internal and, in part, external borders. Given the gaps in the available data, it is possible to draw a preliminary assessment of its impact on the world's³ second largest criminal market. The measures adopted by States throughout the world to contain the spread of the epidemic have had, and still have, major repercussions

2 “Covid-19 is here to stay. People will have to adapt,” *The Economist*, July 4, 2020.

3 “Between \$426 billion and \$652 billion according to Global Financial Integrity, Transnational Crime and the Developing World,” March 2017.

on the globalized drug market. After a brief look at the United States and Mexico, this article presents an overview of the situation in Europe and, more specifically, in France.

A Globalized and Interconnected Market

The illicit drug market is nowadays largely globalized and closely dependent on the vagaries of global trade. This is normally its strength, but in times of brutal crisis it is also its weakness, as it is dependent on an international division of labor and relatively complex logistical chains, which can, as it is the case today, become strained or even collapse.⁴ Thus, the first criminal organizations to bear the brunt of the epidemic in China were the Mexican cartels, particularly those of Sinaloa and Jalisco, producers of heroin, methamphetamine—a very powerful synthetic stimulant—and fentanyl, an opioid,⁵ which plays a central part in the other major ongoing health catastrophe—more than 450,000 deaths since 1999—linked to opioid overdoses in the United States.⁶

The sudden collapse of the Chinese economy in the first quarter of 2020, by almost 7%, and of exports, by more than 17%, in January and February,⁷ have profoundly affected Mexico's supply of chemical precursors, a significant proportion of which comes from the city of Wuhan—the epicenter of the coronavirus epidemic and the chemical industry in China—needed for the production of these three substances.⁸ Consequently, drug exports to North America have decreased, well before Donald Trump's decision to close the vast terrestrial border, 3,169 km, with Mexico on March 20.⁹ As a result, the price of the precursors, needed to produce fentanyl and methamphetamine has increased by 25 to 400%,¹⁰ eventuating in significant repercussions on the wholesale and retail markets of major American cities. In New York City, for example, the price of a half kilogram of methamphetamine is estimated to have tripled from \$66-110 to \$264-308.¹¹ While in

4 “COVID-19 and the drugs supply chain: from production and trafficking to use,” UNODC, Vienna, May 2020.

5 “Coronavirus pandemic drives up price of heroin, meth and fentanyl,” Isabel Vincent, *New York Post*, March 28, 2020.

6 Michel Gandilhon, “The United States before Covid-19: A look back at the deadly opioid epidemic,” *The Conversation*, May 11, 2020.

7 “China exports plummet by 17% as coronavirus takes its toll,” Sue-Lin Wong, *Financial Times*, March 7, 2020.

8 “Precursor chemicals, a little-known dimension of the global illicit drug market,” Michel Gandilhon, *Drugs, International Issues*, No. 7, OFDT, 2014.

9 “Coronavirus chokes the drug trade—from Wuhan through Mexico and onto U.S. streets,” Kate Linticum, *Los Angeles Times*, April 24, 2020.

10 “Cartels are scrambling: Virus snarls global drug trade,” Jim Mustian, Jake Bleiberg, *AP News*, April 19, 2020: <https://apnews.com/4f0a4ca93cc2fee94d386efb13db31a0>

11 “Coronavirus is leading to shortages of Fentanyl and Meth,” Deborah Bonello, *Vice*, March 19,

San Diego, California,¹² average semi-wholesale methamphetamine prices are estimated to have jumped by 400%, from \$1,000 to \$1,400, and retail fentanyl tablet prices by 40%, from \$5 to \$7, according to the Drug Enforcement Administration. In addition, in some northeastern states, such as Maryland, heroin shortages were observed.¹³

The European Drug Market Affected

In a similar way as in the United States, the European Union is largely dependent on global supply to feed its illicit drug market, which is, given the high standard of living and the high prevalence of drug use, one of the largest markets in the world, and therefore one of the most strategic for traffickers. The EMCDDA (European Monitoring Centre for Drugs and Drug Addiction) estimates its value at 30 billion euros in its latest report on the issue.¹⁴ The main products consumed are produced abroad: cannabis resin in Morocco, cocaine in Colombia, and heroin in Afghanistan. The only exceptions are herbal cannabis,¹⁵ which is produced in large quantities in countries such as the Netherlands, Spain, Italy, and the United Kingdom, and synthetic drugs (MDMA, amphetamines, etc.), of which the Netherlands is a major producer.¹⁶

Impact on Various Markets

In this context, the French market, which produces nothing but herbal cannabis and is highly dependent on imports, has been particularly affected by the partial closure of the European Union's external and internal borders. This is particularly true for cannabis resin, the most widely consumed drug in France, which fuels a criminal activity based mainly in southern Spain for wholesalers and in the outskirts of most large French cities for semi-wholesalers and retailers. The dynamism of this traffic is attested by the extremely high level of seizures recorded in France.

2020.

12 "Six Ways Coronavirus is Impacting Organized Crime in the Americas," Parker Asmann, Chris Dalby, Seth Robbins, *Insight Crime*, May 4, 2020.

13 "Covid-19 creates heroin shortage, leading to possible use of replacements like methadone," *Fox News*, April 22, 2020.

14 EMCDDA, Europol, *EU Drug Markets Report 2019*, Publications Office of the European Union, Luxembourg.

15 David Weinberger, Michel Gandilhon, Jalpa Shah, Nacer Lalam, "Illegal cannabis cultivation in Europe: new developments," *Echo Geo*, 4, 2019: <https://journals.openedition.org/echogeo/17704?lang=en>.

16 Following the confinement of populations and the suspension of festive events, which are the usual framework in which these substances are consumed, the synthetic drug market is at a standstill and there is hardly any need to return to it.

In 2018, more than 85 tons of cannabis resin was intercepted, the second highest level ever, and in the first months of 2019, the trends were still up.¹⁷ As an illustration, given the five million annual consumers, tens of tons are needed each month—27 tons according to the former OCRTIS (Central Office for the Repression of Illicit Drug Trafficking), now OFAST (Anti-Drug Office)—to feed the largest market in the European Union.

Cannabis Resin Confined in Spain

Thus, for the criminal groups that export cannabis resin from Morocco, where it is produced, several routes to Spain, which accounts for an average of three-quarters of the resin seizures made each year in the European Union, have been effectively cut off by the decision made by Morocco and Spain to close the borders. This is particularly true for the ferry routes that leave the Moroccan coast, notably from Tangier and Al Hoceima in the Rif region, where the resin is manufactured, and reaches the major cities of southern Spain such as Malaga, Algeciras, Almeria or Motril. These routes are usually heavily used by traffickers who load the cannabis resin into commercial and/or tourist vehicles. The only way to reach Spain was by sea. Normally, in addition to pleasure boats or fishing boats, Moroccan exporters use semi-rigid boats, each capable of carrying up to 3 tons of cannabis resin, which cross the Mediterranean at night to unload their merchandise on the coast or into the country by sailing up rivers such as the Guadarranque, renamed the “narco highway” by traffickers, and the Guadalquivir.

Some organizations can export up to 8 tons of resin per day.¹⁸ Disembarked, the hashish is received by teams working on behalf of wholesalers, many of them are French, installed in Andalusia where the heart of the wholesale market of cannabis destined for large French outlets is located. In 2018, nearly 84% of French cannabis resin seizures originated from Spain.¹⁹ Information made public by the Civil Guard at the end of March showed that, through these vectors, trafficking remained: cannabis resin continued to reach the Iberian Peninsula as evidenced by the persistent dismantling of a large number of networks.²⁰ In Morocco, the seizure of 44 tons of resin, intended for Spain, carried out on 19 April 2020 by the Royal Police showed that these circuits were still active.²¹

The problem traffickers faced was not so much importing the resin into

17 Source OCRTIS, 2019.

18 Source OCRTIS, 2018.

19 Source: OCRTIS, 2018.

20 The balance sheet for the second half of March 2020 is 5.5 tons of hashish seized, nine boats, for 58 traffickers arrested. AFP, “Hashish trafficking between Morocco and Spain continues during the epidemic,” April 1, 2019.

21 <https://www.bladi.net/maroc-saisie-d-une-importante-quantite-de-drogue-destinee-au-marche,67793.html>.

Spain, but getting it into France. Normally, teams specialized in the delivery are in charge of supplying retailers by road with convoys of big sedans: the famous go-fast, or go-slow, then they reach the big French cities via the motorways.²² Between March and the end of June, these strategic routes were closed. As France and Spain no longer allowed tourist vehicles to pass, or only exceptionally for border workers, controls were still reinforced in France on secondary roads. Thus, according to OFAST, in March, “the departures of vehicles in convoys of openers and go-fast type carriers were all cancelled or postponed as a precaution.” The entire logistics chain was disrupted by the closure of the borders and had to be reorganized to allow the trade to continue.

From that point on, there were several possibilities for traffickers. They could rely on road transportation of goods that were still allowed to cross the Spanish border, or they could use container ships from Morocco via the Tangier-Marseille line, which has been operating since 2017. It appears, in view of the few seizures that have been made, that criminal organizations have favored the first solution, as illustrated, among other things, by a case carried out last March on a truck supplying a large chain of stores.²³

Shortage on the French Cannabis Market

In a context marked by the near stoppage of traditional convoys, the use of road freight transport has not been sufficient to avoid a shortage of cannabis resin on a French market faced with both supply-side constraints and demand-side containment. As a result, cannabis seizures on the French market fell by almost 50% in March and April 2020 (5.6 tons) compared to the same period last year (11 tons).

The large outlets, known as suburb outlets are dependent on a just-in-time supply. According to some police estimates, this supply leaves them with a small autonomy of about ten days,²⁴ as they quickly ran out of product. A situation exacerbated by the fact that, during the days preceding the lockdown, on March 15, 2020, many consumers went to the outlets to stock up. Although many of them continued to operate, a clear slowdown in activity was observed: “Even in some very active cities (Vénissieux, West Lyon and Centre), the number of sales outlets dropped by more than half. In some cases monitored in Paris, the level of orders collapsed by 90% compared to the period before the lockdown.”²⁵ The observations carried out within the framework of TREND (Recent trends and new drugs)

22 This is why motorway routes concentrate most of the seizures made in France, i.e., 65% in 2018, source OCRTIS, 2019.

23 Source: OFAST, 2020.

24 OFAST, “The Impact of Covid-19 on Drug Trafficking.”

25 Source OFAST, 2020.

of the OFDT (French Monitoring Centre on drugs and drug addiction) in French metropolises largely confirmed this report.²⁶

Thus, as early as the week following the implementation of the lockdown, some sites in the system, such as Lille, Paris, and Marseille, reported a more or less significant drop in the number of people visiting the drug resale areas and a clear reduction in trafficking activity, without this activity being completely eliminated. In Marseille, retail outlets, which were traditionally open for 15 or 16 hours per day, had to reduce their hours considerably. The situation is the same in the suburbs of Lyon, while in Seine-Saint-Denis, where observations were extremely complicated, because transactions were now taking place inside buildings, the police noted a clear decrease in demand.²⁷

On the supply side, the shortage was reflected from the end of March onwards by increases in the wholesale and retail price of cannabis resin of +40 to +60% per kilogram.²⁸ In the Paris region, the TREND site reported a doubling of cannabis resin prices in some suburbs in the Yvelines, while in Paris it became more expensive than weed. In the Toulouse and Lyon areas, retail prices have risen sharply, by between 50% and 300%. The stability of prices observed in certain sales outlets did not mean that the market was functioning normally. In Marseilles, Rennes, and Toulouse, a form of rationing was at work, since the quantities served, for a price similar to that before lockdown, were smaller.

In this tense context, herbal cannabis, whose consumption has increased significantly in recent years in France,²⁹ has not been able to provide a real alternative to the shortage of cannabis resin, except perhaps in the north of France where industrial cannabiculture has increased significantly. Massively imported from Spain, in 2018, nearly 90% of the seizures made in France by the police were from that country,³⁰ and from the Netherlands, the sealing of the borders has hindered its circulation. If an increasingly massive local production has developed in France in recent years, it has certainly not been sufficient to meet the needs of the domestic market. At most, it has softened the blow for organizations involved in cannabis distribution that had developed their own local production structures.³¹

26 These observations led to the publication of two bulletins available online on the OFDT website: Clément Gérome, Michel Gandilhon, “Évolutions des usages et de l’offre de drogues au temps du Covid-19 : observations croisées du dispositif TREND,” OFDT, 2020.

27 Author’s personal source.

28 Source: OFAST, 2020.

29 Michel Gandilhon, Stanislas Spilka, Caroline Masson, Changes in the cannabis market in France, *Théma*, OFDT, 2019.

30 Source: OCRTIS 2019.

31 Caroline Masson, Michel Gandilhon, “Cannabis culture in France: from craft to industrial production,” *Cahiers de la sécurité et de la justice*, No. 43, 2018.

The Cocaine Market Under Pressure

Since the redirection of cocaine flows by Latin American traffickers at the end of the 1990s,³² the cocaine market in the European Union has become, after cannabis, the second most significant illicit drug market in terms of the number of users, 2.6 million users in the year among 15-34 year olds,³³ and turnover with a little more than 9 billion euros.³⁴ It is the same in France, where annual use has increased more than fivefold over the last twenty years.³⁵ Over time, cocaine has come to represent for French traffickers, with its 600,000 consumers in a year, a market as important as that of cannabis. A trend that has gone hand in hand with a takeover of “North African” organized crime to the detriment of the former milieu.

Cocaine imported into Europe, and more particularly into France, is produced in Colombia. This accounted for 70% of global production in 2017, where production increased fivefold between 2013 and 2017 to reach an all-time high of 1,379 metric tons,³⁶ from where it transits via Brazil and the West Indies. The vast majority of the production arrives on the European market by sea via container traffic (see graph 1). Thus the port of Le Havre, France’s leading commercial port, and recently Marseille, where the largest seizure ever made in France, over 3 tons, was made at the beginning of the year, have become strategic targets for traffickers, who are trying to establish their hold on the docks, as it is regularly illustrated by the dismantling of networks involving employees of the port industry. In addition to the maritime route, air routes are playing an increasingly important role in supplying the French market.

This has particularly been the case since 2011, with the very sharp increase in mule trafficking from Cayenne airport in French Guiana. Thus, in 2018, with more than 2 tons intercepted, either in luggage or *in corpore*, confiscations represent nearly 13% of total cocaine seizures made in France,³⁷ while Surinamese-Guyanese channels would contribute, according to some estimates, to supplying the French market with 15 to 20% of the quantities consumed each year.³⁸ Other significant sources of supply for small retail teams and user-dealers are the Netherlands and increasingly Belgium.

32 Michel Gandilhon, “Cocaine: a globalized commodity,” *Drugs, Health and Society* No. 1, Vol. 15, 2016.

33 EMCDDA, *European Report on Drugs*, Lisbon, 2020.

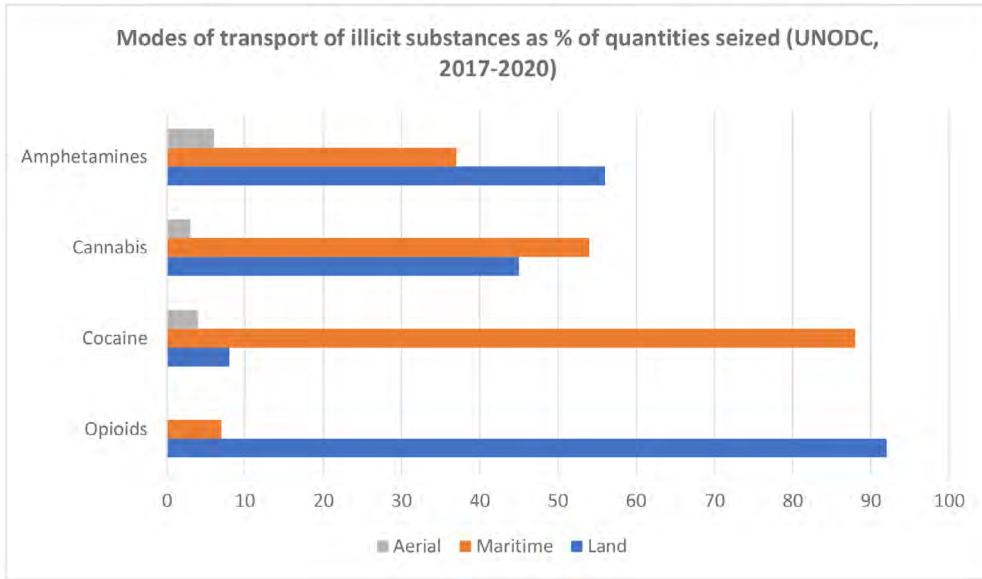
34 EMCDDA, EUROPOL, *EU Drugs Markets Report*, Luxembourg, 2020.

35 Stanislas Spilka et al., “Levels of illicit drug use in France in 2017,” *Trends* No. 128, OFDT, 2018.

36 Michel Gandilhon, “UNODC: the world of drugs reports,” *Swaps*, n° 92-93, 2020.

37 Source: OCRNIS/OFAST, 2019.

38 Senate Information Mission on Drug Trafficking from Guyana, David Weinberger, hearing June 17, 2020: http://www.senat.fr/commission/missions/trafic_de_stupefiants_en_provenance_de_guyane.html.



The latter has become a major transit point for cocaine via the port of Antwerp, where absolutely unprecedented seizures, nearly 62 tons in 2019 or more than 44% of seizures made in Europe, have occurred in recent years. This is also the case, but to a lesser extent, for the ports of Rotterdam, 38 tons seized in 2019, and Hamburg. The Netherlands and Belgium are therefore unavoidable for some of the European traffickers, as they are the largest *hubs* for cocaine redistribution in Western Europe.

On the demand side, as with synthetic drugs such as ecstasy, the festive and recreational dimensions of cocaine use are a key aspect of consumption as evidenced by studies based on wastewater analysis: “In the majority of countries with several surveyed cities, cocaine loads were generally higher in larger cities than in smaller ones. In addition to geographic variations, wastewater analysis can detect weekly fluctuations in illicit drug use patterns. More than three-quarters of cities had higher BE loads in wastewater on weekends (Friday through Monday) than on weekdays, which may reflect a more recreational consumption pattern.”³⁹

A demand shock

Given this reality, the closure of various party establishments and the suspension of large musical gatherings (raves, teknivals, etc.) across Europe, by confining *homo festivus*, has caused a shock in terms of demand. On the supply side, the situation is more complex to assess, even if it seems, in view of the seizures made during the first months of the year 2020, both in Latin America and in Europe, that maritime traffic has remained, at least initially, very active. Thus, according to

39 EMCDDA, *Wastewater analysis and Drugs: a European multi-study, Perspectives on Drugs*, Lisbon, 2020.

the UNODC, 17.5 tons of cocaine destined for Europe, were seized during the first quarter of 2020, most of which occurred in Brazil, which represents an increase of 20% compared to the same period of 2019.

Data published by the EMCDDA and Europol, covering the same period, i.e., at the very beginning of the pandemic crisis, show, for example, that seizures in the port of Antwerp, remained between January and March at high levels, equivalent to the same period of the year 2019.⁴⁰ Commercial traffic by container ship between Latin America and Europe has thus remained important in a context where stocks of cocaine are overflowing in Colombia,⁴¹ while the closure measures taken by this country on March 17, in a context where chaos reigns on its border with Venezuela, have probably had, despite problems of supply of precursors,⁴² only a very relative effectiveness.⁴³ It seems, however, that the tensions in the global demand for cocaine have had a visible impact on certain markets in the subcontinent. In Peru, for example, according to an official report, the price of coca leaf fell by 46% and the price of a kilogram of cocaine by almost 60% between January and April 2020, from \$1,740 to \$734.⁴⁴

Impact in France

The cocaine market in France, such as cannabis resin, was marked by a double shock—a shock linked to the demand with the confinement measures and the suspension of festive events and a shock linked to the supply. Since the airlines with Guyana were suspended and that it was, taking into account the closing of the borders with Belgium more difficult for the traffickers to get supplies in the Netherlands where the principal wholesale market of cocaine in Western Europe is located.⁴⁵ As a result, the first month of containment was marked by price increases in all regions, except in the north of France where the market in Lille continued to be partially supplied from the Netherlands.

In Bordeaux and Rennes, the most common price rose from 60/70 euros to 80/100 euros, while in Lyon, the increases were slightly more significant, with the retail price per gram rising in some cities from 60/70 euros to 80/90 euros or even 100 euros.⁴⁶ However, the absence of data on the purity of the products circulating

40 EMCDDA, EUROPOL, EU Drug Markets, Impact of COVID-19, Luxembourg, May 2020.

41 In Colombia, the Golfo cartel alone, whose stronghold is in the eponymous region of Uraba, is said to have stocks estimated at 40/45 tons.

42 UNODC, COVID-19 and the drug supply chain: from production and trafficking to use, Vienna, 2020.

43 Michel Gandilhon, op. cit, 2020.

44 “Peru’s cocaine prices plummet due to pandemic,” Lima, AFP, May 2, 2020.

45 In Lille, the retail prices of cocaine have even decreased from 60/70 euros to 50 euros, due to the decrease in demand. However, the Lille site, during the first observation exercise, reported the circulation of scams.

46 Clément Gérome, Michel Gandilhon, op.cit., 2020.

does not allow a full assessment of the real state of the supply of cocaine on the French market because dealers, faced with smaller quantities available, may have resorted to cutting the product on a massive scale. This seems to have been the case in Marseille, where the few rare analyses carried out within the framework of the OFDT's SINTES showed a significant decrease in levels in a general context where "scams" were proliferating. In Toulouse, Rennes and Paris, rumors were also circulating about the product being blended.

Disruptions still to come

Even after deconfinement, trafficking in Europe and France is likely to continue to be affected. It is reasonable to believe that the coming global economic crisis, and the subsequent drop in world trade, will strongly slow down the traffic of goods by containers (and therefore the flow of cocaine) as the professionals of the sector were able to note at the end of the first quarter: "The effects of the economic crisis linked to the pandemic are now also manifested by a slowdown in world consumption and European exports which will significantly impact the container and ro-ro traffic for import and export in April."⁴⁷

This is, in any case, the prognosis of the United Nations Container Control Program (CCP) at a global scale, which through the voice of its director Bob Van Den Berghe said that "*the quantity of container movements at the global level has really decreased. And so has the circulation of drugs.*" Fewer containers means less cocaine, even if traffickers have already reacted by increasing the quantities sent per shipment, and more possibilities of surveillance for customs in a context where law enforcement agencies have decided to increase the surveillance of ports. Antwerp customs, following the lead of the port of Santos in Brazil, have announced in October 2019 that it would introduce systematic surveillance and check-ups of ships from high-risk countries (Colombia, Brazil, etc.).⁴⁸ In addition, in terms of demand, at the time of writing, festive establishments and large musical gatherings in France and many European countries have still not resumed their activities.

Balkan Heroin Route Cut Off

Given the level of consumption, the European heroin market is less strategic for organized crime. However, it would be a mistake to neglect it. Indeed, it is far from being marginal in the European Union. With 7.5 billion euros, it is the third largest market in terms of turnover behind cannabis and cocaine.⁴⁹ Segments of organized crime continue to be interested in it, as shown

47 Actu transport logistique, "Haropa records a drop in container traffic," 9 April 2020.

48 "Cocaine: customs wants to scan 100% of containers at the port of Antwerp," *Le Vif L'Express*, 16 October 2019.

49 EMCDDA, *op. cit.*, 2019.

by the recent dismantling of heroin production laboratories in the Netherlands, Bulgaria and the Czech Republic,⁵⁰ or in France marked by the noticeable presence of the Albanian mafia in this field of activity.

The two years have also been marked by very high levels of opium production in Afghanistan and seizures in the European Union have increased sharply in 2018.⁵¹ The closure of the Schengen area, as well as Turkey's decision to close its borders with Bulgaria and Greece, the Western European market have made the European market more difficult for traffickers to invest. This difficulty was made worse by the closure last February of the land borders of Iran and Turkey through which heroin passes when it leaves Afghanistan, as evidenced by the attempts to bypass this route through the seas.

For example, last April, 700 kilos of heroin and 80 kilos of opium were seized in the port of Karachi, Pakistan, bound for the port of Antwerp.⁵² While heroin continued to be smuggled through authorized cargo, the flows have declined sharply, with most European countries reporting a sharp decline in the availability of heroin, particularly in Central Europe, and even shortages.

The French heroin market has thus been profoundly affected by the closure of the European Union's external and internal borders. In the case of cocaine, the difficulties of access to the secondary redistribution market in the Netherlands for criminal groups and small networks of user-dealers have caused great tension on the market in terms of availability, which has manifested itself in more or less significant price increases. According to OFAST, the average retail price of heroin has risen by 30%.

Assessment and Prospects

In view of all these elements, there is little doubt that drug trafficking, on a global scale, as well as in Europe, has experienced serious disruptions, illustrating its close dependence on the major flows of neoliberal globalization. The cannabis resin market is practically paralyzed due to the closure of the borders in Morocco and Spain; the market for cocaine and synthetic drugs is under pressure due to decreasing demand and the logistical problems posed by the decline in world maritime trade and the closure of the Schengen area; the market for heroin has slowed, as tighter internal and external border controls in the European Union have clearly hampered trafficking, demonstrating that the smooth world of free trade provides an optimal setting for the activities of a variety of transnational and national criminal groups.

50 EMCDDA /OEDT, *European Drug Report 2019, Trends and Developments*, Luxembourg, 2020.

51 EMCDDA, Europol, *op. cit.*, 2019.

52 https://www.rtbf.be/info/societe/detail_coronavirus-la-drogue-circule-moins-mais-en-plus-grande-quantite?id=10491045

In France, for example, on the basis of a number of quantitative indicators, such as the level of drug seizures and the number of arrests for drug offences, or qualitative indicators, such as regional assessments of the availability and accessibility of various illicit substances, OFAST has estimated the fall in trafficking activity at almost 30-40%.⁵³ Although it is now difficult to measure the impact, particularly financial, of the pandemic and the measures taken by States to subdue it, on drug-related organized crime, it nevertheless seems that the latter has shown significant resilience and adaptability.

The various sectors that make a living from it, thanks to their involvement in a dynamic market estimated at several billion euros, undoubtedly had the financial means to deal with the crisis. The most vulnerable are, a priori, the networks located at the retail stage, due to the delicate management of the large workforce that is consubstantial with the division of labor required for large sales outlets. In a country like France, where certain parts of the territory, especially in the outskirts of the metropolises, are controlled by gangs linked to trafficking, the social peace that some thought was threatened by the more or less complete interruption of the “business” has not been called into question. The hypothesis of a recurrence of the events of November 2005 has not been considered.

The drop in activity and the lay-off of tens of thousands of small traffic workers (lookouts, dealers,⁵⁴ « nannies », deliverymen, etc.) did not seem to have affected the capacity of criminal organizations to control territory, as the few outbreaks of urban⁵⁵ violence that occurred here and there⁵⁶ were simply a continuation of what French society has been experiencing for the past forty years or so.⁵⁷ In the same way, the fears expressed by Europol concerning an increase in settlements of accounts generated by an aggravation of competition between the different gangs in a context of scarcity of resources, have proved to be unfounded on the whole, at least as far as France is concerned.

It is not just a question of saying that traffickers have forged effective responses to an unprecedented situation by finding, for example, new supply routes or by developing home delivery via social networks. No. It is a question of their ability, at a time of unprecedented intensity, of a sort of life-size crash test, to hold

53 OFAST, “The Impact of Covid-19 on Drug Trafficking,” Memo No. 2020-01, Strategy Unit, June 15, 2020.

54 Christian Ben Lakhdar, *Le trafic de cannabis en France, estimation du gain des dealers afin d’apprécier le potentiel de blanchiment*, OFDT, 2007.

55 Between March 17 and May 5, 379 incidents of urban violence against police officers, including 79 ambushes, were recorded in the sectors under the jurisdiction of the National Police Headquarters and the Paris Police Prefecture.

56 According to Xavier Raufer (CNAM), of the 700 most at-risk neighborhoods, 10% were affected by urban violence, *Le Figaro*, “La carte des violences urbaines pendant le confinement,” May 6, 2020.

57 *Le Figaro*, op. cit.

a territory and a population. The provisional lesson that can be drawn from the last few months is that the legitimacy of the kingpins, in relation to the inhabitants (and even the municipalities⁵⁸), who control trafficking in the cities, based on the redistribution of part of the financial manna, seemed to remain intact.

We have observed in certain neighborhoods, as in Mexico or Brazil, where certain gangs ensured the application of hygiene measures,⁵⁹ while distributing food packages,⁶⁰ drug dealers, duly equipped with masks, calling on the population to respect the lockdown. A means to assert their domination over the population and to send a strong message to a State that no longer has a monopoly on biopolitics. Will this situation persist in the event of a second epidemic wave?

Nowadays, even if an undeniable recovery of the drug market has been observed by law enforcement agencies⁶¹ and stocks of narcotics are being reconstituted, a return to normalcy is not yet on the agenda, particularly in France: the borders with Morocco are still closed; the cocaine networks in Guyana are still at a standstill; collective festive events, the epicenter of the use of stimulating substances, have not resumed. Therefore, the most realistic scenario in the coming months is that of a persistent slump, marked by more or less localized exits and returns from confinement and marked by the maintenance of border controls in an international context of regional outbreaks of the epidemic.

All of this is taking place against the backdrop of a global economic crisis affecting international trade and final demand due to mass unemployment and wage austerity. It is not enough that stocks are full, they must be able to be liquidated. The spectre of overproduction does not only concern the legal economies.

58 Didier Daeninckx, *Municipales. Banlieue naufragée*, Gallimard, 2020.

59 Parker Asman, "What does Coronavirus mean for Criminal Governance in Latin America?" March 31, 2020, Insight Crime: <https://www.insightcrime.org/news/analysis/criminal-governance-latin-america-coronavirus/>.

60 *Le Monde*, Covid-19, des "narcos" à toute épreuve, 14-15 June 2020.

61 Especially since the reopening of Spain's borders with the rest of the EU on June 21, 2020.