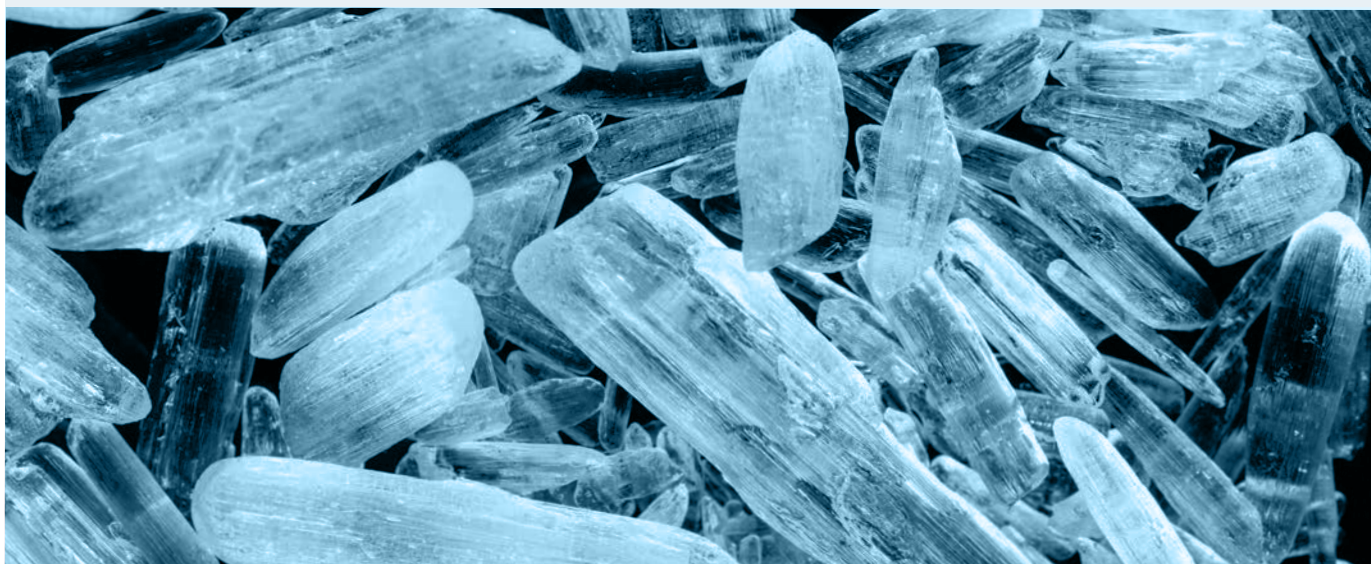




AMPHETAMINE-TYPE STIMULANTS

- The weight of amphetamine-type stimulants (ATS) seized globally between 2008 and 2018 increased, primarily due to methylamphetamine seizures.
 - Methylamphetamine accounted for the greatest proportion of the weight of ATS seized globally in 2018.
 - The weight of ecstasy seized globally increased in 2018, while the weight of amphetamine seized decreased.
- Drug profiling data of analysed border and domestic seizures indicate the proportion of methylamphetamine manufactured using P2P-based methods has increased in recent years.
- Following a prolonged period of growth, indicators of supply and demand for ATS (especially methylamphetamine) remains large and showed some signs of further expansion in 2019–20:
 - While the number of ATS (excluding MDMA) detections at the Australian border decreased in 2019–20, the weight detected increased and is the highest weight on record.
 - The number and weight of national ATS seizures increased to record levels in 2019–20. The number of national ATS arrests also increased to a record level this reporting period.
 - Data from the National Wastewater Drug Monitoring Program (NWDMP) indicate the population-weighted average consumption of methylamphetamine decreased in capital city and regional sites from August 2019 to record low levels in August 2020.
- Despite some decreases, indicators of supply and demand for MDMA point to a relatively stable market:
 - Both the number and weight of MDMA detections at the Australian border decreased in 2019–20.
 - Data from the NWDMP indicate the population-weighted average consumption of MDMA increased in capital city sites and decreased in regional sites from August 2019 to August 2020.
 - The number of MDMA laboratory detections nearly doubled in 2019–20.
 - The number of national MDMA seizures decreased in 2019–20, while the weight of MDMA seized increased.





CANNABIS

- Cannabis continues to be one of the largest illicit drug markets globally and remained the most consumed and seized drug in 2018.
 - While cannabis herb accounted for the greatest proportion of the weight of cannabis seized globally in 2018, the weight of cannabis herb seized decreased, whereas the weight of resin seized increased.
- Indicators of cannabis demand and supply in Australia point to a large and potentially expanding market.
 - While the number of cannabis detections at the Australian border increased in 2019–20, the weight of cannabis detected decreased.
 - Both the number and weight of national cannabis seizures increased to record levels in 2019–20.
 - The number of national cannabis arrests increased in 2019–20 and is the third highest number on record.
 - A record number of cannabis oil extraction laboratories were detected nationally in 2019–20.
 - According to the National Wastewater Drug Monitoring Program, the population-weighted average consumption of cannabis increased in both capital city and regional sites (to a record regional high) from August 2019 to August 2020.





HEROIN

- While illicit opium production remained relatively stable in 2019, the area under opium cultivation worldwide decreased by almost a third.
- Afghanistan remains the largest cultivator of illicit opium in the world.
 - Forensic profiling of both border and domestic seizures indicates that the vast majority of heroin in Australia originates from South-East Asia.
- While the weight of opiates (including heroin and opium) seized globally decreased in 2018, it is the third highest weight on record.
 - Opium accounted for the greatest proportion of the weight of opiates seized globally in 2018.
- The number and weight of global opiate border seizures increased in 2019, with the number of opiate seizures the highest in the decade and the weight three times that seized in 2018.
- Overall, indicators of heroin supply and demand in Australia point to a small but potentially expanding market:
 - Both the number and weight of heroin detections at the Australian border decreased in 2019–20.
 - The number and weight of national heroin seizures increased in 2019–20, with the number of seizures increasing to a record level.
 - The number of heroin and other opioid arrests increased and is the highest reported in the last decade.
 - According to the National Wastewater Drug Monitoring Program, the population-weighted average consumption of heroin from August 2019 to August 2020 increased to record levels in capital city sites and decreased in regional sites. However, consumption remains low relative to methylamphetamine.





COCAINE

- Cocaine remains among the most consumed and seized drugs worldwide, with the weight of cocaine seized globally reaching a record level in 2018.
- While the total area under coca bush cultivation remained relatively stable in 2018, the estimated weight of cocaine produced globally increased to a record level.
- Colombia produces the majority of the world's cocaine, with drug profiling indicating that the majority of both border and domestic cocaine seizures in Australia originated in Colombia.
- Indicators of supply and demand point to a continued expansion of the cocaine market in Australia.
 - The number of cocaine detections at the Australian border remained relatively stable in 2019–20, while the weight detected decreased.
 - The weight of cocaine seized nationally decreased in 2019–20, while the number of seizures increased and is the highest on record.
 - There was a record number of national cocaine arrests in 2019–20.
 - According to the National Wastewater Drug Monitoring Program, the population-weighted average consumption of cocaine increased in both capital city and regional sites from August 2019 to August 2020.





OTHER DRUGS

- Compared to other illicit drug markets in Australia, substances within the ‘other drugs’ category can be described as niche markets. However, these markets are diverse and dynamic and include a range of drugs which merit ongoing monitoring in order to identify new trends, as well as emerging areas of potential harm.
- In 2019–20, the anabolic steroids and other selected hormones market remained small and relatively stable. The markets for anaesthetics, illicit pharmaceuticals and new psychoactive substances (NPS) show a mixed picture, while the tryptamines market shows signs of potential expansion.
- Indicators of demand and supply for ‘other drugs’ in Australia in 2019–20 provide a mixed picture:
 - There was a record number of opioid and tryptamine detections at the Australian border. Both the number and weight of national hallucinogen and other opioid seizures increased and there was a record number of national hallucinogen arrests.
 - According to the National Wastewater Drug Monitoring Program, the population-weighted average regional consumption of fentanyl decreased to a record low level in August 2020.
 - The number of performance and image enhancing drugs detected at the Australian border increased. The number of national steroid seizures decreased, while the weight of steroids seized nationally increased.
 - There was a record number of GHB/GBL laboratories detected nationally.
 - The number of NPS detections at the Australian border increased, with the number of anaesthetics and pharmaceuticals detections decreasing.
 - Forensic profiling indicates both amphetamine-type substances and cathinone-type substances accounted for the greatest proportion of the number of analysed border NPS seizures, with amphetamine-type substances continuing to account for the greatest proportion of the weight seized.





CLANDESTINE LABORATORIES AND PRECURSORS

- The trafficking of precursor chemicals used in illicit drug production is a global market in itself, with the range of chemicals used worldwide to produce illicit drugs—including amphetamine-type stimulants (ATS)—increasing.
- Indicators of domestic illicit drug production in 2019–20 provide a mixed picture:
 - After decreasing for seven consecutive reporting periods, the number of clandestine laboratories detected nationally increased.
 - The majority of laboratories detected nationally continue to be addict-based (small scale) and located in residential areas.
 - While the proportion of clandestine laboratories manufacturing ATS (excluding MDMA) decreased, they continue to account for the greatest proportion of national detections, with methylamphetamine the main drug produced.
 - The number of clandestine laboratories detected nationally manufacturing GHB/GBL increased to a record 23 laboratories.
 - The number of ATS (excluding MDMA) precursors detected at the Australian border more than doubled, while the weight decreased.
 - Both the number and weight of MDMA precursors detected at the Australian border increased, but remain relatively low.

