



CANNABIS



KEY POINTS

- 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.

National cannabis market decade trend: comparison between 2010–11 and 2019–20

| Border detections | | National seizures | | National arrests |
|-------------------|--------------|-------------------|--------------------|------------------|
| Number | Weight | Number | Weight | |
| ⬆ 501% | ⬆ 839% | ⬆ 25% | ⬆ 96% | ⬆ 30 % |
| 2,137 → 12,846 | 69kg → 648kg | 50,073 → 62,454 | 5,452kg → 10,662kg | 58,760 → 76,669 |

| Price ^a (\$) | DUMA ^b urinalysis | NDSHS ^c | |
|----------------------------|---------------------------------|--------------------|------------|
| | | Use in lifetime | Recent use |
| ⬆ | ⬇ | ⬆ | ⬆ |
| \$25.00 → \$27.50 | 45% → 44% | 35% → 37% | 10% → 12% |

a. National median price for a street deal (1 gram) of hydroponic cannabis.

b. Drug Use Monitoring in Australia program. Data reflects the proportion of detainees testing positive to cannabis.

c. National Drug Strategy Household Survey. Data is for 2010 and 2019 and reflects the proportion of the Australian population aged 14 years or older who reported having used marijuana/cannabis.

MAIN FORMS

Cannabis is derived from plants within the Cannabis genus, in particular the two species *Cannabis sativa* and *Cannabis indica*.

- Cannabis plants can grow in a range of climates, as well as indoors through the use of hydroponic cultivation.
- The primary cannabinoid and main psychoactive ingredient in cannabis is delta-9 tetrahydrocannabinol, commonly known as THC, which is concentrated in the leaves and flowering head of the plant.
- The three main forms of cannabis are herb, resin and oil.
 - Herbal cannabis comprises the dried flowers and leaves of the plant, is usually smoked, and is the least potent form.
 - Cannabis resin ('hashish') is produced from the compressed resin glands of the cannabis plant. Resin can be smoked or added to food.
 - Cannabis oil, the most potent form of cannabis, is obtained from the resin and generally applied to cannabis herb or tobacco and smoked (CIS 2019).

INTERNATIONAL TRENDS

Cannabis continues to be the most commonly used illicit drug worldwide, with an estimated 192 million people reporting cannabis use in the previous 12 months in 2018. In the period 2010 to 2018, 151 countries reported cannabis cultivation. There was an increase in the weight of cannabis plants seized and the area under cultivation that was eradicated in 2018 compared to 2017; however, there was a decrease in the number of cannabis plants eradicated and the number of cannabis sites eradicated globally in the same period (UNODC 2020a).

Based on United Nations Office on Drugs and Crime (UNODC) data, cannabis remains the most seized drug worldwide. Over the last decade the number of cannabis seizures (herb and resin) increased 40 per cent, from 1 million in 2008 to 1.4 million in 2018. In contrast, the weight of cannabis (herb and resin) seized over the same period decreased 23 per cent to 5,610.0 tonnes in 2018. In 2017, 6,273.5 tonnes was seized. The weight of cannabis herb seized globally decreased 16 per cent, from 5,112.0 tonnes in 2017 to 4,303.0 tonnes in 2018. In contrast, the weight of cannabis resin seized globally increased 13 per cent, from 1,161.5 tonnes in 2017 to 1,307.0 tonnes in 2018 (UNODC 2020a; UNODC 2020b).

Compared to 2010, the weight of cannabis herb seized in North America in 2018 decreased 84 per cent, however the weight seized in the rest of the world almost doubled over the same period. Paraguay accounted for the greatest proportion of the weight of cannabis herb seized in 2018 (24 per cent), followed by the United States (US; 11 per cent) and India (9 per cent). The Americas accounted for 61 per cent of the weight of cannabis herb seized globally in 2018, with South America accounting for 43 per cent of this total. This was followed by Africa (19 per cent), Asia (13 per cent), Europe (7 per cent) and Oceania (less than 1 per cent; UNODC 2020a; UNODC 2020b).

Spain accounted for the greatest proportion of the weight of cannabis resin seized globally in 2018 (34 per cent), followed by Pakistan (14 per cent), Afghanistan (14 per cent) and the Islamic Republic of Iran (8 per cent). Western and Central Europe accounted for around half of the weight of cannabis resin seized globally in 2018 (51 per cent), followed by the Near and Middle East/South-West Asia (36 per cent) and North Africa (8 per cent). These three subregions accounted for 95 per cent of the weight of cannabis resin seized in 2018 (UNODC 2020a; UNODC 2020b).

According to the World Customs Organization (WCO), the number of cannabis seizures and the weight of cannabis seized globally by WCO agencies continued to decrease in 2019. The number of cannabis seizures decreased 5 per cent, from 10,678 in 2018 to 10,168 in 2019. The weight of cannabis seized decreased 24 per cent, from 708,612.5 kilograms in 2018 to 540,847.1 kilograms in 2019. Herbal cannabis accounted for the greatest proportion of the number and weight of cannabis seized in 2019 (65 per cent of the number and 59 per cent of the weight seized). This was followed by cannabis resin, which accounted for 21 per cent of the number and 1 per cent of the weight of cannabis seized (WCO 2020).

DOMESTIC TRENDS

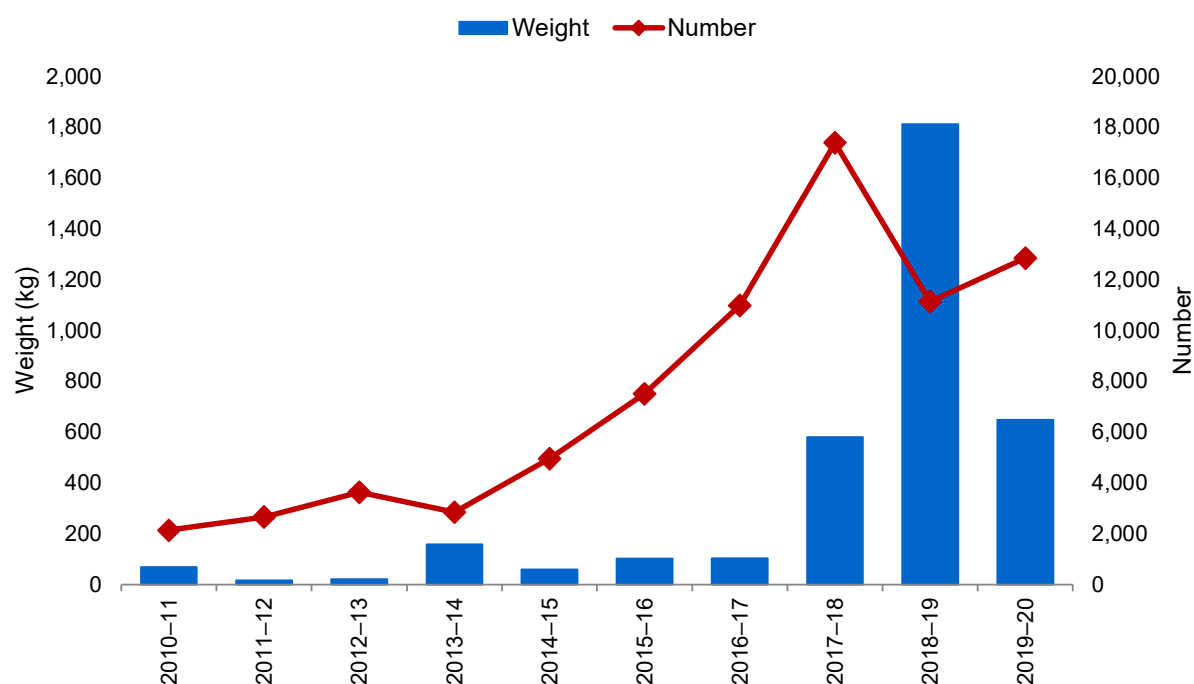
AUSTRALIAN BORDER SITUATION

The number of cannabis detections at the Australian border increased 501 per cent over the last decade, from 2,137 in 2010–11 to 12,846 in 2019–20, with the number of detections displaying an increasing trend over the decade. The number of cannabis detections increased 15 per cent this reporting period from 11,133 in 2018–19.

The weight of cannabis detected increased 832 per cent over the last decade, from 69.6 kilograms in 2010–11 to 648.6 kilograms in 2019–20. Despite some fluctuations, the weight detected also displays an increasing trend over the decade. The weight of cannabis detected decreased 64 per cent this reporting period from a record 1,811.7 kilograms²⁹ in 2018–19 (see Figure 10).

In 2019–20, 46 of the 12,846 cannabis detections (<1 per cent) weighed one kilogram or more. With a combined weight of 184.7 kilograms, these 46 detections account for 28 per cent of the weight of cannabis detected in 2019–20.³⁰

FIGURE 10: Number and weight of cannabis detections at the Australian border 2010–11 to 2019–20 (Source: Department of Home Affairs)



²⁹ In 2018–19 a single cannabis detection weighed 1,500 kilograms.

³⁰ See Appendix 2 for significant border detections of cannabis in 2019–20.

IMPORTATION METHODS

In 2019–20, detections of cannabis at the Australian border occurred in the air cargo, air passenger/crew, international mail and sea cargo streams. By number, international mail accounted for the greatest proportion of cannabis detections (94 per cent), followed by air cargo (6 per cent), air passenger/crew (<1 per cent) and sea cargo (<1 per cent). By weight, international mail accounted for the greatest proportion of detections (70 per cent), followed by air cargo (28 per cent), sea cargo (1 per cent) and air passenger/crew (1 per cent).

EMBARKATION POINTS

In 2019–20, 50 countries were identified as embarkation points for cannabis detected at the Australian border, compared to 49 countries in 2018–19. By weight, the US continued to be the primary embarkation point for cannabis detected in 2019–20. Other key embarkation points by weight this reporting period include the United Kingdom, Spain, China (including Hong Kong), Canada, the Netherlands, Colombia, Turkey, New Zealand and Ireland.

DOMESTIC MARKET INDICATORS

No single dataset provides a comprehensive picture of illicit drugs, or the Australian illicit drug market. Each has benefits and limitations, and it is only through the layering of multiple data that we are able to enhance our understanding of the extent of the supply and demand trends in Australia's illicit drug markets.

The National Drug Strategy Household Survey (NDSHS) collects self-report information on alcohol, tobacco and illicit drug use among the general population and also surveys people's attitudes and perceptions in relation to these. Conducted approximately every three years, the related report presents estimates derived from survey responses weighted to the appropriate Australian population. According to NDSHS data:

- The proportion of the Australian population aged 14 years or older who reported having used cannabis at least once in their lifetime remained relatively stable over the last decade, increasing from 35 per cent in 2010 to 37 per cent in 2019. In 2016 this proportion was 35 per cent.
- The proportion of the Australian population aged 14 years or older who reported having recently³¹ used cannabis also remained relatively stable over the last decade, increasing from 10 per cent in 2010 to 12 per cent in 2019. In 2016 this proportion was 10 per cent (AIHW 2020).

The National Wastewater Drug Monitoring Program (NWDMP) collects wastewater samples every two months in capital city sites and every four months in regional sites. Aimed at acquiring data on the population-scale use of substances causing potential harm, the Program provides a measure of the consumption of 13 illicit and licit drugs. Since the Program began measuring cannabis consumption in August 2018 the population-weighted average consumption increased in both capital city and regional sites. According to data from the NWDMP for August 2019 to August 2020:

- Cannabis consumption was higher per capita in regional sites than capital city sites.
- The population-weighted average consumption of cannabis in capital city sites increased.
- The population-weighted average consumption of cannabis in regional sites increased to a record high in August 2020 (ACIC 2021).

31 In the NDSHS, recent use refers to reported use in the 12 months preceding the survey.

The below data reflect drug use within sentinel groups. As such, they are not representative of all people who use drugs, or drug use in the general population. However, they provide valuable insight into patterns of drug use and market trends and can assist in the identification of emerging issues that require further monitoring.

The Illicit Drug Reporting System (IDRS) collects self-report information on drug use and related harms annually from individuals in Australian capital cities who regularly inject drugs. According to IDRS data:

- Over the last decade, the proportion of respondents reporting cannabis as their drug of choice remained relatively stable, decreasing from 7 per cent in 2011 to 6 per cent in 2020. In 2019 this proportion was 8 per cent.
- The proportion of respondents reporting the recent use³² of any form of cannabis decreased over the last decade, from 79 per cent in 2011 to 67 per cent in 2020, the lowest proportion recorded in the last two decades. In 2019 this proportion was 74 per cent.
- The reported median number of days of cannabis used in the six months preceding interview decreased over the last decade, from 180 days in 2011 to 160 days in 2020. In 2019 the median number of days was 130 (Peacock et al 2021).

The Ecstasy and Related Drugs Reporting System (EDRS) collects self-report information on drug use and related harms annually from individuals in Australian capital cities who regularly use ecstasy and other stimulants. According to EDRS data:

- The proportion of respondents reporting cannabis as their drug of choice increased over the last decade, from 20 per cent in 2011 to 26 per cent in 2020. This proportion remained unchanged from 2019.
- The proportion of respondents reporting the recent use of cannabis remained relatively stable over the last decade, increasing from 85 per cent in 2011 to 88 per cent in 2020. In 2019 this proportion was 85 per cent.
- The reported median number of days of cannabis use in the six months preceding interview remained unchanged in 2011 and 2020 at 48 days. In 2019 the median number of days was 60 (Peacock et al. 2020).

The Drug Use Monitoring in Australia (DUMA) program collects criminal justice and drug use information on a quarterly basis from police detainees, comprising an interviewer-assisted self-report survey and the voluntary provision of a urine sample, which is tested to detect licit and illicit drug use.³³ According to DUMA data:

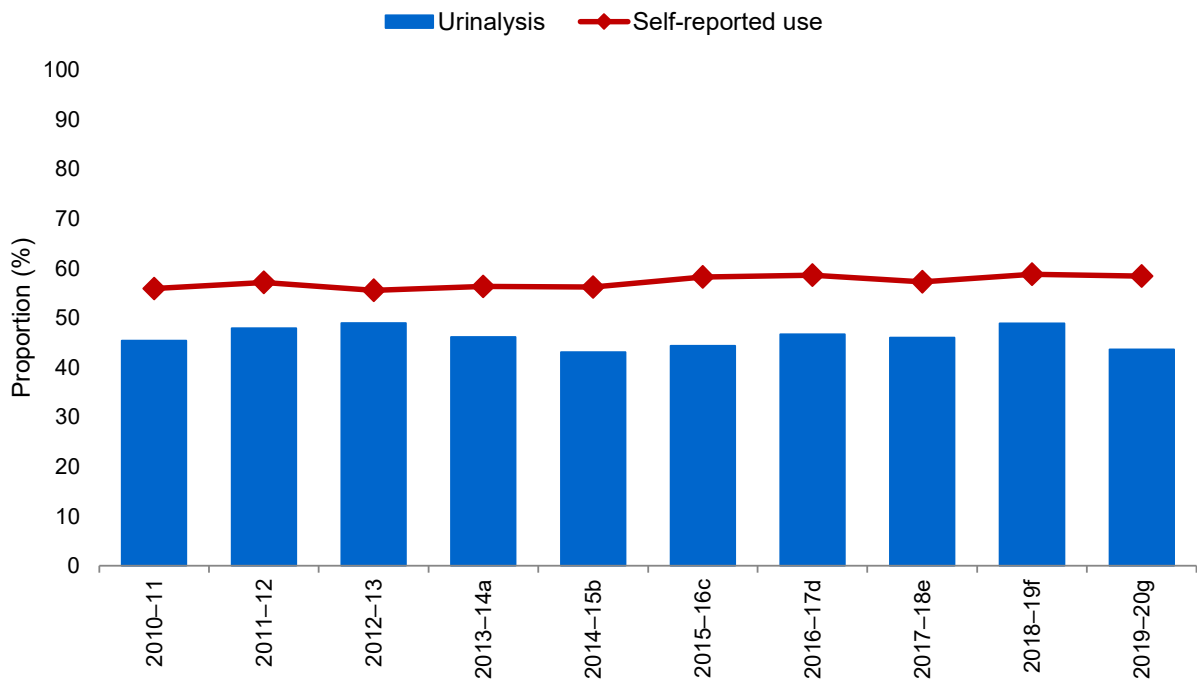
- Over the last decade the proportion of detainees testing positive to cannabis decreased slightly, while self-reporting cannabis use remained relatively stable.
- The proportion of detainees testing positive to cannabis over the last decade ranged from 43 per cent in 2014–15 to 49 per cent in 2012–13 and 2018–19. In 2019–20 this proportion was 44 per cent.
- The self-reported recent use³⁴ of cannabis among detainees over the last decade ranged from 56 per cent in 2012–13 to 59 in 2018–19. In 2019–20, this proportion was 58 per cent (see Figure 11).

32 In both the IDRS and EDRS studies, recent use refers to reported use in the six months preceding interview.

33 Detainees can participate in the survey without providing a urine sample. Cases with missing data are excluded from the relevant analysis.

34 Recent use in the DUMA program refers to self-reported use in the 12 months prior to arrest.

FIGURE 11: National proportion of detainees testing positive for cannabis compared with self-reported recent use, 2010–11 to 2019–20 (Source: Australian Institute of Criminology)



- a. Urine was collected in the third and fourth quarter of 2013 and the first quarter of 2014.
- b. Urine was collected in the third quarter of 2014 and the first and second quarter of 2015.
- c. Urine was collected in the third quarter of 2015 and the first and second quarter of 2016.
- d. Urine was collected in the third quarter of 2016 and the second quarter of 2017.
- e. Urine was collected in the third quarter of 2017 in Adelaide, Brisbane and Perth; the fourth quarter of 2017 in Bankstown; and the first quarter of 2018 in Adelaide, Brisbane, Perth and Surry Hills.
- f. Urine was collected in the third quarter of 2018 in Adelaide, Brisbane and Perth; the fourth quarter of 2018 in Bankstown; and the first quarter of 2019 in Adelaide, Brisbane, Perth and Surry Hills.
- g. Urine was collected in the third quarter of 2019 in Adelaide, Brisbane and Perth; the fourth quarter of 2019 in Bankstown; and the first quarter of 2020 in Adelaide, Brisbane, Perth and Surry Hills.

CLANDESTINE LABORATORIES

The number of cannabis oil extraction laboratories detected nationally increased over the last decade, from 3 in 2010–11 to a record 29 in 2019–20. This reporting period the number increased from 18 in 2018–19 (see *Clandestine Laboratories and Precursors* chapter).

PRICE

At the street level, the price of cannabis is generally measured as a 'deal' (approximately 1 gram). Nationally, the price range for 1 gram of hydroponic cannabis head increased over the last decade, from between \$20 and \$75 in 2010–11 to between \$20 and \$100 in 2019–20. In 2018–19 the reported price ranged between \$10 and \$100. The national median price for 1 gram of hydroponic cannabis head increased over the last decade (from \$25 in 2010–11 to \$27.50 in 2019–20). In 2018–19 the national median price was \$23.75.

Nationally, the price range for 1 ounce (28 grams) of hydroponic cannabis head increased over the last decade, from between \$200 and \$480 in 2010–11 to between \$200 and \$600 in 2019–20. In 2018–19 the reported price ranged between \$200 and \$500. The national median price for 1 ounce of hydroponic cannabis head decreased over the last decade, from \$340 in 2010–11 to \$325 in 2019–20, an increase from \$302.50 in 2018–19.



Nationally, the price range for a single mature hydroponic cannabis plant decreased over the last decade, from between \$1,500 and \$15,000 in 2010–11 to between \$2,000 and \$5,000 in 2019–20 (reported in New South Wales). In 2018–19 the reported price ranged between \$3,000 and \$5,000.

The price for 1 gram of resin increased over the last decade, from between \$25 and \$50 in 2010–11 (reported in New South Wales and Queensland) to \$50 in 2019–20 (reported in Tasmania). In 2018–19 the price ranged between \$25 and \$50.

AVAILABILITY

User surveys indicate that the availability of both hydroponic cannabis and bush cannabis³⁵ decreased this reporting period.

In a 2020 national study of people who regularly inject drugs, the proportion of respondents reporting hydroponic cannabis as 'easy' or 'very easy' to obtain decreased, from 88 per cent in 2019 to 81 per cent in 2020, the lowest proportion recorded in the last decade and a decrease from the 94 per cent reported in 2011. The proportion of respondents reporting bush cannabis as easy or very easy to obtain decreased, from 78 per cent in 2019 to 68 per cent in 2020, the lowest proportion recorded in the last decade and a decrease from the 76 per cent reported in 2011 (Peacock et al. 2021).

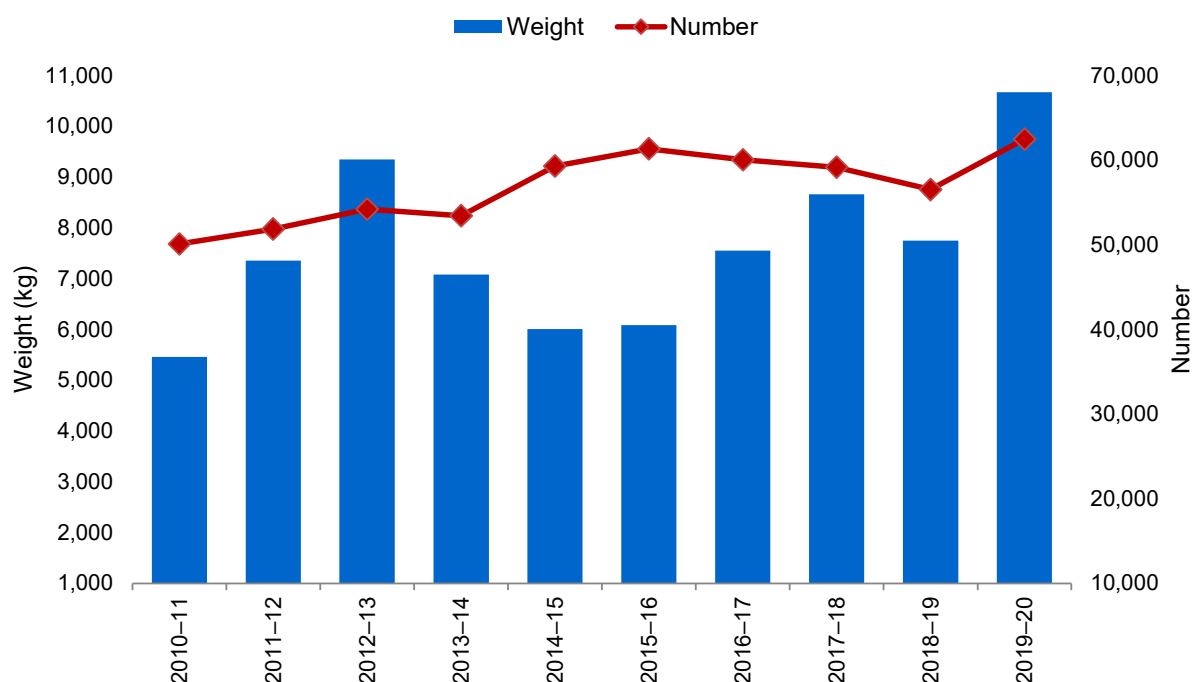
In a 2020 national study of people who regularly use ecstasy and other stimulants, the proportion of respondents reporting hydroponic cannabis as easy or very easy to obtain decreased slightly, from 90 per cent in 2019 to 89 per cent in 2020. This is a decrease from the 93 per cent reported in 2011. The proportion of respondents reporting bush cannabis as easy or very easy to obtain increased, from 78 per cent in 2019 to 81 per cent in 2020. This is an increase from the 77 per cent reported in 2011 (Peacock et al. 2020).

SEIZURES

The number of national cannabis seizures increased 25 per cent over the last decade, from 50,073 in 2010–11 to a record 62,454 in 2019–20, with the number of seizures displaying an increasing trend over the decade. The number of national cannabis seizures increased 11 per cent this reporting period from 56,491 in 2018–19.

The weight of cannabis seized nationally increased 96 per cent over the last decade, from 5,452.4 kilograms in 2010–11 to a record 10,662.6 kilograms in 2019–20. Despite some fluctuations, the weight seized displays an increasing trend during the last decade. The weight of cannabis seized nationally increased 38 per cent this reporting period from 7,740.8 kilograms in 2018–19 (see Figure 12).

³⁵ Bush cannabis refers to cannabis grown outdoors.

FIGURE 12: National cannabis seizures, by number and weight, 2010–11 to 2019–20


South Australia reported the greatest percentage increase in both the number and weight of cannabis seized in 2019–20. This reporting period New South Wales accounted for the greatest proportion of the number (30 per cent) and weight (38 per cent) of cannabis seized nationally (see Table 5).

TABLE 5: Number, weight and percentage change of national cannabis seizures, 2018–19 and 2019–20

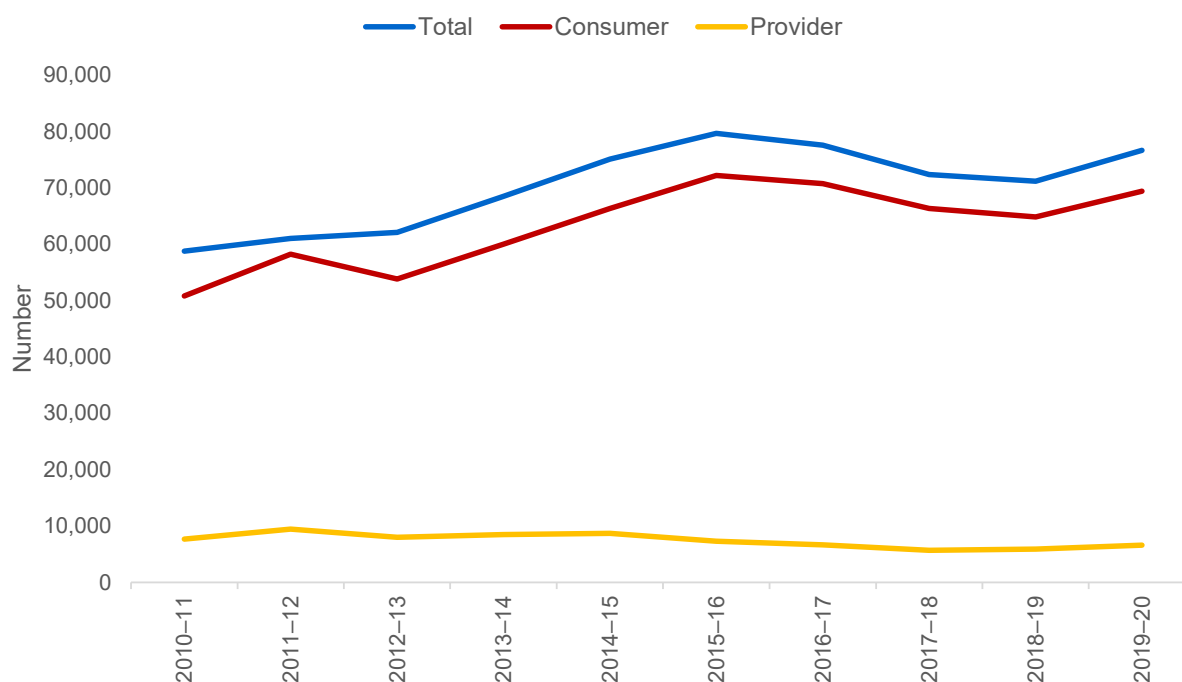
| State/Territory ^a | Number | | | Weight (grams) | | |
|------------------------------|---------------|---------------|-------------|------------------|-------------------|-------------|
| | 2018–19 | 2019–20 | % change | 2018–19 | 2019–20 | % change |
| New South Wales | 17,261 | 18,814 | 9.0 | 2,197,338 | 4,072,121 | 85.3 |
| Victoria | 3,524 | 4,067 | 15.4 | 3,184,656 | 1,681,821 | -47.2 |
| Queensland | 16,955 | 18,689 | 10.2 | 1,105,706 | 2,733,103 | 147.2 |
| South Australia | 116 | 278 | 139.7 | 223,684 | 871,732 | 289.7 |
| Western Australia | 14,240 | 15,601 | 9.6 | 392,922 | 654,936 | 66.7 |
| Tasmania | 1,799 | 2,331 | 29.6 | 220,887 | 173,543 | -21.4 |
| Northern Territory | 1,941 | 2,036 | 4.9 | 71,331 | 90,742 | 27.2 |
| Australian Capital Territory | 655 | 638 | -2.6 | 344,362 | 384,689 | 11.7 |
| Total | 56,491 | 62,454 | 10.6 | 7,740,886 | 10,662,687 | 37.7 |

a. Includes seizures by state/territory police and AFP for which a valid seizure weight was recorded.

ARRESTS

The number of national cannabis arrests increased 30 per cent over the last decade, from 58,760 in 2010–11 to 76,669 in 2019–20, the third highest number on record, with the number of arrests showing an overall increasing trend during the period. The number of national cannabis arrests increased 8 per cent this reporting period from 71,151 in 2018–19. Consumer arrests continues to account for the greatest proportion of arrests, accounting for 91 per cent of national cannabis arrests in 2019–20 (see Figure 13).

FIGURE 13: Number of national cannabis arrests, 2010–11 to 2019–20



South Australia reported the greatest percentage increase in cannabis arrests in 2019–20. Queensland accounted for the greatest proportion of cannabis arrests this reporting period (31 per cent; see Table 6).

TABLE 6: Number and percentage change of national cannabis arrests, 2018–19 and 2019–20

| State/Territory ^a | Arrests | | |
|---|---------------|---------------|------------|
| | 2018–19 | 2019–20 | % change |
| New South Wales | 16,224 | 17,474 | 7.7 |
| Victoria | 10,485 | 11,860 | 13.1 |
| Queensland ^b | 21,780 | 23,697 | 8.8 |
| South Australia | 1,141 | 3,482 | 205.2 |
| South Australia (CENs) ^c | 8,093 | 6,850 | -15.4 |
| Western Australia | 8,917 | 8,921 | 0.0 |
| Western Australia (CIRs) ^d | 1,546 | 1,538 | -0.5 |
| Tasmania | 1,435 | 1,598 | 11.4 |
| Northern Territory | 555 | 412 | -25.8 |
| Northern Territory (DINs) ^e | 732 | 691 | -5.6 |
| Australian Capital Territory | 188 | 117 | -37.8 |
| Australian Capital Territory (SCONs) ^f | 55 | 29 | -47.3 |
| Total | 71,151 | 76,669 | 7.8 |

a. The arrest data for each state and territory include Australian Federal Police data.

b. Queensland cannabis arrest data includes Police Drug Diversion Program participants.

c. Cannabis Expiation Notices.

d. Cannabis Intervention Requirements.

e. Drug Infringement Notices.

f. Simple Cannabis Offence Notices.

NATIONAL IMPACT

Despite decreases in the weight of cannabis seized globally, cannabis continued to be the most consumed and seized illicit drug in 2018, with cannabis herb continuing to account for the greatest proportion of cannabis seized. In 2019, the number and weight of cannabis seizures reported by WCO continued to decrease.

Indicators of cannabis demand and supply in Australia point to a large and potentially expanding market.

Indicators of demand for cannabis include surveys of people who use drugs, police detainees and wastewater analysis.

- According to the NDSHS, the reported recent use and use in lifetime of cannabis increased in 2019.
- According to a national study of people who regularly inject drugs, the reported recent use of cannabis decreased to the lowest proportion recorded in the last decade in 2020, while the reported median days of use increased from 2019 to 2020.
- According to a national study of people who regularly use ecstasy and other stimulants, the reported recent use of cannabis increased from 2019 to 2020, while the median days of use decreased.

- Data from surveys of people who regularly use ecstasy and other stimulants point to a decrease in the availability of hydroponic cannabis and an increase in the availability of bush cannabis.
- According to a national study of police detainees, both the proportion of detainees testing positive to cannabis and self-reported cannabis use decreased in 2019–20.
- The NWDMP indicates that cannabis consumption was higher per capita in regional sites than capital city sites. When comparing data for August 2019 to August 2020, the population-weighted average consumption of cannabis increased in capital city sites and increased to a record level in regional sites.

Indicators of cannabis supply include border detection, seizure, arrest, price and clandestine laboratory data. Compared to 2018–19, in 2019–20:

- The number of cannabis detections at the Australian border increased, while the weight detected decreased.
- The number and weight of national cannabis seizures increased to record levels.
- The number of cannabis arrests increased to the third highest number on record.
- The national median price for 1 gram of hydroponic cannabis head increased.
- A record number of cannabis oil extraction laboratories were detected nationally.

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