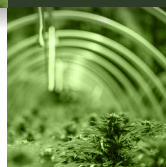






















**CANNABIS**

## KEY POINTS

- Cannabis remains one of the largest illicit drug markets globally and remained the most consumed and seized drug in 2019.
  - While cannabis herb accounted for the greatest proportion of the weight of cannabis seized globally in 2019, the weight seized decreased, whereas the weight of resin seized increased.
- Indicators of cannabis demand and supply in Australia point to a large market that is well supplied.
  - The number of border detections increased by both number and weight in 2020–21. While detections by weight increased only moderately, the detections by number almost doubled from the previous year's figures.
  - The number of national cannabis seizures decreased moderately in 2020–21, while the weight of cannabis seized nationally increased slightly to a record level for the second consecutive reporting period.
  - The number of national cannabis arrests decreased in 2020–21.
  - According to the National Wastewater Drug Monitoring Program, the population-weighted average consumption of cannabis increased to the highest levels recorded by the Program in both capital cities and regional areas in August 2021.



## National cannabis market point in time annual and decade trend comparison

		2019–20 and 2020–21	2011–12 and 2020–21
Border detections	Number	 <b>89%</b> 12,846 → 24,255 <sup>a</sup>	 <b>812%</b> 2,660 → 24,255 <sup>a</sup>
	Weight	 <b>26%</b> 648kg → 819kg	 <b>4,719%</b> 17kg → 819kg
National seizures	Number	 <b>-12%</b> 62,454 → 55,199	 <b>7%</b> 51,823 → 55,199
	Weight	 <b>1%</b> 10,662kg → 10,787kg <sup>a</sup>	 <b>47%</b> 7,349 → 10,787kg <sup>a</sup>
National arrests		 <b>-14%</b> 76,669 → 66,285	 <b>9%</b> 61,011 → 66,285
Price <sup>b</sup> (\$)		 <b>U</b> \$27.50 → \$22.50	 <b>U</b> \$26.25 → \$22.50
DUMA <sup>c</sup>	Urinalysis	 <b>↔</b> 44% → 44%	 <b>U</b> 48% → 44%
NDSHS <sup>d</sup>	Use in lifetime	 <b>U</b> 35% → 37%	 <b>U</b> 35% → 37%
	Recent use	 <b>U</b> 10% → 12%	 <b>U</b> 10% → 12%

a. Highest on record.

b. National median price for a street deal (one gram) of hydroponic cannabis head.

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

d. National Drug Strategy Household Survey. Data reflects the proportion of the Australian population aged 14 years or older who reported having used marijuana/cannabis in 2010 and 2019 (decade trend) and 2016 and 2019 (annual trend).

## MAIN FORMS

Cannabis is derived from plants within the Cannabis genus, in particular the 2 species *Cannabis sativa* and *Cannabis indica*.

- Cannabis plants can grow in a range of climates, as well as indoors using 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 3 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 (ADF 2021; CIS 2019).

## INTERNATIONAL TRENDS

Cannabis is the most used illicit drug worldwide, with the estimated number of cannabis users increasing from 192 million in 2018 to 200 million in 2019. There was a moderate increase in global cannabis cultivation in 2019 compared to 2018, however the number and weight of cannabis (herb and resin) seizures decreased in the same reporting period (UNODC 2020; UNODC 2021).

Based on United Nations Office on Drugs and Crime (UNODC) data, over the last decade (2009 to 2019) the number of cannabis (herb and resin) seizures generally increased. However, the weight of cannabis (herb and resin) seized decreased over the last decade, largely due to a 56% decrease in the Americas. In 2019, the weight of cannabis (herb and resin) seized continued to decrease for the fifth consecutive year, decreasing 8% from 5,610 tonnes in 2018 to 5,174 tonnes in 2019. The weight of cannabis herb seized globally decreased 12%, from 4,303 tonnes in 2018 to 3,779 tonnes in 2019—the lowest figure since 1998. In contrast, the weight of cannabis resin seized globally increased 7%, from 1,307 tonnes in 2018 to 1,395 tonnes in 2019 (actual figures and percentage unknown; UNODC 2020; UNODC 2021).

The Americas accounted for the largest proportion (60%) of the weight of cannabis herb seized globally in 2019, followed by Africa (21%), Asia (13%) and Europe (6%). The United States accounted for the greatest proportion in 2019, followed by Paraguay and Colombia (UNODC 2021).

Spain continued to account for the greatest proportion of the weight of cannabis resin seized globally in 2019, followed by Morocco and Afghanistan. Western and Central Europe accounted for the largest proportion of resin seized globally in 2019 (34%), followed by Near and Middle East/South-West Asia (33%) and North Africa (30%; UNODC 2021).

According to the World Customs Organization (WCO), the number of cannabis seizures increased to 13,483 in 2021 and accounted for 18% of the total number of reported drug seizures. The weight of cannabis seized decreased 37%, from 722,672 kilograms in 2020 to 453,942 kilograms in 2021.

All types of cannabis reported a decrease in weight in 2021, with the sum of herbal cannabis and cannabis resin accounting for 98% of the total weight of cannabis seized. Herbal cannabis replaced cannabis resin as the most seized cannabis type by weight in 2021 (WCO 2022).

## DOMESTIC TRENDS

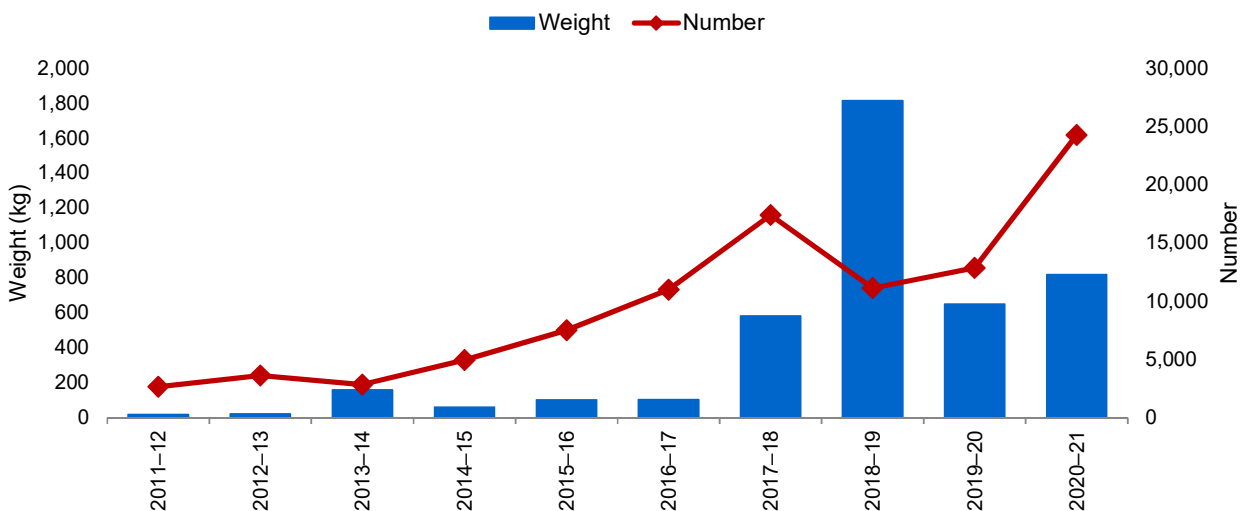
### AUSTRALIAN BORDER SITUATION

The number of cannabis detections at the Australian border increased 812% over the last decade, from 2,660 in 2011–12 to a record 24,255 in 2020–21. The number of cannabis detections increased 89% this reporting period from 12,846 in 2019–20.

Despite some fluctuations, the weight of cannabis detected increased 4,719% over the last decade, from 17.0 kilograms in 2011–12 to 819.3 kilograms in 2020–21. The weight of cannabis detected increased 26% this reporting period from 648.6 kilograms in 2019–20 (see Figure 10).

In 2020–21, 103 of the 24,255 cannabis detections (<1%) weighed one kilogram or more. With a combined weight of 402.0 kilograms, these 103 detections account for 49% of the weight of cannabis detected in 2020–21.<sup>23</sup>

**FIGURE 10: Number and weight of cannabis detections at the Australian border, 2011–12 to 2020–21 (Source: Department of Home Affairs)**



### IMPORTATION METHODS

In 2020–21, 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 continued to account for the greatest proportion of cannabis detections (90%), followed by air cargo (10%), air passenger/crew (<1%) and sea cargo (<1%). By weight, international mail continued to account for the greatest proportion of detections (55%), followed by air cargo (39%), sea cargo (6%) and air passenger/crew (<1%).

<sup>23</sup> See Appendix 2 for significant border detections of cannabis in 2020–21.

## EMBARKATION POINTS

In 2020–21, 45 countries were identified as embarkation points for cannabis detected at the Australian border, compared to 50 countries in 2019–20. By weight, the United States continued to be the primary embarkation point for cannabis detected in 2020–21. Other key embarkation points by weight included China (including Hong Kong), the United Kingdom, Thailand, the Netherlands, Canada, France, Spain, Lithuania and Portugal.

## DOMESTIC MARKET INDICATORS

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. According to NDSHS data:

- The proportion of respondents who reported using cannabis at least once in their lifetime increased, from 35% in 2010 to 37% in 2019. In 2016 this proportion was 35%.
- The proportion of respondents who reported having recently<sup>24</sup> used cannabis increased, from 10% in 2010 to 12% in 2019. In 2016 this proportion was 10% (AIHW 2020).

The National Wastewater Drug Monitoring Program (NWDMP) collects wastewater samples every 2 months in capital city sites and every 4 months in regional sites. The NWDMP began measuring cannabis consumption in August 2018. Since then, the population-weighted average consumption increased in both capital city and regional sites. According to data from the NWDMP for August 2020 to August 2021:

- Cannabis consumption was higher per capita in regional sites than capital city sites.
- The population-weighted average consumption of cannabis in both capital city and regional sites increased to a record high in August 2021 (ACIC 2022).

The below data reflect drug use within sentinel groups, 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 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 stable at 5% in 2012 and 2021. In 2020 this proportion was 6%.
- The proportion of respondents reporting the recent use<sup>25</sup> of any form of cannabis decreased, from 76% in 2012 to 67% in 2021, the lowest proportion recorded in the last 2 decades. This proportion remained unchanged from 2020.
- The reported median number of days of cannabis use in the 6 months preceding interview increased, from 160 days in 2012 to 180 days in 2021. In 2020 the median number of days was 160 (Sutherland et al. 2021a).

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

<sup>24</sup> In the NDSHS, recent use refers to reported use in the 12 months preceding the survey.

<sup>25</sup> In both the IDRS and EDRS studies, recent use refers to reported use in the 6 months preceding interview.

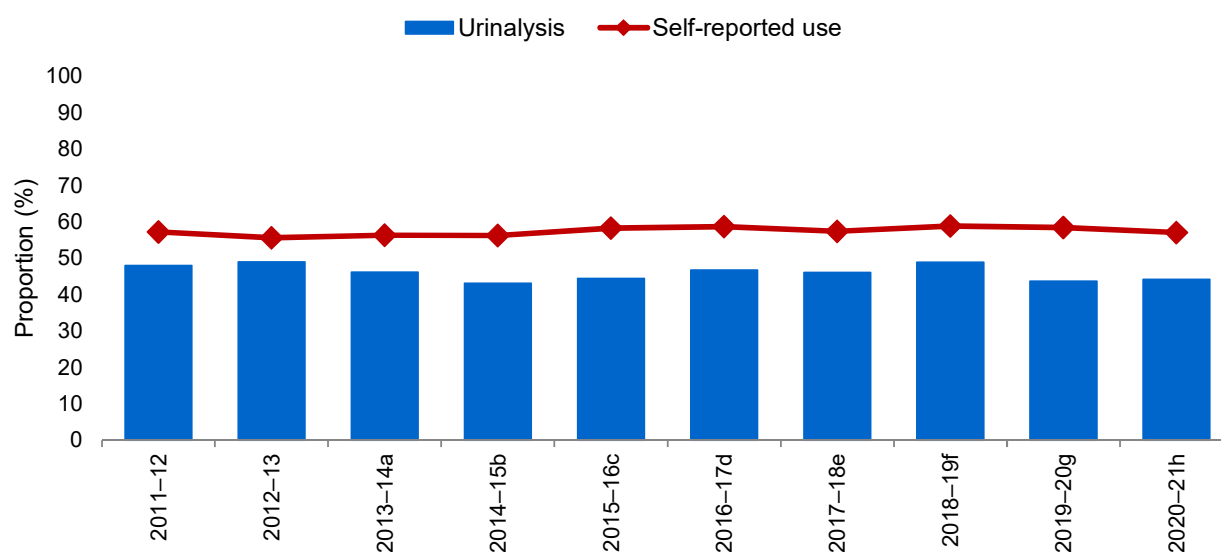


- The proportion of respondents reporting cannabis as their drug of choice increased, from 19% in 2012 to 23% in 2021. In 2020 this proportion was 26%.
- The proportion of respondents reporting the recent use of cannabis increased, from 82% in 2012 to 84% in 2021. In 2020 this proportion was 88%.
- The reported median number of days of cannabis use in the 6 months preceding interview decreased, from 60 days in 2012 to 48 days in 2021. The median number of days remained unchanged from 2020 (Sutherland et al. 2021b).

The Drug Use Monitoring in Australia (DUMA) program collects criminal justice and drug use information on a quarterly basis from police detainees.<sup>26</sup> According to DUMA data:

- Over the last decade the proportion of detainees testing positive to cannabis decreased slightly, while self-reported cannabis use remained relatively stable.
- The proportion of detainees testing positive to cannabis ranged from 43% in 2014–15 to 49% in 2012–13 and 2018–19. In 2019–20 and 2020–21 this proportion remained stable at 44%.
- The self-reported recent use<sup>27</sup> of cannabis among detainees ranged from 56% in 2012–13 to 59% in 2016–17 and 2018–19. In 2020–21 this proportion was 57%, a slight decrease from 58% in 2019–20 (see Figure 11).

**FIGURE 11: National proportion of detainees testing positive for cannabis compared with self-reported recent use, 2011–12 to 2020–21 (Source: Australian Institute of Criminology)**



- Urine was collected in the third and fourth quarter of 2013 and the first quarter of 2014.
- Urine was collected in the third quarter of 2014 and the first and second quarter of 2015.
- Urine was collected in the third quarter of 2015 and the first and second quarter of 2016.
- Urine was collected in the third quarter of 2016 and the second quarter of 2017.
- 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.
- 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.
- Urine was collected in the third quarter of 2019 in Adelaide, Brisbane and Perth; the fourth quarter of 2018 in Bankstown; and the first quarter of 2020 in Adelaide, Brisbane, Perth and Surry Hills.
- Urine was collected in the second quarter of 2021 in Adelaide, Bankstown, Brisbane and Perth.

<sup>26</sup> Detainees can participate in the survey without providing a urine sample. Cases with missing data are excluded from the relevant analysis.

<sup>27</sup> Recent use in the DUMA program refers to self-reported use in the 12 months prior to arrest.

## CLANDESTINE LABORATORIES

The number of cannabis oil extraction laboratories detected nationally increased 533%, from 3 in 2011–12 to 19 in 2020–21. This reporting period the number decreased 34% from the record 29 in 2019–20 (see *Clandestine Laboratories and Precursors chapter*).

## PRICE

At the street level, the price of cannabis is generally measured as a ‘deal’ (approximately one gram). Nationally, the price range for one gram of hydroponic cannabis head remained relatively stable, ranging between \$20 and \$100 in 2011–12 to between \$15 and \$100 in 2020–21. In 2019–20 the reported price ranged between \$20 and \$100. The national median price for one gram of hydroponic cannabis head decreased slightly, from \$26.25 in 2011–12 to \$22.50 in 2020–21. In 2019–20 the national median price was \$27.50.

Nationally, the price range for one ounce (28 grams) of hydroponic cannabis head decreased, ranging between \$200 and \$700 in 2011–12 and between \$220 and \$600 in 2020–21. In 2019–2020 the reported price ranged between \$200 and \$600. The national median price for one ounce of hydroponic cannabis head decreased, from \$362.5 in 2011–12 to \$300 in 2020–21, a decrease from \$325 in 2019–20.

Nationally, the price range for a single mature hydroponic cannabis plant increased, ranging between \$2,000 and \$5,000 in 2011–12, and between \$300 and \$5,000 in 2020–21. In 2019–20 the reported price ranged between \$2,000 and \$5,000 (reported in New South Wales). The national median price for a single mature hydroponic cannabis plant remained stable at \$3,800, when comparing data from 2011–12 and 2020–21.

The price range for one gram of resin decreased, from between \$25 and \$100 in 2011–12 (reported in New South Wales, Queensland and the Northern Territory) to \$25 (reported in Tasmania) in 2020–21. The 2020–21 price decreased from \$50 (reported in Tasmania) in 2019–20.

## AVAILABILITY

User surveys provide mixed results for the availability of hydroponic cannabis and bush cannabis<sup>28</sup> this reporting period.

In a 2021 national study of people who regularly inject drugs, the proportion of respondents reporting hydroponic cannabis as ‘easy’ or ‘very easy’ to obtain increased, from 81% in 2020 to 88% in 2021. This is a decrease from the 92% reported in 2012. The proportion of respondents reporting bush cannabis as easy or very easy to obtain increased, from 68% in 2020 to 78% in 2021. This is a decrease from the 81% reported in 2012 (Sutherland et al. 2021a).

In a 2021 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 remained stable at 89% in 2020 and 2021. This is a decrease from the 95% reported in 2012. The proportion of respondents reporting bush cannabis as easy or very easy to obtain decreased, from 81% in 2020 to 79% in 2021. This is a decrease from the 80% reported in 2012 (Sutherland et al. 2021b).

<sup>28</sup> Bush cannabis refers to cannabis grown outdoors.

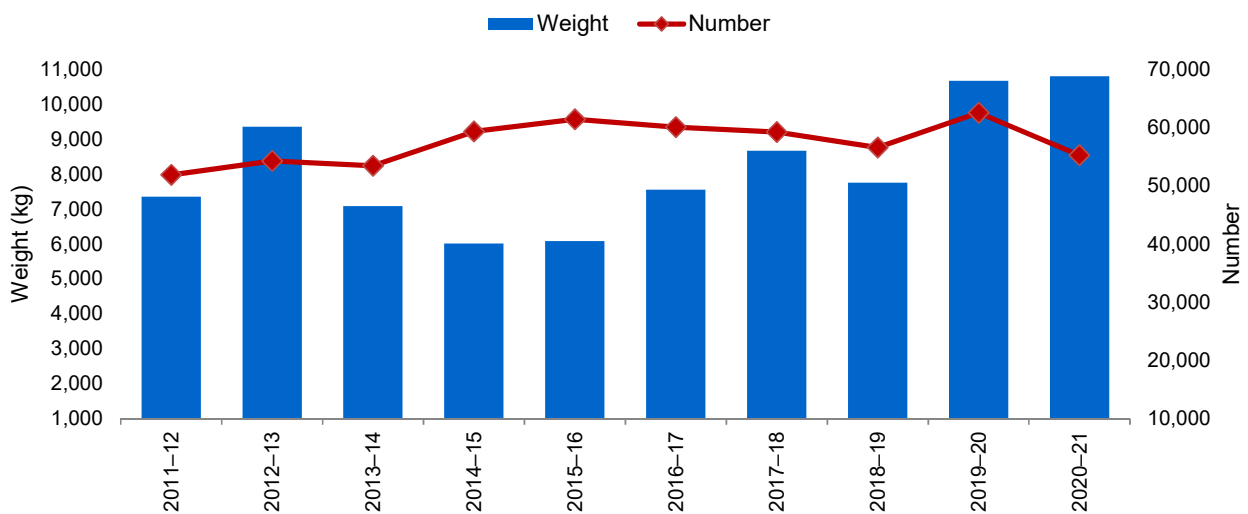


## SEIZURES

The number of national cannabis seizures increased 7% over the last decade, from 51,823 in 2011–12 to 55,199 in 2020–21. The number of national cannabis seizures decreased 12% this reporting period from a record 62,454 in 2019–20.

The weight of cannabis seized nationally increased 47% over the last decade, from 7,349.2 kilograms in 2011–12 to a record 10,787.3 kilograms in 2020–21. The weight of cannabis seized nationally remained relatively stable this reporting period, increasing 1% from 10,662.6 kilograms in 2019–20 (see Figure 12).

**FIGURE 12: National cannabis seizures, by number and weight, 2011–12 to 2020–21**



South Australia reported the greatest percentage increase in the number of cannabis seizures in 2020–21, while Victoria reported the greatest percentage increase in the weight of cannabis seized. This reporting period New South Wales continues to account for the greatest proportion of the number of national cannabis seizures (31%), while Victoria accounted for the greatest proportion of the weight of cannabis seized nationally (38%; see Table 5).

TABLE 5: Number, weight and percentage change of national cannabis seizures, 2019–20 and 2020–21

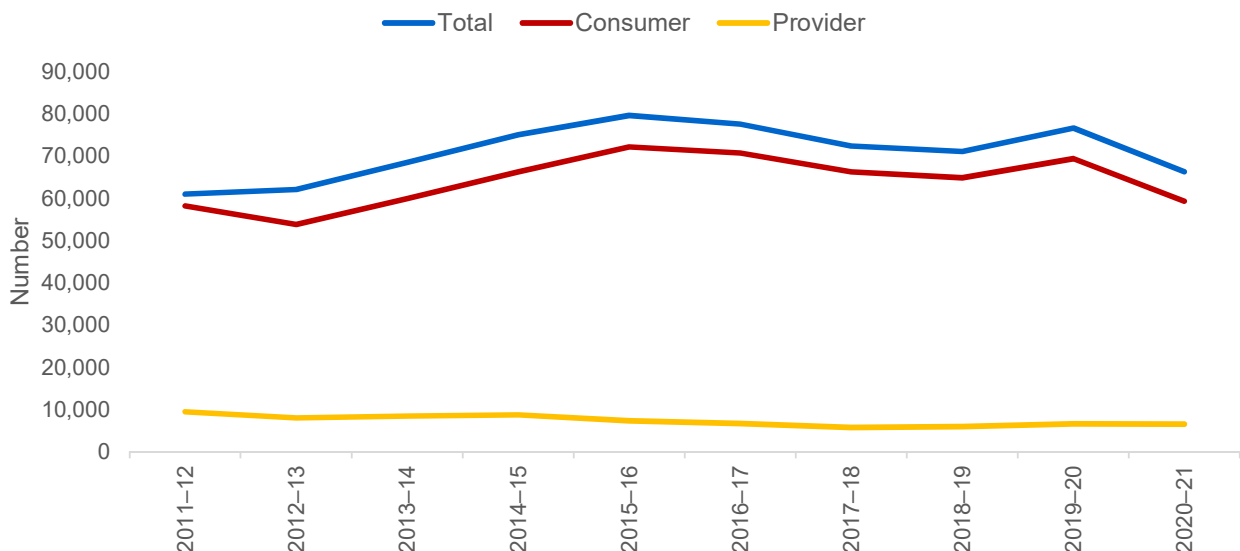
State/Territory <sup>a</sup>	Number			Weight (grams)		
	2019–20	2020–21	% change	2019–20	2020–21	% change
New South Wales	18,814	17,278	-8.2	4,072,121	2,993,153	-26.5
Victoria	4,067	3,681	-9.5	1,681,821	4,101,061	143.8
Queensland	18,689	15,344	-17.9	2,733,103	1,175,778	-57.0
South Australia	278	463	66.5	871,732	899,800	3.2
Western Australia	15,601	13,481	-13.6	654,936	976,327	49.1
Tasmania	2,331	2,811	20.6	173,543	223,544	28.8
Northern Territory	2,036	1,754	-13.9	90,742	172,472	90.1
Australian Capital Territory	638	387	-39.3	384,689	245,215	-36.3
<b>Total</b>	<b>62,454</b>	<b>55,199</b>	<b>-11.6</b>	<b>10,662,687</b>	<b>10,787,350</b>	<b>1.2</b>

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

## ARRESTS

Overall, the number of national cannabis arrests increased 9% over the last decade, from 61,011 in 2011–12 to 66,285 in 2020–21. The number of national cannabis arrests decreased 14% this reporting period from 76,669 in 2019–20. Consumer arrests continue to account for the greatest proportion of arrests, accounting for 90% of national cannabis arrests in 2020–21 (see Figure 13).

FIGURE 13: Number of national cannabis arrests, 2011–12 to 2020–21



The Northern Territory was the only jurisdiction that reported an increase in cannabis arrests in 2020–21. Queensland accounted for the greatest proportion of cannabis arrests this reporting period (31%; see Table 6).

**TABLE 6: Number and percentage change of national cannabis arrests, 2019–20 and 2020–21**

State/Territory <sup>a</sup>	Arrests		
	2019–20	2020–21	% change
New South Wales	17,474	15,101	-13.6
Victoria	11,860	11,855	0.0
Queensland	23,697	20,437	-13.8
South Australia	3,482	2,439	-30.0
South Australia (CENS) <sup>b</sup>	6,850	4,920	-28.2
Western Australia	8,921	7,577	-15.1
Western Australia (CIRs) <sup>c</sup>	1,538	1,395	-9.3
Tasmania	1,598	1,439	-9.9
Northern Territory	412	426	3.4
Northern Territory (DINs) <sup>d</sup>	691	622	-10.0
Australian Capital Territory	117	74	-36.8
Australian Capital Territory (SCONS) <sup>e</sup>	29	0	-100.0
<b>Total</b>	<b>76,669</b>	<b>66,285</b>	<b>-13.5</b>

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

b. Cannabis Expiation Notices.

c. Cannabis Intervention Requirements.

d. Drug Infringement Notices.

e. Simple Cannabis Offence Notices.

## SUMMARY

Despite decreases in the weight of cannabis seized globally, cannabis continued to be the most consumed and seized illicit drug in 2019, with cannabis herb continuing to account for the greatest proportion of cannabis seized. In 2021, the number of cannabis seizures reported by World Customs Organization agencies increased, while the weight of cannabis seized decreased.

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

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