

CANNABIS

KEY POINTS

- Although the weight of cannabis seized globally decreased from 2015 to 2016, it remained the most seized drug in the world in 2016.
 - While cannabis herb continues to account for the greatest proportion of the weight of cannabis seized globally, the weight of cannabis herb seized in 2016 decreased, whereas the weight of resin seized increased.
- Indicators of cannabis supply and demand in Australia provide a mixed picture, but overall point to a large, relatively stable market.
 - The number and weight of cannabis detections at the Australian border increased this reporting period, with the number of cannabis detections in 2017–18 the highest on record and the weight detected the highest recorded in the last decade.
 - Cannabis oil accounted for the greatest proportion of the weight of cannabis detected at the Australian border this reporting period, with a single cannabis oil detection accounting for around one fifth of the weight of cannabis detected in 2017–18.
 - While the number of national cannabis seizures continued to decrease in 2017–18, the weight of cannabis seized nationally increased for the third consecutive reporting period and is the second highest weight recorded in the last decade.
 - The number of national cannabis arrests decreased for the second consecutive reporting period in 2017–18.





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 2011a; CIS 2011b).

INTERNATIONAL TRENDS

In 2016, the combined weight of cannabis herb and resin seized globally decreased, from over 7,000 tonnes in 2015 to 6,313 tonnes in 2016. Despite this decrease, cannabis remains the most seized drug globally. The weight of cannabis resin seized globally increased, from 1,536 tonnes in 2015 to 1,631 tonnes in 2016, while seizures of cannabis herb decreased over the same period, from 5,781 tonnes to 4,682 tonnes. The UNODC continues to assess that the trafficking of cannabis herb remains largely intraregional, whereas the trafficking of cannabis resin is both intra and interregional, with Afghanistan and Morocco key source countries for cannabis resin (UNODC 2018; UNODC 2017).

North America continued to account for the greatest proportion (39.0 per cent) of the weight of cannabis herb seized globally in 2016, followed by South and Central America and the Caribbean (23.0 per cent), Africa (17.0 per cent) and Asia (14.0 per cent). The Near and Middle-East and South-West Asia (mostly in Afghanistan, Pakistan, Morocco, the Islamic Republic of Iran and Algeria) accounted for the greatest proportion of the weight of cannabis resin seized globally in 2016 (50.0 per cent), followed by North Africa (23.0 per cent) and Western and Central Europe (23.0 per cent; UNODC 2018).

According to the World Customs Organization (WCO), the number and weight of cannabis seized globally by WCO agencies continued to decline in 2017. The number of cannabis seizures decreased, from 12,530 in 2016 to 11,067 in 2017, with the weight of cannabis seized decreasing from 1,010,264 kilograms in 2016 to 818,781 kilograms in 2017. The WCO notes that the reported decline in global cannabis seizures is primarily due to decreases in the number and weight of herbal cannabis seizures. In contrast, increases were reported in the number and weight of cannabis resin, plants and 'other forms' of cannabis seized in 2017 (WCO 2018).

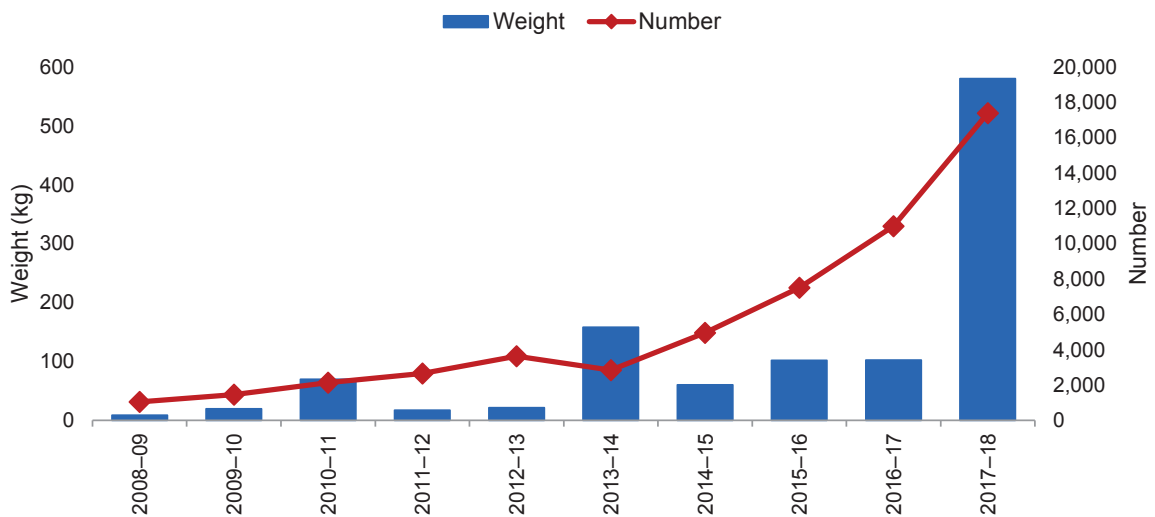


DOMESTIC TRENDS

AUSTRALIAN BORDER SITUATION

Both the number and weight of cannabis detected at the Australian border increased in 2017–18 (see Figure 10). The number of cannabis detections increased 58.2 per cent this reporting period, from 10,987 in 2016–17 to a record 17,383 in 2017–18. The weight of cannabis detected this reporting period increased 466.0 per cent, from 102.5 kilograms in 2016–17 to 580.2 kilograms in 2017–18, the highest weight recorded in the last decade. In 2017–18, 49 cannabis detections (or 0.3 per cent), weighed one kilogram or more. With a combined weight of 238.3 kilograms, these 49 detections account for 41.1 per cent of the weight of cannabis detected in 2017–18.⁵⁰

FIGURE 10: Number and weight of cannabis detections at the Australian border, 2008–09 to 2017–18 (Source: Department of Home Affairs)



While cannabis seed continues to account for the greatest proportion of the number of cannabis detections this reporting period (66.2 per cent), cannabis oil accounted for the greatest proportion of the weight of cannabis detected in 2017–18 (70.1 per cent). A single cannabis oil detection accounted for around one fifth of the weight of cannabis detected this reporting period.

⁵⁰ See Appendix 1 for significant border detections of cannabis in 2017–18.



IMPORTATION METHODS

In 2017–18, detections of cannabis occurred in the international mail, air cargo, sea cargo and air passenger/crew streams. This reporting period the international mail stream accounted for the greatest proportion of the number of cannabis detections at the Australian border (83.9 per cent), followed by air cargo (15.7 per cent), air passenger/crew (0.4 per cent) and sea cargo (<0.1 per cent). By weight, the air cargo stream accounted for the greatest proportion of cannabis detected at the Australian border (57.7 per cent), followed by international mail (41.8 per cent), sea cargo (0.3 per cent) and air passenger/crew (0.3 per cent).⁵¹

EMBARKATION POINTS

In 2017–18, 50 countries were identified as embarkation points for cannabis detected at the Australian border, compared with 49 countries in 2016–17. By weight, the United States continued to be the primary embarkation point for cannabis detected in 2017–18. Other key embarkation points by weight this reporting period include Germany, the United Kingdom, the Netherlands, Serbia, Canada, France, Switzerland, Lithuania and Italy.

DOMESTIC MARKET INDICATORS

No single data set 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 the 2016 NDSHS:

- The proportion of the Australian population aged 14 years or older who reported having used cannabis at least once in their lifetime remained unchanged at 34.8 per cent in both 2013 and 2016.
- The proportion of the Australian population aged 14 years or older who reported having recently⁵² used cannabis increased, from 10.2 per cent in 2013 to 10.4 per cent in 2016 (AIHW 2017).

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.

⁵¹ Figures for importation methods of cannabis detections in 2017–18 will be available on the Crime Statistics Australia website. See <<http://crimestats.aic.gov.au/IDDR/>>.

⁵² In the NDSHS, recent use refers to reported use in the previous 12 months.



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 the national study of injecting drug users:

- The proportion of respondents reporting cannabis as their drug of choice increased, from 5.0 per cent in 2017 to 7.0 per cent in 2018.
- The proportion of respondents reporting the recent use⁵³ of cannabis remained stable at 73.0 per cent in 2018.
- The reported median number of days of cannabis use in the six months preceding interview decreased, from 140 days in 2017 to 100 days in 2018. This is the second lowest reported median number of days of cannabis use in the last decade⁵⁴ (Peacock et al. 2018a).

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 the national study of regular ecstasy users:

- The proportion of respondents reporting cannabis as their drug of choice decreased, from 28.0 per cent in 2017 to 26.0 per cent in 2018.
- The proportion of respondents reporting the recent use of cannabis increased, from 89.0 per cent in 2017 to 90.0 per cent in 2018. This is the highest proportion reported since 2003.
- The reported median number of days of cannabis use in the six months preceding interview decreased, from 60 days in 2017 to 48 days in 2018⁵⁵ (Peacock et al. 2018b).

The Drug Use Monitoring in Australia (DUMA) program collects criminal justice and drug use information on a quarterly basis from police detainees and comprises an interviewer-assisted self-report survey and the voluntary provision of a urine sample which is subjected to urinalysis to detect licit and illicit drug use.⁵⁶ According to data from the DUMA program:

- The proportion of detainees testing positive to cannabis remained relatively stable this reporting period, decreasing from 46.7 per cent in 2016–17 to 46.0 per cent in 2017–18.
- The self-reported recent use⁵⁷ of cannabis among detainees decreased this reporting period, from 58.6 per cent in 2016–17 to 57.3 per cent in 2017–18.
- Over the last decade, the proportion of detainees testing positive to cannabis and self-reporting cannabis use have remained relatively stable (see Figure 11).

53 In both the Illicit Drug Reporting System (IDRS) and Ecstasy and Related Drugs Reporting System (EDRS), recent use refers to reported use in the six months preceding interview.

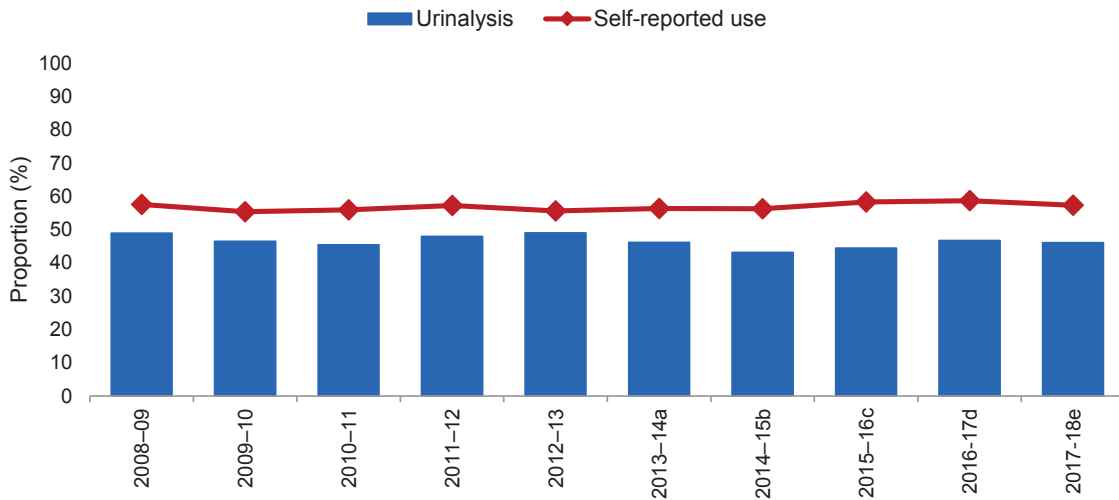
54 A figure for this data will be available on the Crime Statistics Australia website. See <<http://crimestats.aic.gov.au/IDDR/>>.

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

57 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, 2008–09 to 2017–18 (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.

The Australian Secondary Students Alcohol and Drug Survey (ASSAD) collects self-report information on alcohol, tobacco, over-the-counter drugs and illicit substance use among Australian secondary school students (aged 12 to 17) and is conducted every three years. According to the 2017 ASSAD survey:

- The proportion of respondents reporting cannabis use at least once in their lifetime increased, from 16.0 per cent in 2014 to 17.0 per cent in 2017.
- The proportion of respondents reporting having used cannabis at least once in the past month increased, from 7.0 per cent in 2014 to 8.0 per cent in 2017 (Guerin & White 2018).

CLANDESTINE LABORATORIES

Although the number of cannabis oil extraction laboratories detected nationally decreased 19.0 per cent this reporting period, from 21 laboratories in 2016–17 to 17 laboratories in 2017–18, the number of detections remains high.

- This reporting period South Australia reported 6 detections, followed by New South Wales (4), Western Australia (3), and Victoria (2) and Queensland (2; see *Clandestine laboratories and precursors* chapter).





PRICE

Nationally, the price for 1 gram of hydroponic cannabis head remained relatively stable this reporting period, ranging between \$20 and \$50 in 2017–18, compared with a price range of \$10 to \$50 in 2016–17. Nationally, the price of 1 ounce of hydroponic cannabis head remained unchanged this reporting period, ranging between \$200 and \$450. Similar to 2016–17, the price for a single mature hydroponic cannabis plant in 2017–18 ranged between \$2,000 and \$5,000, with the price of one gram of cannabis resin (reported in Queensland and Northern Territory) also remaining stable this reporting period, ranging between \$25 and \$50.

AVAILABILITY

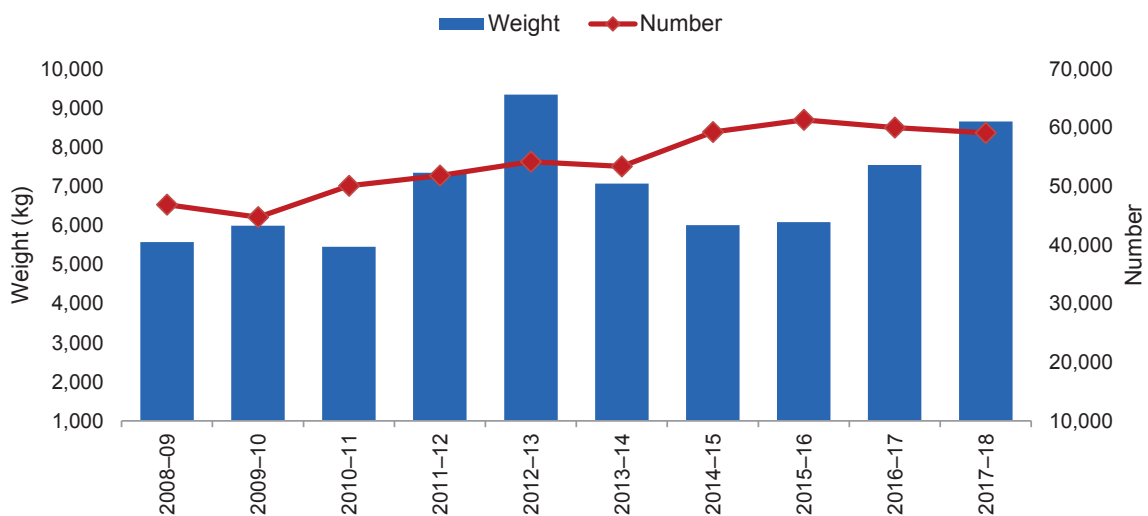
In a 2018 national study of regular injecting drug users, the proportion of respondents reporting hydroponic cannabis as easy or very easy to obtain decreased, from 92.0 per cent in 2017 to 89.0 per cent in 2018. In the same study, the proportion of respondents reporting ‘bush’⁵⁸ cannabis as easy or very easy to obtain increased, from 75.0 per cent in 2017 to 77.0 per cent in 2018 (Peacock et al. 2018a).

In a 2018 national study of regular ecstasy users, the proportion of respondents reporting hydroponic cannabis as easy or very easy to obtain decreased, from 94.0 per cent in 2017 to 84.0 per cent in 2018. In the same study, the proportion of respondents reporting bush cannabis as easy or very easy to obtain decreased, from 76.0 per cent in 2017 to 75.0 per cent in 2018 (Peacock et al. 2018b).

SEIZURES AND ARRESTS

The number of national cannabis seizures decreased 1.4 per cent this reporting period, from 60,006 in 2016–17 to 59,139 in 2017–18. The weight of cannabis seized nationally increased 14.7 per cent this reporting period, from 7,547.8 kilograms in 2016–17 to 8,655.9 kilograms in 2017–18 (see Figure 12). This is the second highest weight seized in the last decade.

FIGURE 12: National cannabis seizures, by number and weight, 2008–09 to 2017–18



⁵⁸ Bush cannabis refers to cannabis grown outdoors.



Western Australia reported the greatest percentage increase in the number of cannabis seizures in 2017–18, while Queensland reported the greatest percentage increase in the weight of cannabis seized. This reporting period New South Wales accounted for the greatest proportion of the number of national cannabis seizures (30.0 per cent), followed by Western Australia (28.4 per cent) and Queensland (28.0 per cent). Combined, these three states account for 86.3 per cent of the number of national cannabis seizures in 2017–18. Queensland accounted for the greatest proportion of the weight of cannabis seized nationally this reporting period (29.6 per cent), followed by New South Wales (27.4 per cent) and Victoria (16.6 per cent). Combined, these three states account for 73.5 per cent of the weight of cannabis seized nationally in 2017–18 (see Table 5).

TABLE 5: Number, weight and percentage change of national cannabis seizures, 2016–17 and 2017–18

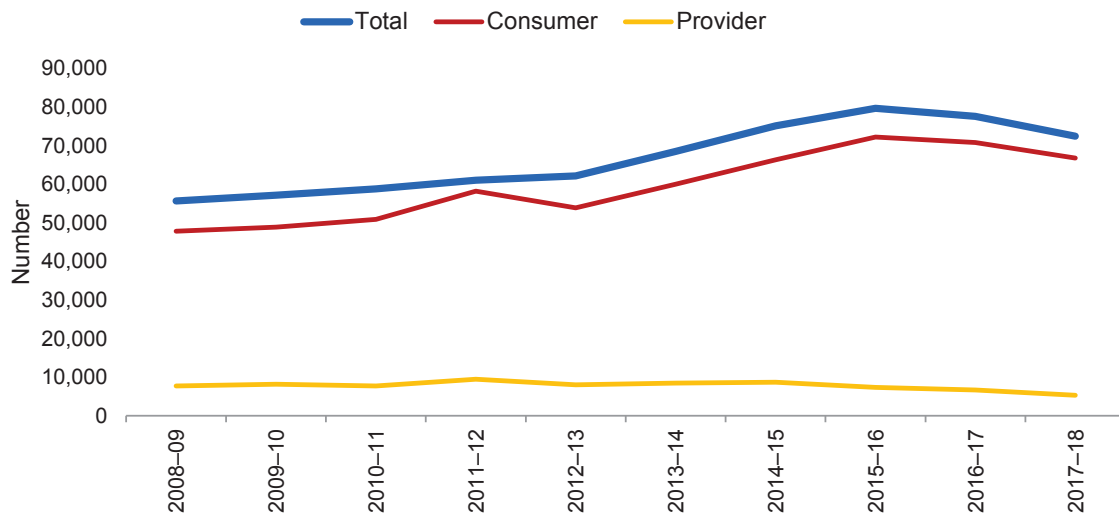
State/Territory ^a	Number			Weight (grams)		
	2016–17	2017–18	% change	2016–17	2017–18	% change
New South Wales	17,749	17,720	-0.2	1,926,599	2,373,144	23.2
Victoria	3,426	3,312	-3.3	2,390,703	1,434,393	-40.0
Queensland	17,667	16,543	-6.4	917,625	2,558,050	178.8
South Australia	423	366	-13.5	697,732	506,229	-27.4
Western Australia ^b	15,852	16,771	5.8	968,240	1,254,008	29.5
Tasmania	1,857	1,897	2.2	267,008	213,959	-19.9
Northern Territory	2,267	1,922	-15.2	202,815	163,708	-19.3
Australian Capital Territory	765	608	-20.5	177,106	152,507	-13.9
Total	60,006	59,139	-1.4	7,547,828	8,655,998	14.7

a. Includes seizures by state and territory police and Australian Federal Police for which a valid seizure weight was recorded.

b. The 2017–18 data provided by the Western Australia Police Force reflects improvements made to the quality of the drug seizure and offender dataset. As a result, caution should be exercised in comparing data from previous reporting periods.

The number of national cannabis arrests decreased 6.7 per cent this reporting period, from 77,549 in 2016–17 to 72,381 in 2017–18. Consumer arrests continue to account for the greatest proportion of arrests, comprising 92.0 per cent of cannabis arrests in 2017–18 (see Figure 13). All states and territories reported more cannabis consumer than provider arrests this reporting period.

FIGURE 13: Number of national cannabis arrests, 2008–09 to 2017–18



Tasmania reported the greatest percentage increase in cannabis arrests in 2017–18. Queensland accounted for the greatest proportion of national cannabis arrests this reporting period (29.2 per cent), followed by New South Wales (23.0 per cent). Combined, these two states account for 52.2 per cent of national cannabis arrests in 2017–18 (see Table 6).

TABLE 6: Number and percentage change of national cannabis arrests, 2016–17 and 2017–18

State/Territory ^a	Arrests		
	2016–17	2017–18	% change
New South Wales	16,765	16,679	-0.5
Victoria	10,164	9,675	-4.8
Queensland	23,836	21,126	-11.4
South Australia	1,877	1,672	-10.9
South Australia (CENs) ^b	9,200	8,961	-2.6
Western Australia ^c	10,523	9,342	-11.2
Western Australia (CIRs) ^d	2,004	1,763	-12.0
Tasmania	1,460	1,591	9.0
Northern Territory	627	507	-19.1
Northern Territory (DINs) ^e	707	675	-4.5
Australian Capital Territory	304	338	11.2
Australian Capital Territory (SCONs) ^f	82	52	-36.6
Total	77,549	72,381	-6.7

- a. The arrest data for each state and territory include Australian Federal Police data.
- b. Cannabis Expiation Notices.
- c. The 2017–18 data provided by the Western Australia Police Force reflects improvements made to the quality of the drug seizure and offender dataset. As a result, caution should be exercised in comparing data from previous reporting periods.
- d. Cannabis Intervention Requirements.
- e. Drug Infringement Notices.
- f. Simple Cannabis Offence Notices.



NATIONAL IMPACT

The weight of cannabis seized globally decreased from 2015 to 2016. While cannabis herb continues to account for the greatest proportion of the weight of cannabis seized globally, the weight of cannabis herb seized in 2016 decreased, while the weight of resin seized increased.

Indicators of cannabis demand and supply in Australia provide a mixed picture, but overall point to a large and relatively stable market.

Indicators of cannabis demand include surveys of illicit drug users and police detainees.

- According to the 2016 NDSHS, reported cannabis use in lifetime remained stable, with a small increase in reported recent use.
- According to a national study of police detainees, both the proportion of detainees self-reporting cannabis use and those testing positive to cannabis decreased in 2017–18; however, these proportions have remained relatively stable over the last decade.
- According to a national study of injecting drug users, the proportion of respondents reporting recent cannabis use remained stable, while the reported median number of days of cannabis use decreased in 2018 and is the second lowest number reported in the last decade.
- According to a national study of ecstasy and related drugs users, the proportion of respondents reporting recent cannabis use increased in 2018 and is the highest reported in the last decade; however the reported frequency of use decreased.
- According to a national study of secondary students, both the reported use of cannabis in lifetime and use in the past month increased from 2014 to 2017.

Indicators of cannabis supply include border detection, seizure, arrest and clandestine laboratory data.

- Both the number and weight of cannabis detected at the Australian border increased this reporting period, with a record 17,383 detections in 2017–18.
 - Unlike previous reporting periods where cannabis seeds have been prevalent, cannabis oil accounted for the majority of the weight of cannabis detected this reporting period, with a single cannabis oil detection accounting for around one fifth of the weight detected in 2017–18.
- While both the number of national cannabis seizures and arrests decreased this reporting period, they remain high.
- The weight of cannabis seized nationally increased in 2017–18 and is the second largest weight recorded in the last decade.
- The number of cannabis oil extraction laboratories detected nationally decreased in 2017–18, but remains high.



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