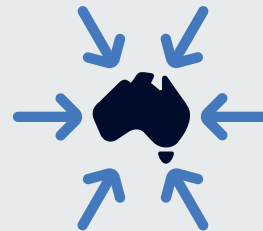


SNAPSHOT

STATE OF THE MARKET

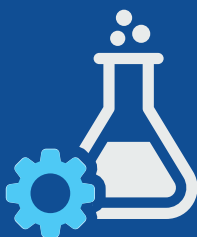
For the foreseeable future **reliable supplies to Australia** of high quality methylamphetamine, cocaine, MDMA and heroin **is a given** and there is **potential for further increases**.



The world is seeing **record levels** of cultivation and manufacture of **cocaine and methylamphetamine**, particularly from traditional source countries in the Americas and Asia.

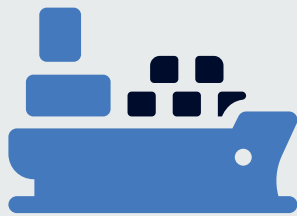
MDMA is traditionally supplied by countries in Europe, but more recently there have also been indications of **increased domestic manufacture**.

The Australian **heroin market** is supplied by relatively high quality product, primarily from **South-East Asia**.



High end domestic manufacture of illicit drugs is becoming **more sophisticated**, with SOC taking advantage of a broader range of chemicals and sophisticated equipment.

Australia is not alone in dealing with **drug threats**. They are manifesting in the **United States, Canada, the United Kingdom, New Zealand** and across **Asia and Africa**.

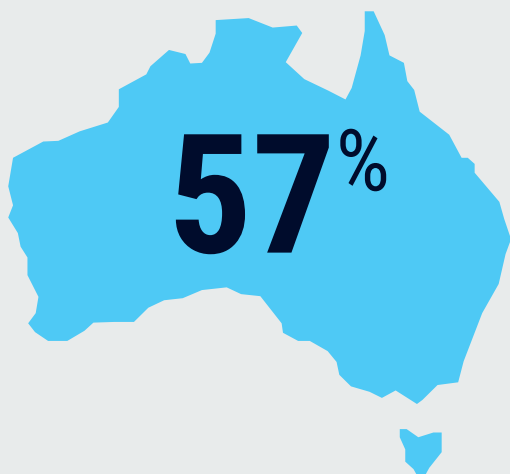


We are seeing **larger shipments** on a **more frequent** basis and this is likely to continue. However a **significant quantity** of illicit drugs is being **seized** by law enforcement, with the quantities seized in some cases exceeding domestic consumption.

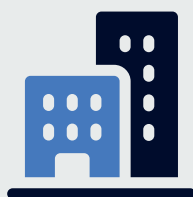
Demand for the major drugs is **resilient** and difficult to address. This will continue while Australian drug users choose to consume these substances and to pay **premium prices** in world terms for the drugs.



Where Australia has had the opportunity to do so, we have been **successful in preventing or suppressing threats** such as fentanyl that are causing significant problems in other countries.



The August 2024 collection covers around **57 per cent** of Australia's population – about **14.5 million Australians**.



Capital city **cocaine, MDMA, heroin** and **ketamine** average consumption exceeded regional consumption.



Regional **alcohol, nicotine, MDA, methylamphetamine, oxycodone, fentanyl** and **cannabis** average consumption exceeded capital city consumption.

AUGUST AND OCTOBER 2024 HIGHLIGHTS

RECORD HIGHS



METHYLAMPHETAMINE
capital city
(August)

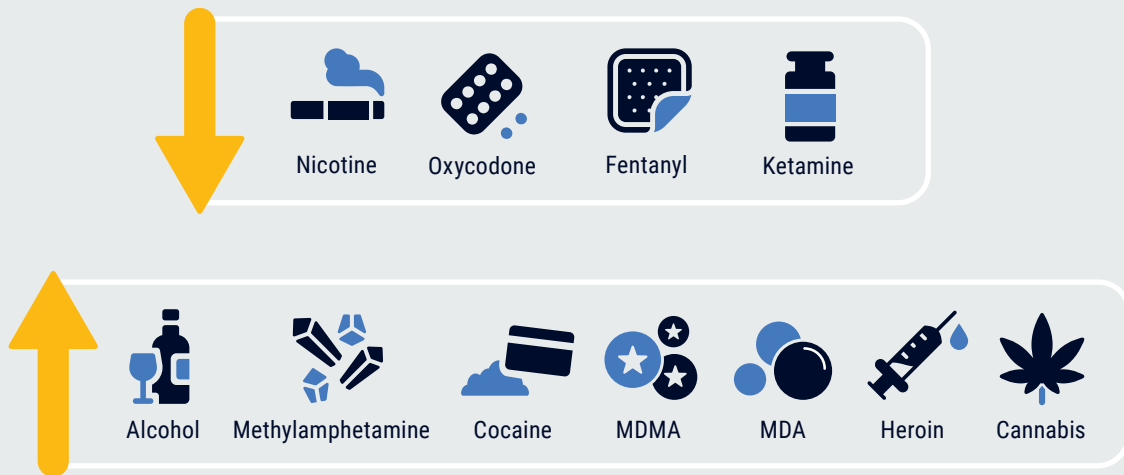


MDMA
capital city
(October)



HEROIN
regional
(August)

Between April and August 2024, the population-weighted average **capital city** consumption of:



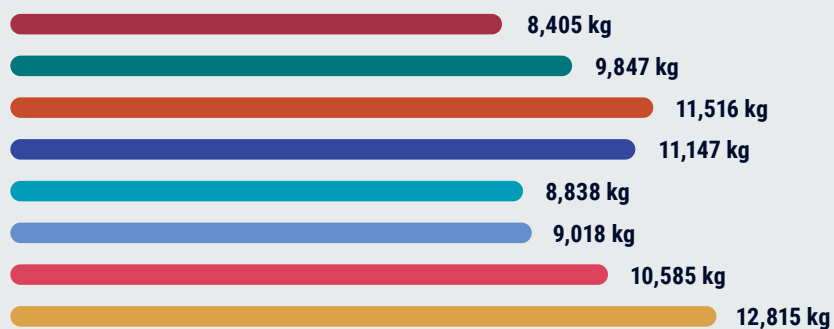
Between April and August 2024, the population-weighted average **regional** consumption of:



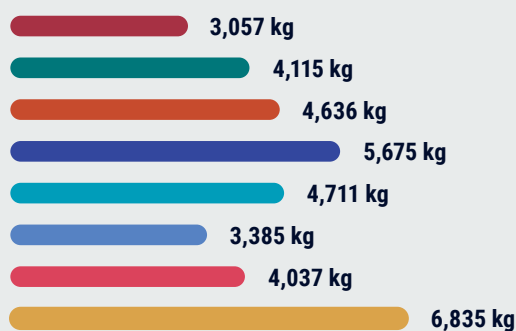
● Year 1 (2016–17) ● Year 2 (2017–18) ● Year 3 (2018–19) ● Year 4 (2019–20) ● Year 5 (2020–21) ● Year 6 (2021–22) ● Year 7 (2022–23) ● Year 8 (2023–24)



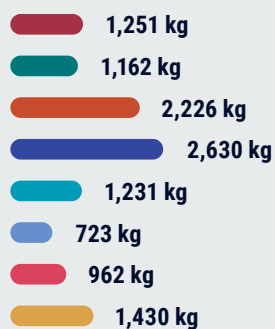
Methylamphetamine



Cocaine



MDMA



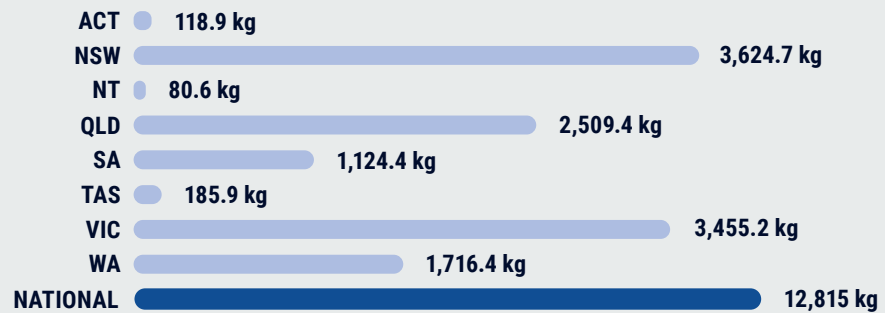
Heroin



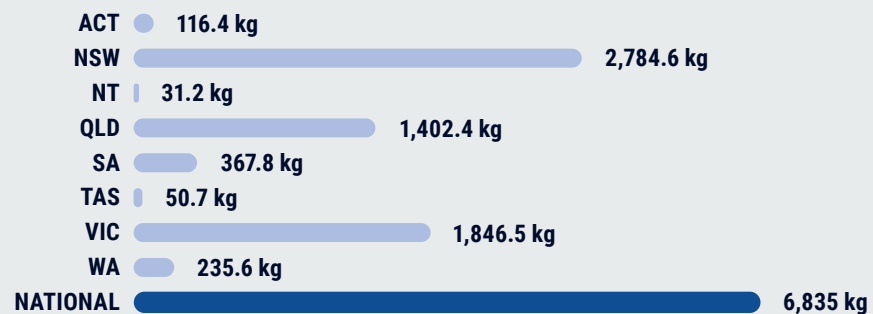
Estimated state and territory annual consumption of methylamphetamine, cocaine, MDMA and heroin for Year 8 of the Program.



Methylamphetamine



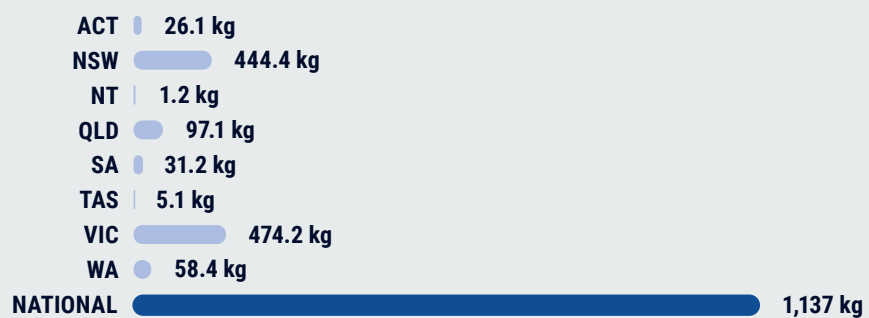
Cocaine



MDMA



Heroin



YEAR 8 TRENDS

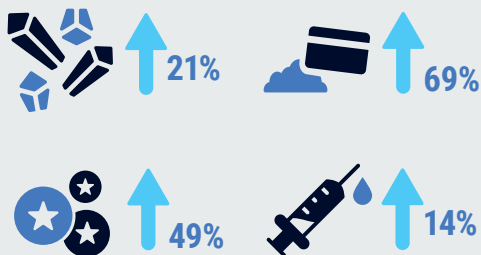
Between Year 7 and 8 of the Program (August 2023 to August 2024) total estimated consumption of **methamphetamine, cocaine, MDMA** and **heroin** increased by 5.6 tonnes, or 34 per cent of the combined weight.



MARKET IMPACTS:

Consumption of **methamphetamine, cocaine, MDMA** and **heroin** increased 21%, 69%, 49% and 14% respectively.

INCREASE



MARKET VALUE:

The estimated street value of the 4 drugs in Year 8 was **\$11.5 billion**, down from \$12.4 billion in Year 7.