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Key Points

1. In 2004 the availability of heroin was reported to be stable in those jurisdictions in which heroin has traditionally predominated. The price of a gram of heroin decreased in most jurisdictions, but remained stable in NSW and Tasmania. The price per cap remained stable in all jurisdictions except Victoria and NT, where it decreased and increased, respectively. Heroin remained the cheapest in NSW, ACT and VIC.
2. Methamphetamine prices remained stable in 2004. Methamphetamine powder and base were considered "easy" to "very easy" to obtain, and availability was stable. Compared to 2003, similar proportions of respondents reported that crystal methamphetamine was 'easy' to 'very easy' to obtain and greater numbers reported that the availability had been stable in the preceding six months. In 2004, the proportion of IDU that reported recent use of crystal methamphetamine remained stable in all jurisdictions except Tasmania where it decreased.
3. The price of a cap of cocaine remained stable in NSW, the only State where sufficient numbers were able to comment. The proportions of IDU reporting recent cocaine use decreased in all jurisdictions except WA, where a slight increase was observed. The frequency of cocaine use among IDU in NSW remained low, and continued to be sporadic in all other jurisdictions.
4. Cannabis remained "easy" to obtain in all jurisdictions. Hydroponically grown cannabis continued to dominate the market. The use of bush, hash and hash oil was noted in all jurisdictions. The potency of hydroponic cannabis continued to be rated by IDU as high.

A national overview of the 2004 IDRS

The key findings of the 2004 Illicit Drug Reporting System (IDRS) are presented in this Bulletin. The IDRS monitors emerging trends in the use, price, purity and availability of heroin, methamphetamine, cocaine and cannabis. The annual data collection includes a survey of injecting drug users (IDU), a survey of key experts who are professionals in the field of illicit drugs, and the analysis of existing indicator data on drug-related issues. This year is the fifth year that all three components of the IDRS were conducted in every State and Territory in Australia.

This bulletin contains a summary of the main findings from the 2004 national IDRS, based on interviews with 948 IDU (at least 100 in each jurisdiction) and 285 key experts. Injecting drug users are recruited as they are considered a sentinel group to detect illicit drug trends. The information from the IDU survey is therefore not representative of illicit drug use in the general population, but is indicative of emerging trends that warrant further monitoring.

Drug trends in this publication are cited by State/Territory, although they represent trends in the capital city of each jurisdiction. Further details will be published in the national and State IDRS Drug Trends annual reports, which will be available through NDARC in early 2005.

HEROIN

Estimates of the price of heroin by jurisdiction appear in Table 1. Prices for all drugs are based upon recent purchases by IDU. For comparison, equivalent figures from previous years are presented in all tables. Other data presented below include purity, availability and use of heroin.

Price: The price of a gram of heroin reduced (by between \$20 to \$95) in most jurisdictions except NSW and TAS. The median price of a gram of heroin ranged from \$300 in NSW, ACT and VIC to \$500 in WA. Median cap prices were around \$50 in all jurisdictions except VIC (\$40). Compared to 2003, similar numbers of IDU reported that the price of heroin was stable in the six months preceding interview, with the exception of TAS where only small numbers were able to comment (Table 1).

Table 1:
Median price of last IDU purchase of a gram of heroin by jurisdiction, 2000-2004

	MEDIAN PRICE \$ PER GRAM				
	2000	2001	2002	2003	2004
NSW	220	320	300	300	300
ACT	300	485	350	350	300
VIC	300	450	400	380	300
TAS	375	325	350*	350*	350*
SA	320	350	450	425	320
WA	450	750	550	550	500
NT	600	550	500*	-	400
QLD	350	450	350	400	380

* median price based on small numbers (n < 10)

Purity: IDU were asked what the purity or strength of heroin was currently and if there has been any change in purity in the preceding six months. Of those able to comment, most IDU reported heroin purity to be low (33%) to medium (36%). Around a third (29%) of IDU reported the purity of heroin to be stable in the six months preceding interview (Table 2).

Availability: In 2004, the majority of IDU who commented on the availability of heroin thought it was 'easy' or 'very easy' to obtain and had remained stable in the preceding months, except in the NT and TAS, where only small numbers were able to comment (Table 2).

Table 2:
Current purity and availability of heroin by jurisdiction, 2004

% of those who commented:	National N=640	NSW n=148	ACT n=91	VIC n=129	TAS n=16	SA n=62	WA n=69	NT n=27	QLD n=98
Current purity									
Don't know	6	2	3	7	31	10	3	19	5
Low	33	39	26	26	19	37	38	44	30
Medium	36	35	42	40	25	29	38	19	38
High	14	12	19	14	13	8	12	15	16
Fluctuates	12	12	10	13	13	16	10	4	11
Current availability									
Don't know	2	-	-	1	25	-	3	15	2
Very easy	52	56	53	60	-	55	46	-	61
Easy	34	37	39	31	25	34	32	26	32
Difficult	11	7	8	8	19	11	15	59	5
Very difficult	1	-	1	-	31	-	4	-	-

Use: Compared to the 2003 IDRS, the proportion of IDU that reported recent heroin use remained stable in most jurisdictions except QLD where it increased, TAS where it decreased to the lowest level reported and in the NT where the proportions increased to levels reported in 2001 (Table 3).

Table 3:
Proportion of IDU who reported use of heroin in preceding six months, by jurisdiction 2000-2004

	2000	2001	2002	2003	2004
National	78	66	68	65	69
NSW	95	96	96	97	95
ACT	92	83	89	88	91
VIC	97	90	94	90	86
TAS	38	24	21	26	19
SA	73	65	48	55	60
WA	80	55	64	63	69
NT	56	36	22	16	34
QLD	82	63	81	64	79

Overall nationally the median frequency of heroin use in the last six months preceding interview remained stable at 72 days. However, the frequency of heroin use increased in VIC, WA and the NT, and decreased in NSW, ACT, SA, QLD and decreased slightly in TAS.

METHAMPHETAMINE

As in 2002 and 2003, the 2004 IDRS distinguished between methamphetamine powder (speed), methamphetamine base and crystal methamphetamine (ice).

Price: The median price for a gram of methamphetamine powder ranged from \$50 (SA) to \$290 (TAS, n < 10). Reported prices remained stable in WA, QLD, increased in NSW, ACT, TAS and the NT and decreased in VIC and SA. A point of speed was \$27.50 in SA, \$40 in VIC and \$50 in the other jurisdictions. The median price of a point of base ranged from \$25 in SA to \$35 in VIC (n < 10) and \$50 in all other jurisdictions. A point of crystal methamphetamine ranged from \$30 in SA to \$50 in all other jurisdictions. The majority reported the price of all forms of methamphetamine to be stable.

Purity: IDU were asked to describe the current purity of methamphetamine powder (speed), base and crystal (ice). Speed had the highest proportion report the purity as low, base as medium and ice as high. The largest proportion of IDU who commented described the purity or strength of all three forms of methamphetamine as stable in the six months preceding interview.

Table 4:
Proportion of IDU reporting recent use of different forms of methamphetamine by jurisdiction, 2000-2004

	SPEED					ICE					BASE*			
	2000	2001	2002	2003	2004	2000	2001	2002	2003	2004	2001	2002	2003	2004
NSW	32	42	39	31	35	14	29	25	38	45	23	23	32	31
ACT	63	63	51	48	41	17	72	34	65	73	36	30	13	25
VIC	49	74	70	70	65	9	52	26	50	41	32	20	18	11
TAS	77	45	35	51	60	6	56	20	69	52	52	74	46	72
SA	51	47	56	53	44	11	58	56	48	48	59	65	51	46
WA	81	87	77	71	61	51	85	74	80	83	56	56	40	45
NT	70	63	67	60	60	6	24	20	34	32	18	21	30	26
QLD	58	80	55	58	61	13	75	39	60	51	75	42	50	60

*did not ask about base in 2000

Availability: The majority of respondents in all jurisdictions reported that methamphetamine powder was 'easy' or 'very easy' to obtain and that availability was stable. Among those who could comment, base was also considered to be 'easy' or 'very easy' to obtain, and availability stable. Those that commented on crystal methamphetamine in each jurisdiction reported that it was 'easy' or 'very easy' to obtain, except in NT where there were mixed reports. The availability of methamphetamine remained stable in most jurisdictions.

Use: The proportion of IDU reporting use of powder methamphetamine in the six months preceding interview has stabilised in all jurisdictions except TAS, SA and WA (Table 4). The use of base decreased in VIC, SA and the NT and increased in the ACT, TAS, WA and QLD. The use of crystal methamphetamine increased in NSW, ACT, decreased in VIC, TAS and QLD and remained stable in SA.

COCAINE

Estimates of the price of cocaine by jurisdiction appear in Table 5. Cocaine price, purity and availability were reported by small numbers of respondents in all jurisdictions except NSW.

Price: The number of people who reported on the price of cocaine per gram was less than ten in all jurisdictions in 2004. The price for a gram of cocaine was lowest in SA at \$195 a gram (however only two people commented) and highest in ACT (\$350, n=3). The cost of a cap of cocaine was highest in QLD at \$150, (however only one person commented) and was lowest in NSW (n=34) and SA (n=1) at \$50 (Table 5).

Purity: IDU were asked to describe the current purity or strength of cocaine and if there had been any change in purity in the six months preceding interview. IDU reports of the purity of cocaine were variable.

Table 5:
Median price of last purchase of cocaine by jurisdiction, 2000-2004

	MEDIAN PRICE \$ PER GRAM					MEDIAN PRICE \$ PER CAP				
	2000	2001	2002	2003	2004	2000	2001	2002	2003	2004
NSW	200	200	200	200	290 [^]	50	50	50	50	50
ACT	-	-	-	200	350 [^]	-	-	-	-	-
VIC	250 [^]	250	200 [^]	250 [^]	200 [^]	80 [^]	50 [^]	50 [^]	-	-
TAS	300 [^]	450 [^]	233 [^]	250 [^]	325 [^]	65 [^]	100 [^]	100 [^]	80 [^]	-
SA	225 [^]	200 [^]	250 [^]	250 [^]	190 [^]	75 [^]	50 [^]	50 [^]	-	50 [^]
WA	250	300	350	250	-	50	-	-	-	-
NT	-	-	-	-	250 [^]	-	-	-	-	60 [^]
QLD	-	-	-	300	200 [^]	-	-	-	-	150 [^]

[^] Median prices are based on small numbers (n < 10)

Note: Dashes represent no (or one) purchase of stated amount

Of those able to comment, nearly a third (30%) reported the purity as medium, 27% as medium and 23% as high. Twenty one percent of IDU reported that the purity had remained stable, 22% thought it was decreasing, 15% thought it was increasing and a further 26% did not know.

Availability: Cocaine nationally was considered 'easy' (30%), 'very easy' (24%), difficult (27%) and very difficult (9%) to obtain. Reports between jurisdictions differed. In NSW and SA over 60% reported availability to be either 'very easy' or 'easy' whereas in the ACT, TAS and QLD over 60% reported 'difficult' or 'very difficult'.

Use: Nationally since 2001 the recent use of cocaine has steadily decreased. The proportion of IDU reporting recent cocaine use decreased in all jurisdictions except WA and NT where the proportion increased to levels similar to 2002 (Figure 1). The frequency of daily use among those that used cocaine continues to be low (6% in 2004, 5% in 2003) in comparison to 2002 (24%) in NSW and remained sporadic in all other jurisdictions.

Figure 1:
Proportion of IDU samples that reported using cocaine in preceding six months, by jurisdiction, 2000-2004

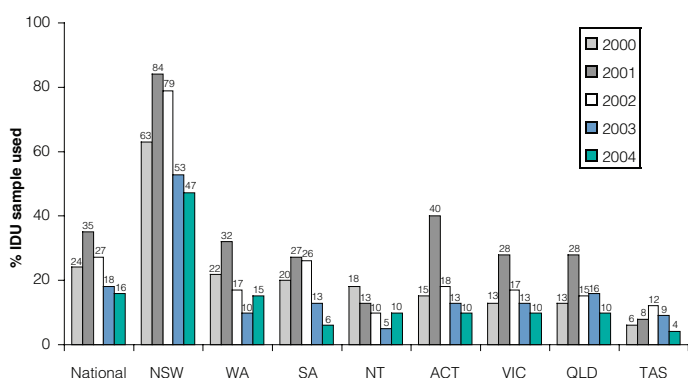


Table 6:
Median price of last purchase of cannabis by jurisdiction, 2000-2004

	PRICE \$ PER GRAM								MEDIAN PRICE \$ PER OUNCE							
	2000	2001	2002	2003		2004		2000	2001	2002	2003		2004			
				Hydro	Bush	Hydro	Bush				Hydro	Bush	Hydro	Bush		
NSW	20	20	20	20	20	20	20	300	320	300	310	225	300	175		
ACT	25	20	20	20	20	20	20	300	280	250	322.5	200	280	200		
VIC	20	20	20	20	20	20	20	280	250	250	280	250	240	180		
TAS	25	25#	25	25	25	25	25	300	280	250	300	150	280	180		
SA	25*	25*	25*	25*	25*	25*	25*	220	200	180	200	180	200	180		
WA	25^	25^	25	25	20	25	25	300	250	250	270	200	250	200		
NT	25	25	25	25	25	25	23	300	300	300	305	200	300	200		
QLD	25	25	25	25	15	25	20	300	320	300	310	240	300	200		

* approximately 2.5 grams

approximately 1.5 grams

^ approximately 2 grams

CANNABIS

Since 2003, the IDRS distinguished between hydroponic and outdoor-grown ('bush') cannabis. Hydroponic cannabis continues to be the form most commonly used in all jurisdictions, followed by outdoor-grown cannabis. Hash and hash oil are mainly used in SA and WA.

Price: The price of an ounce of hydroponic remained cheapest in SA at \$200 (most expensive in NSW, QLD and NT at \$300) and the price for an ounce of bush ranged from \$175 in NSW to \$200 in the ACT, WA, NT and QLD. Gram prices for both forms varied from \$20-\$25, consistent with previous years. In SA, the median price for both hydroponic and bush cannabis remained at \$25 for a bag containing approximately two and a half grams. The majority of IDU in all jurisdictions reported that the price of both hydroponic and outdoor cannabis had remained stable in the preceding six months (Table 6).

Potency: As in previous years, the IDU in all jurisdictions perceived potency of hydroponic cannabis as 'high' and stable. Outdoor grown ('bush') cannabis was perceived to be of 'medium' potency by the majority of IDU in all jurisdictions but SA where it was described as being 'high' to 'medium' potency. Potency of bush cannabis was regarded as stable in all jurisdictions.

Availability: Hydroponic cannabis was considered 'very easy' or 'easy' to obtain by the majority of IDU in all jurisdictions, and availability was described as stable. Reports on bush cannabis availability were more mixed, but it was generally described as 'easy' or 'very easy' to obtain.

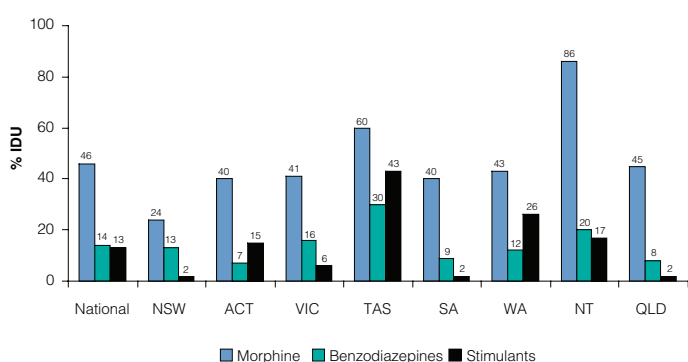
Use: As in all previous years of the IDRS, cannabis use was common, and hydroponic cannabis continued to dominate the market with the majority in all jurisdictions reporting it as the form most used. The use of outdoor crop or bush cannabis in the six months preceding interview was reported in all jurisdictions by over half of respondents

(59% in NSW, VIC to 80% in TAS). The use of hash (6% in NSW to 27% in WA) and hash oil (4.5% in NSW, NT to 13% in SA) in the preceding six months was also reported in all jurisdictions.

DIVERTED PHARMACEUTICALS

The injection of pharmaceutical preparations has been identified by the IDRS as an issue that requires monitoring. Substantial proportions of IDU report recent injection of morphine which remains highest in the NT and TAS (Figure 2). A slight decrease in morphine injection was reported in all jurisdictions except NSW and VIC where it increased slightly. Benzodiazepine injection continues to occur among significant minorities in all jurisdictions (30% in TAS to 7% in ACT) (Figure 2). Almost half (43%) of the TAS sample and 26% of IDU in WA reported injection of pharmaceutical stimulants in the six months preceding interview (Figure 2). The injection of illicit methadone syrup (62%) and illicit physeptone (47%) is highest in TAS. Twenty-nine percent of IDU in VIC reported the injection of illicit buprenorphine followed by 20% in WA, 17% in QLD and less than 15% in the other jurisdictions.

Figure 2:
Proportion of IDU that reported recent injection of morphine, benzodiazepines and pharmaceutical stimulants by jurisdiction, 2004



CONCLUSIONS

- In 2004 the availability of heroin has increased slightly since the shortage of 2001, although the prevalence and frequency of use has not returned to the same levels as seen in 2000. Compared to the 2003 sample, similar proportions of participants in 2004 reported that the price of heroin had remained stable in the preceding six months except in TAS.
- Substantial proportions of IDU continue to use all forms of methamphetamine. The proportion of participants reporting recent use of crystal methamphetamine remained the same in all jurisdictions except in VIC, TAS and QLD where a slight decrease was noted. The availability of crystal methamphetamine was reported to have remained stable over the six months preceding interview unlike 2003 where the use of crystal methamphetamine increased in all jurisdictions except SA. Substantial proportions of IDU in TAS, WA, NT and the ACT use pharmaceutical stimulants.
- The proportions reporting recent cocaine use decreased in all jurisdictions except WA and the NT. NSW continues to have the highest level of cocaine use, however the frequency of use remained low among IDU. Cocaine use remained relatively uncommon and infrequent in other jurisdictions.
- Hydroponically grown cannabis continued to dominate the cannabis market, and was considered 'easy' or 'very easy' to obtain in all jurisdictions. The price and availability was considered to be stable, and the potency 'high'.
- There are jurisdictional differences in the types of diverted pharmaceutical preparations that IDU inject.

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