1.5 Cannabis market

1.5.1 Production

Production of cannabis basically comprises three different products: cannabis herb, cannabis resin and cannabis oil.

- **Cannabis herb** is comprised of the flowering tops and leaves of the plant, which are smoked like tobacco using a variety of techniques. While this drug is consumed throughout the world, the largest market for cannabis herb is in the Americas, accounting more than 60 per cent of global seizures in 2004. North America alone was responsible for more than half of all seizures. Africa accounted for more than 30 per cent of global cannabis herb seizures. Over the 1994-2004 period, the proportion of cannabis herb seizures in global cannabis seizures amounted to 79 per cent (81 per cent in 2004)

- **Cannabis resin** (*hashish*) consists of the secretions of the plant emitted in the flowering phase of its development. Nineteen per cent of global cannabis seizures were in the form of cannabis resin in 2004. Western Europe is the largest market for cannabis resin, accounting for more than 70 per cent of global resin seizures in 2004, and some 80 per cent of the hashish consumed in Europe is estimated to be produced in Morocco.

- **Cannabis oil** (*hashish* oil) is far less widely used than cannabis herb or cannabis resin. Although cannabis oil seizures doubled in 2004, they accounted still for just 0.01 per cent of global cannabis seizures in 2004.

Production estimates for cannabis are collected by UNODC, but must be regarded with a high degree of caution. They are highly tentative and should be viewed as informed guesses established by experts. As scientifically valid monitoring systems for cannabis cultivation continue to be the exception and not the rule, even major producing countries are not in a position to provide scientifically valid estimates.

Moreover, the fact that cannabis is a plant that grows in virtually every inhabited region of the world, that can be cultivated with little maintenance on small plots, and that can even be grown indoors, further complicates matters. Therefore, remote sensing approaches in estimating the areas under cultivation, as used for poppy and coca, are difficult if not impossible if global cultivation had to be estimated.

In other words, the lack of clear geographical concentrations in a few countries (as is the case for opium poppy or cocaine) has made it difficult to introduce effective and reliable crop monitoring systems for the world at large.

Cannabis herb is cultivated in some 176 countries

Over the 1994-2004 period, 82 countries provided UNODC with cannabis production estimates. For comparison, only 36 countries provided estimates for opium poppy cultivation, and only six provided estimates for coca leaf production.

The fact that a country did not provide an estimate does not mean that no cultivation exists, as many countries lack the capacity to establish reliable estimates. Another possibility to identify cannabis producing countries has been to analyse reports on the source of the cannabis trafficked in a country. On this basis, 142 producer countries could be identified for the 1994-2004 period.

A third list of producer countries was generated by singling out those that report the seizure of whole cannabis plants. It is inefficient and thus unlikely to transport whole plants internationally, as only certain parts are

useable as a drug. Thus, when a whole plant is seized, it is very likely that it was locally produced. Seizures of whole cannabis plants were reported in 141 countries during the 1994-2004 period.

Combining these three lists results in the identification of 176 countries and territories where cannabis is produced. This is equivalent to 90 per cent of the countries and territories which receive UNODC's Annual Reports Questionnaire (195). However, there are no indications that in the remaining countries cannabis production does not take place.

Global production of cannabis is estimated at 45,000 metric tons

Since the publication of the 2005 *World Drug Report*, there has been a slight increase in the global cannabis production estimate, from 42,000 metric tons to 45,000 metric tons. A tentative breakdown of these estimates shows that the bulk of cannabis continues to be produced in the Americas (54 per cent), notably in North America (35 per cent), in South America (18 per cent), Africa (27 per cent) and Asia (15 per cent). Only 4 per cent of global cannabis herb production occurs in Europe. This may appear low, however, it should be noted that Europe also accounts for just three per cent of global cannabis herb seizures. Oceania accounts for 1 per cent of global production.

Production of herbal cannabis in North America appears to decline

A number of indicators suggest that the Americas, and notably North America, produce more cannabis than any other region. The cannabis markets in the Americas are, however, largely self-sufficient, that is, most of the cannabis produced in the Americas is also consumed in the region.

According to United States estimates, 10,100 metric tons of cannabis herb were produced in Mexico in 2005. This would make Mexico the largest cannabis herb producer in North America. In the United States, about 4,455 metric tons of cannabis herb were produced in 2004/5, according to the United States Office of National Drug Control Policy. An estimated 800 metric tons of cannabis herb are produced in Canada.
Cannabis herb production in that region appears to have declined. In Mexico, production of cannabis herb is said to have decreased from 13,500 metric tons in 2003 to 10,100 metric tons in 2005 (-25 per cent). This success was largely due to large-scale eradication efforts. Similarly, in the United States production has been reduced from some 5,560 metric tons to 4,455 metric tons.

Cannabis production significantly increases in Paraguay

The UNODC estimate for cannabis production in Paraguay was raised from 2,000 to slightly less than 6,000 metric tons[23], a three-fold increase. However, the growth reported from Paraguay was even more dramatic, suggesting an annual production of some 15,000 metric tons of cannabis. The upsurge was explained by an increase in the cultivation area and the introduction of new species which allow for cannabis cultivation in the dry winter months, thus leading to higher yields.

However, the reported estimate did not tally with credible information that 85 per cent of Paraguayan cannabis resin (equivalent to 12,750 metric tons) is destined for cannabis markets in Brazil. Given the official estimates of cannabis users in Brazil (1 per cent of the population age 15-64 or 1.2 million persons), each user would have had to consume 10.5 kg of cannabis per year which is far in excess of the usual figures for annual use (100-250 grams per user). Absorption capacity in other South American countries is limited and no information has emerged so far from Paraguay conquering markets outside South America. Therefore, taking all these factors into consideration, the estimate for cannabis production in Paraguay was raised more conservatively.

Production also on the rise in Africa and Asia

Other major producing countries of cannabis herb are – according to UNODC estimates – Morocco (3,700 metric tons)[24], South Africa (2,200 metric tons), Colombia (2,000 metric tons) and Nigeria (2,000 metric tons). Further important producer countries are

23 This would be equivalent to either the new estimate of 3000 hectares and the old yield of 1960 kg/ha or the old area under cultivation estimate (1,100 ha) and the new yield estimates of more than 5000 kg/ha per year .

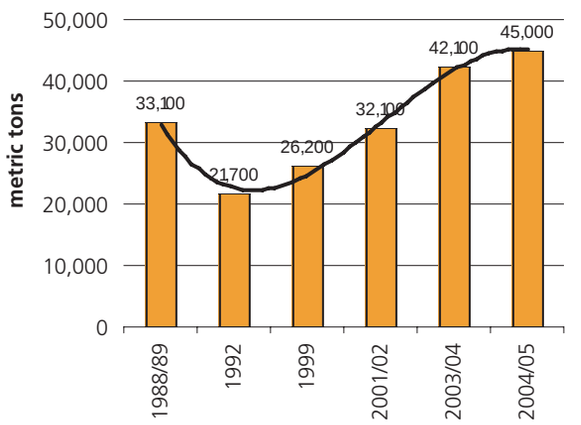
24 The estimate of cannabis herb production of Morocco was established on the basis of the cannabis cultivation survey carried out by the Government of Morocco, in collaboration with UNODC, and seizure data providing an indication of the likely split of cannabis resin and cannabis herb production. Taking the typical cannabis-to-cannabis-resin transformation ratios into account, seizure data suggest that less than 5 per cent of the land under cannabis cultivation in Morocco is dedicated to cannabis herb production. Based on these ratios, the total area under cannabis herb cultivation was estimated at 4,500 hectares in 2004. Using the average yield in Morocco (813 kg in 2004) resulted in an estimate of 3,660 metric tons of cannabis herb production in Morocco.

Kazakhstan, Philippines, Egypt, Lebanon, Canada, India, Sri Lanka, Kyrgyzstan, Afghanistan, Albania and Netherlands, with an estimated production ranging between 300 and 1,600 metric tons per country.

In Africa, cannabis production shows an upward trend, except for Morocco where production has declined sharply. A number of Asian countries also reported higher production estimates.

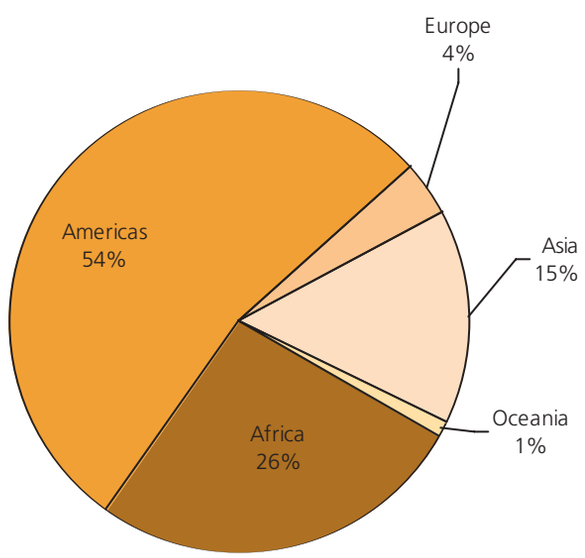
Although the changes at the global level have not been dramatic over the past two years, current production estimates are substantially higher than those for the early 1990s. After having fallen in the late 1980s, global cannabis production seems to be now more than twice as high as a decade earlier. The trend in production is in line with seizure data.

Fig. 75: Estimates of global cannabis herb production[25]



Sources: UNODC, World Drug Reports 2004 and 2005, UNODC, Annual Reports Questionnaire Data, Government Reports and UNODC estimates.

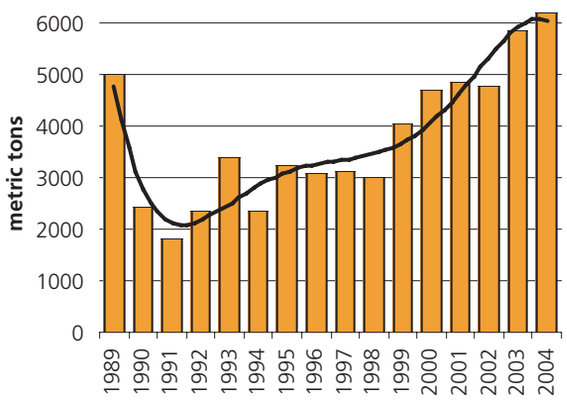
Fig. 74: Distribution of cannabis herb production in 2004/05 (N = 45,000 metric tons)



Source: UNODC, Annual Reports Questionnaire Data/DELTA.

25 The very strong increase between 2001/02 and 2003/04 is due to an expansion of country estimates (applying consumption based production estimates for countries which did not supply such estimates); without that methodological change, the increase would have only been from 32,000 to 35,000 metric tons.

Fig. 76: Cannabis herb seizures, 1999-2004



Source: UNODC, Annual Reports Questionnaire Data.

Cannabis resin

Morocco continues to be a major source of cannabis resin

The world's largest cannabis resin producer continues to be Morocco, supplying illicit markets in North Africa and West Europe. West Europe is the world's largest market for cannabis resin, accounting for more than 70 per cent of global resin seizures in 2004.

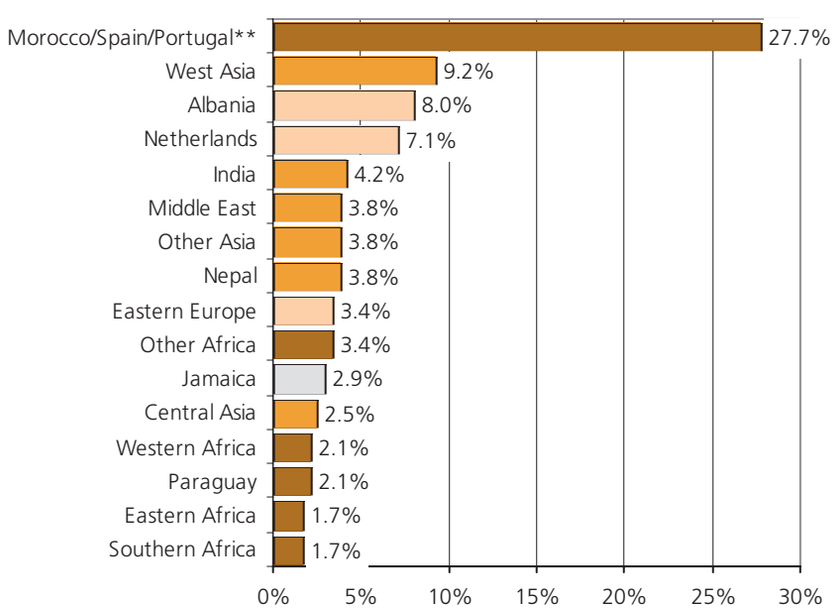
Over the 2002-2004 period, Member States cited Morocco as source country, followed by Pakistan and Afghanistan. The proportion of Morocco has, however, declined slightly, from 31 per cent over 1999-2003[vi] to 28 per cent over the 2002-2004 period, suggesting that the source basis for supplying the cannabis resin market is expanding to a number of other countries.

Other countries cited as important sources of cannabis resin are Albania and the Netherlands. In some cases, it is not always clear whether the cannabis resin was produced in these countries or whether it was only bought in these countries, originating from Morocco. Jamaica and Paraguay are said to be key sources of cannabis resin in the Americas.

Cannabis resin production plummets in Morocco

Since 2003, the Government of Morocco has conducted comprehensive cannabis surveys, in cooperation with UNODC. The 2003 survey placed total resin production at about 3,060 metric tons, cultivated on 134,000 hectares of land in the Rif region by some 96,600 families. The 2004 survey showed a 10 per cent decline in the land dedicated to cannabis cultivation (120,500 hectares), with an estimated production of 2,760 metric tons. The 2005 survey found a further 40 per cent decline to 72,500 hectares and a decline in production to 1,066 metric tons, clearly reflecting the intensified efforts of the Moroccan authorities to eliminate

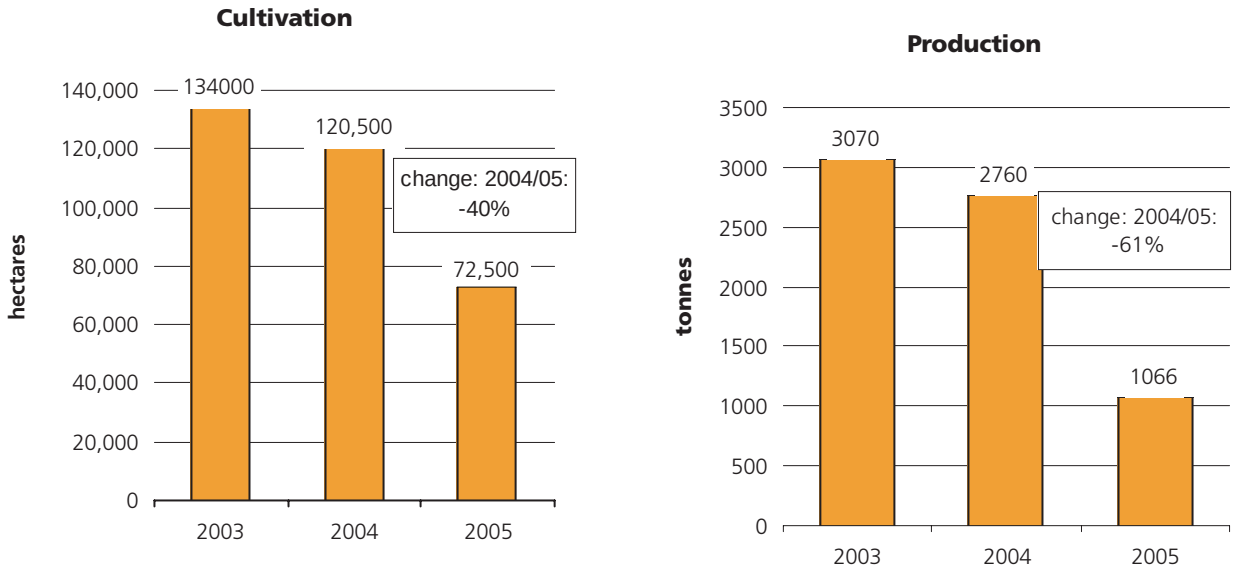
Fig. 77: Countries and sub-regions most frequently cited as sources of cannabis resin, 2002-2004 (based on information from 64 countries)*



* number of times countries were identified as source countries, as a proportion of countries reporting.
** shown together as they lie along the same trafficking route.

Source: UNODC, Annual Reports Questionnaire Data.

Fig. 78: Morocco - cannabis cultivation and production, 2003-2005



Source: UNODC, Annual Reports Questionnaire Data.

Table 10: Tentative estimates of global cannabis resin production, 2004

	Seizures in metric tons (2004)	Estimated proportion of seizures related to cannabis resin originating in Morocco	Potential seizures in metric tons related to Moroccan cannabis resin in 2004	Cannabis resin production estimates
West & Central Europe	1,083.00	80%	866.4	
North Africa	103.4	90%	93	
Seizures related to Moroccan cannabis resin			959.4	
Global seizures			1,470.50	
Seizures related to Moroccan cannabis resin in % of global seizures			65%	
Cannabis resin production in Morocco (2004) in metric tons				2,760
1. Estimate of global cannabis resin production (based on Moroccan cannabis resin production)				4,230
2. Estimate based on cannabis herb production estimates and seizures				
	Cannabis herb	Cannabis resin	Proportion	Cannabis resin production estimates
Seizures in metric tons (2004)	6,189.30	1,470.50	24%	
2. Cannabis production estimate (based on herb production estimate)	45,000		24%	10,692
3. Combined estimate				
Average of estimates 1 and 2				7,461
3. UNODC cannabis resin production, rounded (Range)				7,500 (4,200-10,700)

cannabis production from their territory.

The decline of Moroccan cannabis production in 2004 (-10 per cent) was, however, not sufficient to reduce global cannabis resin production in that year. Cannabis resin seizures and consumption estimates suggest that the long-term upward trend in cannabis resin production did not come to a halt in 2004.

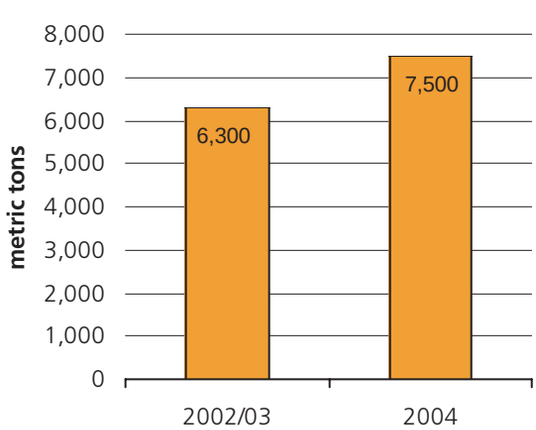
Tentative estimates, extrapolating results from Moroccan cannabis resin production data and extrapolating global resin production from herb production estimates with the help of seizure statistics, suggest that some 7,500 metric tons of cannabis resin were produced in 2004 (range: 4,200-10,700). Previous estimates, based on the same methodology, resulted in an estimate of some 6,300 metric tons (range: 5,100-7,400) for the year 2002/03.

No global production estimates for 2005 are, as yet, available. One can assume, however, that the strong decline of cannabis resin production by some 1700 metric tons in Morocco has had an impact on global cannabis production, leading to some decline of global cannabis resin production in 2005.

A tentative breakdown of global cannabis resin production suggests that some 40 per cent of the global cannabis resin supply is being produced in North Africa and more than a quarter in the Near and Middle East.

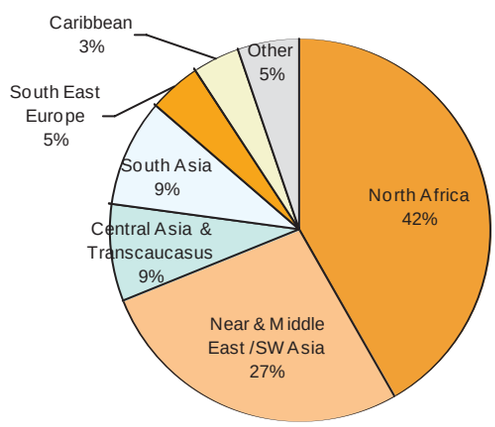
These two regions account for more than two thirds of global cannabis resin production. Other cannabis resin producing regions of importance are Central Asia, South Asia and, to a lesser extent, South-East Europe and the Caribbean.

Fig. 79: Tentative global cannabis resin production estimates, 2002/3 and 2004



Sources: UNODC, World Drug Report 2004 and UNODC and Government of Morocco, Cannabis Survey 2003 and 2004; UNODC, Annual Reports Questionnaire Data.

Fig. 80: Distribution of global cannabis resin production (N = 7,500 tons in 2004)



Source: UNODC, Annual Reports Questionnaire data.

1.5.2 Trafficking

Trafficking of both cannabis herb and cannabis resin continues to increase

Cannabis herb and resin remain the most widely trafficked drugs worldwide, accounting for the majority of all seizures. Almost all countries in the world are affected by cannabis trafficking. The upward trend in cannabis seizures, which began in the early 1990s, continued in 2004.

Cannabis herb seizures surpassed the 6,000 metric ton mark (+6 percent) in 2004. Most cannabis herb seizures were reported from Mexico, followed by the United States, South Africa, Nigeria and Morocco. In 2004, seizures of cannabis resin also increased by 6 percent to 1,470 metric tons. Most seizures of cannabis resin were made by Spain, followed by Pakistan, France, Morocco, Iran.

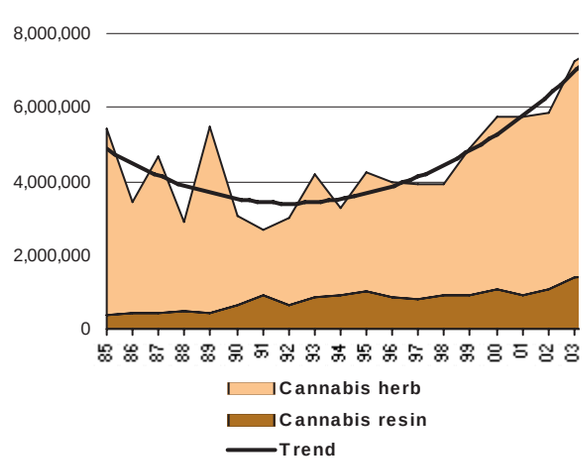
Cannabis herb remains, by far, the most widely trafficked drug

In terms of both volume and geographic spread, cannabis herb is the most intercepted drug in the world. Cannabis herb seizures rose by 6 per cent in 2004 and have doubled over the past ten years.

More than half of the global total of cannabis herb is seized in North America, notably Mexico and the United States. With seizures of 2,164 metric tons in 2004, Mexico leads the world's ranking, accounting for 35 per cent of global seizures, followed by the United States, where 1,118 metric tons of cannabis herb were seized in 2004. While the overall proportion of seizures made in North America has largely remained stable, less seizures are made in South America: whereas in 1990, South America accounted for 46 per cent of global cannabis herb seizures, this share has fallen to 7 per cent in 2004. The share of Africa, on the other hand, has been increasing continuously: from 16 per cent of global cannabis herb seizures in 1990 to 20 per cent in 2002 and 31 per cent in 2004. The strong upward trend recorded in 2004 can be explained by exceptionally high seizures of cannabis made in South Africa and Nigeria.

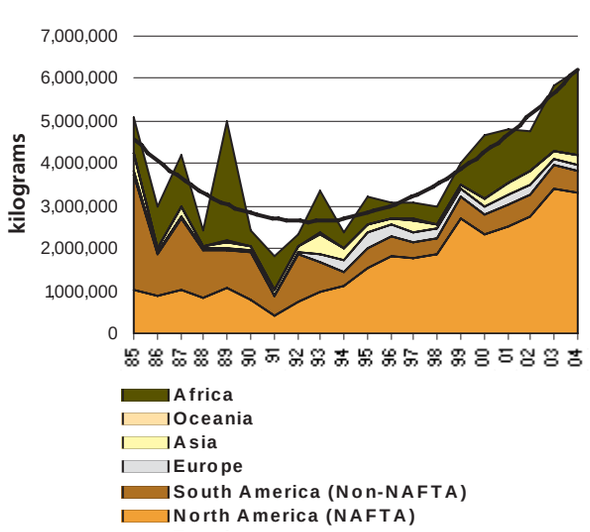
Cannabis seizures increased in Asia, primarily due to a surge of cannabis seizures in India which increased from 79 tons in 2003 to 144 tons in 2004 (+ 81 per cent). Europe presents a varied picture: While seizures in West and Central Europe declined by some 37 per cent (from 101 tons in 2003 to 63 tons in 2004), a strong upward trend was observed for East Europe where seizures of cannabis herb more than doubled: from 42 tons in 2003 to 97 tons in 2004 (+ 130 per cent). Almost all of this increase reflects an upsurge of cannabis herb seizures in the Russian Federation (from 41 tons in 2003 to 89 tons in 2004). Cannabis seizures declined in Oceania.

Fig. 81: Cannabis seizures, 1985-2004



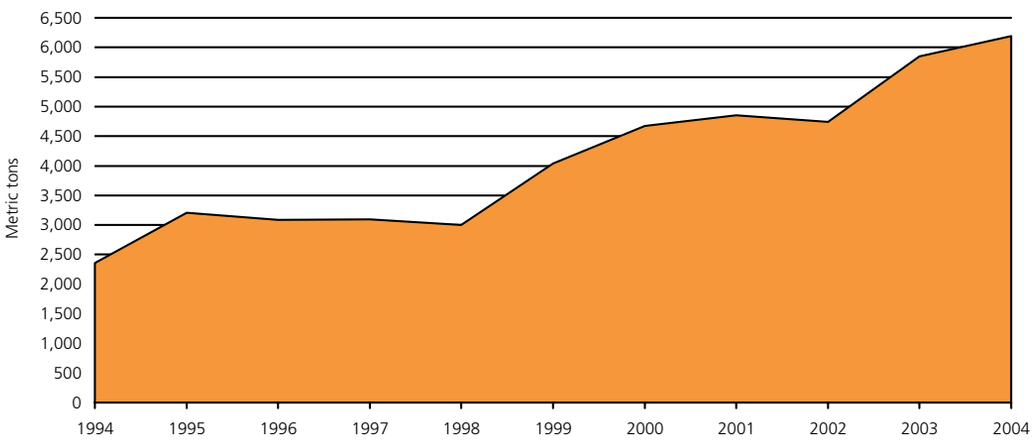
Source: UNODC, Annual Reports Questionnaire data.

Fig. 82: Regional breakdown of cannabis herb seizures, 1985-2004

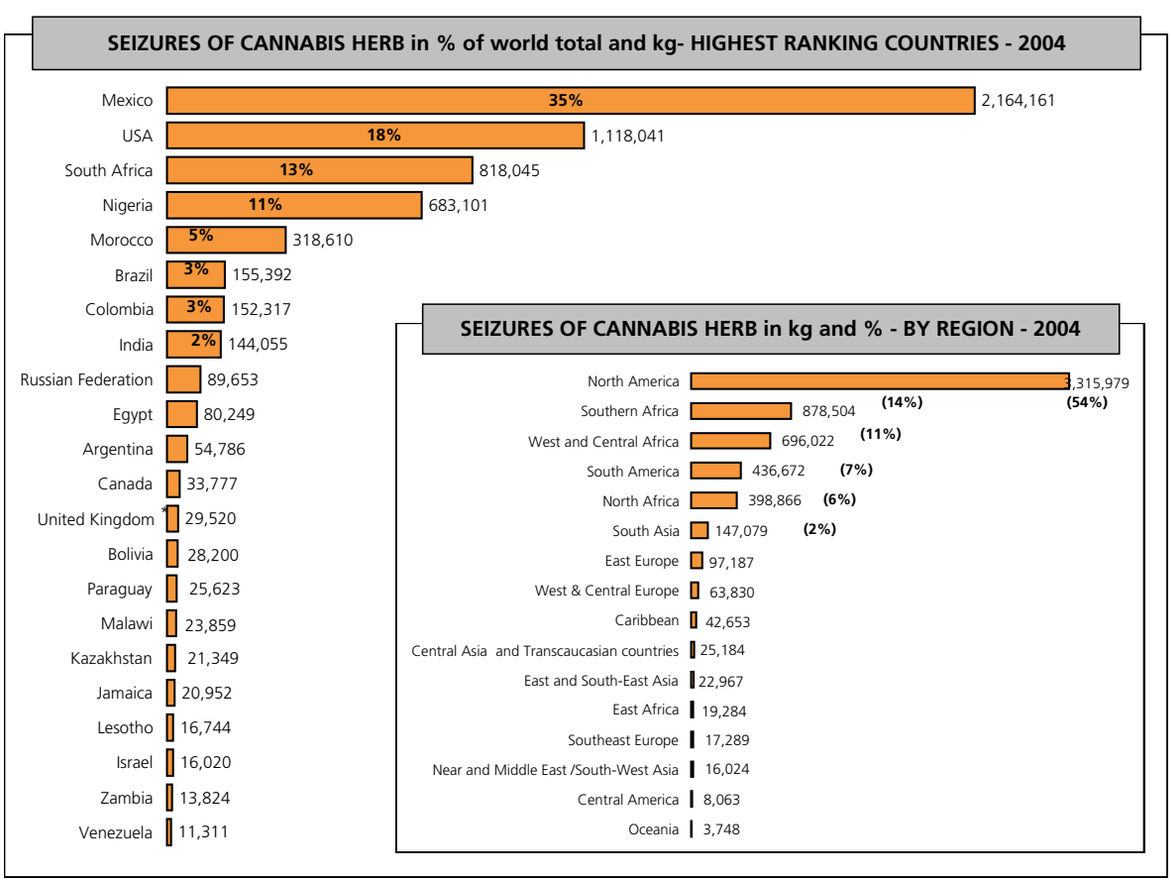


Source: UNODC, Annual Reports Questionnaire data.

Fig. 83: Global seizures of cannabis herb, 1994 -2004

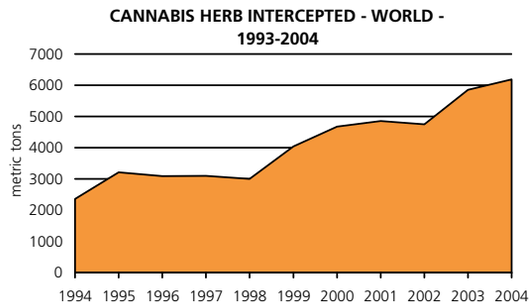


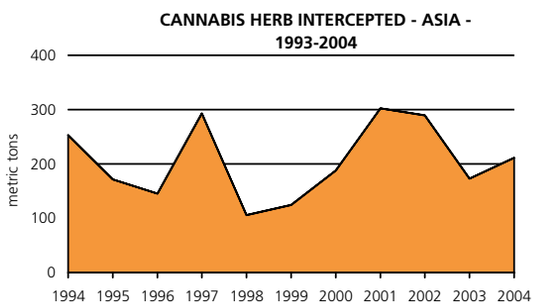
Year	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Metric tons	2,358	3,209	3,089	3,097	2,998	4,042	4,674	4,857	4,745	5,850	6,189

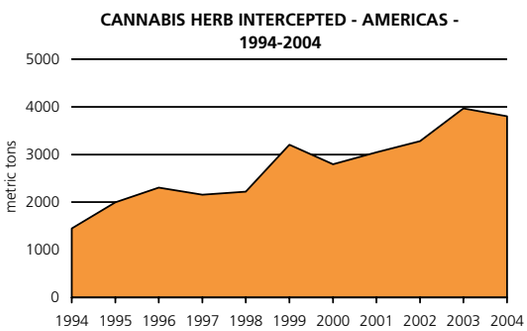


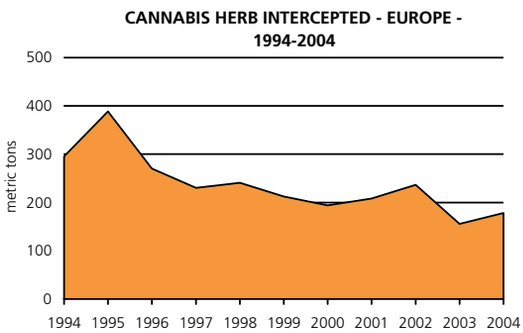
* data refer to 2003

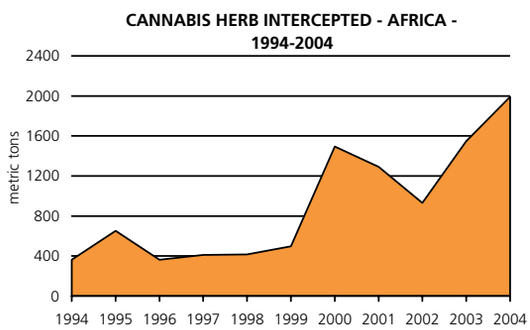
Fig. 84: Global seizures of cannabis herb, 1994 -2004

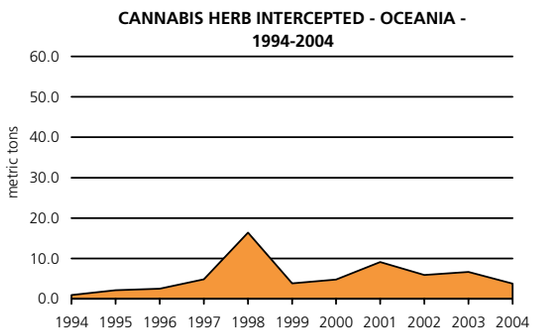




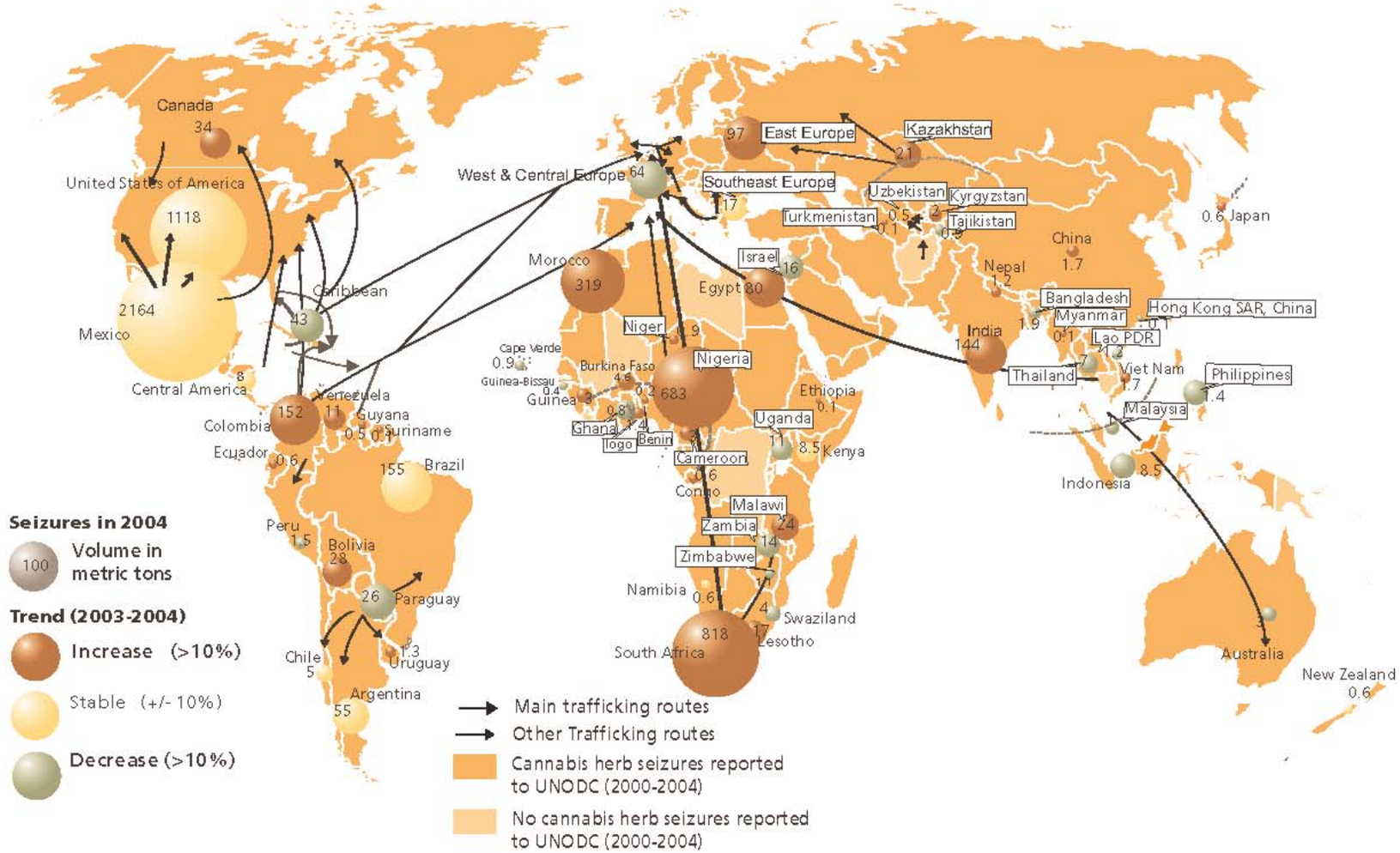








Map 15: Cannabis herb seizures 2003 - 2004: extent and trends (countries reporting seizures of more than 10 kg.)



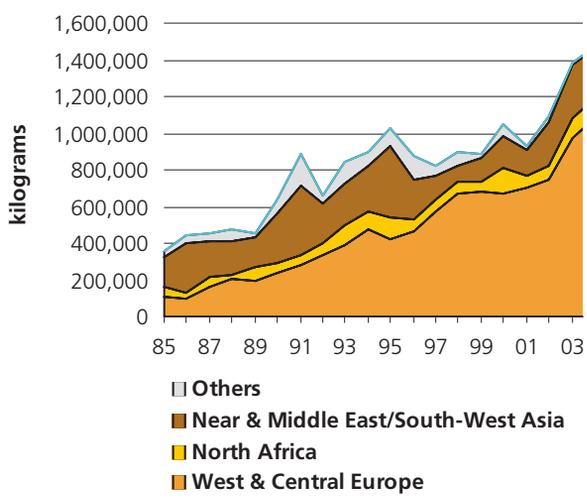
Note: Routes shown are not necessarily documented actual routes, but are rather general indications of the directions of illicit drug flows.

Trafficking in cannabis resin

Global cannabis seizures increase to all time high in 2004

Global cannabis resin seizures increased by 6 per cent to 1,471 metric tons, reaching a new all time high. The increases were most significant in West and Central Europe (+ 13 per cent), the largest market for cannabis resin in the world. Cannabis resin seizures declined in Africa, Asia, the Americas and Oceania.

Fig. 85: Global cannabis resin seizures, 1985-2004



Source: UNODC, Annual Reports Questionnaire Data / DELTA.

Most cannabis resin seizures are made in West & Central Europe, followed by Near and Middle East / South-West Asia and North Africa…

Three subregions account for 99 per cent of global cannabis resin seizures: West and Central Europe (74 per cent), Near and Middle East/South-West Asia (18 per cent) and North Africa (7 per cent). The largest seizures worldwide were reported by Spain (794 metric tons or 54 per cent of the total), followed by Pakistan (135 metric tons or 9 per cent), Morocco (86 metric tons or 6 per cent) and Iran (86 tons or 6 per cent). In Afghanistan, cannabis resin seizures declined by almost half, from 81 tons in 2003 to 41 tons in 2004. In Algeria, seizures of some 12 tons of cannabis resin were reported for 2004, more than double the quantity seized in 2002.

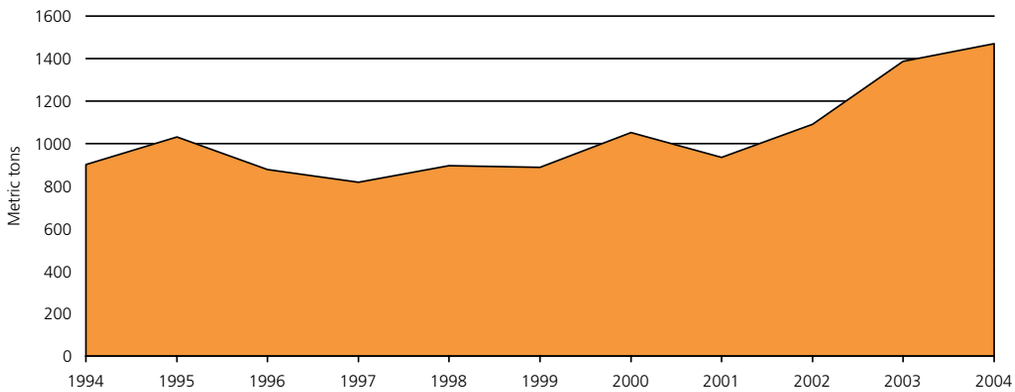
Europe continues to be the main destination of cannabis resin

The main destination of cannabis resin is West & Central Europe. About 80 per cent of the cannabis resin destined for the West & Central European market is estimated to originate in Morocco. Much of the cannabis resin transits Spain and the Netherlands before being shipped to other countries. The remainder of the resin supply originates in Afghanistan/Pakistan, Central Asia (mostly for the Russian Federation, other CIS states and some of the Baltic countries) or from within Europe (mainly Albania, supplying the markets of various Balkan countries and Greece).

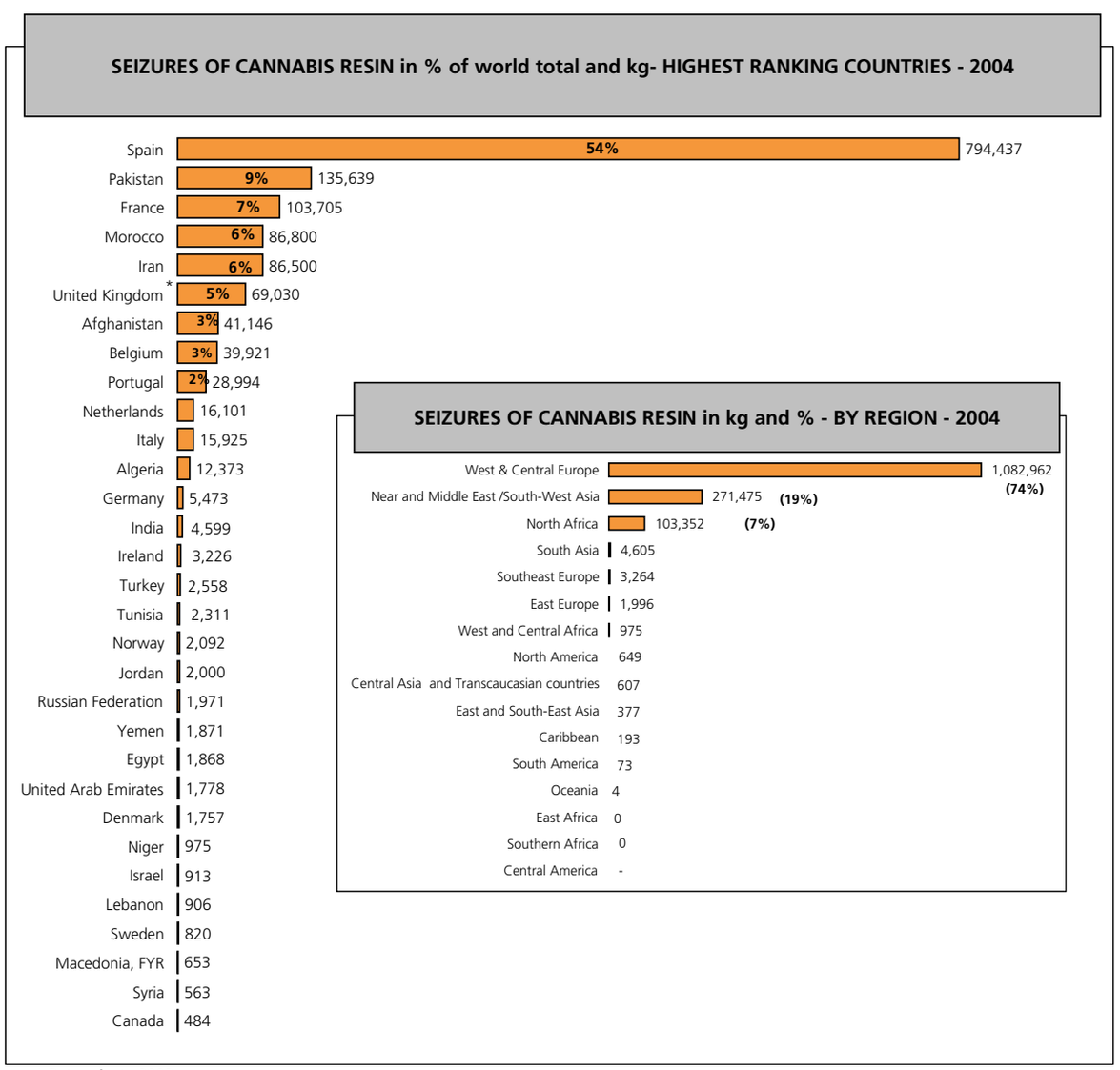
The second largest destination of cannabis resin is the Near and Middle East / South-West Asia region. This region is mainly supplied from cannabis resin produced in Afghanistan and Pakistan and, to a lesser degree, from cannabis resin originating in Lebanon. Some of the cannabis resin from Afghanistan/Pakistan is also being shipped to Canada and to countries in Eastern Africa.

North Africa makes up the third largest market and is predominantly supplied by cannabis resin produced in Morocco. The importance of other markets is limited. Nepal is a source country for cannabis resin exports to India and to some other countries and Jamaica is a source country for cannabis resin exports to some other countries in the Americas.

Fig. 86: Global seizures of cannabis resin, 1993 - 2004

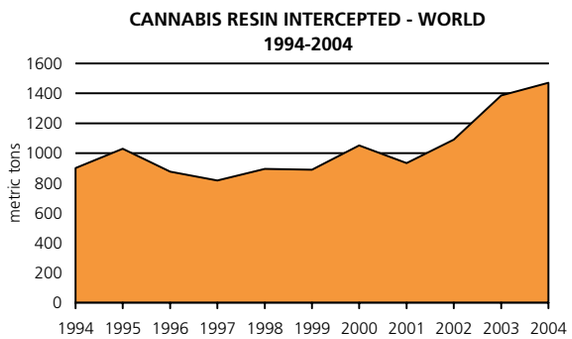


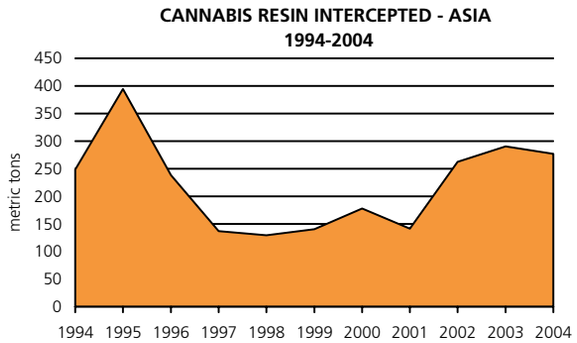
Year	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Metric tons	901	1,030	877	818	896	889	1,053	934	1,090	1,386	1,471

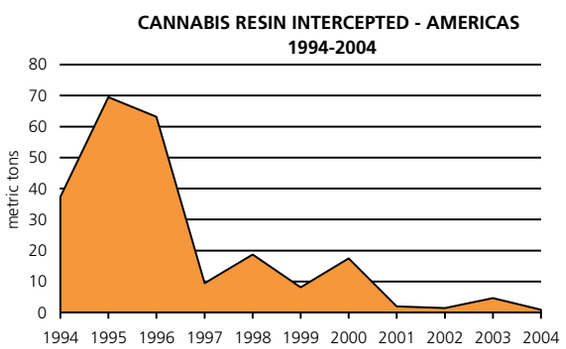


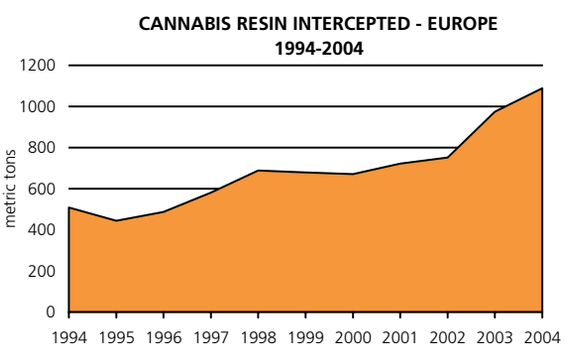
* Data refer to 2003

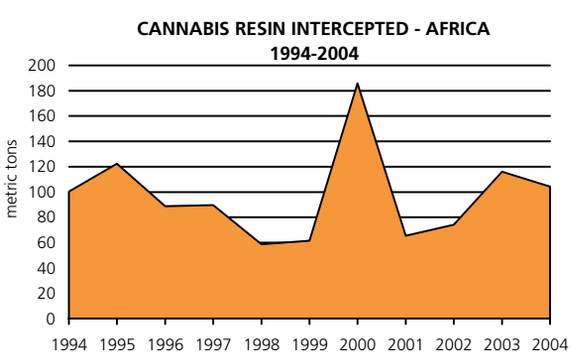
Fig. 87: Global seizures of cannabis resin, 1994-2004

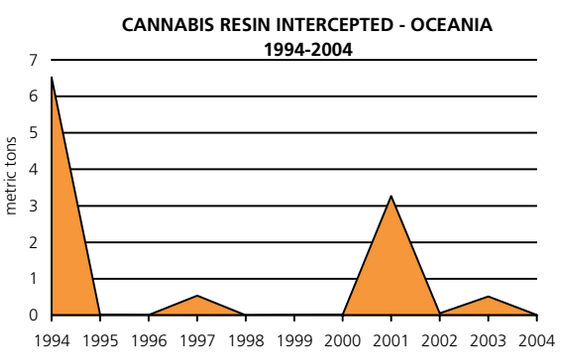




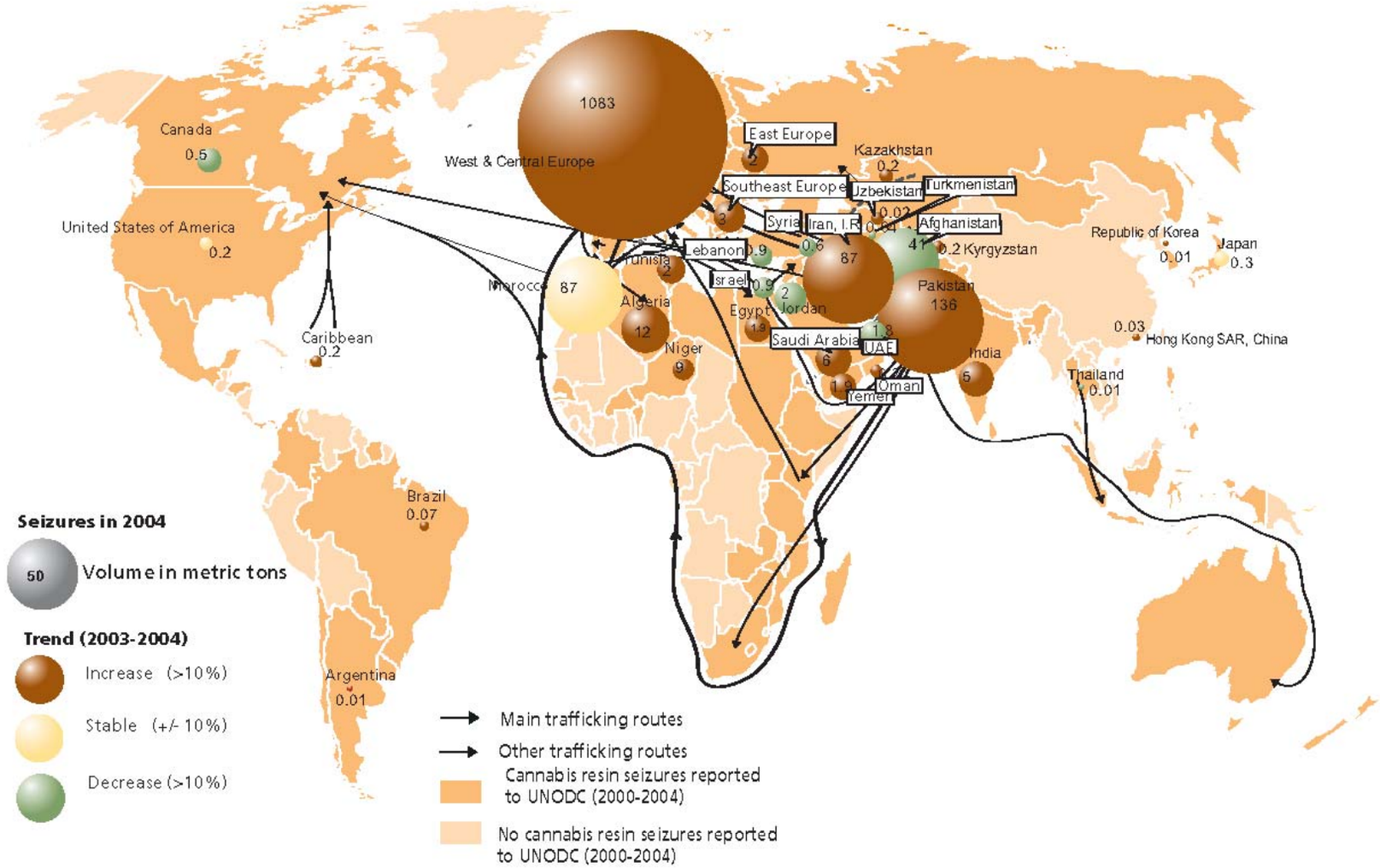








Map 16: Cannabis resin seizures 2003 - 2004: extent and trends (countries reporting seizures of more than 10 kg.)



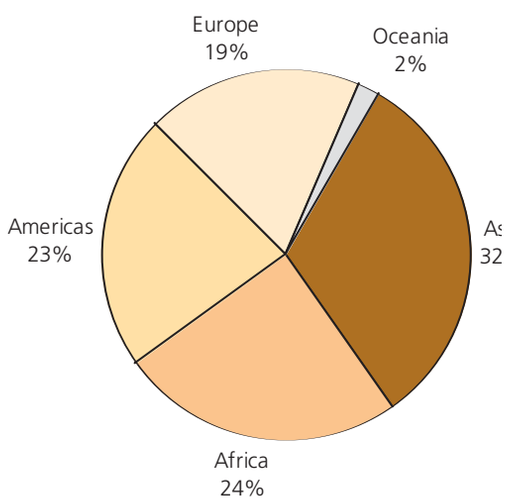
Note: Routes shown are not necessarily documented actual routes, but are rather general indications of the directions of illicit drug flows.

1.5.3 Abuse

Cannabis continues to be, by far, the most widely used drug in the world

Cannabis remains by far the most commonly used drug in the world. An estimated 162 million people used cannabis in 2004, equivalent to 3.9 per cent of the global population age 15-64. In relative terms, cannabis use is most prevalent in Oceania, followed by North America and Africa. While Asia has the lowest prevalence expressed as part of the population, in absolute terms it is the region that is home to some 52 million cannabis users, more than a third of the estimated total.

Fig. 88: Global cannabis market - breakdown by region



Sources: Sources: UNODC, Annual Reports Questionnaire Data, Govt. reports, reports of regional bodies, UNODC estimates.

Global cannabis use continues to increase - though after years of significant increases, it plateaus at current levels in some regions

After years of reported increases, cannabis use appears to have stabilized at current levels in North America, some countries of East and South-East Asia and in some countries of Western Europe. Cannabis use continues to increase in some countries in South, Central and East Europe and in Africa.

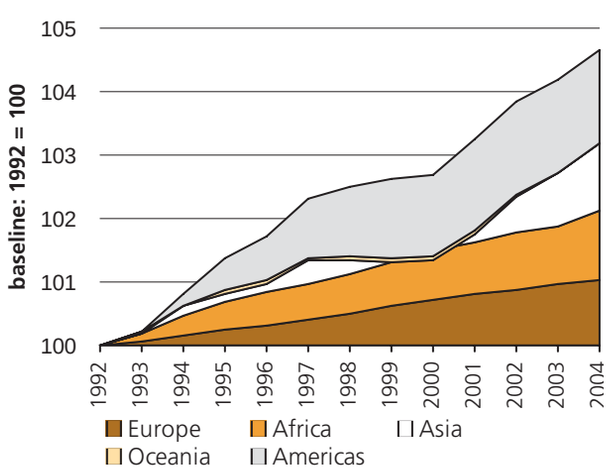
UNODC's annual prevalence estimate is only slightly higher than that published in 2005 *World Drug Report*. Stable or declining use rates of cannabis were reported in Oceania and the Americas. The annual prevalence of cannabis of secondary school students remained stable in the United States in 2005. Large increases in the use of cannabis have been primarily reported in African countries (eg. Algeria, Nigeria, Zambia).

The drug use trends, as perceived by experts, continued pointing upwards at the global level, suggesting a further expansion of the cannabis market. Since the late 1990s, cannabis use - as shown by the UNODC annual prevalence estimates – has increased by more than 10 per cent at the global level.

Over the last decade, cannabis use has increased in almost all regions, except Oceania

UNODC's drug use trends, as perceived by experts, suggest that there has been an increase in cannabis use in

Fig. 89: Twelve-year cannabis use trends, as perceived by experts



Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Table 11: Annual prevalence of cannabis use, 2003-2005

	Cannabis use	
	No. of users	*in % of population age 15-64*
EUROPE	30,800,000	5.6
West & Central Europe	23,400,000	7.4
South-East Europe	1,900,000	2.3
East Europe	5,500,000	3.8
AMERICAS	36,700,000	6.4
North America	29,400,000	10.3
South America	7,300,000	2.6
ASIA	52,100,000	2.1
OCEANIA	3,200,000	15.3
AFRICA	39,600,000	8.1
GLOBAL	**162,400,000**	3.9

Above global average
Around global average
Below global average

Sources: Annual Reports Questionnaire data, various Government reports, reports of regional bodies, UNODC estimates.

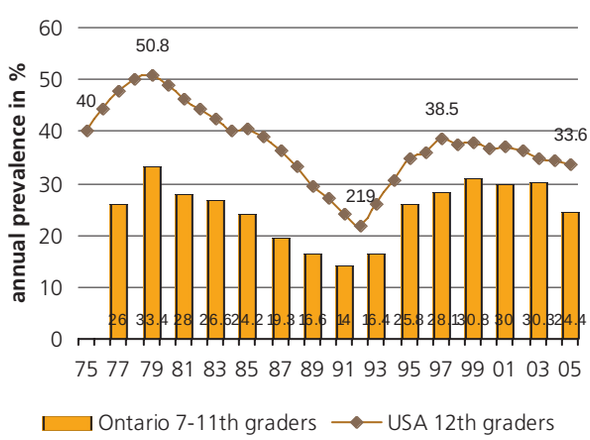
most regions, with the exception of Oceania where a downward trend has been observed. However, Oceania has traditionally had the highest cannabis prevalence rates in the world.

Cannabis use in the Americas increased strongly in the 1990s but has stabilized over last few years

UNODC's drug trends indicator has shown strong increases of cannabis use in the 1990s, clearly exceeding the global trend indicator. Since 2001, cannabis use is perceived to have been practically stable in the Americas. Nonetheless, the Americas showed the highest increase of all regions after 12 years.

But these findings have to be qualified. Available trend data for North America, as reflected in regularly undertaken school surveys, show indeed strong increases in cannabis use in the 1990s. But, this was followed by a stabilization in Canada as of 1999 (and a decline in 2005) and a gradual decline in the United States since 1997 (among 12th grade students). While for each individual year the decline was not statistically significant, over the 1997-2005 period cannabis use among 12th grade students in the United States declined by almost 13 per cent. In both Ontario, Canada, and in the United States prevalence rates in 2005 were lower than two decades ago.

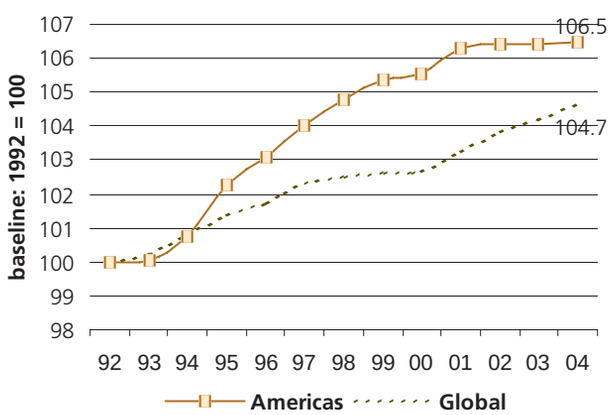
Fig. 90: Annual prevalence among high-school students in the USA and in Canada (Ontario only), 1975-2005



Sources: NIDA, *Monitoring the Future, 2005* and CAMH, Ontaria Drug Use Survey 2005.

School surveys carried out in Brazil show a similar trend. Strong increases were observed in the past. Lifetime prevalence of cannabis use in 10 state capitals of Brazil among 10-18 year old students increased from 3.4 per cent in 1989, to 4.5 per cent in 1993 and to 7.6 per cent in 1997.[26] New school studies conducted in Brazil across the country in 2004[27] revealed – using data from the same 10 capital cities - a decline to 6.4 per cent (unweighted average). The Brazilian data also suggest that cannabis use was in 2004 significantly higher than a decade ago but lower than in the late 1990s.

Fig. 91: Twelve-year cannabis use trends as perceived by experts: Americas

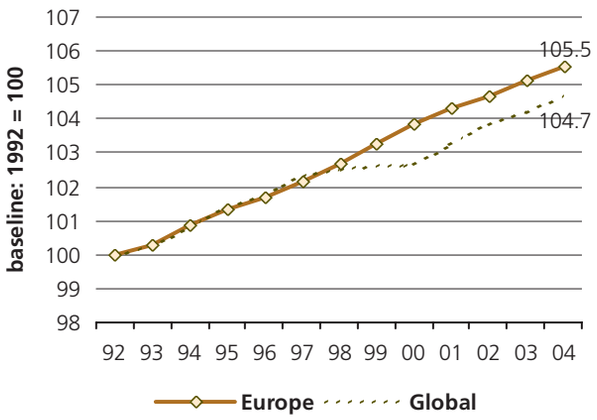


Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Cannabis use continues to rise in Europe

UNODC's cannabis trend indicator for Europe shows an ongoing upward trend, even though cannabis use has apparently stabilized in a number of West European countries, including the Nordic countries, France and Germany. In much of the rest of Europe, cannabis is reported to continue growing. UNDOC's cannabis trend indicator for Europe shows thus a higher level than the global indicator, having exceeded the global average as of 1999.

Fig. 92: Twelve-year cannabis use trends as perceived by experts: Europe

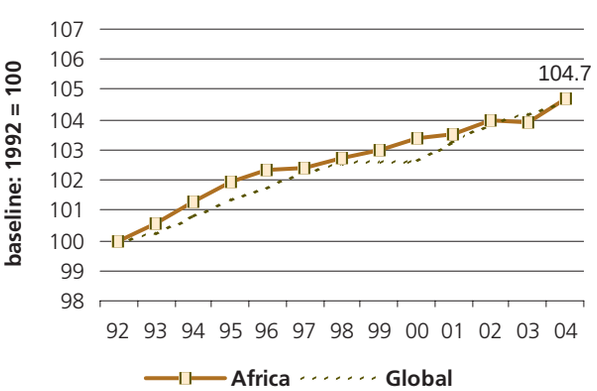


Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Higher cannabis use in Africa

Cannabis use in Africa is on the rise. Cannabis use was reported to have grown in all years in Africa since 1992. It is likely that the drug use trend has been underestimated as many countries in Africa have not regularly submitted annual reports questionnaires. Strong growth

Fig. 93: Twelve-year cannabis use trends as perceived by experts: Africa



Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

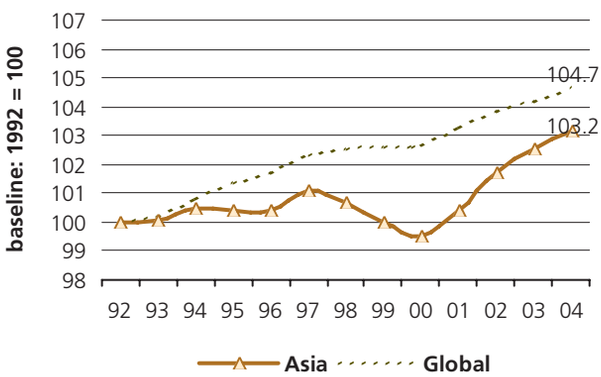
26 IV Levantamento sobre o Uso de Drogas entre Estudantes de 1 e 2 graus em 10 Capitais Brasileiras, 1997.
27 CEBRID, Levantamento Nacional Sobre o Uso de Drogas Psicotrópicas entre Estudantes do Ensino Fundamental e Médio da Rede Pública de Ensino nas 27 Capitais Brasileiras, 2004.

in recent years has been reported in much of western, eastern and northern Africa.

After some decline in the late 1990s, cannabis use surging in Asia

Over the 1992-1995 period, UNODC's drug trend indicator for Asia remained below the global average. However, it has shown some of the strongest growth rates since 2000, following some declines in the late 1990s. Exceptions to this general upward trend are a number of countries in South-East Asia which reported either stable or declining cannabis use.

Fig. 94: Twelve-year cannabis use trends as perceived by experts: Asia



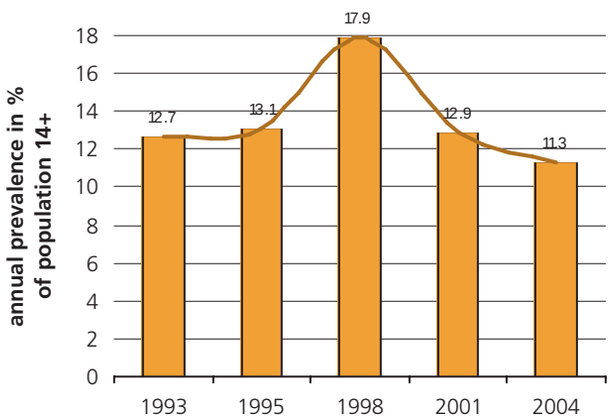
Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Continuous declines of cannabis use in Oceania

In contrast to most regions, a clear downward trend in cannabis use has been reported from Oceania. Australian Household Survey data suggest that cannabis use declined by some 37 per cent between 1998 and 2004 and that cannabis use levels are now below the levels in 1993. Similarly, the drug trend indicator – after having exceeded the global average in the second half of the 1990s - shows for Oceania slightly lower levels than in 1992, twelve years earlier.

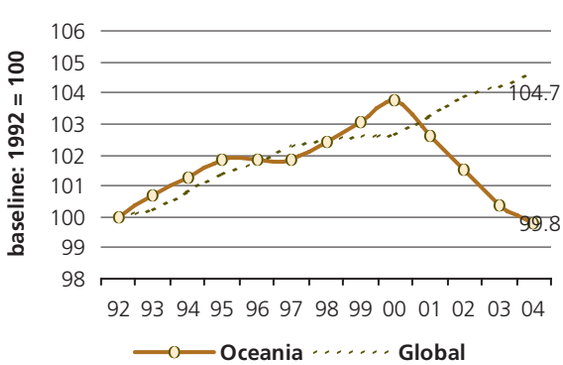
Though no definite answers as to the reasons for the massive decline exist, there are indications that the wide spread of cannabis use in Australia (and other countries in Oceania) in the late 1990s, in combination with growing levels of THC, meant that problems related to cannabis use became more apparent, notably to younger users, so that the substance has lost some of its previous benign image. There has also been far more media attention to the adverse effects of cannabis, particularly cannabis psychosis, prompting potential users to reconsider their choices.

Fig. 95: Annual prevalence of cannabis use among the general population in Australia, 1993-2004



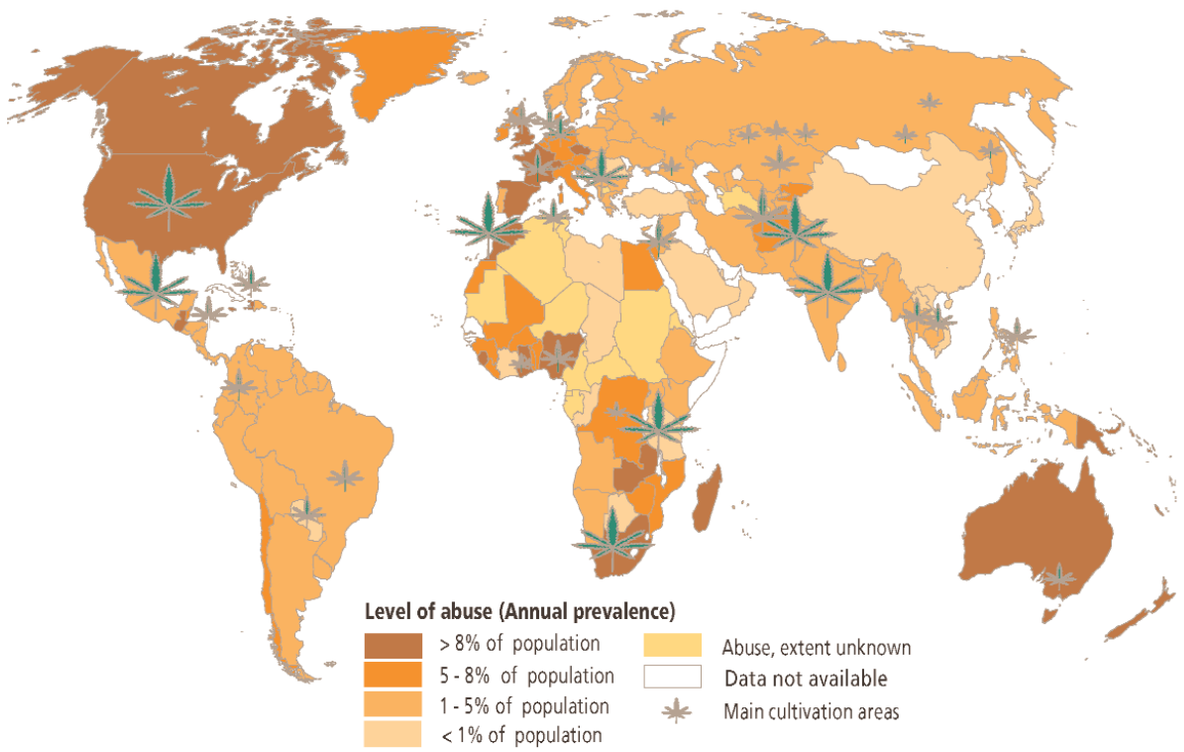
Source: Australian Institute of Health and Welfare, *The 2004 National Drug Strategy Household Survey.*

Fig. 96: Twelve-year cannabis use trends as perceived by experts: Oceania

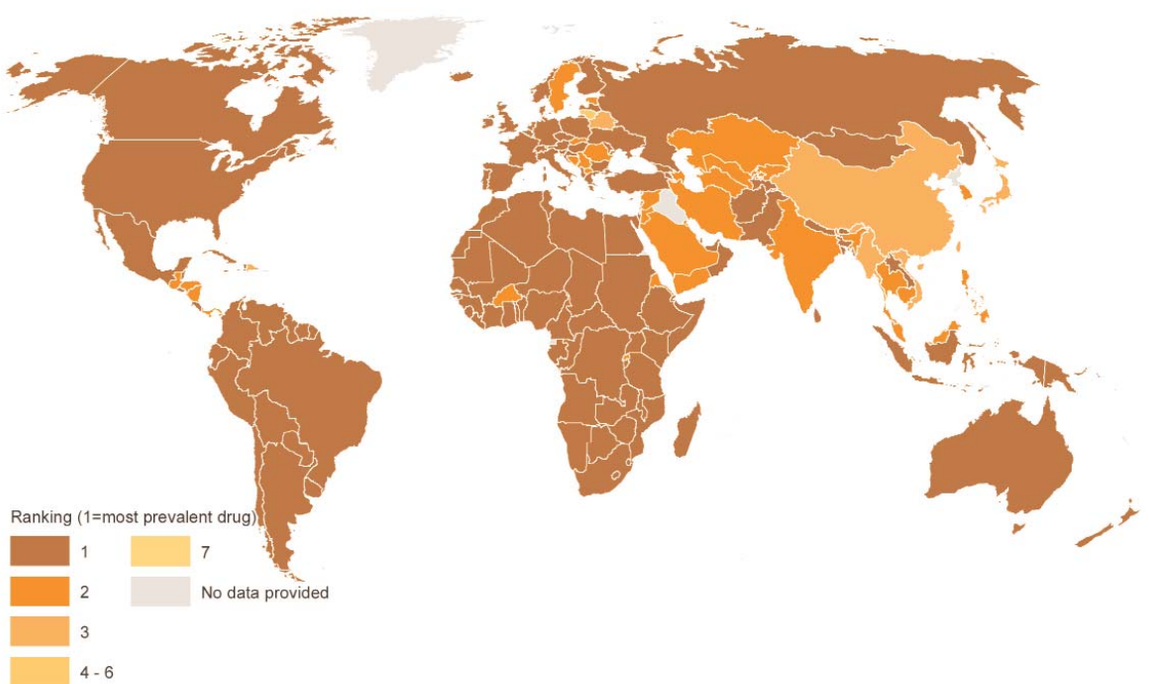


Sources: UNODC, Annual Reports Questionnaire Data, Government reports, UNODC Field Offices, UNODC's Drug Abuse Information Network for Asia and the Pacific (DAINAP), EMCDDA, CICAD, HONLEA reports and local studies.

Map 17: Use of cannabis 2003-2004 (or latest year available)

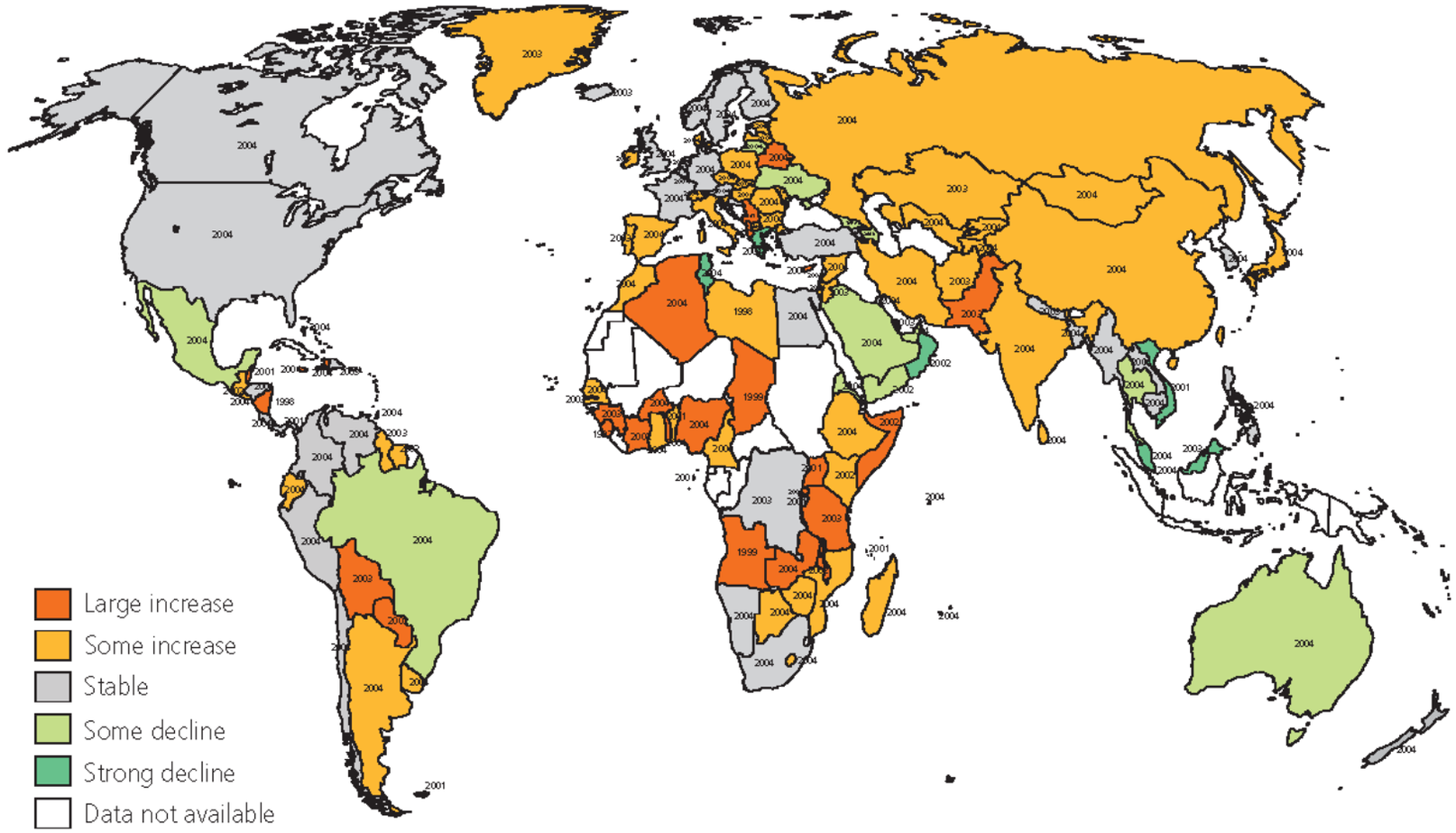


Map 18: Ranking of cannabis in order of prevalence in 2004 (or latest year available)



Sources: UNODC Annual Reports Questionnaires data, SAMSHA US National Household Survey on Drug Abuse, Iranian Ministry of Health, Rapid Assessement Study and UNODC ARQ,Council of Europe, ESPAD.

Map 19: Changes in use of cannabis, 2004 (or latest year available)



Source: UNODC Annual Reports Questionnaire Data and national reports.