

IN CONFIDENCE



SUMMER OUTLOOK

December 2024



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Purpose

This document is the [final report](#) in a series of three reports that will deliver an outlook into the acute drug harm risks that may arise during the upcoming 2024/2025 summer period. There is an understanding that with all drug use there is a risk of harm. High Alert monitors for changes in this baseline level of harm to identify opportunities for early intervention and to anticipate outbreaks of acute harm.

This analysis is intended to assist in the preparation of drug checking services and harm reduction measures offered by service providers and event organisers throughout the summer festival period. This assessment is based on information from the last ten months.¹

Some of the indicators used to inform this outlook include New Zealand Customs Service (Customs) seizures, data from community drug checking services, insights from the international drug market, data from the Drugs in Wastewater Testing Programme, analysis of harm incidents, reports from High Alert's partners, and lessons learned from previous festival seasons.

This document is an assessment of indicators available to High Alert at a particular point in time. Due to its relatively small size the New Zealand drug market can be subject to rapid changes in drug supply, and therefore consumption and harm.

[For the purpose of this report, information updated from November will appear in light blue.](#)

Key Points

- It is *highly unlikely* widespread misrepresentation of MDMA with synthetic cathinones or other harmful substances will occur. MDMA supply remains adequate to meet demand and harm is anticipated to occur at baseline levels similar to the previous summer, although isolated incidents of misrepresentation may occur.
- There is a *realistic possibility* new substances not previously identified in New Zealand [will continue to emerge](#) following the recent NPS ban in China. This could include a new synthetic cathinone or a new ketamine analogue. These substances will carry unknown risks, increasing the potential for adverse effects and harm.
- It is *highly likely* cocaine and ketamine consumption will increase when compared to previous festival seasons. A corresponding increase in baseline cocaine and ketamine harm can be expected.
- It is *almost certain* the majority of drug harm experienced in the festival environment will stem from high-risk drug use practices rather than from misrepresentation or adulteration. All stakeholders should consider the opportunities available to them to circulate specific harm reduction messaging about high-risk use. Particular focus should be given for advice around high dosing and polydrug use, both in regards to combinations of multiple drugs, and combinations of drugs and alcohol.
- It is *highly unlikely* widespread misrepresentation of LSD with NBOMe-like substances will occur during the upcoming festival period.

¹ Statistics are accurate as of 11 December 2024

Analysis

It is *highly unlikely* widespread misrepresentation of MDMA with synthetic cathinones, or other harmful substances will occur during the upcoming festival period. Harm is anticipated to occur at baseline levels similar to the previous summer, although isolated incidents of misrepresentation may occur.

MDMA supply is meeting current levels of demand, with levels of MDMA in wastewater remaining largely stable. While seizures of MDMA at the border are lower than is typical for this time of year, seizures of synthetic cathinones also remain low.

Drug checking data from the previous three years continues to suggest the frequency of synthetic cathinones misrepresented as MDMA remains low. Since 1 July 2024, approximately 95.9% of presumed MDMA presented to drug checking clinics were identified as MDMA. Of the substances that returned either a partial result for MDMA, or no MDMA at all, approximately 25.8% contained a synthetic cathinone in some quantity.

On 15 November, High Alert issued a notification after the toxic chemical mercury chloride, was detected in a white powder presumed to be MDMA. Since the release of the notification, no other cases have been identified. It is *unlikely* that widespread misrepresentation involving this substance will occur over summer. There have been no further detections of this substance and High Alert have not identified any associated instances of harm.

There is a *realistic possibility* new substances not previously identified in New Zealand will continue to emerge following the recent NPS ban in China. This could include a new synthetic cathinone or a new ketamine analogue. These substances will carry unknown risks, increasing the potential for adverse effects and harm.

China continues to be the top export country of synthetic cathinones into New Zealand. In July 2024, China introduced a legislative change scheduling 46 NPS. This included the synthetic cathinone dimethylpentylone, and ketamine analogue fluorexetamine (2-FXE). Prior to the ban, these were occasionally seen at festival events across New Zealand misrepresented as MDMA and ketamine respectively.

While illegal in New Zealand, these substances were uncontrolled in China prior to the law change, meaning chemical companies could legally synthesise and sell them. Substances banned in China tend to cease production immediately, *likely* due to China's harsh penalties for drug supply, however remaining supplies continue to be sold illicitly.

The typical pattern following Chinese NPS bans shows banned substances fade from the market, and are replaced by new chemicals not yet captured by the ban. This poses an increased risk to people who use drugs as these substances will introduce a new and possibly unknown set of effects and dosages.

Recently, New Zealand Customs Service seized a new synthetic cathinone, N-isopropylbutylone, at the border. This was the first confirmed detection of this substance in New Zealand. It was also identified in a sample of presumed MDMA at a drug checking clinic in late November. In October 2024, a sample presented to a drug checking clinic was found to contain N-cyclohexylpentylone

(Cypentylone), a synthetic cathinone. This was the first detection of this substance in New Zealand, and one of the first worldwide. *Very little is known about these substances. It is unknown how prevalent these substances are in the market however it is unlikely that widespread misrepresentation involving this substance will occur over summer.*

It is highly likely cocaine and ketamine consumption will increase when compared to previous festival seasons. A corresponding increase in baseline cocaine and ketamine harm can be expected.

This is the continuation of a trend as the party drug market has increasingly diversified over the past three summer festival seasons. Last season (2023/2024), presumed ketamine samples accounted for 9.2% of all drug checking presentations, while cocaine accounted for 5.2%. This was an increase on the previous summer where ketamine accounted for 8.5% of total samples and cocaine 3.5%.

The cocaine and ketamine markets have continued to grow throughout 2024. *Seizures of cocaine at the border have decreased in the last few months compared with earlier this year. However, wastewater analysis suggests that cocaine consumption nationally remains high compared to the same period (July to October) in 2023.* Since 1 July 2024, presentations of presumed cocaine have accounted for approximately 10.6% of all drug checking samples.

Consumption of ketamine can be difficult to quantify, however seizure data suggests supply remains high.² Since 2018, seizures of ketamine at the border have increased each year, in line with an apparent increase in availability and consumption nationwide. As of September 2024, seizures of ketamine almost equal the total amount seized in 2023. Since 1 July 2024, approximately 12.3% of all drug checking samples were presumed to have been ketamine.

An increase in both cocaine and ketamine consumption will likely result in a corresponding increase in the baseline level of harm that is associated with drug use. While cocaine is rarely misrepresented, there remains the risk of a ketamine analogue being misrepresented as ketamine which may lead to adverse or unexpected effects.

It is almost certain the majority of drug harm experienced in the festival environment will stem from high-risk drug use practices rather than from misrepresentation or adulteration.

Previous festival seasons showed that the majority of reported incidents of drug harm are the result of high-risk drug use practices such as polydrug use and consumption of very high doses. Polydrug use refers to the practise of consuming a combination of drugs, including alcohol, or taking additional drugs when a person is still affected by another drug. This could be intentional or unintentional, and cause unpredictable, and potentially harmful effects as substances can have synergising or muting effects.

The combination of MDMA and alcohol will *likely* remain the most common polydrug combination this summer due to their availability and social acceptability. The increase in cocaine and ketamine availability will *likely* increase instances of polydrug related harm. Consideration should be given by drug checking and healthcare providers to circulate messaging around the risks of polydrug use,

² While monthly Customs seizure volume does not necessarily correlate to availability or consumption, it can be a useful indicator of future availability as large volumes of seizures can be indicative of high levels of supply.

particularly around the consumption of alcohol in combination with illicit drugs, to mitigate and reduce associated harm.

The use of very high doses of substances can occur intentionally and unintentionally. Higher doses can increase the risk of unintended or adverse effects. There have been anecdotal reports of people with little experience of drug use inadvertently consuming high doses resulting in unwanted or unexpected effects. Understanding what a typical dose is for a chosen substance, and how to accurately measure a dose, is essential in preventing inadvertent high consumption and associated risks. Consideration should be given by drug checking providers to continue providing harm reduction information, particularly about dosing, to people using their services.

It is *highly unlikely* widespread misrepresentation of LSD with NBOMe-like substances will occur during the upcoming festival period.

Consumption of LSD in festival settings is expected to occur in relatively high levels. During the 2023/2024 summer season, LSD samples were the third most presented drug type to drug checking services accounting for approximately 7% of all samples. Since 1 July 2024, drug checking data shows approximately 97.5% of all presumed LSD samples were as presumed.

While LSD use makes up a very small proportion of acute drug harm, misrepresentation remains a concern, particularly with NBOMe-like substances. These substances tend to be stronger than LSD, leading to adverse effects when dosed as LSD. These risks are amplified when used in combination with other central nervous stimulants, like MDMA or caffeine. Although NBOMe-like substances, such as 25B-NBOH and 25I-NBOMe, have been known to be misrepresented as LSD, none have been detected in New Zealand in 2024.

HIGH ALERT NOTIFICATION: Fake oxycodone tablets containing synthetic opioid

On 12 December, High Alert issued a notification advising that a nitazene (either N-pyrrolidino isonitazene or N-pyrrolidino protonitazene) was detected in a tablet designed to mimic the appearance of legitimate oxycodone tablets. These tablets were seized by the New Zealand Customs Service at the border. It is unknown if these tablets are currently in circulation or if there will be further attempts to import these pills into New Zealand.

High Alert currently assesses that it is *highly unlikely* synthetic opioids will impact the summer festival drug environment. However, internationally synthetic opioids have been misrepresented as cocaine and MDMA. High Alert recommends that medical treatment providers and festival staff familiarise themselves with the signs of an opioid overdose.

Conclusion

As of December, it is expected there will be low levels of acute drug harm over the 2024/2025 summer period similar to those experienced in the year prior. This is in part due to the supply of MDMA remaining adequate combined with fewer instances of misrepresentation.

There remain some potential risks in new substances with unknown effects entering the market, an increase in baseline levels of harm associated with cocaine and ketamine consumption, and a continuation of harm associated with high-risk drug use practices.

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Probabilistic Language

PROBABILITY STATEMENT	QUALITATIVE STATEMENT	PROBABILITY
ALMOST CERTAIN	A scenario that has only a remote chance of not occurring or an explanation that only has a remote chance of not being currently accurate	>90%
HIGHLY LIKELY	A scenario that has only a small chance of not occurring or an explanation that only has a small chance of not being currently accurate	75-85%
LIKELY	A scenario that is more likely than not to occur or an explanation that is more likely than not to be currently accurate	55-70%
REALISTIC POSSIBILITY	A scenario that has a realistic chance of occurring or an explanation that has a realistic possibility of being currently accurate, but which does not outweigh all other alternative possibilities and explanations	25-50%
UNLIKELY	A scenario that is plausible, but which has only a small chance of occurring or an explanation that is plausible but only has a small chance of being currently accurate	15-20%
HIGHLY UNLIKELY	A scenario that only has a remote chance of occurring or an explanation that only has a remote chance of being currently accurate	<10%