



U.S. Department of Justice  
**National Drug Intelligence Center**

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# **The Availability of Southwest Asian Heroin in the United States: A Market Analysis**



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## Assessment

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# The Availability of Southwest Asian Heroin in the United States: A Market Analysis

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## Strategic Finding

The availability of Southwest Asian heroin has and will continue to make moderate inroads in U.S. heroin markets; however, it is unlikely in the near term that Southwest Asian heroin will challenge or surpass South American heroin as the primary type of white powder heroin available in U.S. markets.

## Overview

South American heroin has been the most readily available white powder heroin in the United States for at least the past decade. Prior to the introduction of South American heroin in the mid-1990s, heroin from Southeast Asia was the dominant type of white powder heroin available. Heroin from Southwest Asia has not dominated the market in the United States since the early 1980s. Nonetheless, Southwest Asian heroin remains available in some U.S. heroin markets, primarily large metropolitan areas including Chicago, Detroit, St. Louis, Atlanta, and New York City, and in recent years, availability appears to have increased slightly.

## Discussion

Southwest Asia, more specifically Afghanistan, is and will remain, at least for the near term, the world's largest producer of illicit opium. The United Nations Office on Drugs and Crime (UNODC) estimates that 6,100 metric tons of opium were harvested in Afghanistan in 2006,

accounting for roughly 92 percent of global cultivation. Heroin produced from Afghan opium is consumed by large heroin addict populations throughout Eurasia, southeastern Asia, and increasingly sub-Saharan and West Africa. Law enforcement reporting indicates that only limited quantities of Southwest Asian heroin reach white powder heroin markets in the United States and that the likelihood of Southwest Asian heroin gaining anything more than a proportionately small share of the U.S. market is limited.

Two Drug Enforcement Administration (DEA) programs, the Heroin Signature Program (HSP) and the Heroin Domestic Monitor Program (HDMP), provide indicators of the geographic origins of heroin available at wholesale and retail levels in the United States. In both programs, heroin samples are subject to in-depth chemical analysis to determine, among other things, the geographic source areas of the heroin. Under the HSP, the DEA Special Testing and Research Laboratory analyzes heroin samples primarily from port of entry (POE) seizures, as well as a random sample of other seizures and purchases submitted to DEA laboratories, to determine source areas. The HSP examines the wholesale level of the trade. The HDMP is a heroin purchase program designed to identify the purity, price, and source of origin of retail-level heroin available in 28 major U.S. metropolitan markets. It should be noted that while both programs provide indicators, results do not correlate with actual market share.

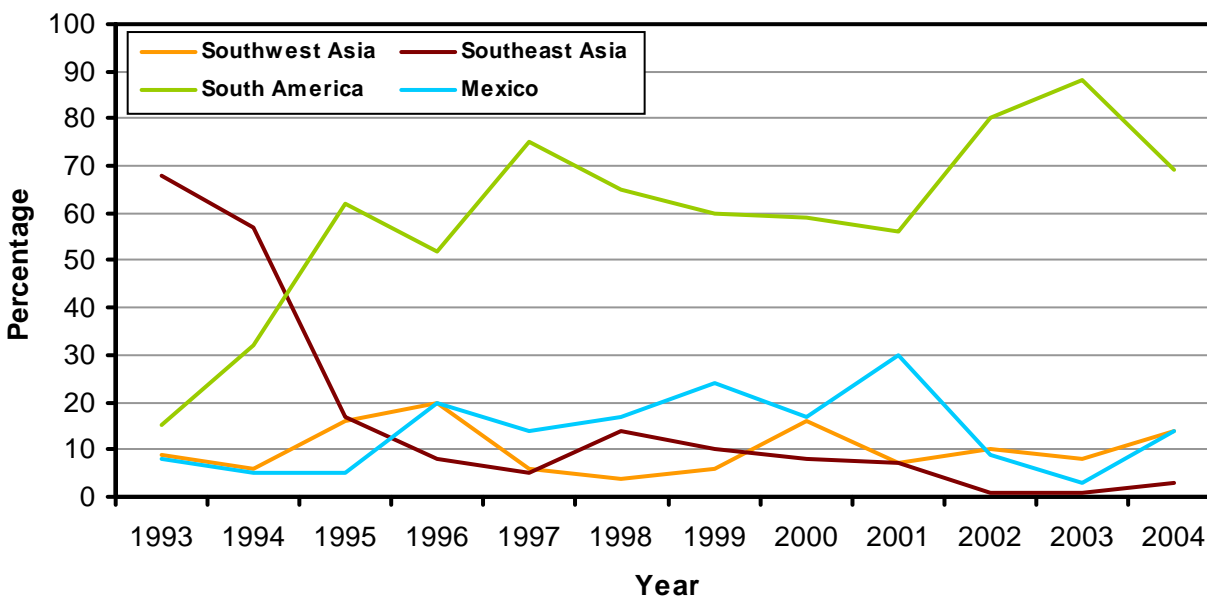


Figure 1. Heroin Signature Program Data, 1993–2004, Geographic Source Area Distribution by Percentage. Source: Drug Enforcement Administration.

\*Actual percentage for Southeast Asia for 2003 was less than 1.

A review of HSP results through 2004, the latest year for which such data are available, indicates that Southwest Asian heroin currently accounts for only a small proportion of the heroin analyzed under the auspices of the program. Until 1992, a significant portion of the heroin analyzed under the HSP was determined to be of Southwest Asian origin. In fact, from 1980 to 1985 a greater proportion of heroin analyzed was determined to be of Southwest Asian origin than any other type. From 1986 through 1992, the proportion of Southwest Asian heroin was surpassed by other types of heroin, namely Mexican heroin, Southeast Asian heroin, or both types. Nonetheless, the proportion of Southwest Asian heroin ranged from 17 percent to 36 percent of the heroin seized under the program. In 1993, when a signature was identified for South American heroin, the proportion of Southwest Asian heroin identified under the HSP dropped considerably to just 9 percent. Since that time, aside from 1996 when 20 percent of the heroin identified under the program was of Southwest Asian origin, the percentage

of Southwest Asian heroin has not exceeded 16 percent. (See Figure 1.)

A review of HDMP data from 2000 to 2005, the latest year for which such data are available, indicates that the number of Southwest Asian heroin samples under the auspices of the HDMP is relatively low. From 2000 through 2005, the number of qualified samples determined to be Southwest Asian heroin accounted for less than 5 percent of the qualified samples analyzed in each of those years. In comparison, a preponderance of the samples analyzed was determined to be South American heroin, followed by Mexican heroin. Less than 2 percent of qualified samples in each of those years were determined to be Southeast Asian heroin. (See Table 1 on page 3.)

HDMP results from 2000 through 2005 are consistent with law enforcement reporting, indicating that Southwest Asian heroin is available in a limited number of markets throughout the country and that availability in those markets has remained relatively consistent in recent

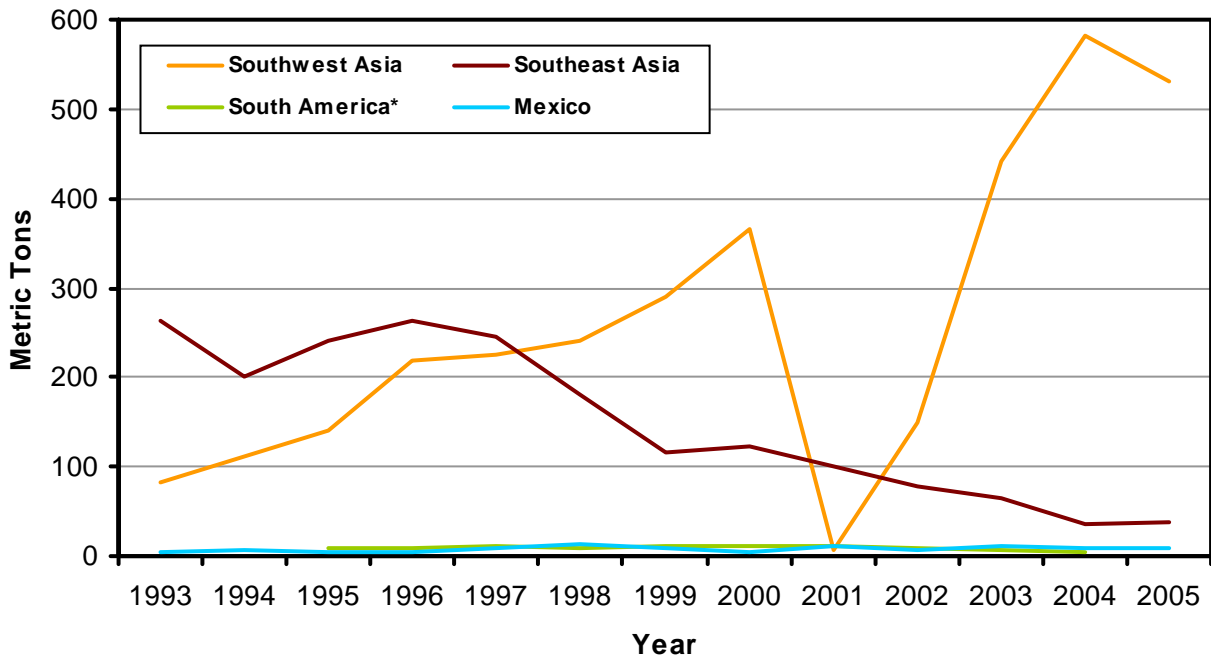


Figure 2. Estimates of Heroin Production by Geographic Source Area in Metric Tons, 1993–2005.

Source: Crime and Narcotics Center.

\*An estimate was not available for South America in 1993, 1994, and 2005.

**Table 1. Table 1. Cities With Heroin Domestic Monitor Program Purchases of Southwest Asian Heroin, 2000–2005**

City	2000	2001	2002	2003	2004	2005
Atlanta	4	1	4	7	1	5
Baltimore	1	6	2	1	2	1
Chicago	5	7	4	8	1	2
Detroit	6	3	4	4	8	3
Miami	1	-	-	-	-	-
Newark	1	-	-	-	-	-
New Orleans	-	1	1	-	3	1
New York	3	-	1	1	1	5
Richmond	-	-	-	1	1	-
St. Louis	-	-	-	7	-	4
Washington, D.C.	5	11	6	4	2	2
<b>Total Southwest Asian heroin</b>	<b>26</b>	<b>29</b>	<b>22</b>	<b>33</b>	<b>19</b>	<b>23</b>
<b>Total qualified samples</b>	<b>672</b>	<b>766</b>	<b>614</b>	<b>822</b>	<b>790</b>	<b>704</b>

Source: Drug Enforcement Administration.

years. Limited quantities of Southwest Asian heroin are available in various cities, including Atlanta, Chicago, Detroit, St. Louis, and New York City. South American and, occasionally, Southeast Asian white powder heroin is also available in each of those markets. Consequently, it is difficult to determine specific ratios of each type of white powder heroin, i.e., South American, Southwest Asian, or Southeast Asian, because in many cases law enforcement personnel cannot or do not attempt to distinguish between the different types. Further complicating the issue is the fact that white powder heroin is generically and collectively referred to as China white. The generic use of the term “China white” has inadvertently contributed to a misperception that the term refers to heroin produced in Asia when, in fact, it refers only to the fact that the heroin is in white powder form and could have been produced in Southeast Asia, Southwest Asia, or South America. Thus, recent anecdotal law enforcement reporting that has suggested increased occurrences of China white heroin should be viewed cautiously, since signature analysis is the only definitive method to determine the source area of heroin. That said, the possibility exists that the availability of Southwest Asian heroin is more pervasive than is suggested by the indicator programs, although there is little doubt that South American heroin dominates the white powder heroin market in the United States.

Law enforcement and intelligence reporting indicates that primarily West African and Pakistani but also East European, Middle Eastern, and Russian criminal groups transport limited quantities of Southwest Asian heroin to the United States, typically using couriers on commercial aircraft or via cargo and express mail services. Couriers transport Southwest Asian heroin through major international airports in the United States, including those in New York, Newark, Chicago, Atlanta, Houston, and Los Angeles. Most Southwest Asian heroin transported through Houston and Los

Angeles is quite likely destined for markets in the eastern United States, including Chicago and New York.

Southwest Asian heroin is available at the wholesale level in Chicago, Detroit, and New York. Pakistanis and West Africans are the primary wholesale distributors of Southwest Asian heroin in New York, which is a source of supply for Southwest Asian heroin distributed at retail level in cities in the eastern United States. Nigerian criminal groups in Chicago use couriers to transport Southwest Asian heroin to Chicago via Europe and Africa and are the primary wholesale distributors of Southwest Asian heroin in the area. Chicago serves as a source of supply for Southwest Asian heroin distributed at the retail level in a limited number of cities in the Midwest, including St. Louis. Southwest Asian heroin is distributed at the retail level in the Detroit and Atlanta metropolitan areas. Beyond these niche markets, the availability of Southwest Asian heroin appears to be limited.

## **Outlook**

Analysis of law enforcement and intelligence reporting—including the HSP and HDMP, the two primary heroin indicator programs—indicates that despite significant increased opium production in Afghanistan, the availability of Southwest Asian heroin in the United States will remain at stable, low levels in the near term. White heroin produced in South America appears sufficient to supply the demand for white powder heroin in the United States. Colombian and Dominican traffickers, and increasingly Mexican traffickers, are the primary wholesale distributors of white powder heroin and maintain well-established transportation and distribution networks to ensure a consistent flow of South American heroin to U.S. markets. Conversely, transportation and distribution networks necessary to significantly increase the availability of Southwest Asian heroin in the United States appear limited at best. A significant interruption in the availability of high

purity South American heroin could present the opportunity for increased availability of Southwest Asian heroin in the United States. However, it is unlikely that unless the interruption is both significant and sustained, the availability of Southwest Asian heroin will expand beyond its current niche markets.

## Sources

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Numerous state and local law enforcement agencies throughout the United States provided valuable input to this report through their participation in interviews with NDIC field program specialists.

Central Intelligence Agency

Crime and Narcotics Center

Executive Office of the President

Office of National Drug Control Policy

High Intensity Drug Trafficking Areas

United Nations Office on Drugs and Crime

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