HEROIN

KEY POINTS

- Global opium cultivation and heroin production decreased in 2018, with Afghanistan remaining the largest cultivator of illicit opium in the world.
  - Drug profiling of both border and domestic seizures indicates the vast majority of heroin seized in Australia originated in South-East Asia.
  - For the first time since 2013, forensic profiling in the first six months of 2019 identified heroin originating from South America, accounting for over 7 per cent of the bulk weight of analysed samples.
- The weight of opiates (including heroin and opium) seized globally reached record levels in 2017.
  - Opium accounted for the greatest proportion of the weight of opiates seized globally, while heroin accounted for the greatest proportion of global opiate border seizures.
- Overall, indicators of heroin supply and demand in Australia suggest the heroin market remains small, but has experienced small growth in some areas.
  - The number of heroin detections at the Australian border decreased in 2018–19, while the weight detected increased.
  - While the weight of heroin seized nationally decreased this reporting period, the number of national heroin seizures increased in 2018–19 and is the second highest on record.
  - The number of national heroin and other opioid arrests increased in 2018–19 and is the second highest reported in the last decade.
  - According to the National Wastewater Drug Monitoring Program, the population-weighted average consumption of heroin increased in both capital city and regional sites from August 2018 to August 2019, however consumption is low relative to methylamphetamine.

MAIN FORMS

Heroin (diacetylmorphine or diamorphine) is a derivative of morphine—an alkaloid contained in raw opium.

- Illicit cultivation of opium occurs on a large scale in three primary regions:
  - South-West Asia, known as the 'Golden Crescent', which encompasses large areas of Afghanistan and parts of Pakistan.
  - South-East Asia, known as the 'Golden Triangle', which encompasses the border regions of Myanmar, Thailand and Laos.
  - Latin America, primarily Mexico and Colombia.
- Of the four main 'grades' of heroin, grades 1 and 2 refer to heroin base, not commonly found in Australia. Grade 3 heroin is more refined than heroin base and less granular. Unsuitable for injection, it is most commonly heated and the vapours inhaled. Grade 4 powdered heroin is the most common grade used in developed countries. It is the purest form and is suitable for injection.
- In Australia, heroin is most commonly found either as a powder or a hard granular material, usually white or off-white in colour (though colour is not a reliable indicator of origin or purity).
- The most common route of administration for heroin is injection, followed by snorting, inhalation (through smoking), swallowing or as an additive to cannabis or tobacco (ADF 2019; EMCDDA 2017; UNODC 2016).

INTERNATIONAL TRENDS

The total area under opium cultivation worldwide decreased 17 per cent, from 418,000 hectares in 2017 to around 346,000 hectares in 2018. While global opium production decreased 25 per cent, from 10,500 tonnes in 2017 to 7,790 tonnes in 2018, it remains amongst the highest weights reported in the last two decades. Afghanistan remains the largest opium producing country in the world, accounting for 82 per cent of global illicit opium production in 2018. The decrease in global opium production in 2018 was primarily the result of decreases in Afghanistan[34], where the area under opium poppy cultivation decreased by 20 per cent. Despite this decrease, the estimated area under cultivation in Afghanistan in 2018 is the second largest on record (UNODC 2018; UNODC 2019).

Opium production in Myanmar also decreased in 2018 and is at its lowest reported level since 2010—heroin originating from South East Asia, including Myanmar, dominates AFP border seizures. The area under opium cultivation in Myanmar has continued to decrease since 2014. The total area under opium cultivation decreased 11 per cent, from 37,300 hectares in 2018 to 33,100 hectares in 2019. Due to increases in average opium yield (11 per cent increase from 2018), the estimated production of opium in 2019 was 508 tonnes—a 2 per cent decrease from the 520 tonnes reported in 2018. Estimated global heroin production decreased 25 per cent, from between 692 and 1,042 tonnes in 2017 to between 487 and 737 tonnes of heroin in 2018 (UNODC 2019; UNODC 2020).

34 A severe drought in Afghanistan impacted opium cultivation and production in 2018.

According to the United Nations Office on Drugs and Crime (UNODC) 2019 World Drug Report, the weight of opiates (including heroin and opium) seized globally reached record levels in 2017. The weight of heroin seized globally increased 13 per cent, from 91 tonnes in 2016 to 103 tonnes in 2017, with the weight of opium seized globally increasing 5 per cent, from 658 tonnes in 2016 to 693 tonnes in 2017 (UNODC 2019).

The UNODC notes that most seizures of opiates occurred in, or close proximity to, the main opium production areas. In 2017, more than 90 per cent of global illicit opium production took place in Asia, which also accounted for 86 per cent of total weight of opiates (expressed in heroin equivalents) seized globally. Similar to 2016, in 2017 the Islamic Republic of Iran accounted for the greatest proportion of the weight of opiates seized globally (39 per cent), followed by Afghanistan (26 per cent) and Pakistan (14 per cent; UNODC 2018; UNODC 2019).

In 2017, the weight of heroin seized globally continued to increase in all regions except Oceania. Pakistan accounted for the greatest proportion of the weight of heroin seized globally in 2017 (24 per cent), followed by the Islamic Republic of Iran (23 per cent) and Turkey (17 per cent; UNODC 2019).

According to the World Customs Organization (WCO), heroin continues to account for the greatest proportion of global opiate seizures at the border. Heroin was the only drug within the 'opiates' category to report an increase in the number and weight of seizures in 2018, with other opiates reporting decreases. The number of heroin border seizures increased 12 per cent to 1,514 in 2018. While specific weights were not available, the weight of heroin seized increased 33 per cent in 2018 (WCO 2019).

DOMESTIC TRENDS

AUSTRALIAN BORDER SITUATION

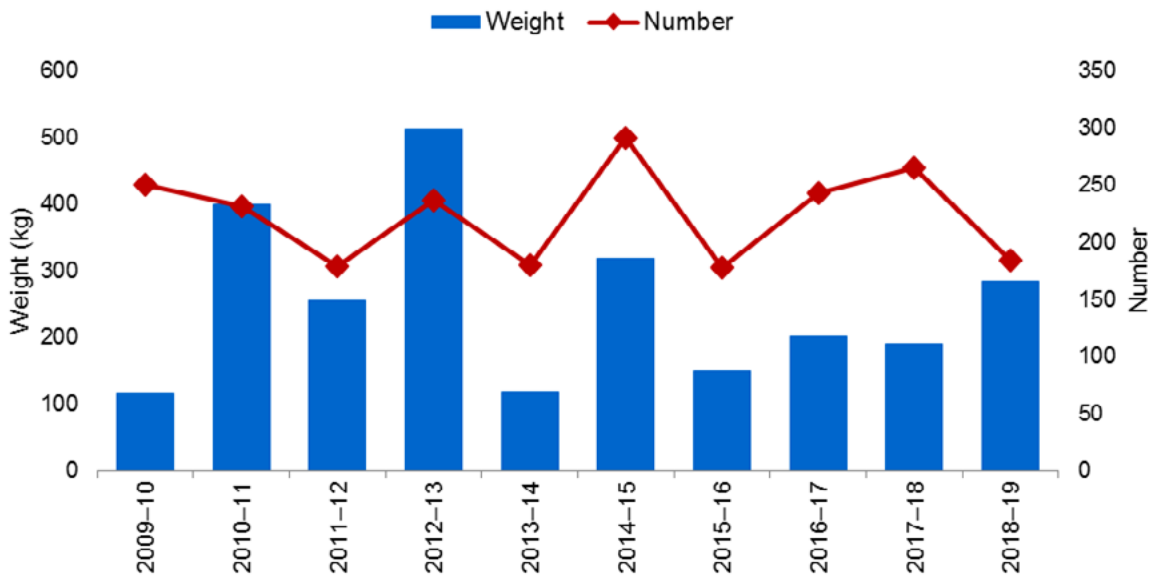
The number of heroin detections at the Australian border fluctuated greatly over the last decade, decreasing 26 per cent from 250 in 2009–10 to 184 in 2018–19 but the long-term trend was relatively stable. The number of heroin detections decreased 31 per cent this reporting period, from 265 in 2017–18.

The weight of heroin detected also fluctuated over the last decade, increasing 141 per cent from 117.5 kilograms in 2009–10 to 283.4 kilograms in 2018–19. The weight of heroin detected increased 49 per cent this reporting period, from 190.1 kilograms in 2017–18 (see Figure 14).

In 2018–19, 40 of the 184 heroin detections (22 per cent) weighed one kilogram or more. With a combined weight of 269.6 kilograms, these 40 detections accounted for 95 per cent of the weight of heroin detected in 2018–19.[35]

35 See Appendix 2 for significant border detections of heroin in 2018–19.

FIGURE 14: Number and weight of heroin detections at the Australian border, 2009–10 to 2018–19 (Source: Department of Home Affairs)



IMPORTATION METHODS

In 2018–19, detections of heroin at the Australian border occurred in the air cargo, air passenger/crew, international mail and sea cargo streams. By number, the international mail stream accounted for the greatest proportion of heroin detections (81 per cent), followed by air cargo (17 per cent), air passenger/crew (1 per cent) and sea cargo (1 per cent). By weight, the air cargo stream accounted for the greatest proportion of detections (68 per cent), followed by international mail (21 per cent), sea cargo (11 per cent) and air passenger/crew (<1 per cent).

EMBARKATION POINTS

In 2018–19, 21 countries were identified as embarkation points for heroin detected at the Australian border, compared to 24 countries in 2017–18. By weight, Malaysia was the primary embarkation point for heroin detected in 2018–19. Other key embarkation points by weight this reporting period include Thailand, Laos, Singapore, Iraq, South Africa, Pakistan, Mozambique, Indonesia and India.

DRUG PROFILING

The Australian Federal Police (AFP) Forensic Drug Intelligence (FDI) team operates a forensic drug profiling capability through the National Measurement Institute (NMI), which enables the identification of the regions of origin and manufacturing trends for samples of heroin submitted from seizures made at the Australian border[36] and seizures provided to the AFP by international agencies for the purpose of chemical profiling.[37] The capability also allows for comparisons within and between seizures to identify distinct batches of drugs, the origin of drugs, or to demonstrate links between groups involved in illicit drug manufacture or trafficking.

36 This data may also include seizures destined for Australia which occurred offshore.
37 Data from these samples/seizures have not been included in these summary.

The following data relate to seizures investigated by the AFP between 2009 and June 2019, from which samples were submitted to the NMI for routine analysis and profiling.[38]

- Heroin originating from South-East Asia (SEA) continues to dominate AFP seizures (see Tables 7 and 8).
- For the first time since 2013, heroin originating from South America was seized during this reporting period (see Table 7). This seizure was made offshore (but destined for Australia) as part of Operation HOTH and accounted for 7 per cent of the total bulk weight analysed in the first six months of 2019.
- While there was an increase in the number of heroin seizures of South-West Asian (SWA) origin in the first six months of 2019, they were small seizures and accounted for less than one per cent of the total bulk weight for that period.
- Across the 2018 to June 2019 reporting period, there were a number of instances where geographical origin was unable to be determined. These are small seizures and account for less than one cent of the total bulk weight of samples analysed in that period.

TABLE 7: Geographical origin of heroin samples as a proportion of analysed AFP border seizures, 2009–June 2019[39] (Source: Australian Federal Police, Forensic Drug Intelligence)

Year	South-East Asia %	South-West Asia %	South America %	Unclassified %	South-East Asia & Unclassified %	South-West Asia & Unclassified %
Jan–Jun 2019	73.3	13.3	6.7	6.7	–	–
2018	92.3	–	–	7.7	–	–
2017	94.1	5.9	–	–	–	–
2016	95.2	4.8	–	–	–	–
2015	77.8	18.5	–	3.7	–	–
2014	52.2	37.0	–	2.2	4.3	–
2013	74.6	18.2	5.5	–	1.8	–
2012	70.7	25.9	–	3.4	–	–
2011	49.0	51.0	–	–	–	–
2010	63.8	27.5	–	5.8	–	2.9
2009	53.9	42.6	–	3.4	–	–

38 Improvements in information technology have brought about changes to how the data is collated and presented, and for this reason, care should be taken in comparing figures before 2010 to more recent data. For all reporting years, the data represent a snapshot across the applicable reporting period. These figures cannot reflect seizures that have not been submitted for forensic examination due to prioritisation of law enforcement resources or those that have passed through the border undetected. Certain seizures/samples, such as those containing swabs or trace material, have been omitted from the analysis as they are not amenable to chemical profiling. It is difficult to extrapolate the impact of any observed border trends on drugs reaching consumers i.e. street level seizures in Australia. Samples from selected state and territory jurisdictions are submitted for chemical profiling as part of the Enhanced National Intelligence Picture on Illicit Drugs (ENIPID) capability.

39 This data may also include seizures destined for Australia which occurred offshore.

TABLE 8: Geographical origin of heroin samples as a proportion of total bulk weight of analysed AFP border seizures, 2009–June 2019[40] (Source: Australian Federal Police, Forensic Drug Intelligence)

Year	South-East Asia %	South-West Asia %	South America %	Unclassified %	South-East Asia & Unclassified %	South-West Asia & Unclassified %
Jan–Jun 2019	92.5	0.3	7.1	<0.1	–	–
2018	99.9	–	–	<0.1	–	–
2017	99.9	0.1	–	–	–	–
2016	100.0	–	–	–	–	–
2015	97.4	1.8	–	0.8	–	–
2014	89.9	7.8	–	<0.01	0.2	–
2013	84.3	8.9	4.3	–	2.5	–
2012	98.4	1.3	–	0.3	–	–
2011	39.4	60.6	–	–	–	–
2010	47.9	50.6	–	1.5	–	–
2009	70.1	27.4	–	2.7	–	–

The Enhanced National Intelligence Picture on Illicit Drugs (ENIPID) capability extends forensic profiling to include state and territory seizures involving heroin, methylamphetamine and cocaine. This enables the identification of convergences between supply routes into different jurisdictions, links between different criminal groups, as well as comparison of trends between jurisdictions.[41]

Heroin samples submitted to the ENIPID capability in 2018 and the first six months of 2019 continue to reflect the situation at the border, highlighting the continued dominance of SEA heroin in the Australian market (see Appendix 3, Tables 3 and 4).[42]

- When compared to the AFP border data, an increase in the "Mixed/Unclassified" samples for the 2018 period was noted, however this remained consistent with trends observed in the ENIPID data reported in previous years.
- A slight increase in SWA heroin was observed when compared to AFP border data for the 2018 reporting period; however, when compared to 2017, there is a notable decrease in heroin ENIPID samples of SWA origin.

40 This data may also include seizures destined for Australia which occurred offshore.
41 The Proceeds of Crime Act-funded ENIPID project officially concluded on 30 June 2016. Since then, the ENIPID capability has been integrated into core AFP Forensic Drug Intelligence duties to ensure its continued delivery through AFP Forensics.
42 Care should be taken when drawing any conclusions from this data due to the low number of heroin samples profiled during this period.

DOMESTIC MARKET INDICATORS

No single dataset provides a comprehensive picture of illicit drugs, or the Australian illicit drug market. Each has benefits and limitations, and it is only through the layering of multiple data that we are able to enhance our understanding of the extent of the supply and demand trends in Australia's illicit drug markets.

The National Wastewater Drug Monitoring Program (NWDMP) collects wastewater samples every two months in capital city sites and every four months in regional sites. Aimed at acquiring data on the population-scale use of substances causing potential harm, the program provides a measure of the consumption of 13 illicit and licit drugs, including heroin from August 2017. According to data from the NWDMP for August 2018 to August 2019:

- Heroin consumption fluctuated, but overall was higher per capita in capital city sites than regional sites.
- The population-weighted average consumption of heroin in both capital city and regional sites increased.
- Demand for heroin remains low compared to other illicit drugs, particularly methylamphetamine.
- The ACIC estimates that around 940 kilograms of heroin was consumed annually in Australia, an increase from the estimated 750 kilograms of heroin consumed in the previous year (ACIC 2020).

The below data reflect drug use within sentinel groups. As such, they are not representative of all people who use drugs, or drug use in the general population. However, they provide valuable insight into patterns of drug use and market trends and can assist in the identification of emerging issues that require further monitoring.

The Illicit Drug Reporting System (IDRS) collects self-report information on drug use and related harms annually from individuals in Australian capital cities who regularly inject drugs. According to this national study:

- The proportion of respondents reporting heroin as their drug of choice decreased over the last decade, from 54 per cent in 2010 to 45 per cent in 2019. In 2018 this proportion was 41 per cent.
- While heroin remains the most commonly reported drug of choice within this population, in 2019 methylamphetamine was reported as the drug injected most often in the past month (42 per cent for methylamphetamine compared to 40 per cent for heroin).
- The reported recent use[43] of heroin in this population decreased over the last decade, from 64 per cent in 2010 to 54 per cent in 2018. In 2019 this proportion was 55 per cent, the first increase in recent use reported in the last decade.
- Over the last decade the reported median number of days of heroin use in the six months preceding interview increased, ranging from 60 days in 2013 to 90 days in 2015 and 2019, respectively. In 2018, the reported number of days was 74 (Stafford & Burns 2011; Peacock et al. 2019a).

43 In both the IDRS and EDRS studies, recent use refers to reported use in the six months preceding interview.

The Ecstasy and Related Drugs Reporting System (EDRS) collects self-report information on drug use and related harms annually from individuals in Australian capital cities who regularly use ecstasy and other stimulants. According to this national study:

- The proportion of respondents reporting the recent use of heroin remained relatively stable over the last decade, with 4 per cent of this population reporting the recent use of heroin in 2010, compared to 3 per cent reported in both 2018 and 2019 (Sindicich & Burns 2011; Peacock et al. 2019a).

The Australian Needle and Syringe Program Survey (ANSPS) collects self-report information and capillary blood samples[44] annually to monitor blood borne viral infections and associated risk behaviour among individuals who inject drugs. According to the ANSPS National Data Reports:

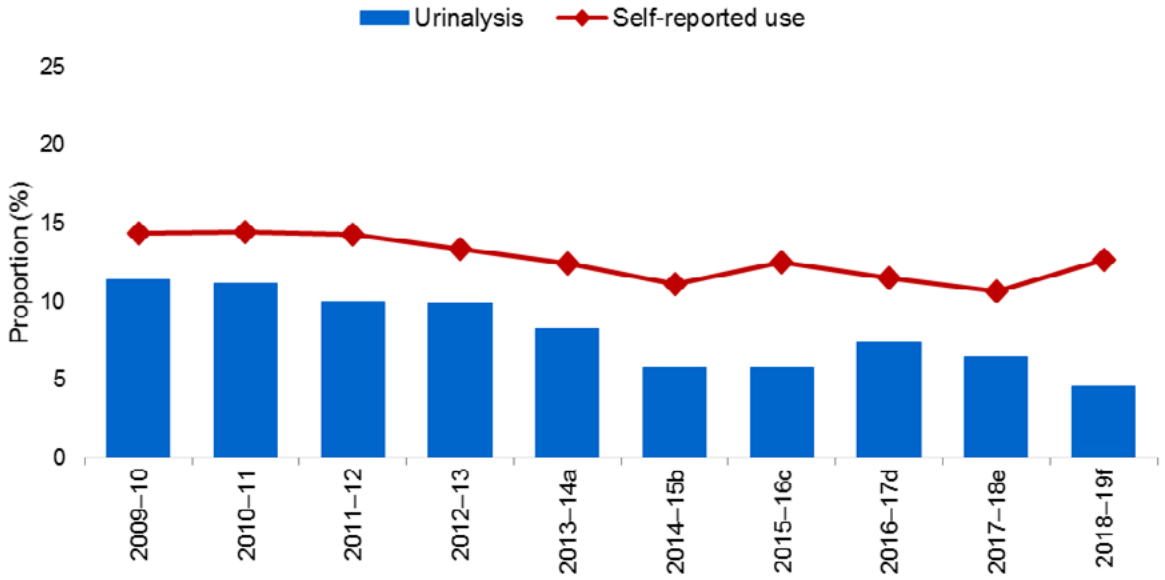
- Methylamphetamine was the most commonly reported drug last injected since 2014. Notably, earlier in the decade heroin was the most commonly reported drug last injected (in 2009 heroin was 34 per cent and methylamphetamine was 24 per cent).
- The proportion of respondents reporting heroin as the drug last injected varied across the states and territories, but nationally decreased over the last decade, ranging from 34 per cent in 2009 to 26 per cent in 2018. The proportion reported in 2018 is a decrease from the 30 per cent reported in 2017 (Iversen & Maher 2015; Heard et al. 2019).

The Drug Use Monitoring in Australia (DUMA) program collects criminal justice and drug use information on a quarterly basis from police detainees, comprising an interviewer-assisted self-report survey and the voluntary provision of a urine sample, which is tested to detect licit and illicit drug use.[45] According to DUMA program data:

- Over the last decade the proportion of detainees testing positive to heroin and self-reporting heroin use generally decreased.
- The proportion of detainees testing positive[46] to heroin over the last decade ranged from a low of 5 per cent in 2018–19 to a high of 11 per cent in 2009–10 and 2010–11. In 2017–18 this proportion was 6 per cent.
- The proportion of detainees self-reporting recent heroin use[47] over the last decade ranged from 11 per cent in both 2014–15 and 2017–18 to 14 per cent in 2009–10, 2010–11 and 2011–12. In 2018–19 this proportion was 13 per cent (see Figure 15).

44 Individuals participating in the survey are invited to provide a blood sample for HIV and HCV antibody testing.
45 Detainees can participate in the survey without providing a urine sample. Cases with missing data are excluded from the relevant analysis.
46 Heroin and its metabolite can be detected in urine for six hours after administration.
47 Recent use in the DUMA program refers to self-reported use in the 12 months prior to arrest.

FIGURE 15: National proportion of detainees testing positive for heroin compared with self-reported recent use, 2009–10 to 2018–19 (Source: Australian Institute of Criminology)



a. Urine was collected in the third and fourth quarter of 2013 and the first quarter of 2014.
b. Urine was collected in the third quarter of 2014 and the first and second quarter of 2015.
c. Urine was collected in the third quarter of 2015 and the first and second quarter of 2016.
d. Urine was collected in the third quarter of 2016 and the second quarter of 2017.
e. Urine was collected in the third quarter of 2017 in Adelaide, Brisbane and Perth; the fourth quarter of 2017 in Bankstown; and the first quarter of 2018 in Adelaide, Brisbane, Perth and Surry Hills.
f. Urine was collected in the third quarter of 2018 in Adelaide, Brisbane and Perth; the fourth quarter of 2018 in Bankstown; and the first quarter of 2019 in Adelaide, Brisbane, Perth and Surry Hills.

The Australian Secondary Students Alcohol and Drug (ASSAD) Survey collects self-report information on alcohol, tobacco, over-the-counter drugs and illicit substance use among Australian secondary school students (aged 12 to 17) and is conducted every three years. According to the 2017 ASSAD survey:

- 1 per cent of respondents reported heroin use at least once in their lifetime.
- 1 per cent of respondents reported having used heroin at least once in the past month (Guerin & White 2018).[48]

PRICE

At the street level the price of heroin is generally measured as a ‘taste/cap’ or in grams. Nationally, the price for one taste/cap of heroin (0.1 to 0.3 grams) increased over the last decade, ranging between $40 and $100 in 2009–10 to between $30 and $150 in 2018–19 (noting there is a large overlap in price ranges). The price range reported in 2018–19 remained unchanged from 2017–18. The national median price also increased over the last decade, from $52.50 in 2009–10 to $75 in 2018–19, a decrease from $90 in 2017–18.

48 Due to changes in the ASSAD questionnaire between 2014 and 2017, data specific to heroin consumption are not available for previous reporting periods, which previously focused on opiates. Reported opiate use in 2014 was 1.5 per cent for lifetime use and 0.6 per cent for past month use.

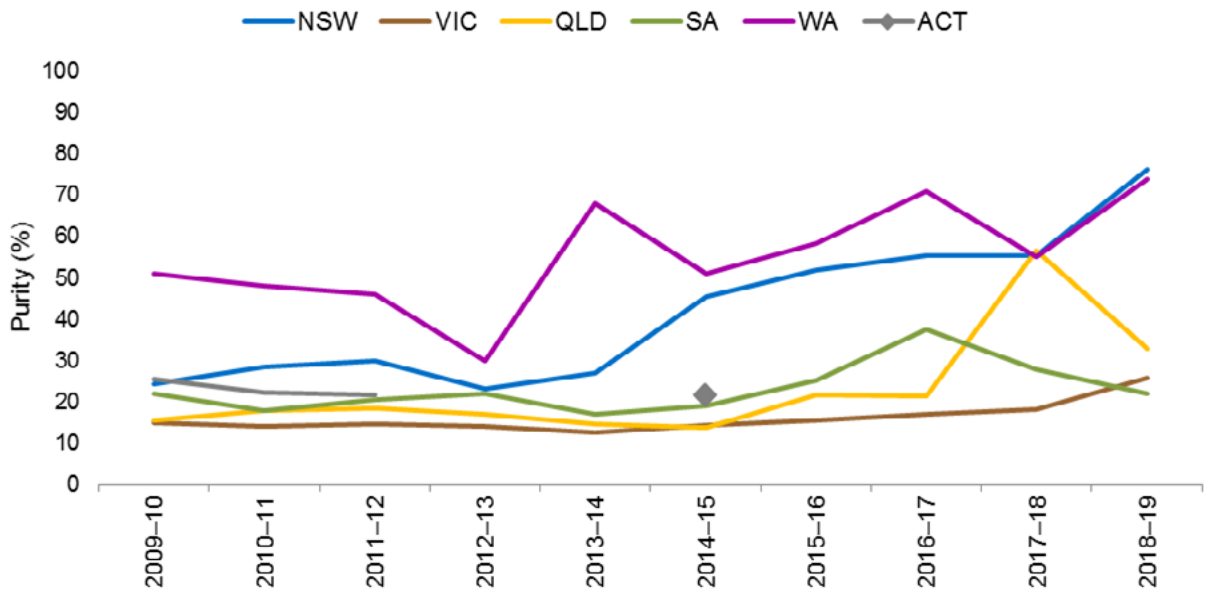
The price for one gram of heroin remained relatively stable over the last decade, ranging between $200 and $600 in 2009–10 to between $200 and $700 in 2018–19. The price range reported in 2018–19 remained unchanged from 2017–18. The national median price increased slightly over the last decade, from $375 in 2009–10 to $400 in 2018–19.

No price data were available for a kilogram of heroin in 2009–10. This reporting period New South Wales and Victoria were the only jurisdictions to report a price for one kilogram of heroin, which ranged between $90,000 and $170,000, compared with a price range of $160,000 to $195,000 (reported by New South Wales and Victoria) in 2017–18.

PURITY

Since 2009–10, the annual median purity of analysed heroin samples ranged between 13 per cent and 76 per cent (see Figure 16) across the states and territories. In 2018–19, the annual median purity ranged from 22 per cent in South Australia to 76 per cent in New South Wales. While annual median heroin purity generally trended upwards over the last decade, this was most marked in New South Wales. Heroin purity in Victoria, which is Australia's primary heroin market, was low and relatively stable.

FIGURE 16: Annual median purity of heroin samples, 2009–10 to 2018–19



AVAILABILITY

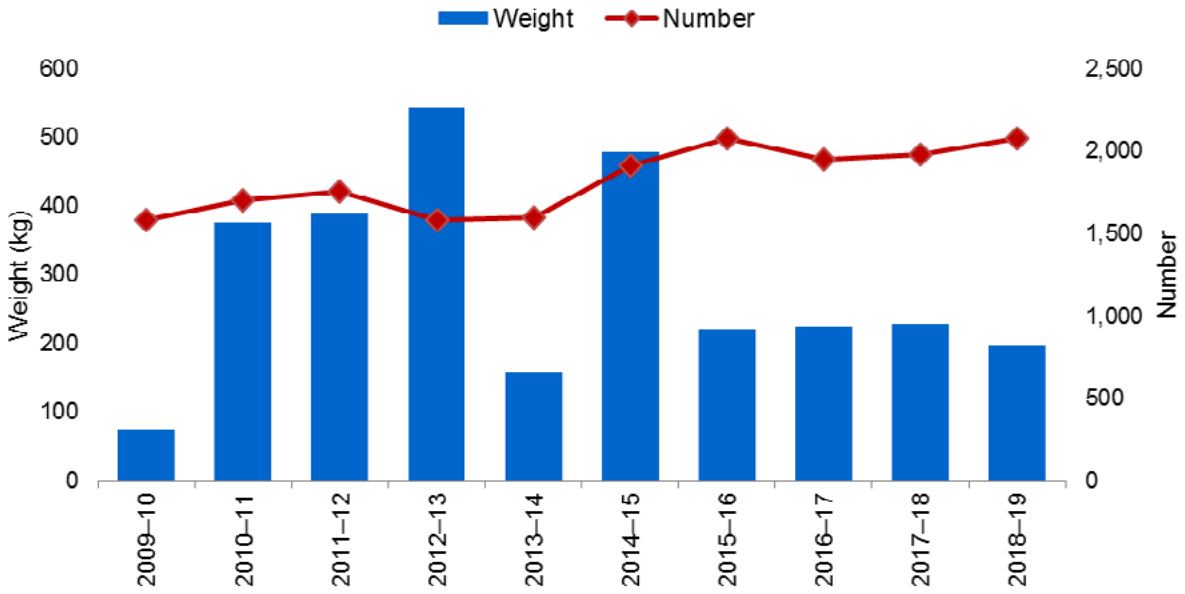
User surveys indicate no change in the reported availability of heroin in 2019 compared to 2018. In a 2019 survey of people who regularly inject drugs, the proportion of respondents reporting heroin as 'easy' or 'very easy' to obtain remained unchanged at 89 per cent. This figure is similar to the proportion reported in 2010 (86 per cent; Stafford & Burns 2011; Peacock et al. 2019a).

SEIZURES

The number of national heroin seizures increased 32 per cent over the last decade, from 1,582 in 2009–10 to 2,080 in 2018–19. The number of national heroin seizures remained high and relatively stable over the last four reporting periods, increasing 5 per cent this reporting period from 1,977 in 2017–18, with the 2,080 seizures in 2018–19 the second highest number on record.

The weight of heroin seized nationally increased 165 per cent over the last decade, from 74.7 kilograms in 2009–10 to 197.7 kilograms in 2018–19. The weight seized nationally remained relatively stable over the last four reporting periods, decreasing 14 per cent this reporting period from 229.3 kilograms in 2017–18 (see Figure 17).

FIGURE 17: National heroin seizures, by number and weight, 2009–10 to 2018–19



Tasmania reported the greatest percentage increase in the number of heroin seizures in 2018–19, while South Australia reported the greatest percentage increase in the weight of heroin seized. This reporting period New South Wales accounted for the greatest proportion of both the number (56 per cent) and weight (44 per cent) of heroin seized nationally (see Table 9).

TABLE 9: Number, weight and percentage change of national heroin seizures, 2017–18 and 2018–19

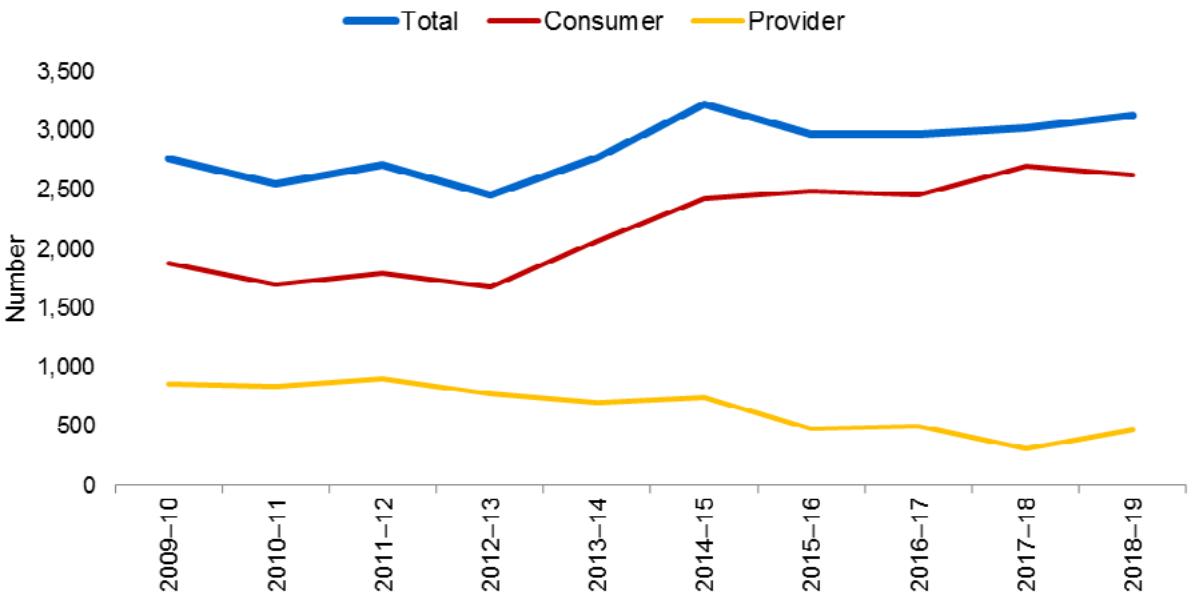
	Number			Weight (grams)		
State/Territory[a]	2017–18	2018–19	% Change	2017–18	2018–19	% Change
New South Wales	1,015	1,170	15.3	160,692	86,633	-46.1
Victoria	329	310	-5.8	46,252	56,915	23.1
Queensland[b]	186	198	6.5	20,205	25,026	23.9
South Australia	22	20	-9.1	569	15,408	2,607.9
Western Australia[c]	372	334	-10.2	1,432	13,656[d]	853.6
Tasmania	9	13	44.4	114	99	-13.2
Northern Territory	2	2	0.0	1	7	600.0
Australian Capital Territory	42	33	-21.4	41	53	29.3
Total	**1,977**	**2,080**	**5.2**	**229,306**	**197,797**	**-13.7**

a. Includes seizures by state/territory police and Australian Federal Police for which a valid seizure weight was recorded.
b. The 2018–19 data provided by the Queensland Police Service reflects improvements made to the quality of the drug seizure dataset. As a result, caution should be exercised in comparing data from previous reporting periods.
c. The 2018–19 data provided by the Western Australia Police Force reflects improvements made to the quality of the drug seizure dataset. As a result, caution should be exercised in comparing data from previous reporting periods.
d. The majority of the weight of heroin seized in Western Australia in 2018–19 relates to a single seizure.

ARRESTS

The number of national heroin and other opioid arrests increased 13 per cent over the last decade, from 2,767 in 2009–10 to 3,129 in 2018–19. The number of arrests remained relatively stable for the last four reporting periods, increasing 3 per cent this reporting period from 3,029 in 2017–18, with the 3,129 arrests in 2018–19 the second highest number reported in the last decade. Consumer arrests continue to account for the greatest proportion of arrests, accounting for 84 per cent of national heroin and other opioid arrests in 2018–19 (see Figure 18).

FIGURE 18: Number of national heroin and other opioid arrests, 2009–10 to 2018–19



Victoria reported the greatest percentage increase in the number of heroin and other opioid arrests in 2018–19. This reporting period Victoria accounted for the greatest proportion of national heroin and other opioid arrests (47 per cent; see Table 10).

TABLE 10: Number and percentage change of national heroin and other opioid arrests, 2017–18 and 2018–19

	Arrests		
State/Territory[a]	2017–18	2018–19	% change
New South Wales	887	907	2.3
Victoria	1,359	1,469	8.1
Queensland	325	330	1.5
South Australia	135	86	-36.3
Western Australia	265	285	7.5
Tasmania	32	33	3.1
Northern Territory	0	3	–
Australian Capital Territory	26	16	-38.5
Total	**3,029**	**3,129**	**3.3**

a. The arrest data for each state and territory include Australian Federal Police data.

NATIONAL IMPACT

In 2018, the total area under opium cultivation worldwide decreased 17 per cent and global opium production decreased 25 per cent—primarily due to declines in opium production in Afghanistan. Estimated global heroin production also decreased 25 per cent in 2018. The weight of heroin seized globally increased 13 per cent between 2016 and 2017, with Pakistan accounting for the greatest proportion of the weight of global seizures. The number and weight of heroin seized at the border by WCO agencies increased in 2018.

Indicators of heroin demand and supply in Australia provide a mixed picture. Overall, they suggest the heroin market remains small but has experienced small growth in some areas.

Indicators of heroin supply include surveys of drug users, police detainees and wastewater analysis.

- According to national study of regular injecting drug users in 2019, there was a notable increase in the reported median number of days of heroin use, with the reported recent use of heroin increasing for the first time in the last decade.
- According to the ANSPS, the proportion of respondents reporting heroin as the last drug injected decreased in 2018.
- According to a national study of police detainees, the proportion of detainees testing positive to heroin decreased in 2018–19, while self-reported heroin use increased.
- The NWDMP indicates that heroin consumption was higher per capita in capital city sites than regional sites. When comparing data for August 2018 and August 2019, the population-weighted average consumption of heroin increased in both capital city and regional sites.

Indicators of heroin demand include border detection, seizure, arrest, price and purity data. Compared to 2017–18, in 2018–19:

- The number of heroin detections at the Australian border decreased, while the weight detected increased.
- Forensic profiling indicates that South East Asia remains the predominant source of analysed heroin in Australia. Of note this reporting period is the identification of heroin originating from South America, which was last identified in 2013.
- The number of national heroin seizures increased to the second highest on record, while the weight of heroin seized nationally decreased.
- The number of national heroin and other opioids arrests increased.
- The national median price for one taste/cap of heroin decreased.
- The annual median purity of analysed heroin samples fluctuated.

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