

KEY POINTS

- While illicit opium production remained relatively stable in 2019, the area under opium cultivation worldwide decreased by almost a third.
- Afghanistan remains the largest cultivator of illicit opium in the world.
 - Forensic profiling of both border and domestic seizures indicates that the vast majority of heroin in Australia originates from South-East Asia.
- While the weight of opiates (including heroin and opium) seized globally decreased in 2018, it is the third highest weight on record.
 - Opium accounted for the greatest proportion of the weight of opiates seized globally in 2018.
- The number and weight of global opiate border seizures increased in 2019, with the number of opiate seizures the highest in the decade and the weight three times that seized in 2018.
- Overall, indicators of heroin supply and demand in Australia point to a small but potentially expanding market:
 - Both the number and weight of heroin detections at the Australian border decreased in 2019–20.
 - The number and weight of national heroin seizures increased in 2019–20, with the number of seizures increasing to a record level.
 - The number of heroin and other opioid arrests increased and is the highest reported in the last decade.
 - According to the National Wastewater Drug Monitoring Program, the population-weighted average consumption of heroin from August 2019 to August 2020 increased to record levels in capital city sites and decreased in regional sites. However, consumption remains low relative to methylamphetamine.

National heroin market decade trend: comparison between 2010–11 and 2019–20

Border	detections	Nation			
Number	Weight	Number Weight		National arrests	
U -24%	U -72%	• 31%	U -44%	• 38%	
232 → 177	400kg \rightarrow 110kg	1,700 → 2,230	375kg → 210kg	2,551 → 3,514	

Price ^b		DUMA	NDSHS ^d		
(\$)	Annual median purity range	urinalysis	Use in lifetime	Recent use	
0	θ	U	⇒	•	
\$50.00 → \$85.00	14.0% to 48.0% $ ightarrow$ 39.7% to 77.0%	11% → 7%	$1\% \rightarrow 1\%$	<1% → <1%	

a. Heroin arrests include arrests for heroin and other opioids.

b. National median price for a street deal, one taste/cap, of heroin (0.1–0.3 grams) of heroin.

c. Drug Use Monitoring in Australia program. Data reflects the proportion of detainees testing positive to heroin.

d. National Drug Strategy Household Survey. Data is for 2010 and 2019 and reflects the proportion of the Australian population aged 14 years or older who reported having used heroin.

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 2020; EMCDDA 2017; UNODC 2016).

INTERNATIONAL TRENDS

The total area under opium cultivation worldwide decreased 30 per cent, from around 346,000 hectares in 2018 to 240,800 hectares in 2019. While a decline in the area under opium cultivation was reported in Afghanistan and Myanmar in 2019, the total global area under opium cultivation is still substantially larger than that recorded a decade ago. Similarly, while illicit opium production remained relatively stable in 2019, it has shown an upward trend over the last decade. Afghanistan remains the largest illicit opium producing country in the world (UNODC 2020a).

The area under opium cultivation in Myanmar has continued to decrease since 2014. Decreases in the area under opium cultivation were observed in all surveyed regions in 2020. The total area under opium cultivation decreased 11 per cent, from 33,100 hectares in 2019 to 29,500 hectares in 2020. The average opium yield decreased 11 per cent in 2020, resulting in a decrease in estimated opium production. The estimated production of opium in 2020 was 405.0 tonnes—a 20 per cent decrease from the 508.0 tonnes in 2019. The weight of heroin seized in Myanmar more than doubled, increasing from 690.0 kilograms in 2019 to 1,389.0 kilograms in 2020 (UNODC 2020b; UNODC 2021a).

The total area under opium cultivation in Afghanistan increased 37 per cent, from 163,000 hectares in 2019 to 224,000 hectares in 2020. Increases in the area under opium cultivation were observed in all surveyed regions in 2020, with the exception of the Eastern region which decreased 28 per cent. Based on average opium yield data from previous years and estimated average yield, the estimated production of opium in 2020 was 6,300.0 tonnes (UNODC 2021b).

According to the World Drug Report, the weight of global opiate seizures increased steadily over the 2008–2018 period. While the weight of opiates seized globally decreased in 2018, the weight seized remains the third highest weight on record. In 2018 the weight of heroin seized globally decreased 6 per cent to 96.0 tonnes and the weight of opium seized increased 2 per cent to 703.6 tonnes (UNODC 2020a; UNODC 2020c).

Similar to 2017, the United Nations Office on Drugs and Crime (UNODC) notes that most seizures of opiates are reported in or in close proximity to the main opium production areas. In 2018, more than 90 per cent of global illicit opium production took place in Asia—the region accounting for the greatest proportion of the total weight of opiates seized globally. The Islamic Republic of Iran continued to account for the greatest proportion of the weight of opiates seized globally in 2018 (53 per cent), followed by Afghanistan (12 per cent), Turkey (9 per cent) and Pakistan (5 per cent; UNODC 2020a).

While the weight of heroin and morphine seized in South-West Asia decreased 42 per cent, from a record 136.5 tonnes in 2017 to 79.4 tonnes in 2018, South-West Asia continues to account for the greatest proportion of the weight of heroin and morphine seized globally. In 2018 the weight of heroin and morphine seized in Europe reached record levels, increasing to 29.7 tonnes. According to the UNODC, 103 countries reported heroin seizures in 2018 with the top three countries—the Islamic Republic of Iran (25.0 tonnes), Turkey (19.0 tonnes) and the United States (9.0 tonnes)—accounting for 54 per cent of the weight of heroin seized globally (UNODC 2020a; UNODC 2020c).

According to the World Customs Organization (WCO), both the number and weight of global opiate border seizures increased in 2019. The number of opiate seizures increased 38 per cent, from 2,030 in 2018 to 2,795 in 2019, and the weight seized increased 231 per cent, from 15,612.3 kilograms in 2018 to 51,689.0 kilograms in 2019. Over the last decade, the number of opiate seizures increased, with the weight of opiates seized fluctuating but increasing overall. Heroin continues to account for the greatest proportion of the number of global opiate border seizures (1,300 seizures, accounting for 47 per cent of all opiate seizures in 2019). Heroin was the only drug within the 'opiates' category to report a decrease in the number of seizures in 2019, with the category of opiates reporting an increase in the weight seized heroin accounted for the second highest proportion (28 per cent) of the total weight of opiates seized at the border (WCO 2020).

DOMESTIC TRENDS AUSTRALIAN BORDER SITUATION

The number of heroin detections at the Australian border fluctuated greatly over the last decade, decreasing 24 per cent from 232 in 2010–11 to 177 in 2019–20, although the overall trend remained relatively stable over the decade. The number of heroin detections decreased 4 per cent this reporting period, from 184 in 2018–19.

While the weight of heroin detected also fluctuated over the last decade, it followed a general decreasing trend, decreasing 72 per cent from 400.2 kilograms in 2010–11 to 110.6 kilograms in 2019–20. The weight of heroin detected decreased 61 per cent this reporting period, from 283.4 kilograms in 2018–19 (see Figure 14).

In 2019–20, 34 of the 177 heroin detections (19 per cent) weighed one kilogram or more. With a combined weight of 90.5 kilograms, these 34 detections accounted for 82 per cent of the total weight of heroin detected in 2019–20.³⁶



FIGURE 14: Number and weight of heroin detections at the Australian border 2010–11 to 2019–20 (Source: Department of Home Affairs)

HEROIN

IMPORTATION METHODS

In 2019–20, detections of heroin at the Australian border occurred in the air cargo, air passenger/crew and international mail streams. By number, the international mail stream accounted for the greatest proportion of heroin detections (73 per cent), followed by air cargo (24 per cent) and air passenger/ crew (3 per cent). By weight, the air cargo stream accounted for the greatest proportion of detections (56 per cent), followed by international mail (44 per cent) and air passenger/crew (<1 per cent).

EMBARKATION POINTS

In 2019–20, 15 countries were identified as embarkation points for heroin detected at the Australian border, compared to 21 countries in 2018–19. By weight, Malaysia was the primary embarkation point for heroin detected in 2019–20. Other key embarkation points by weight this reporting period include Thailand, the United Arab Emirates, Singapore, Germany, Laos, the United Kingdom, South Africa, China (including Hong Kong) and the Netherlands.

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 border³⁷ and seizures provided to the AFP by international agencies for the purpose of chemical profiling.³⁸ 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.

The following data relate to seizures investigated by the AFP between 2011 and June 2020, from which samples were submitted to the NMI for routine analysis and profiling.³⁹

- Heroin in the Australian market continues to be predominantly of South-East Asian (SEA) origin.
- For the first time in six years, 2019 saw the seizure of heroin of South American (SA) origin. This seizure was made offshore but destined for Australia as part of Operation HOTH. This single seizure accounted for 7 per cent of the total bulk weight of heroin analysed in 2019.
- In 2019, the number of seizures of South-West Asian (SWA) origin increased to levels not seen since 2015.
- The total bulk weight of seizures in 2019 and the first six months of 2020 are predominantly comprised of heroin of SEA origin.

³⁷ This data may also include seizures destined for Australia which occurred offshore.

³⁸ Data from these samples/seizures has not been included in this summary.

³⁹ Profiling data relate to seizures investigated by the AFP and from which samples were submitted to the National Measurement Institute (NMI) for routine analysis and profiling. 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.

Year	South-East Asia %	South-West Asia %	South America %	Unclassified %	South-East Asia & Unclassified %	South-West Asia & Unclassified %
Jan–Jun 2020 ^a	100.0	-	-	-	-	-
2019	81.0	14.3	4.7	-	-	-
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	-	-	_	_

a. In the first half of 2020, there was only one seizure of heroin profiled.

TABLE 8: Geographical origin of heroin samples as a proportion of total bulk weight of analysed AFPborder seizures, 2011–June 2020⁴¹ (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 2020 ^a	100.0	-	-	-	-	-
2019	92.5	0.5	7.0	-	-	-
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	-	-	-	-

a. In the first half of 2020, there was only one seizure of heroin profiled.

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.⁴²

⁴⁰ This data may also include seizures destined for Australia which occurred offshore.

⁴¹ This data may also include seizures destined for Australia which occurred offshore.

⁴² 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.

Heroin samples submitted to the ENIPID capability in 2019 and the first six months of 2020 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).⁴³

When compared to the AFP border data, an increase in the "Mixed/Unclassified" samples for the reporting period was noted, however this remained consistent with the trends observed in the ENIPID data reported in previous years.

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 Drug Strategy Household Survey (NDSHS) collects self-report information on alcohol, tobacco and illicit drug use among the general population and also surveys people's attitudes and perceptions in relation to these. Conducted approximately every three years, the related report presents estimates derived from survey responses weighted to the appropriate Australian population. According to NDSHS data:

- Over the last decade, the proportion of the Australian population aged 14 years or older who reported having used heroin at least once in their lifetime remained stable at 1 per cent in 2010, 2016 and 2019.
- Over the last decade, the proportion of the Australian population aged 14 years or older who reported having recently⁴⁴ used heroin remained stable at <1 per cent in 2010, 2016 and 2019 (AIHW 2020).

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. Since the Program began measuring heroin, the population-weighted average consumption increased in capital city sites and decreased in regional sites. According to data from the NWDMP for August 2019 to August 2020:

- Heroin consumption fluctuated, with per capita consumption higher in capital city sites than regional sites.
- The population-weighted average consumption of heroin in capital city sites increased to a record high in August 2020.
- The population-weighted average consumption of heroin decreased in regional sites.
- Demand for heroin remains low compared to other illicit drugs, particularly methylamphetamine.
- The ACIC estimates that around 1.0 tonne of heroin was consumed annually in Australia, an increase from the estimated 940 kilograms of heroin consumed in the previous year (ACIC 2021).

⁴³ Care should be taken when drawing any conclusions from this data due to the low number of heroin samples profiled during this period, a possible reflection of the low demand for heroin that currently exists within Australia.

⁴⁴ In the NDSHS, recent use refers to reported use in the 12 months preceding the survey.

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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 IDRS data:

- The proportion of respondents reporting heroin as their drug of choice decreased over the last decade, from 53 per cent in 2011 to 50 per cent in 2020. In 2019 this proportion was 45 per cent. Heroin remains the most commonly reported drug of choice within this population.
- Over the last decade the proportion of respondents reporting heroin as the drug most injected in the past month increased, from 43 per cent in 2011 to 46 per cent in 2020. In 2019 this proportion was 40 per cent.
- Heroin replaced methylamphetamine as the drug most injected in the past month in 2020.
- The reported recent use⁴⁵ of heroin in this population remained relatively stable over the last decade, increasing from 62 per cent in 2011 to 63 per cent in 2020. In 2019 this proportion was 55 per cent.
- Over the last decade the reported median number of days of heroin use in the six months preceding interview increased, from 72 days in 2011 to 96 days in 2020. In 2019 the reported number of days was 90 (Peacock et al. 2021).

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 EDRS data:

The proportion of respondents reporting the recent use of heroin decreased over the last decade, with 4 per cent of this population reporting the recent use of heroin in 2011, compared to 1 per cent in 2020. In 2019 this proportion was 3 per cent (Sindicich & Burns 2011; Peacock et al. 2020).

The Australian Needle and Syringe Program Survey (ANSPS) collects self-report information and capillary blood samples⁴⁶ annually to monitor blood borne viral infections and associated risk behaviour among individuals who inject drugs. According to ANSPS data:

The proportion of respondents reporting heroin as the drug last injected nationally decreased over the last decade, from 34 per cent in 2010 to 27 per cent in 2019. This continues a decreasing trend observed since 2000, where 56 per cent of respondents reported heroin as the drug last injected. The proportion reported in 2019 is a slight increase from the 26 per cent reported in 2018 (Heard et al. 2020).

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.⁴⁷ According to DUMA data:

- The proportion of detainees testing positive to heroin and self-reporting heroin use generally decreased over the last decade.
- The proportion of detainees testing positive⁴⁸ to heroin over the last decade ranged from 5 per cent in 2018–19 to 11 per cent in 2010–11. In 2019–20 this proportion was 7 per cent.

⁴⁵ In both the IDRS and EDRS studies, recent use refers to reported use in the six months preceding interview.

⁴⁶ Individuals participating in the survey are invited to provide a blood sample for HIV and HCV antibody testing.

⁴⁷ Detainees can participate in the survey without providing a urine sample. Cases with missing data are excluded from the relevant analysis.

⁴⁸ Heroin and its metabolite can be detected in urine for 6 hours after administration.

 The proportion of detainees self-reporting recent heroin use⁴⁹ over the last decade ranged from 11 per cent in 2017–18 to 14 per cent in 2010–11. In 2018–19 and 2019–20 this proportion remained stable at 13 per cent (see Figure 15).

FIGURE 15: National proportion of detainees testing positive for heroin compared with self-reported recent use, 2010–11 to 2019–20 (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.

g. Urine was collected in the third quarter of 2019 in Adelaide, Brisbane and Perth; the fourth quarter of 2019 in Bankstown; and the first quarter of 2020 in Adelaide, Brisbane, Perth and Surry Hills.

PRICE

At the street level, the price of heroin is generally measured as a 'taste/cap' or in grams. Nationally, the price range for one taste/cap of heroin (0.1 to 0.3 grams) remained relatively stable over the last decade, from between \$40 and \$150 in 2010–11 to between \$50 and \$150 in 2019–20. In 2018–19 the price ranged from \$30 to \$150. The national median price increased over the last decade, from \$50 in 2010–11 to \$85 in 2019–20, an increase from \$75 in 2018–19.

The price range for one gram of heroin remained relatively stable over the last decade, from between \$200 and \$700 in 2010–11 to between \$200 and \$750 in 2019–20. In 2018–19 the price ranged from \$200 to \$700. The national median price increased over the last decade, from \$325 in 2010–11 to \$462.50 in 2019–20, an increase from \$400 in 2018–19.

No price data were available for a kilogram of heroin in 2010–11. This reporting period New South Wales, Victoria and the Australian Capital Territory were the only jurisdictions to report a price for one kilogram of heroin, which ranged between \$90,000 and \$220,000, compared with a price range of \$90,000 to \$170,000 (reported by New South Wales and Victoria) in 2018–19.

⁴⁹ Recent use in the DUMA program refers to self-reported use in the 12 months prior to arrest.

PURITY

Since 2010–11, the annual median purity of analysed heroin samples ranged between 13 per cent and 77 per cent. While fluctuating, the annual median purity of heroin increased over the last decade. In 2019–20, the annual median purity ranged from 40 per cent in South Australia to 77 per cent in Western Australia. This reporting period, with the exception of New South Wales which decreased, all states reported an increase in the annual median purity of heroin. The annual median purity of heroin in Victoria, which is Australia's primary heroin market, more than doubled from 2018–19 to 2019–20 (see Figure 16).



FIGURE 16: Annual median purity of heroin samples, 2010–11 to 2019–20

AVAILABILITY

User surveys indicate a decrease in the reported availability of heroin in 2020 compared to 2019. In a 2020 survey of people who regularly inject drugs, the proportion of respondents reporting heroin as 'easy' or 'very easy' to obtain decreased, from 89 per cent in 2019 to 77 per cent in 2020, the lowest proportion recorded in the last decade. This is a decrease from the 86 per cent reported in 2011 (Peacock et al. 2021).

SEIZURES

The number of national heroin seizures increased 31 per cent over the last decade, from 1,700 in 2010–11 to a record 2,230 in 2019–20, with the number of seizures displaying an increasing trend over the decade. The number of national heroin seizures remained high and relatively stable over the last four reporting periods, increasing 7 per cent this reporting period from 2,080 in 2018–19.

The weight of heroin seized nationally decreased 44 per cent over the last decade, from 375.7 kilograms in 2010–11 to 210.7 kilograms in 2019–20. Despite some fluctuations, the weight of heroin seized displays a decreasing trend over the last decade. The weight seized nationally remained relatively stable over the last five reporting periods, increasing 7 per cent this reporting period from 197.7 kilograms in 2018–19 (see Figure 17).



FIGURE 17: National heroin seizures, by number and weight, 2010–11 to 2019–20

The Northern Territory reported the greatest percentage increase in the number and weight of heroin seized in 2019–20, although starting from a low base. This reporting period New South Wales accounted for the greatest proportion of both the number (58 per cent) and weight (61 per cent) of heroin seized nationally (see Table 9).

	Number			Weight		
State/Territory ^a	2018–19	2019–20	% change	2018–19	2019–20	% change
New South Wales	1,170	1,298	10.9	86,633	127,646	47.3
Victoria	310	308	-0.6	56,915	62,411	9.7
Queensland	198	195	-1.5	25,026	2,105	-91.6
South Australia	20	27	35.0	15,408	595	-96.1
Western Australia	334	332	-0.6	13,656 ^b	17,756	30.0
Tasmania	13	17	30.8	99	52	-47.5
Northern Territory	2	6	200.0	7	35	400.0
Australian Capital Territory	33	47	42.4	53	125	135.8
Total	2,080	2,230	7.2	197,797	210,725	6.5

TABLE 9: Number, weight and percentage change of national heroin seizures, 2018–19 and 2019–20

a. Includes seizures by state/territory police and Australian Federal Police for which a valid seizure weight was recorded.

b. The majority of the weight of heroin seized in Western Australia in 2018–19 relates to a single seizure.

HEROIN

ARRESTS

The number of national heroin and other opioid arrests increased 38 per cent over the last decade, from 2,551 in 2010–11 to 3,514 in 2019–20, with the number of arrests showing an increasing trend during the period. The number of arrests increased by more than 5 per cent for the first time after four reporting periods of relative stability, increasing 12 per cent this reporting period from 3,129 in 2018–19. Consumer arrests continue to account for the greatest proportion of arrests, accounting for 84 per cent of national heroin and other opioid arrests in 2019–20 (see Figure 18).



FIGURE 18: Number of national heroin and other opioid arrests, 2010–11 to 2019–20

The Australian Capital Territory reported the greatest percentage increase in the number of heroin and other opioid arrests in 2019–20. This reporting period Victoria accounted for the greatest proportion of national heroin and other opioid arrests (42 per cent; see Table 10).

TABLE 10: Number and percentage change of national heroin and	d other opioid arrests, 2018–19 and
2019–20	

	Arrests				
State/Territory ^a	2018–19	2019–20	% change		
New South Wales	907	1,257	38.6		
Victoria	1,469	1,464	-0.3		
Queensland	330	355	7.6		
South Australia	86	94	9.3		
Western Australia	285	284	-0.4		
Tasmania	33	33	0.0		
Northern Territory	3	1	-66.7		
Australian Capital Territory	16	26	62.5		
Total	3,129	3,514	12.3		

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

NATIONAL IMPACT

In 2019, the global cultivation of opium decreased while the global production of opiates remained relatively stable. Afghanistan remains the main illicit opium producing country. The estimated weight of global heroin seizures decreased in 2018, with Iran accounting for the greatest proportion of the weight seized. According to WCO agencies, in 2019 the number of heroin seizures decreased while the weight of heroin seized increased.

Indicators of supply and demand suggest that the Australian heroin market remains small but point to a potential expansion of the market.

Indicators of heroin demand include surveys of people who use drugs, police detainees and wastewater analysis.

- According to the NDSHS, both the reported recent use and use in lifetime of heroin remained relatively stable in 2019.
- According to the ANSPS, the proportion of respondents reporting heroin as the drug last injected increased slightly in 2019.
- According to a national study of people who regularly inject drugs, the reported recent use and median number of days of heroin use increased in 2020, while the reported availability of heroin decreased.
- According to a national study of people who regularly use ecstasy and other stimulants, the reported recent use of heroin decreased in 2020.
- According to a national study of police detainees, the proportion of detainees testing positive to heroin increased and self-reported heroin use remained relatively stable in 2019–20.
- The NWDMP indicates that heroin consumption was higher per capita in capital city sites than regional sites. When comparing data for August 2019 and August 2020, the population-weighted average consumption of heroin increased to a record level in capital city sites and decreased in regional sites.

Indicators of heroin supply include border detection, forensic profiling, seizure, arrest, price and purity data. Compared to 2018–19, in 2019–20:

- Both the number and weight of heroin detected at the Australian border decreased.
- Forensic profiling indicates that South-East Asia remains the predominant source of analysed heroin in Australia. For the first time since 2013, heroin originating from South America was identified in 2019.
- The number and weight of heroin seized nationally increased, with the number of seizures increasing to a record level.
- The number of national heroin and other opioid arrests increased to the highest number reported in the last decade.
- The national median price for a street deal and one gram of heroin increased.
- The annual median purity of analysed heroin samples increased in all states except New South Wales.

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