

International Narcotics  
Situation Report [REDACTED]

November 1991

Perspective

Colombia: Traffickers and Heroin Production [REDACTED]

A significant expansion of opium poppy cultivation in Colombia during the past year reflects trafficker interest in entering the international heroin market. Although Colombian heroin production is still minor by global standards, the present rate of expansion indicates that opium cultivation in Colombia could surpass the combined totals [REDACTED] by the end of next year. The traffickers' vast resources and well-developed networks would allow them to use such a base to seize a niche in the US and European markets. [REDACTED]

The Colombians appear to be participating in heroin trafficking to increase their short-term drug profits, improve their production and marketing processes, and diversify. The Colombian traffickers may be trying to "cover their bets" in response to reports of a stagnating US cocaine market, but the powerful profit incentive alone could account for the shift. [REDACTED] data indicate, for example, that the profit margin on heroin is about 10 times higher than that of cocaine. [REDACTED] the Colombian cartels have evaluated the heroin market and believe that it may expand over the next few years, especially in the United States. [REDACTED]

[REDACTED] By developing indigenous opium sources, the traffickers could control all aspects of the production cycle, from acquisition of the raw material to final distribution, a development that would make them unique in the heroin trade. [REDACTED]

[REDACTED] the traffickers for now are focusing on perfecting production methods rather than gearing up for a major switch from cocaine to heroin. In addition, from a production perspective, poppy cultivation does not draw resources from the cocaine trade, and the manpower involved in heroin processing would not normally be involved in the production of cocaine. [REDACTED]

[REDACTED] For example, the opium poppies are almost always grown at a higher altitude and in different areas than coca plants. The traffickers also are probably using the expanded cultivation to improve the quantity and quality of their heroin. [REDACTED] the quality

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of Colombian heroin is poor, compared with that now available, and, if the Colombians hope to be competitive, it will have to be improved. [REDACTED]

[REDACTED] senior Colombian officials are concerned over the expansion of poppyfields, but Bogota is undecided about what approach to take. The government's current manual eradication efforts can tie up large numbers of troops or police, diverting them from other counternarcotics operations. In addition, manually cleared poppyfields can be replanted almost immediately and be ready for harvest in three to five months. [REDACTED]

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