

## Executive Summary

### Background

Drug availability estimates for 2001 were developed for the four major drugs: cocaine, heroin, methamphetamine, and marijuana. This effort responded to a request from the U.S. Attorney General for measurement of the quantity of illicit substances available to drug users in the United States. There is significant uncertainty in these estimates due to the illicit and clandestine nature of the various drugs, and the limited data currently collected to aid in these analyses. Therefore, caution is urged in the application of these estimates.

Six interagency working groups (one for each of the drug-types, a consumption working group and a seizure working group) were formed and staffed by members of the following federal agencies: Crime and Narcotics Center, U.S. Customs, Drug Enforcement Administration, Defense Intelligence Agency, Department of Justice, National Institute of Justice, El Paso Intelligence Center, Joint Interagency Task Force West, National Drug Intelligence Center, Office of National Drug Control Policy, Substance Abuse and Mental Health Services Administration, Department of Treasury, U.S. Coast Guard, and the U.S. Interdiction Coordinator. This document is the compendium of the reports from each of the six working groups.

### Results

The table below summarizes the working groups' drug availability estimates. Federal-wide drug seizures are also shown to provide context to the drug availability estimates. The availability estimates are presented in ranges, and, in some cases, fairly wide ranges. It is important to understand that supply-based estimates for cocaine have matured over several years of research and, therefore, present a more precise picture. On the other hand, the estimates for methamphetamine and marijuana are developmental and, therefore, have a larger degree of uncertainty. In the table below, each drug availability's methodology was assigned a rating to reflect the different maturities. The methodology used for the cocaine estimate is an "Approved" methodology because of its consistency among various independent data sets. Heroin is assigned a "Pending" rating, to reflect that it is in development and requires further analyses to determine its validity. The methodologies for the methamphetamine and marijuana estimates are assigned a "Preliminary" rating since they use first-time approaches and require more data to reduce their uncertainty.

**Table 1: Drug Availability Estimates and Federal Seizures in Calendar Year 2001**

<b>DRUG</b>	<b>Maturity of the Methodology</b>	<b>Street Availability in 2001 (pure metric tons)</b>	<b>Federal Seizures in 2001 (metric tons)</b>
Cocaine	Approved	260-270	106
Heroin	Pending	13-18	2.5
Methamphetamine	Preliminary	110-140	3.6
Marijuana	Preliminary	10,000-24,000	1,215

The importance of these estimates is not necessarily in the figures themselves, but in: 1) the process established to develop the figures, and 2) the application of those figures to other facets of the drug problem. Once fully developed, the measures of drug availability can be applied to issues such as performance measurement, threat assessment, and market modeling. But note that drug availability is one indicator of performance. And although these estimates were developed by federal law enforcement, intelligence, and health-related communities, controlling availability is the responsibility of many more governmental organizations than these.

- **Cocaine:** This estimate of 260-270 pure metric tons was determined through the integration of many routinely reported sources such as the potential cocaine production estimates reported annually by the Central Intelligence Agency, the Office of National Drug Control Policy's (ONDCP) annual consumption estimate, and worldwide seizure statistics. This mature methodology provided annual estimates of cocaine availability over the past six years, which show a convergence between both supply-based and demand-based approaches. The greatest uncertainty in the estimate is the amount of cocaine consumed by foreign markets due to a lack of routinely collected standardized data.
- **Heroin:** This estimate of 13-18 pure metric tons was based on the number of users, their frequency of use and expenditures, and the retail price of heroin. There is uncertainty in the estimate due to the widely varying prices of heroin and user behavior. A supply-based estimate could not be determined due to inconsistency between the current Colombia potential production estimate and the Heroin Signature Program's estimate of South American heroin entering the U.S domestic market. The apparent discrepancy requires the development of a follow-on process to develop a rational estimate.
- **Methamphetamine:** Domestic production is the primary source of methamphetamine available for domestic demand. The largest component of the 110-140 pure metric tons of methamphetamine is manufactured from diverted Canadian and U.S. pseudoephedrine and ephedrine. There is considerable uncertainty in the diversion figures, which highlights the need for improvements in tracking precursor chemicals in order to reduce their use in the manufacture of illegal synthetic drugs.
- **Marijuana:** The 10,000 to 24,000 metric ton estimate of marijuana availability was based on a two-part methodology that separately derived the quantities of foreign and domestically produced marijuana available. The speculative estimate of domestic marijuana production was calculated by applying three hypothetical seizure rates to domestic cannabis eradication figures. There is considerable uncertainty in the estimate due to the lack of direct information on the magnitude of the domestic production component. Development of either a cannabis signature to determine the source areas of seized marijuana samples, or a science-based estimate of illegal domestic cannabis cultivation, would significantly improve the accuracy of this estimate.

### **Follow-on Process**

The process established over the past six-months, for consolidating various drug-supply data into methodologies estimating drug availability, provides many benefits to policymakers at the Department of Justice, the Office of National Drug Control Policy and the participating law enforcement agencies. The reports from each of the six working groups, not only provides estimates of drug availability, but recommendations on how to improve those estimates. This process must continue, albeit at a different level of effort, to respond to the action items generated by those initial reports.

The current set of estimates form a baseline that can enable trend analyses providing that similar estimates are made in subsequent years. These trends and estimates force the reconciliation of the various pieces of the counterdrug effort, thus leading to a more consistent foundation for drug policy.

A follow-on process, led by drug policymakers, will attempt to improve and update these availability estimates by improving the data sets that feed into these estimates. The executive-level interagency Steering Committee established for this initial effort will be continued for the follow-on process. Offices of Primary Responsibility (OPRs) will be established to execute the action items generated from the Working Group recommendations. The table below shows the significant action items for each of the six OPRs.

In summary, improved drug availability estimates are necessary to support decision-makers' need to understand the scale of the drug problem in America. Based upon the current estimates' uncertainties, the most important action items should relate to domestic marijuana cultivation, a more accurate signature of heroin production, consumption habits of heroin users, and trafficking flow patterns through Mexico and Canada. It is imperative that policymakers and the Congress fund additional data collection systems to make any real progress in developing reliable estimates that will contribute to reasoned shifts in policy and strategy.

**Table 2: Significant action items generated by each Working Group.**

<b>Office of Primary Responsibility</b>	<b>Significant Action Item</b>
Cocaine	Expand estimates of cocaine purity throughout the market
Heroin	Improve production & HSP/DMP estimation methodologies
Methamphetamine	More accurately estimate legitimate and diverted US and Canadian ephedrine and pseudoephedrine
Marijuana	Develop signature program
Consumption	More accurately estimate number of drug users and their use behavior
Seizure	Institutionalize access to and cross-referencing of federal seizures; integrate state/local seizures