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BODY:
SUBJECT: MONTHLY REPORT, AUGUST 1992

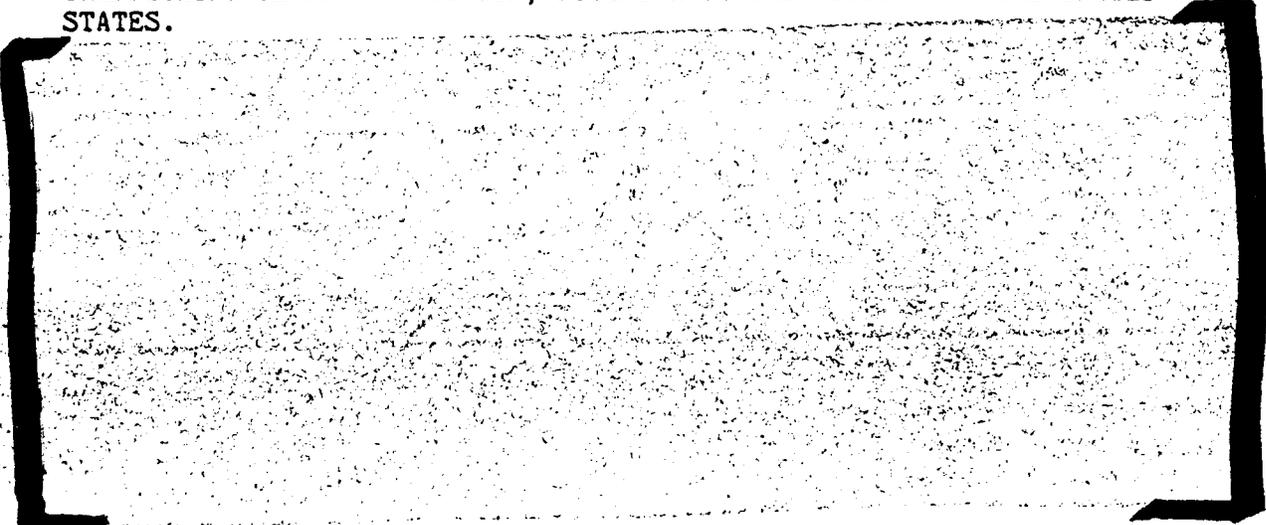
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TEXT:

1. THIS REPORT SUMMARIZES KEY ISSUES DISCUSSED IN THE MONTHLY WARNING MEETINGS HELD BY NATIONAL INTELLIGENCE OFFICERS DURING AUGUST 1992

KEY POINTS

COLOMBIA: ALREADY THE HUB OF THE WORLD'S COCAINE MARKET, COLOMBIA COULD BECOME AN IMPORTANT CULTIVATOR OF OPIUM AND A TRAFFICKING CENTER FOR HEROIN, POSING A FURTHER THREAT TO THE UNITED STATES.



COLOMBIA

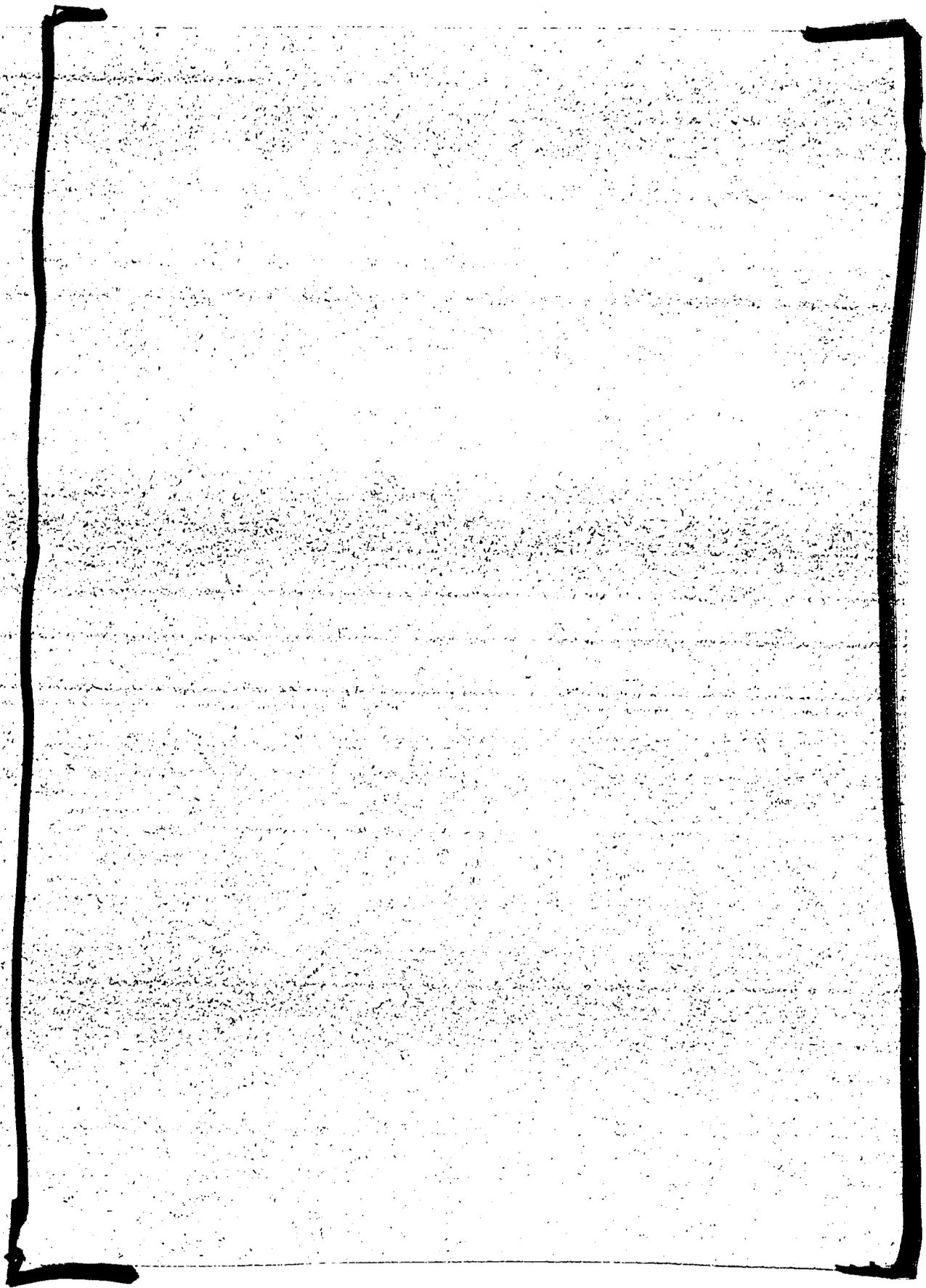
COLOMBIA HAS THE INFRASTRUCTURE IN PLACE FOR TRAFFICKING IN DRUGS, AND ITS GEOGRAPHIC, TOPOGRAPHIC, AND CLIMATIC CONDITIONS ARE CONDUCIVE TO GROWING OPIUM POPPIES. POPPY CULTIVATION TECHNIQUES

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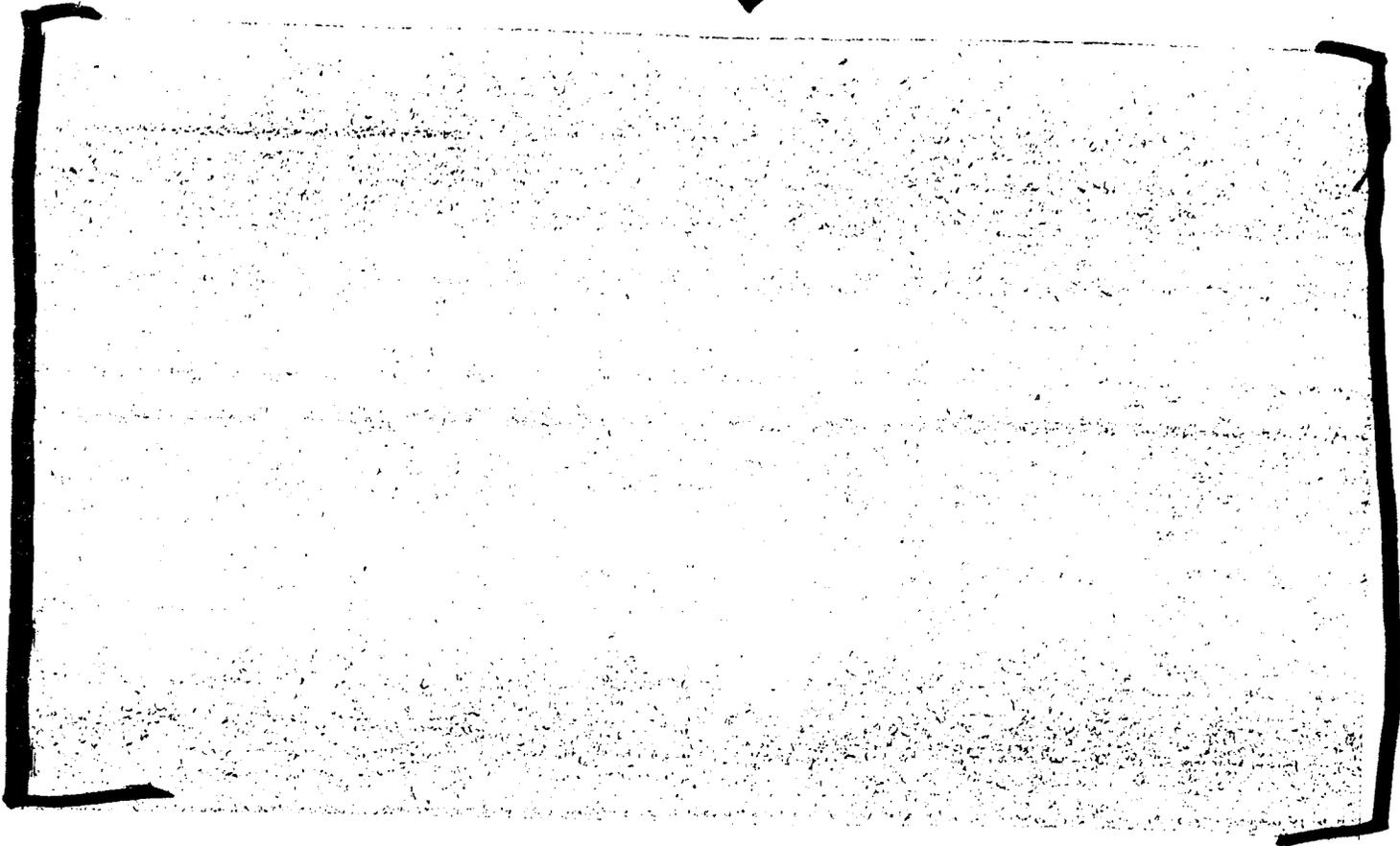
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ARE IMPROVING RAPIDLY AND HEROIN YIELDS IN COLOMBIA WILL LIKELY INCREASE MARKEDLY IN THE YEARS AHEAD. SOME COCAINE KINGPINS HAVE DIVERSIFIED INTO HEROIN, AND COLOMBIAN INSURGENT GROUPS ALSO ARE INVOLVED IN THE BUSINESS.

- INTELLIGENCE COMMUNITY ANALYSTS BELIEVE COLOMBIA IS SECOND ONLY TO BURMA IN TERMS OF HARVESTABLE CULTIVATION OF OPIUM POPPIES. HOWEVER, THIS REPRESENTS ONLY POTENTIAL PRODUCTION BECAUSE YIELDS DEPEND ON PRODUCTION METHODS AND EXPERTISE STILL IN THEIR INFANCY IN COLOMBIA; THERE MAY BE AS FEW AS FOUR CHEMISTS IN THE COUNTRY CAPABLE OF PRODUCING HIGH GRADE HEROIN THAT WOULD BE COMPETITIVE IN THE US MARKET.
- IT IS POSSIBLE THAT COLOMBIA COULD OVERTAKE MEXICO AS THE REGION'S LARGEST OPIUM PRODUCER THIS YEAR. NEVERTHELESS, COLOMBIA REMAINS A SMALL PLAYER IN THE HEROIN TRAFFICKING BUSINESS, ALTHOUGH THE VOLUME OF ITS HEROIN ENTERING THE UNITED STATES IS ON THE RISE.
- EVIDENCE OF INVOLVEMENT BY THE COCAINE CARTELS IN THE HEROIN TRADE IS SKETCHY. HOWEVER, IF THE MAJOR CARTELS MOVE TO ESTABLISH CONTROL OVER THE INDUSTRY AND GAIN A LARGER SHARE OF THE US MARKET, VIOLENCE COULD ESCALATE SIGNIFICANTLY IN BOTH THE UNITED STATES AND COLOMBIA.
- BOTH MAJOR INSURGENT GROUPS, THE FARC AND THE ELN, HAVE LONG BEEN LINKED TO THE COCAINE INDUSTRY AND APPARENTLY ARE NOW EXPANDING INTO HEROIN. SOME REPORTS INDICATE THAT THEY HAVE EXTENSIVE POPPY FIELDS; THE COLOMBIAN GOVERNMENT BELIEVES THEY ARE "PROFOUNDLY" INVOLVED IN CULTIVATION.

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