



Product Spotlight: Alcoholic drinks

Contents

1. Consumer motivations to buy illicit alcoholic drinks

- **Where** is the illicit trade in alcoholic drinks growing?
- **How many** alcoholic drinks purchases are illicit?
- **Who** buys illicit alcoholic drinks?
- **Which** channels are mostly used for illicit purchases?
- **Why** do consumers buy illicit alcoholic drinks?

2. How can those working to combat illicit trade deter them?

- The gap between consumer attitudes and those combatting illicit trade
- Preferred stakeholder strategies
- Conclusions and recommendations



CONSUMER MOTIVATIONS TO BUY ILLICIT ALCOHOLIC DRINKS

There are high levels of illicit alcohol, across Europe

Country	Estimated illicit trade	Growth
Austria	12.7%	0.6%
Belgium	10.4%	2.2%
France	11.3%	-0.9%
Germany	12.2%	1.4%
Ireland	10.8%	-4.9%
Luxembourg	10.7%	-3.1%
Netherlands	11.9%	-1.2%
Switzerland	11.2%	0.1%
United Kingdom	11.9%	3.1%
Western Europe	11.5%	-0.3%

Country	Estimated illicit trade	Growth
Denmark	12.9%	0.7%
Finland	12.4%	2.1%
Norway	14.1%	5.1%
Sweden	12.6%	3.0%
Nordics	13.0%	2.7%

Country	Estimated illicit trade	Growth
Bulgaria	11.6%	0.1%
Croatia	12.2%	3.9%
Czech Republic	12.9%	-2.1%
Estonia	12.3%	-2.2%
Latvia	11.7%	2.7%
Lithuania	13.6%	0.7%
Slovakia	12.3%	2.1%
Slovenia	13.4%	1.4%
Hungary	13.4%	9.0%
Poland	14.3%	4.7%
Romania	11.8%	-2.2%
Central/Eastern Europe	12.7%	1.6%

Country	Estimated illicit trade	Growth
Average all countries	12.7%	1.8%

Below all countries' average  Above all countries' average

Country	Estimated illicit trade	Growth
Azerbaijan	14.2%	7.8%
Belarus	16.0%	5.9%
Kazakhstan	13.3%	2.2%
Russia	15.7%	0.8%
Serbia	12.4%	-0.6%
Turkey	13.1%	8.3%
Ukraine	17.0%	9.9%
Eastern borders (non EU)	14.5%	4.9%

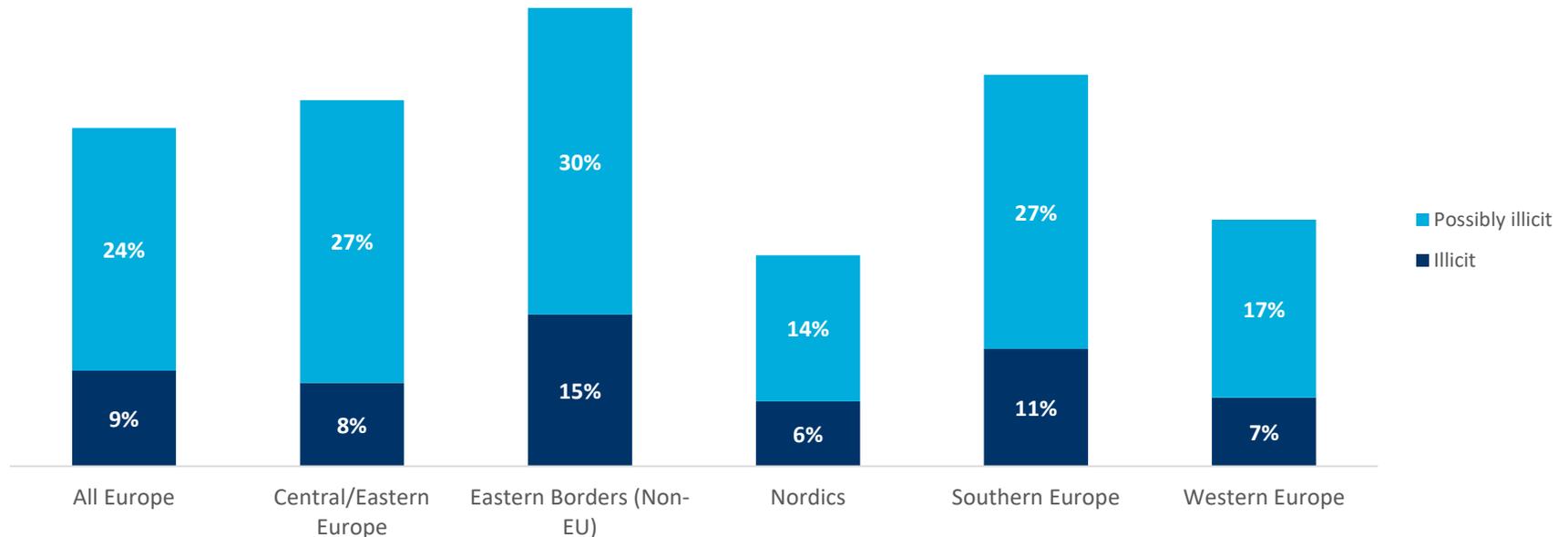
Country	Estimated illicit trade	Growth
Cyprus	11.8%	1.5%
Greece	12.5%	2.0%
Italy	11.5%	2.5%
Malta	11.2%	-4.2%
Portugal	12.5%	2.3%
Spain	12.3%	3.1%
Southern Europe	12.0%	1.2%

Source: Oxford Economics stakeholder survey, n=3,275

- The heatmap across 39 European countries highlights high levels of illicit alcohol across Europe according to our respondents, from 10% in Belgium to 17% in Ukraine, but great variety in growth over the last three years (e.g., decrease of 5% in Ireland vs. an increase in Ukraine of 10%).
- Fastest growth in Eastern Borders region, in particular Ukraine, Turkey, Azerbaijan and Belarus.

Consumers indicate large amount of “possibly illicit” trade

In general, how likely do you think that some of the products you have purchased could have been illicit goods?
Consumers

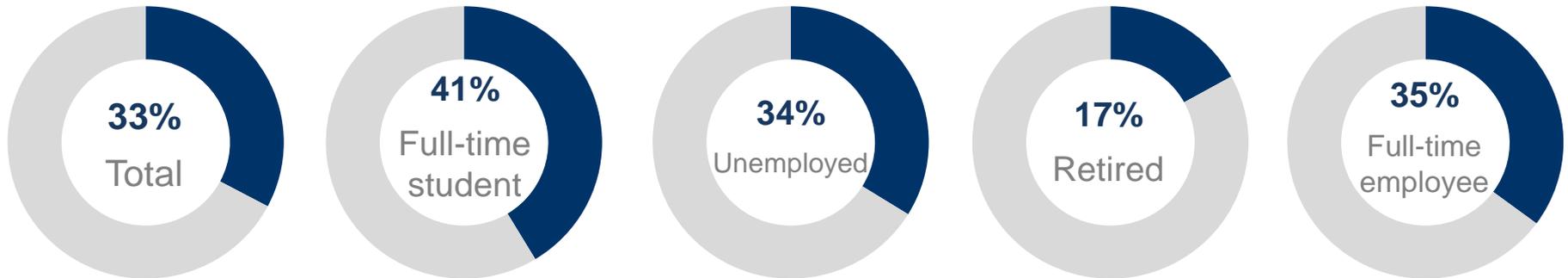


Source: Oxford Economics consumer survey, n=18,966

- Consumers’ estimates of illicit purchases highlight extent of “possibly illicit” purchases, where they lack confidence that they are buying legitimate alcoholic drinks.
- Across Europe almost a quarter (24%) of purchases are possibly illicit, more than 2.5 times estimated illicit purchases.
- For this presentation, to understand consumers motivations for buying illicit alcohol, we use this larger population, including possibly illicit. 5

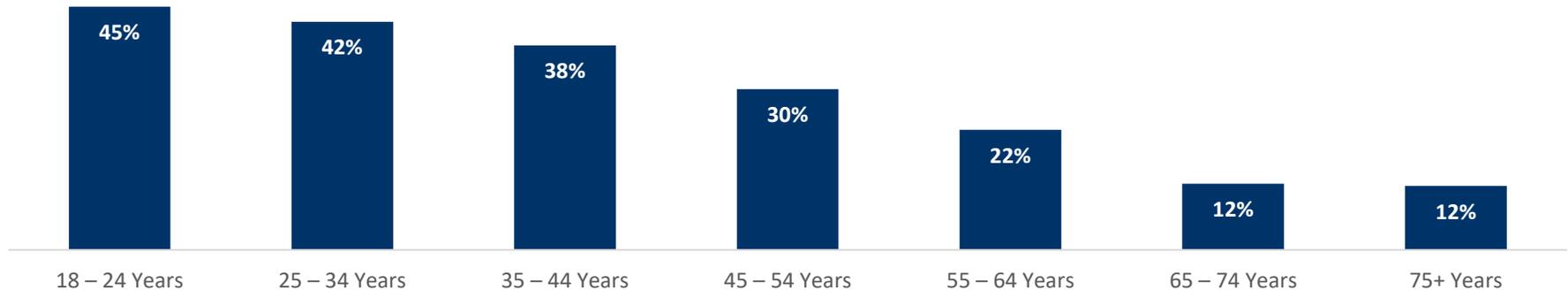
The young are more likely to buy illicit alcohol

Percentage of illicit purchases by working role



Source: Oxford Economics consumer survey, n=18,966; Full-time student n=1,267; Unemployed n=1,481; Retired n=2,587; Full-time employee n=10,420

Percentage of illicit purchases by consumer age

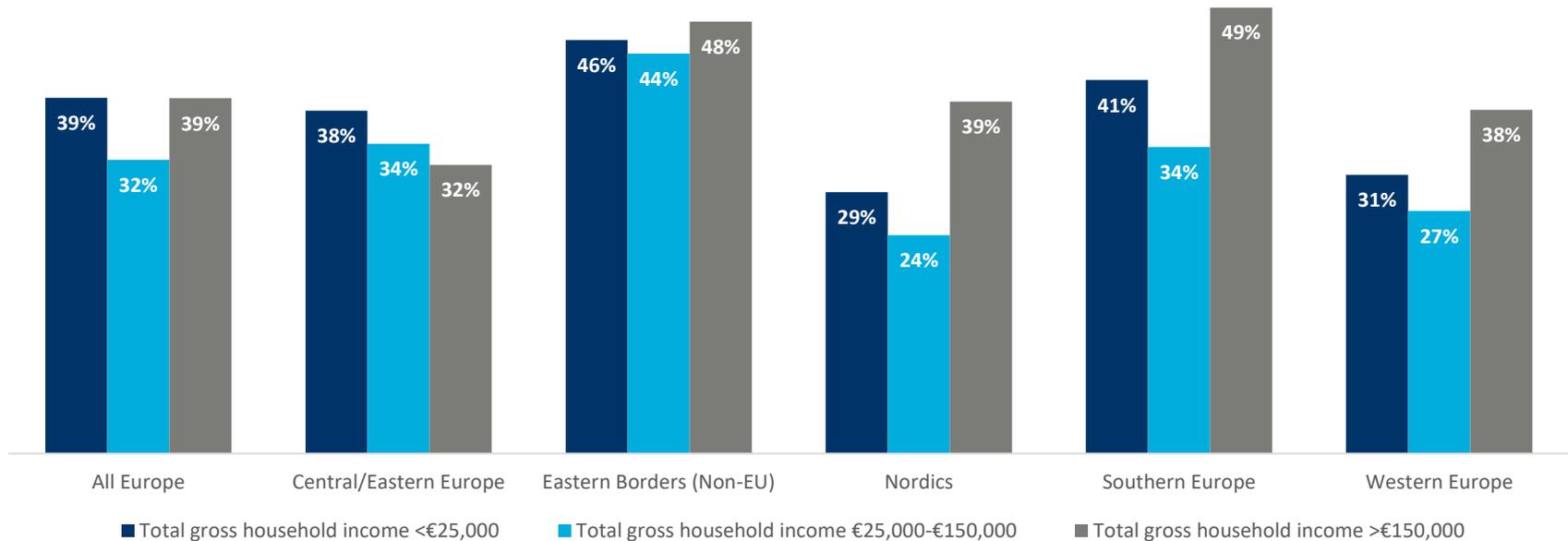


Source: Oxford Economics consumer survey, n=18,966; 18-24 n=1,1621; 25-34 n=4,058; 35-44 n=4,617; 45-54 n=4,002; 55-64 n=3,040; 65-74 n=1,407; 75+ n=221

- The strongest correlation with respondents who regularly buy illicit alcohol (at least monthly) is with age, as tendency to buy illicit decreases with age.
- The occupation stats reinforce that age appears to be a greater influence than income level.

The wealthy are as likely to buy illicit alcohol as the poor

In general, how likely do you think that some of the products you have purchased could have been illicit goods?
Consumers



Source: Oxford Economics consumer survey, n=18,966 ; Total gross household income <€25,000 n=4,251; Total gross household income €25,000-€150,000 n=6,774; Total gross household income >€150,000 n=687

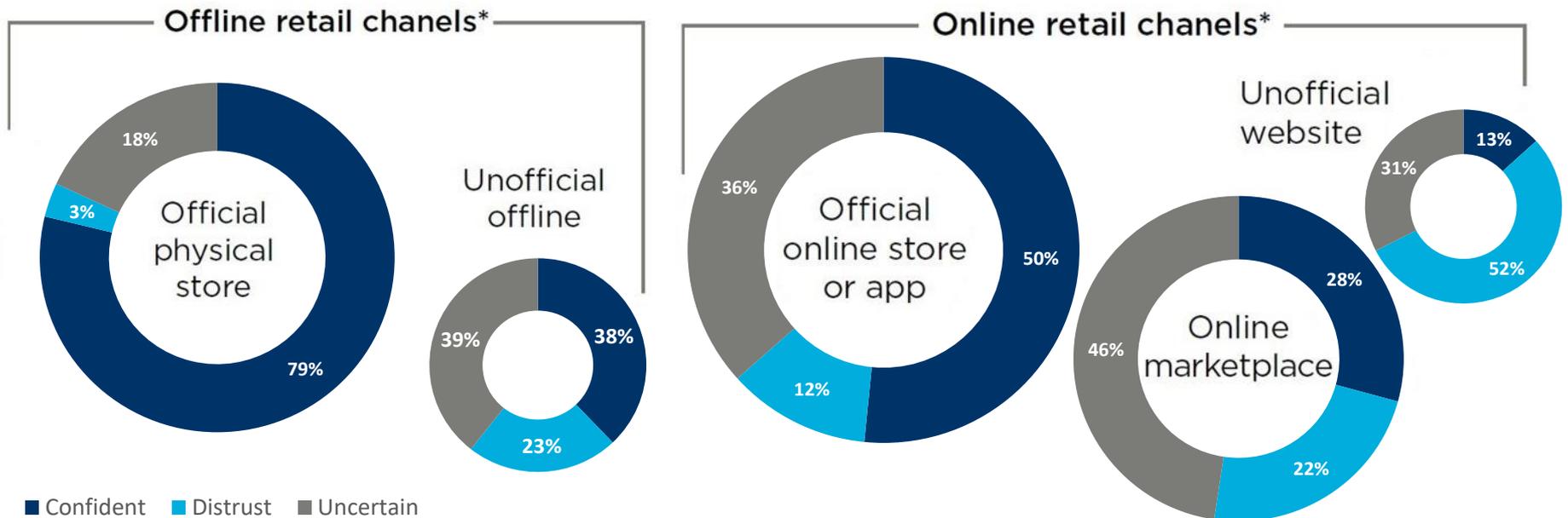
- The wealthy, earning > €150,000, are more likely to buy illicit alcohol than all other income groups in all regions except for Central/Eastern Europe.
- Possible explanations include higher use of e-commerce and scepticism of official distribution channels.



WHY DO CONSUMERS BUY ILLICIT ALCOHOL?

Consumers are unsure if online purchases are legitimate

For each of the different ways you may have bought goods, please rate your confidence that you were buying authentic and legitimate products
Consumers



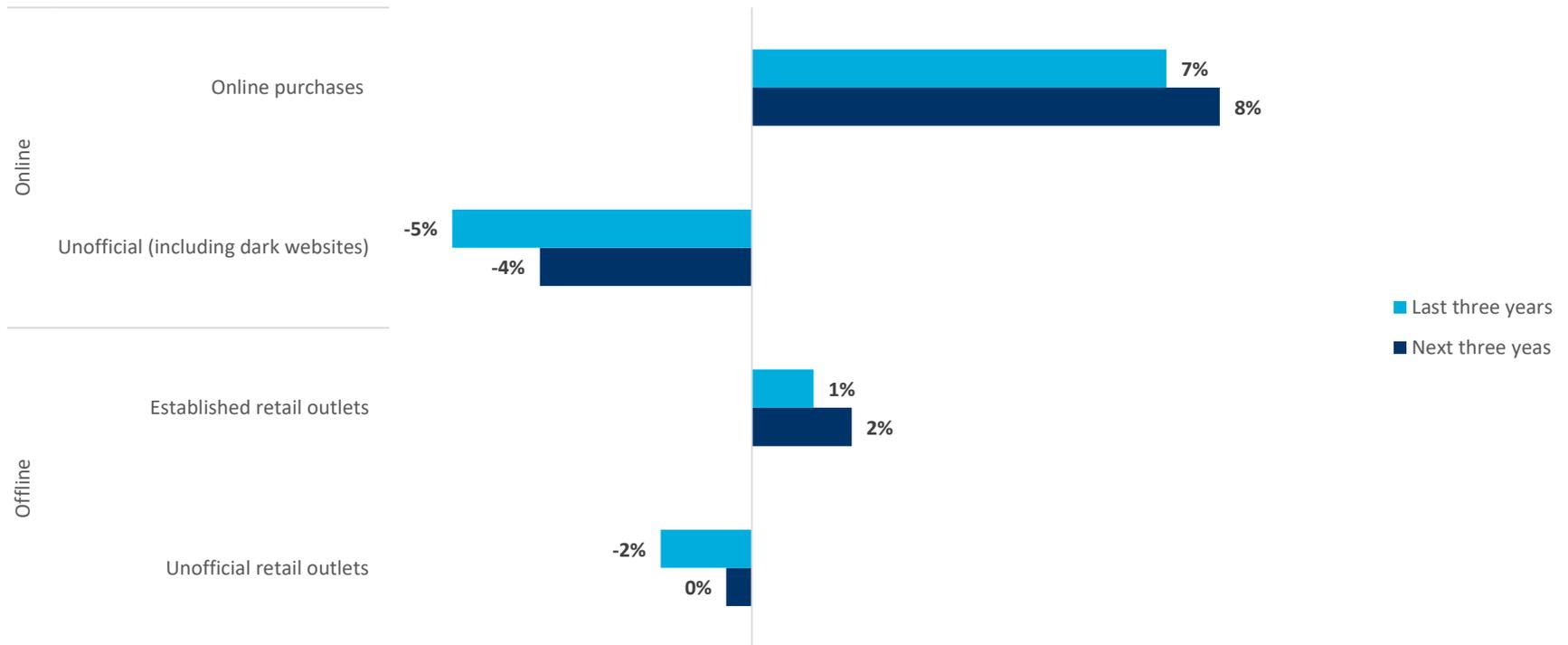
Source: Oxford Economics consumer survey; Official physical store n=18,891; Unofficial offline n=36,826; Official online store or app n=18,475; Online marketplace n=18,329; Unofficial website n=18,138

- Buying from official physical stores, consumers are clearly more confident that they are buying legit goods, compared with an unofficial source (a friend, colleague or market).
- Online, confidence in official outlets is much lower, with only 28% fully confident that they are buying legitimate goods from online marketplaces.

Consumers are buying more online, and via official sources

Please tell us how you expect your shopping attitudes and behaviours will change over the next three years

Consumers

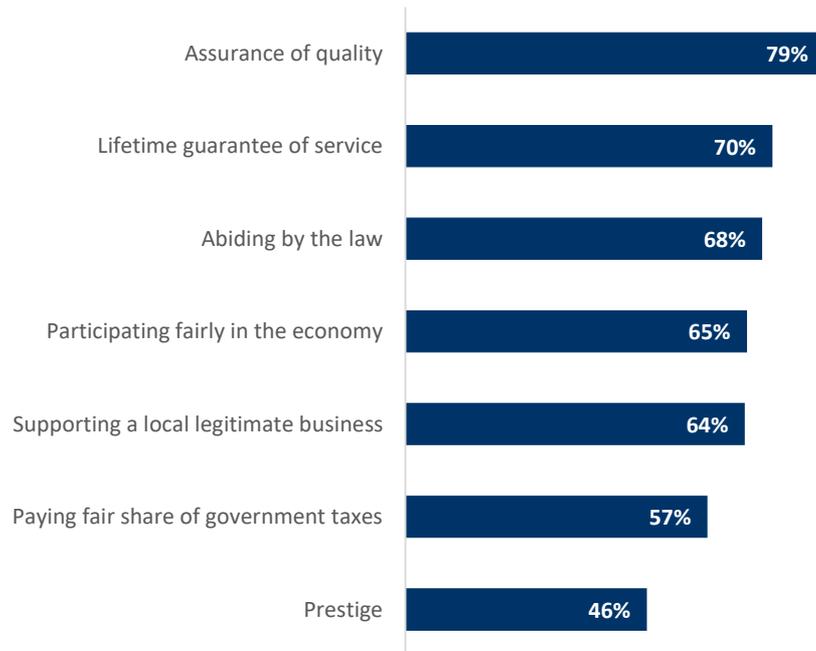


Source: Oxford Economics consumer survey, n=18,966

- This level of consumer uncertainty looks likely to persist, as consumers buy more online.
- However, consumers say they are moving away from unofficial outlets, both online and offline. In fact, consumers predict that they will buy 4% less illicit alcohol over the next three years.

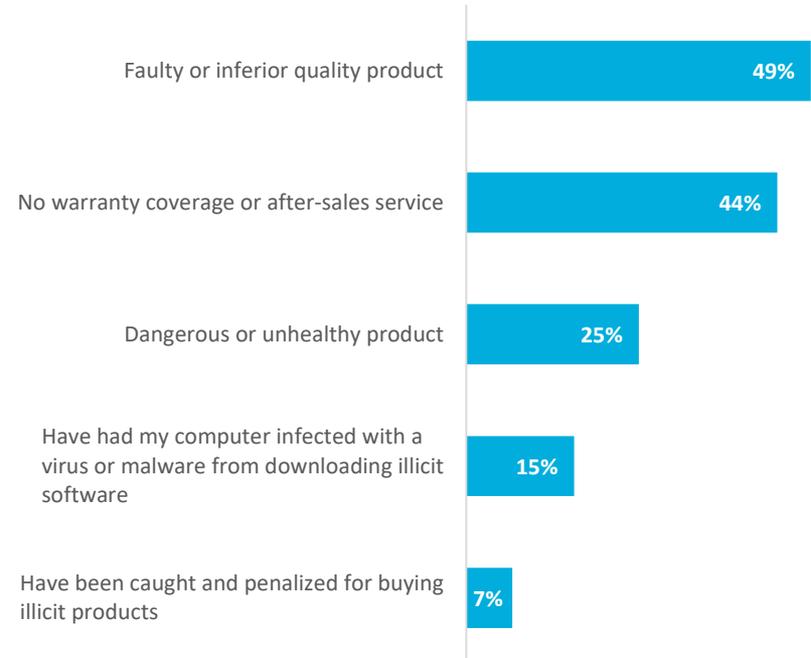
There are many reasons to prefer official channels

Please rate the importance of each of the following factors in buying from authorized sources
“Very important” and “Important” responses
Consumers



Source: Oxford Economics consumer survey, n=17,767

Have you ever experienced any of the following as a result of buying potentially illicit goods
Consumers

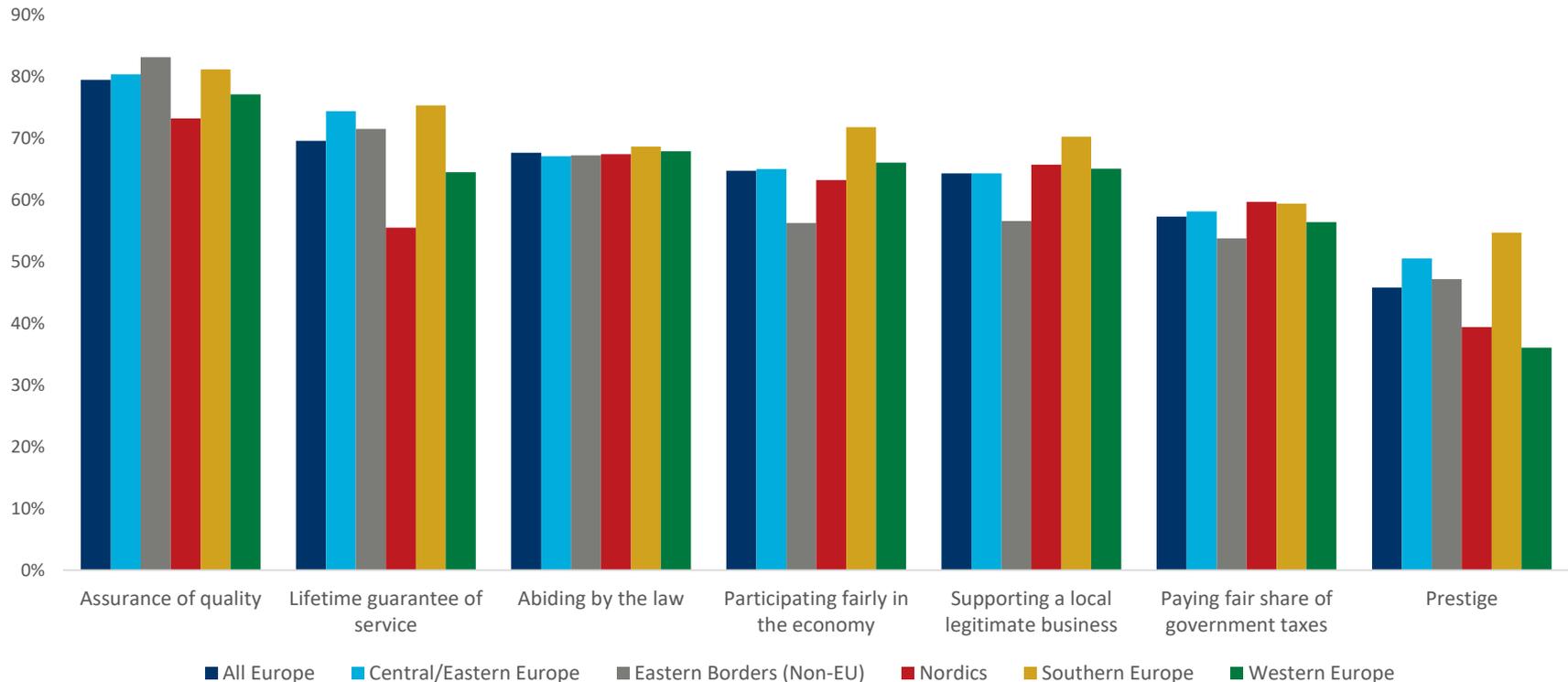


Source: Oxford Economics consumer survey, illicit responses, n=6,146

- Assurance of quality, with less risk of a dangerous or unhealthy product and better service over the products’ life, are the leading reasons given for preferring legitimate goods (and avoiding illicit ones).
- “Social reasons”, such as abiding by the law and supporting legitimate businesses, also feature, ahead of brand prestige.

Reasons to favour licit goods will vary by region

Please rate the importance of each of the following factors in buying from authorized sources
"Very important" and "Important" responses
 Consumers



Source: Oxford Economics consumer survey, n=17,767; Central/Easter Europe n=4,809; Eastern Borders n=3,271; Nordics n=1,764; Southern Europe n=3,277; Western Europe n=4,646

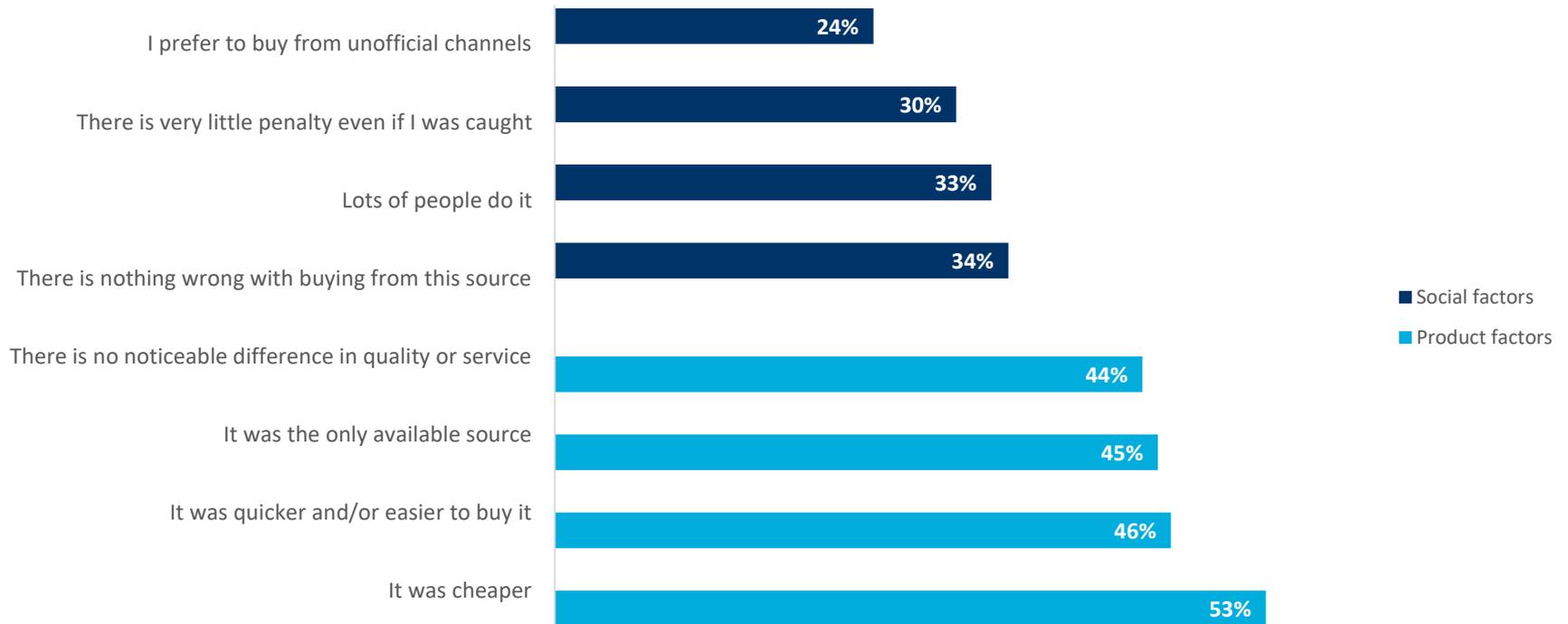
- There appears to be consistency across European regions in social attitudes towards illicit trade, e.g., regarding the importance of abiding by the law and paying taxes.
- There is greater regional variety to more product-centric reasons for preferring legitimate goods, 12 e.g., lower scores in Nordics for quality assurance, lifetime service and prestige.

Product and social reasons also drive illicit purchases

Please rate the importance of each of the following factors in buying from potentially unauthorized sources

“Very important” and “Important” responses

Consumers

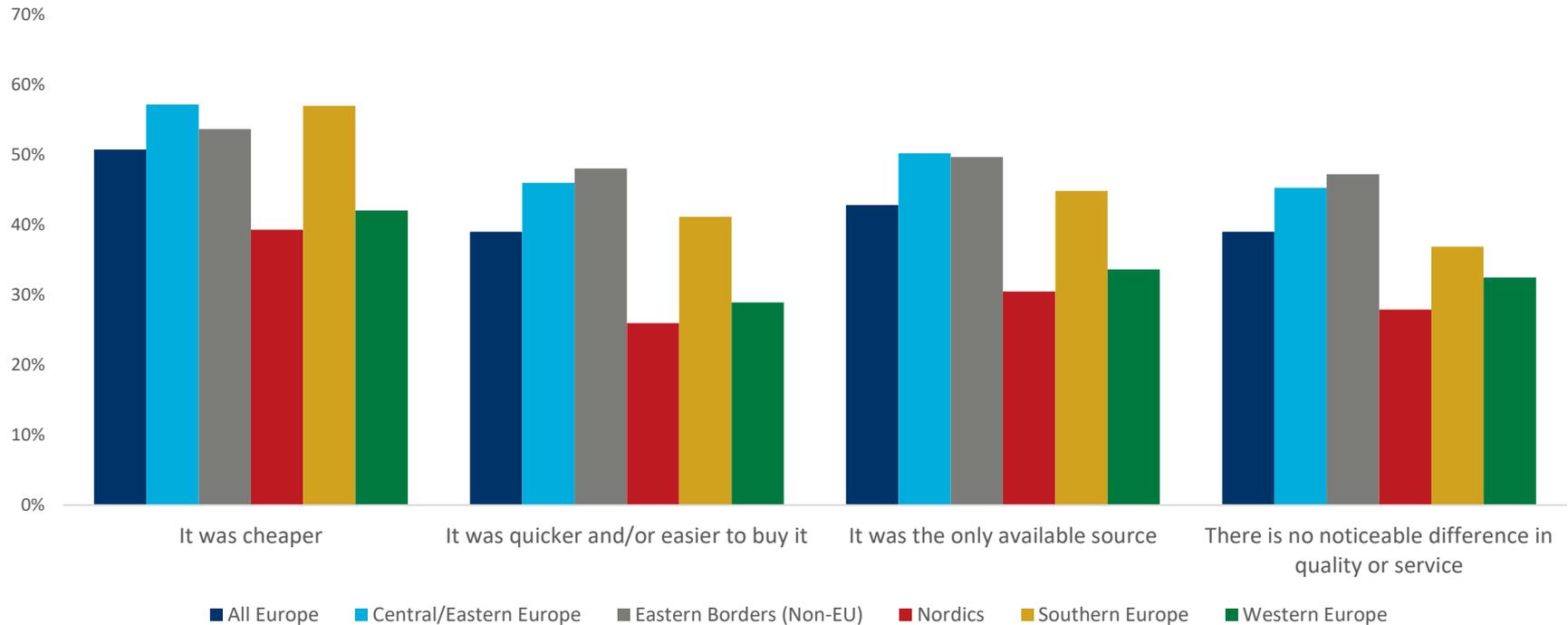


Source: Oxford Economics consumer survey, illicit purchases, n= 6,146

- Cost is the most popular reason for buying illicit goods, but is closely followed by other “product”-related reasons, like availability or no noticeable difference in quality.
- Social factors also feature, if some way behind product factors.

Motivations to buy illicit vary considerably by region

Please rate the importance of each of the following factors in buying from potentially unauthorized sources
“Very important” and “Important” responses
 Consumers

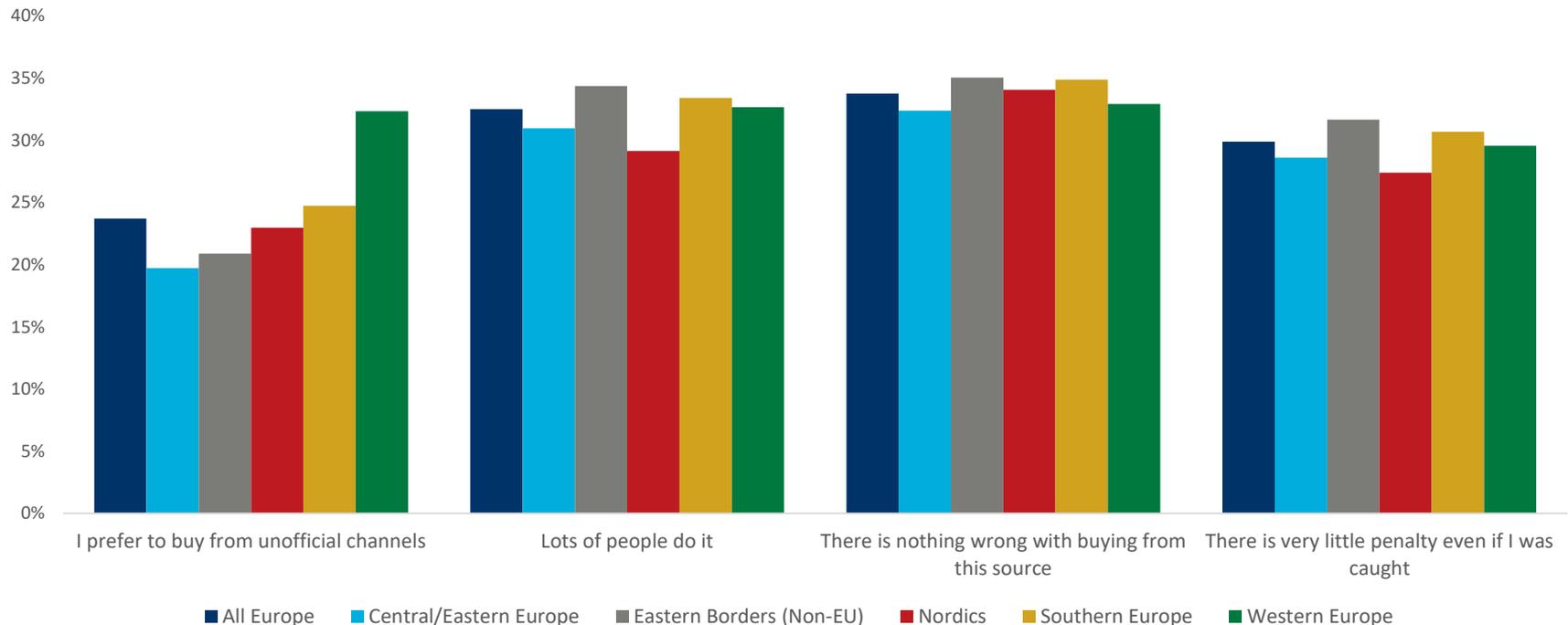


Source: Oxford Economics consumer survey, illicit purchases, n=6,146; Central/Eastern Europe n=1,779; Eastern Borders n=1,484; Nordics n=405; Southern Europe n=1,281; Western Europe n=1,197

- There is noticeable variety in regional responses as to why they buy illicit goods, with Nordics rating factors lowest followed by Western Europe. Cost is the leading reason, by 8-9 percentage points from availability.
- Cost is the leading reason in Southern Europe, Eastern Europe and Eastern Borders, followed by availability, with a difference of 4 points in Eastern Borders, 7 in Eastern/Central and 12 in Southern Europe.

Social motivations for illicit purchases are more consistent

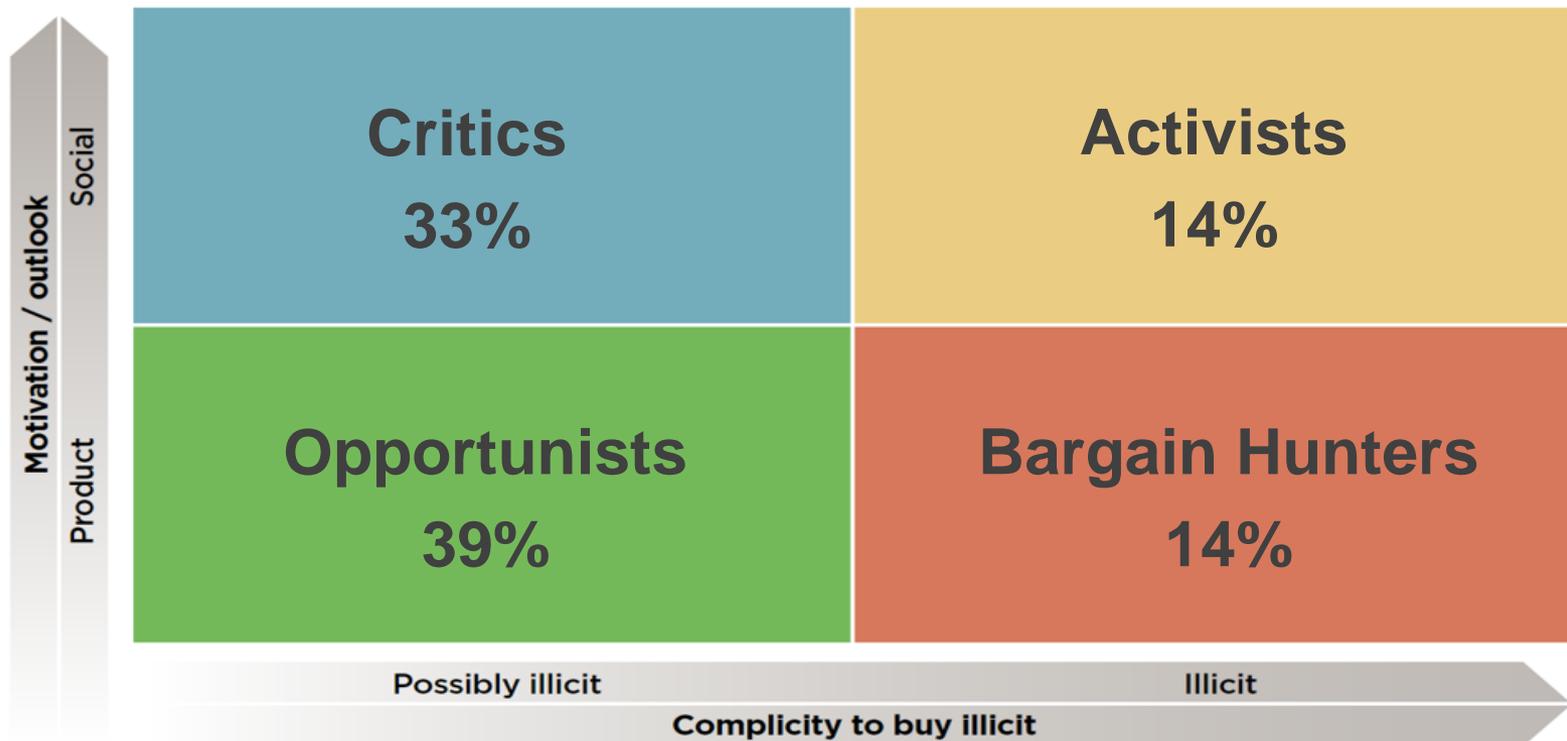
Please rate the importance of each of the following factors in buying from potentially unauthorized sources
"Very important" and "Important" responses
 Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=6,146; Central/Eastern Europe n=1,779; Eastern Borders n=1,484; Nordics n=405; Southern Europe n=1,281; Western Europe n=1,197

- Similar to total purchases, there is less regional variety regarding the social reasons for buying alcohol from potentially unauthorized sources. An interesting exception is the large share of Western Europe's consumers preferring to buy from illicit channels.

We can use motivation and complicity to segment illicit purchases



Source: Oxford Economics consumer survey, illicit purchases, n=6,146

- To analyse illicit purchases, we can group them into four segments based on the complicity to buy illicit (i.e. whether it was a possible or probable illicit purchase), and the motivation (mostly for product reasons, or where social reasons are at least as important).

Each consumer segment exhibits distinct characteristics



- We can view the spread of illicit alcohol purchases and how consumer motivations differ by region.



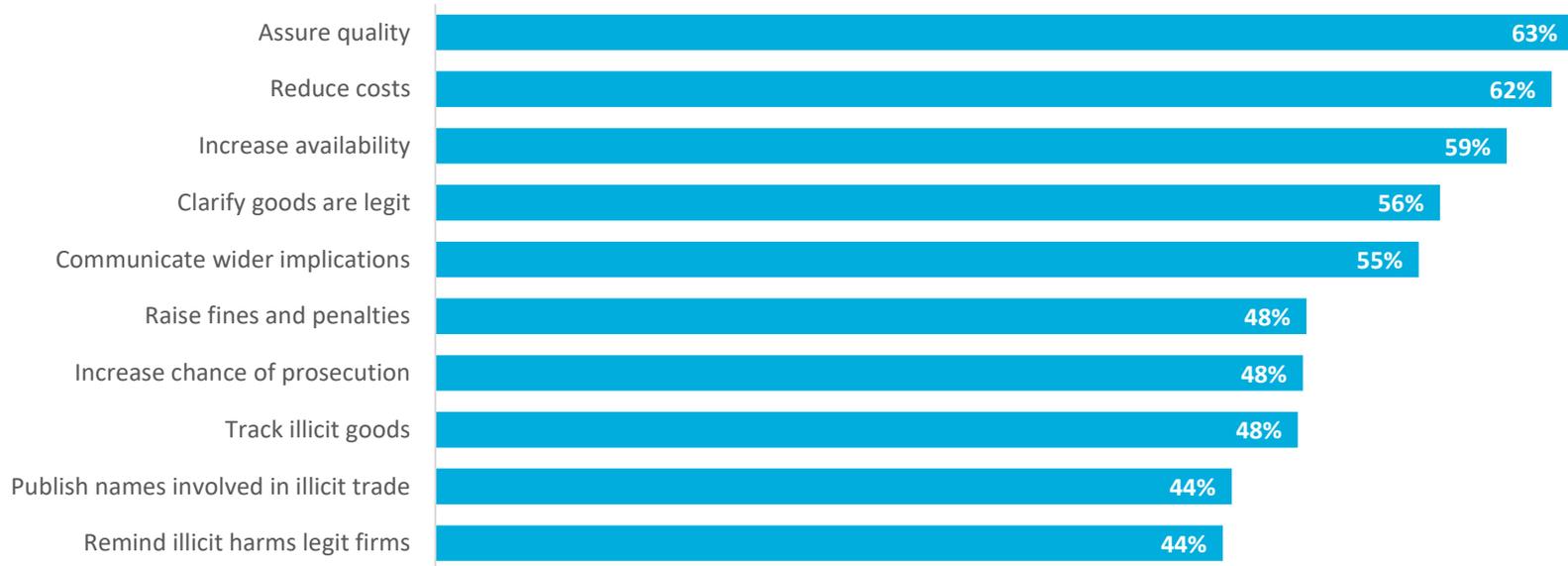
WHICH ACTIONS COULD DETER CONSUMERS?

A combination of initiatives can deter illicit purchases

How effective would the following actions be in discouraging you from buying from sources that may not be legitimate?

“Very important” and “Important” responses

Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=6,146

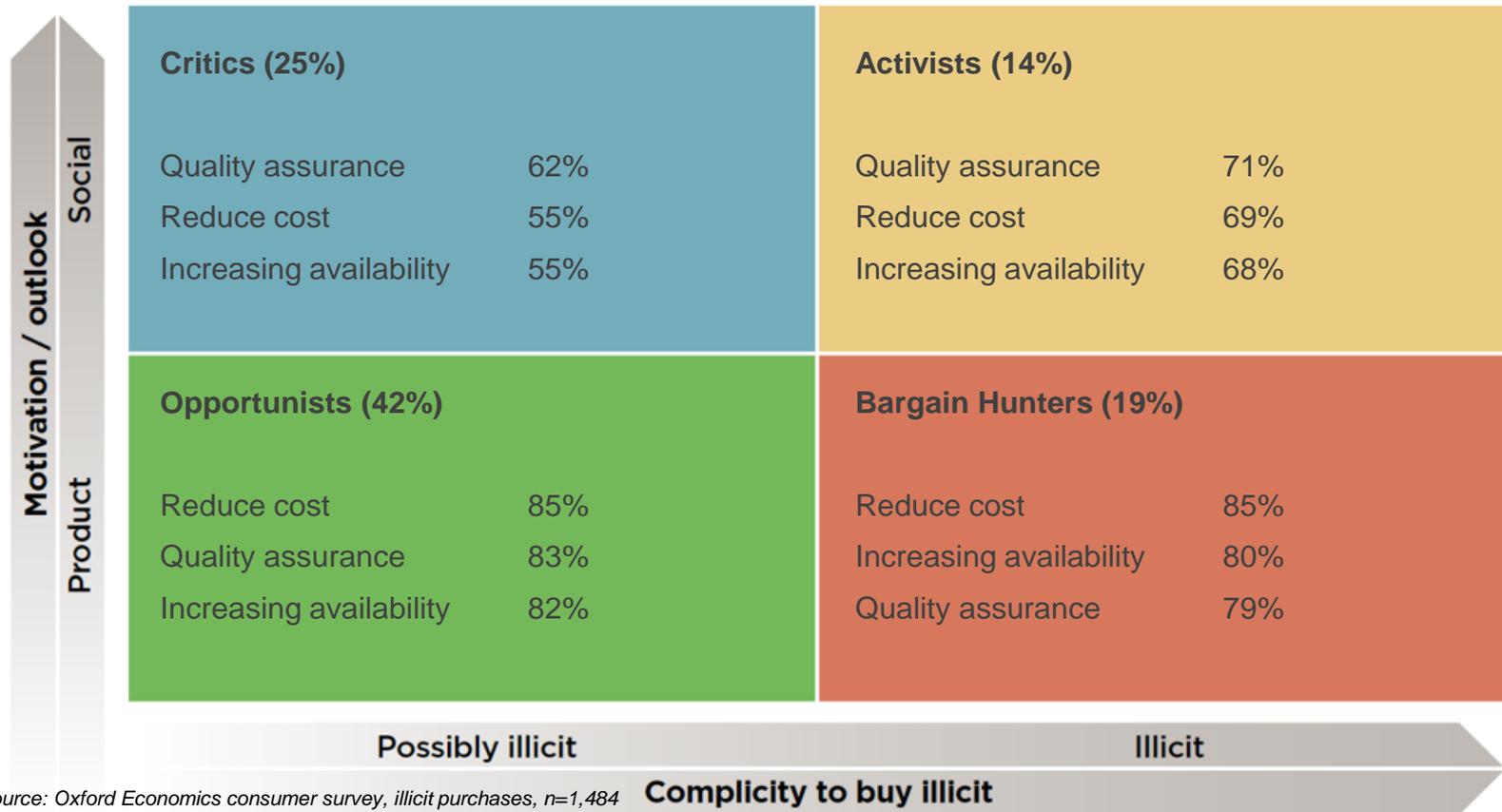
- The responses confirm the complexity of consumer motivations; that there may be several reasons why a consumer buys illicit alcohol and a variety of effective interventions to deter them.
- The following charts list, for each region, the top three effective strategies for each segment, with the percentage of purchases that respondents said could be deterred by the initiative.

For Central/Eastern Europe, clarifying goods are legit and communicating risks of illicit could also be effective



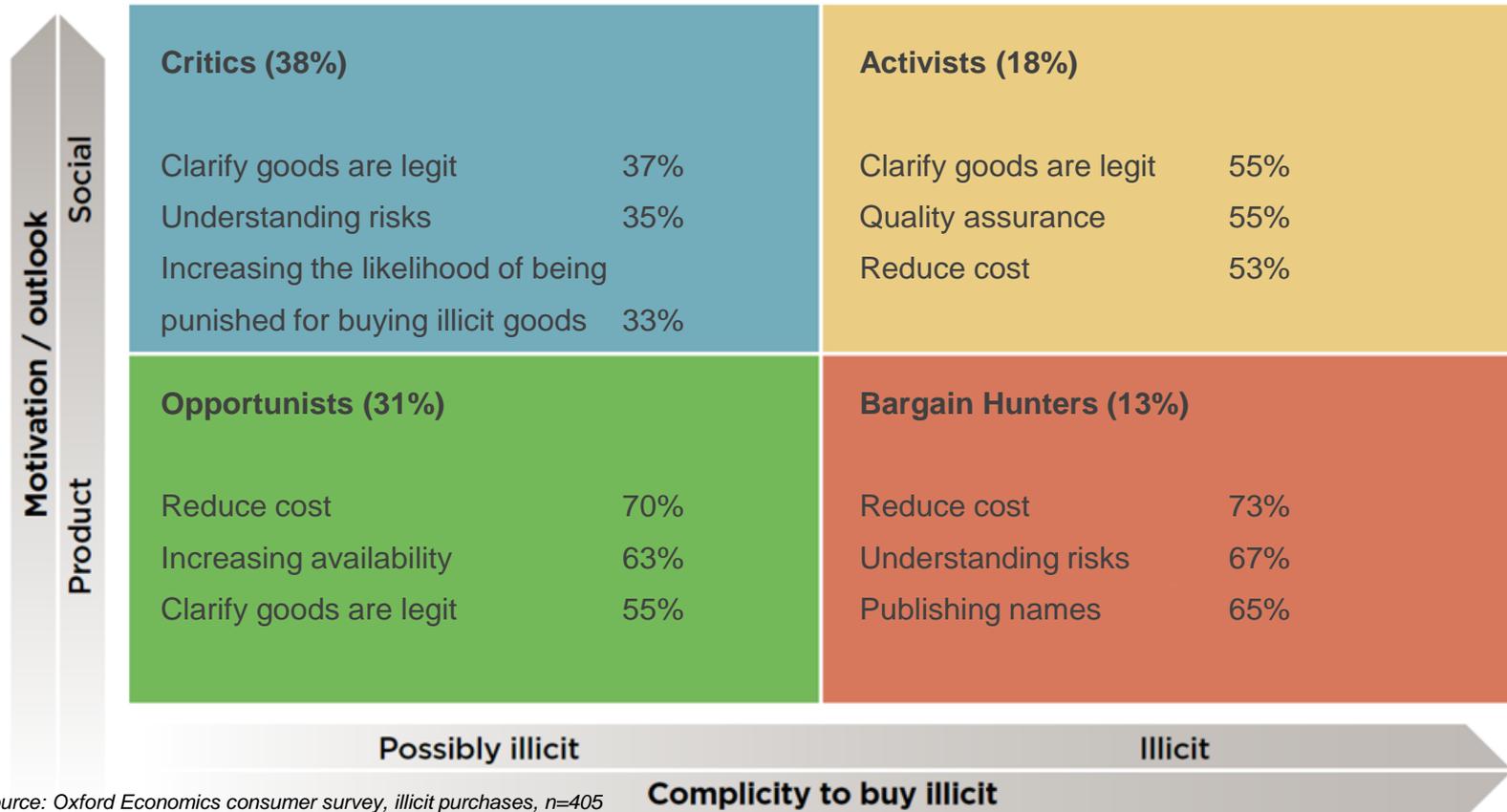
- Product-focused purchases show expected strategies, with reducing cost the most popular, followed by quality assurance and increasing availability.
- Strategies for the 33% of critics and 10% of activists show a different pattern. Quality assurance is most effective and clarifying goods are legit also feature for both, with cost not in the top three.

For Eastern Borders cost, quality and availability are key



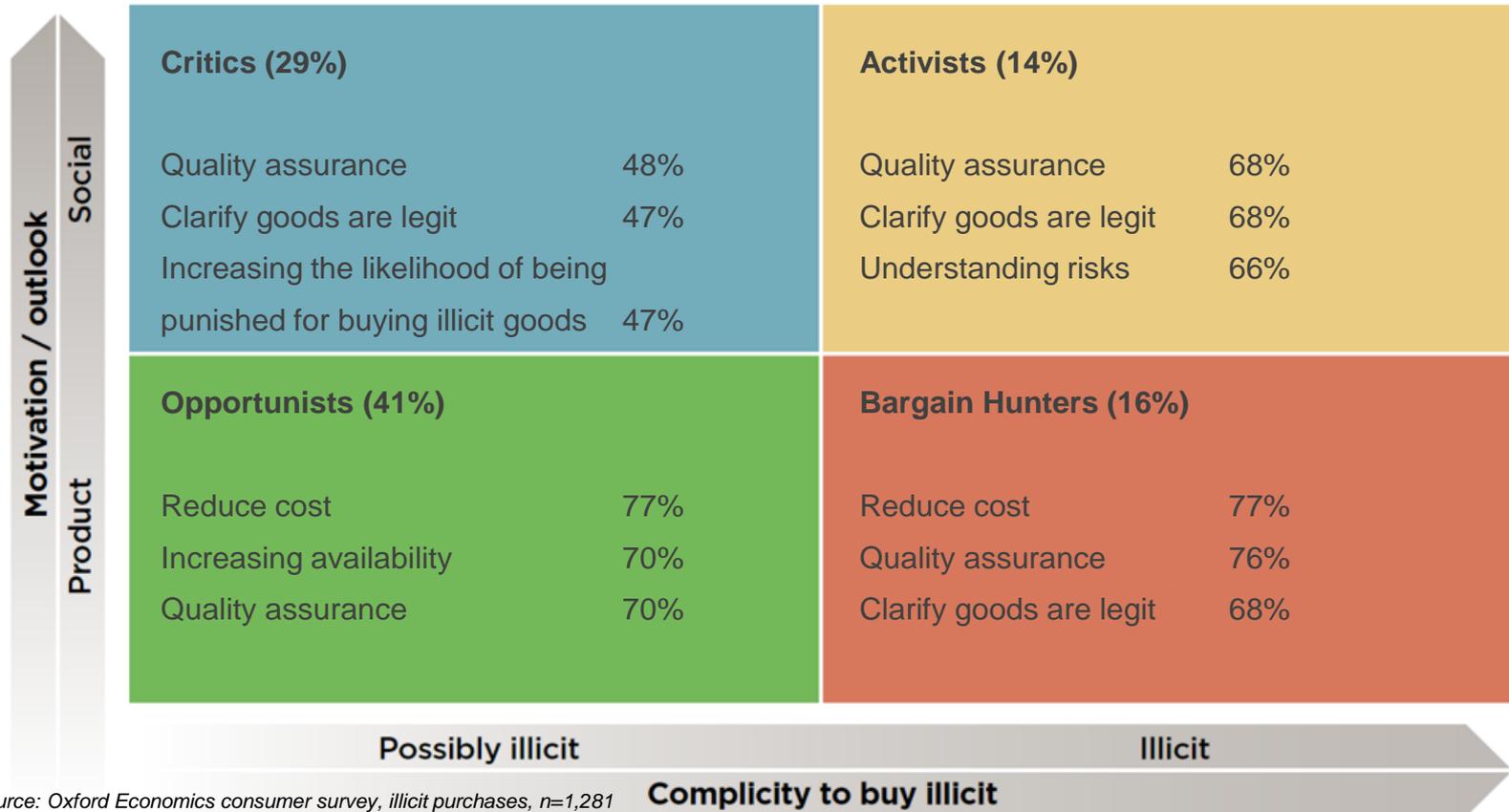
- For the Eastern borders region, cost is most effective for opportunists and bargain hunters, but quality assurance is most effective with those more motivated by social factors (critics and activists).

For Nordics, clarifying goods are legit, raising awareness and sanctions feature



- Nordics have a majority of illicit purchases (56%) for social reasons. Clarifying goods are legit is the most effective strategy. Explaining the risks is effective for 35% of critics and 67% of bargain hunters.
- Increasing penalties, or publishing names appears in the top three for critics and bargain hunters²² respectively.

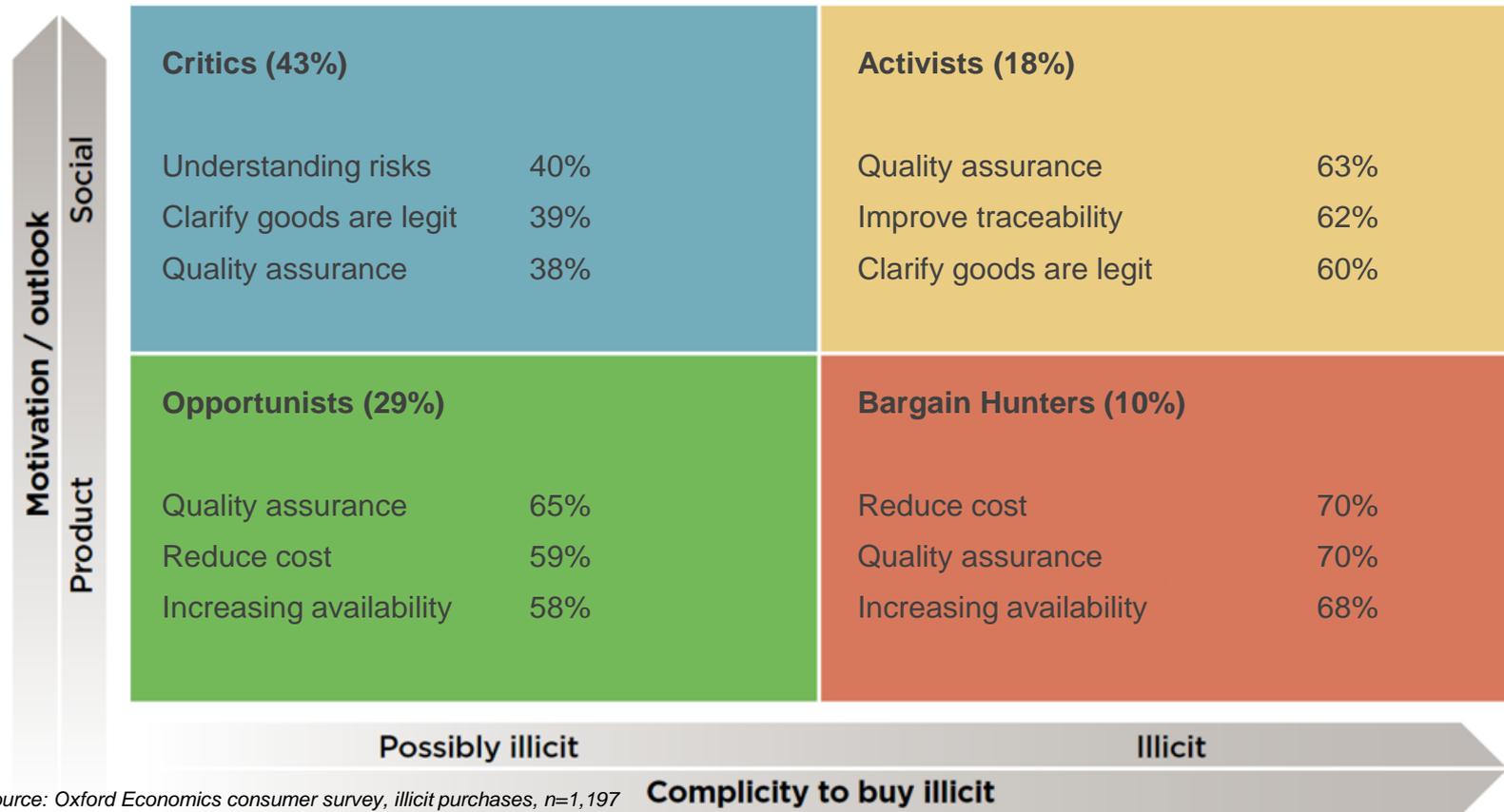
For Southern Europe clarifying goods are legit features along with cost, quality and availability



Source: Oxford Economics consumer survey, illicit purchases, n=1,281

- For the 57% of product-related illicit purchases, the most effective strategies are as expected; reducing cost, assuring quality and increasing availability.
- For the 29% of critics and 14% of activists, cost and availability don't feature in the top three, with quality assurance and clarifying that goods are legit most effective.

For Western Europe, cost is less of a motivation



- Western Europe has a majority of illicit purchases for social reasons (61%). Most effective strategies are explaining the risks, clarifying goods are legit, improving traceability and quality assurance.
- Quality assurance is the top strategy for three segments and features in all, whereas cost features in only the two product-related segments.

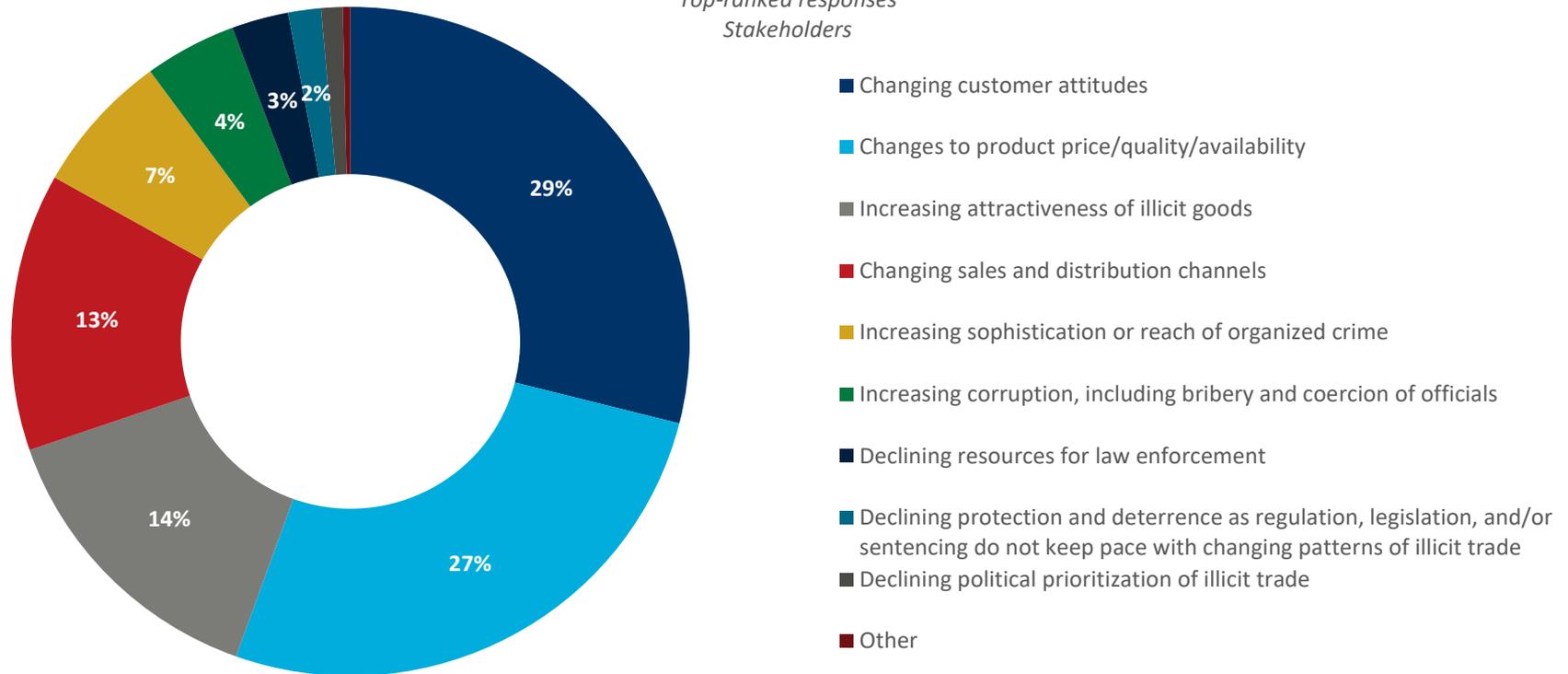


APPROACHES TO COMBATTING ILLICIT ALCOHOL

Those fighting illicit trade highlight shifts in consumer behaviour and product features as most significant

What are the top five reasons for the increase in illicit alcohol?

*Top-ranked responses
Stakeholders*



Source: Oxford Economics stakeholder survey, n=1,662

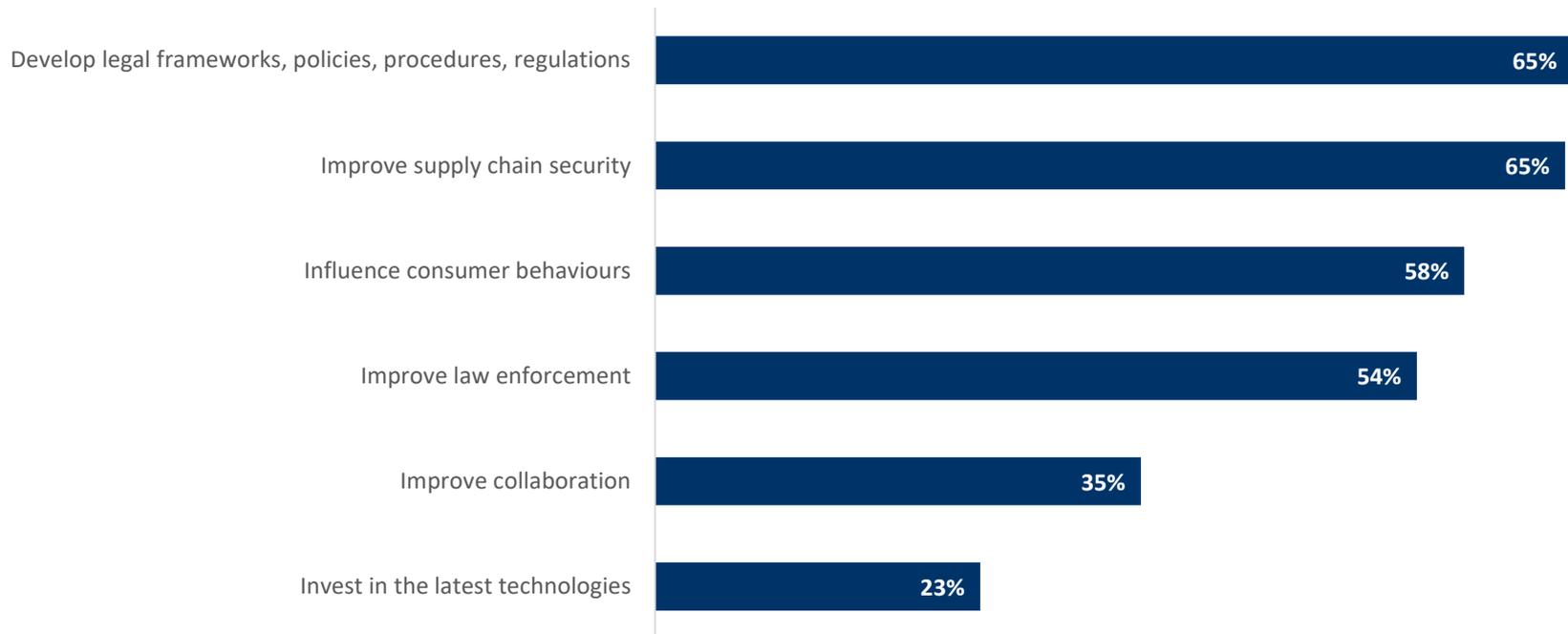
- Businesses, policy officials and law enforcers (stakeholders) recognise the shifting nature of illicit trade, in particular changes in customer attitudes, to products and distribution channels.

Multiple strategies will be needed, actioned by businesses, policy officials and law enforcement

Which of the following actions would be most effective in combatting illicit trade?

Top three-ranked choices

Stakeholders



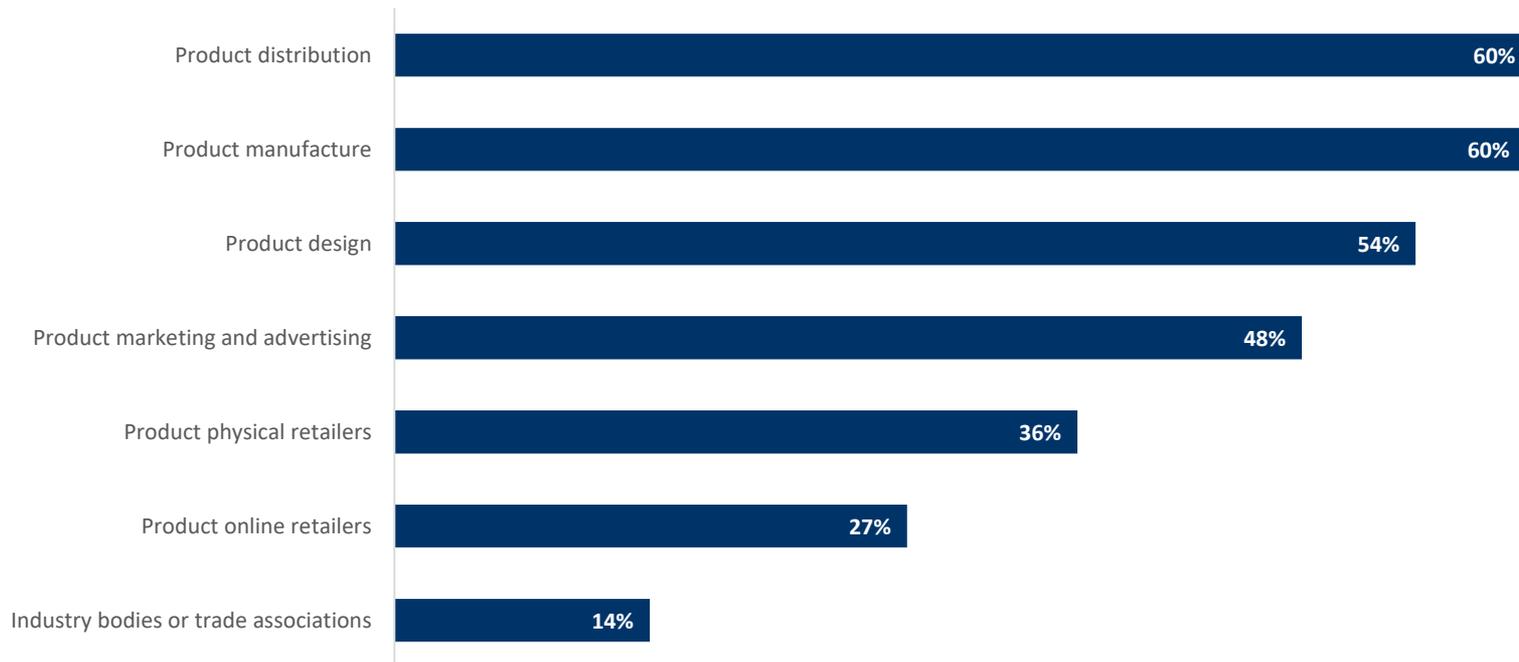
Source: Oxford Economics stakeholder survey, n=3,275

- Stakeholders prioritise policy interventions and supply chain improvements. Improving collaboration and investing in the latest technologies are prioritised by fewer respondents.

Stakeholders recommend action at early stages in the supply chain

Where would action be most effective in improving products the supply chain and retailing?

*Top-three ranked choices
Stakeholders*



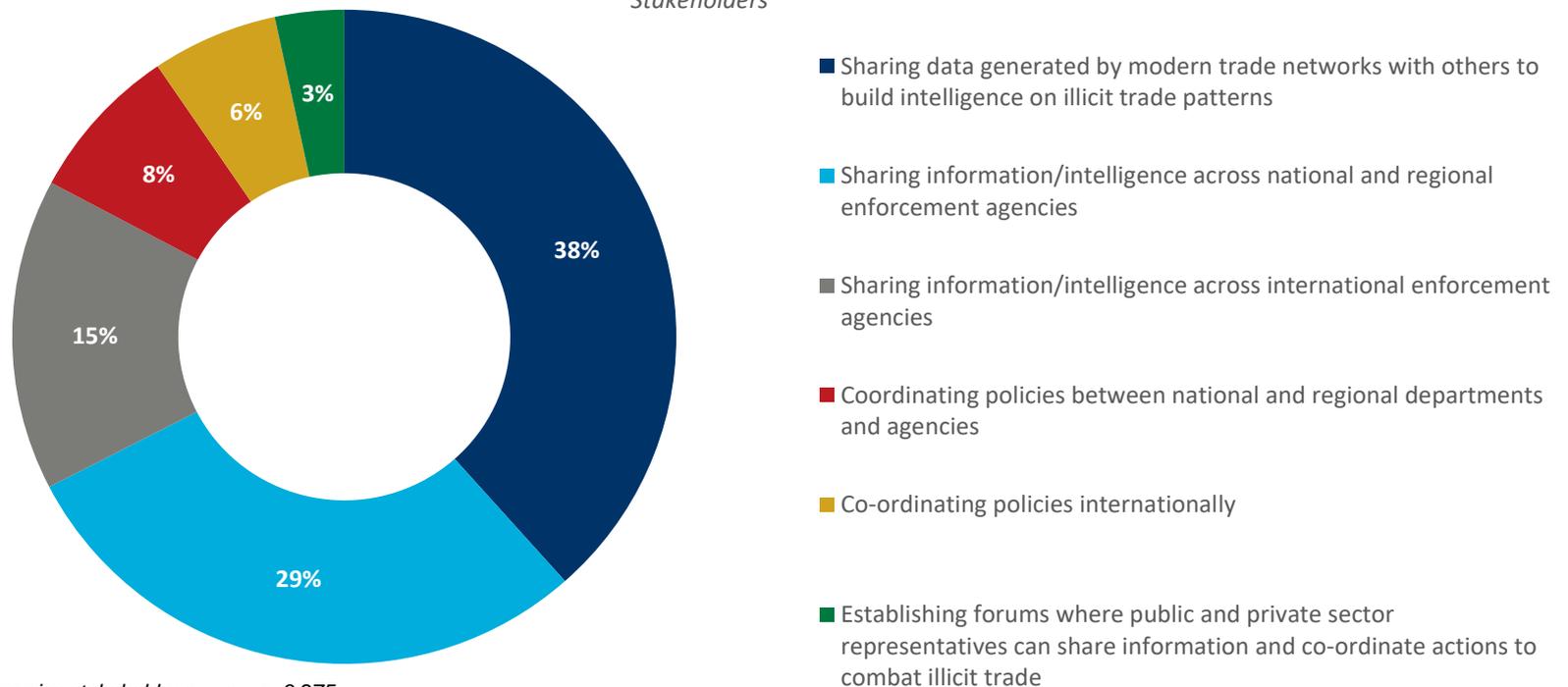
Source: Oxford Economics stakeholder survey, n=3,275

- Most effective actions in the supply chain are at the early stages, design, manufacture and distribution.
- Actions to combat illicit trade by retailers, offline and online, are viewed as less effective.

There are opportunities for stakeholders to work together to combat illicit alcohol

Which actions would be most effective in improving collaboration among different parties involved in combatting illicit trade?

Top-ranked responses
Stakeholders

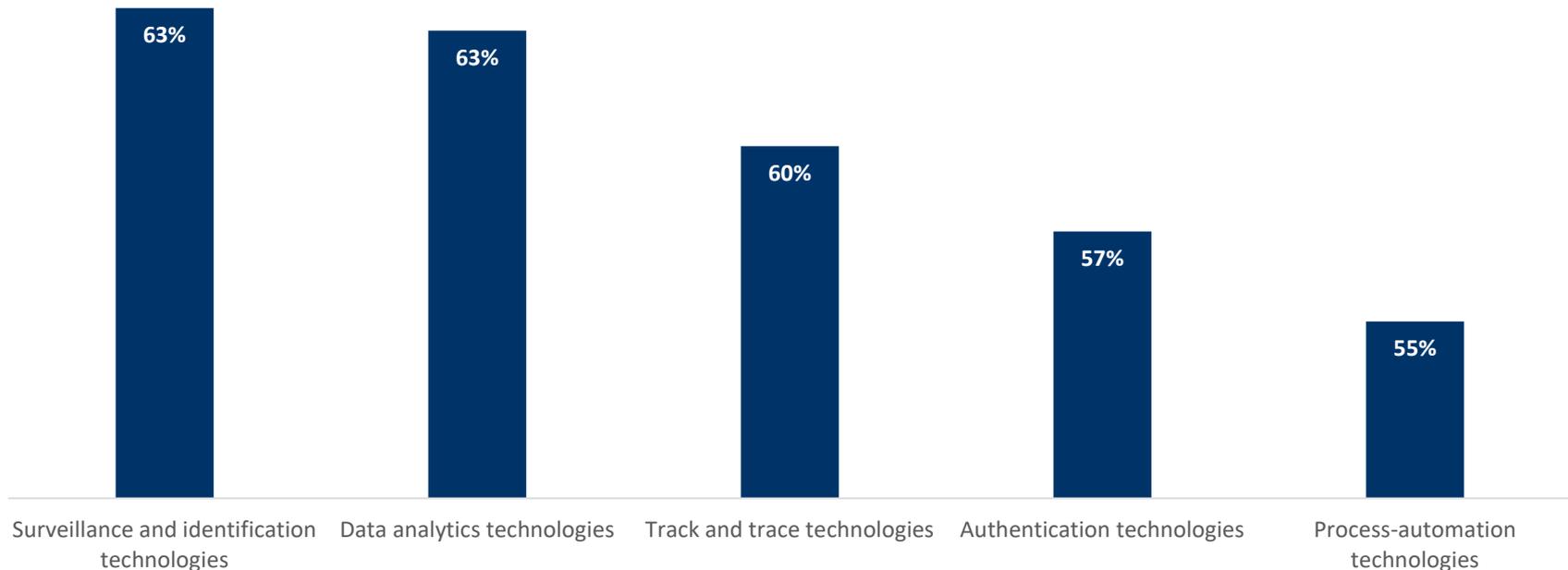


Source: Oxford Economics stakeholder survey, n=3,275

- Those working to combat illicit trade recognise that more can be done to work effectively together, and across departmental and geographic borders. Sharing data and intelligence is seen as the most effective way to collaborate, ahead of policy co-ordination.

Technologies are not seen as a quick fix

Please rate the effectiveness of the following technologies in tackling illicit trade?
"Extremely effective" and "Effective" responses
Stakeholders



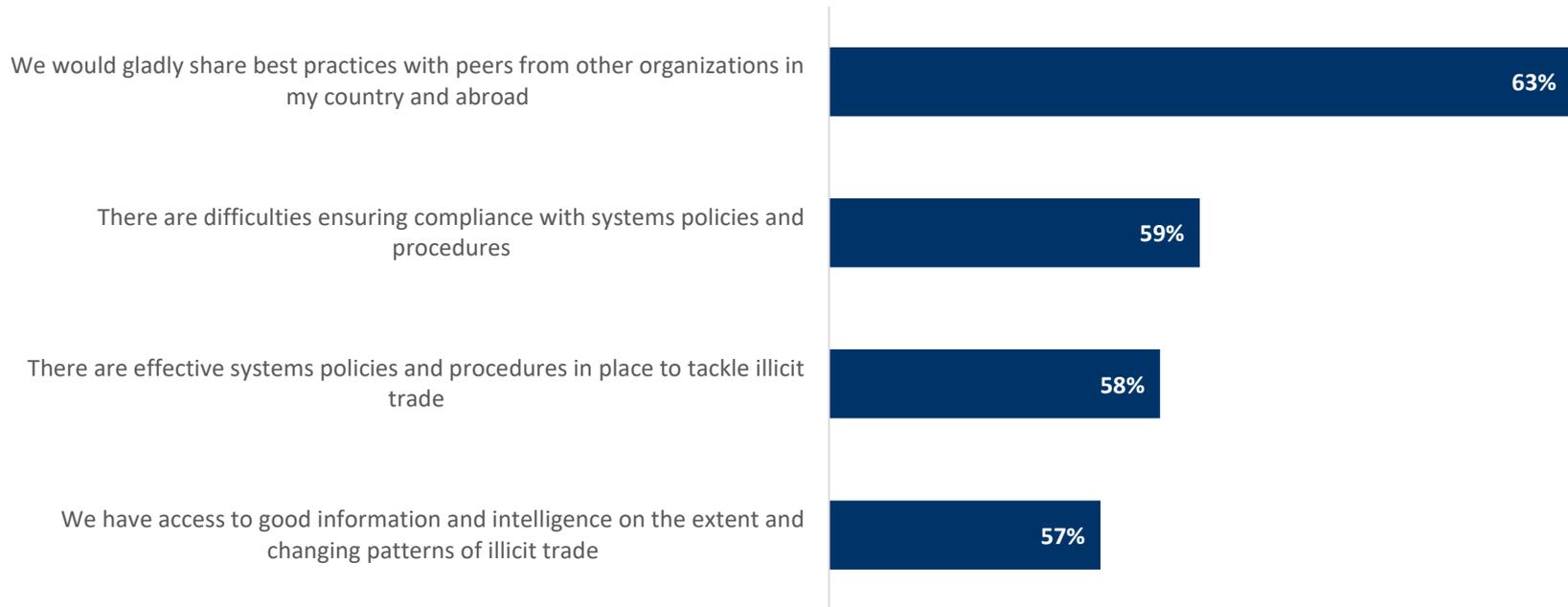
Source: Oxford Economics stakeholder survey, n=3,275

- There are important innovations that make a difference and are seen as effective by the majority of stakeholders.
- Stakeholders appear to be realistic, not viewing technology as a quick fix. These scores are a moderate endorsement and technology is seen as the least effective action overall to combat illicit trade (on p27).

Stakeholders are ill-prepared to tackle illicit trade...

Please rate your level of agreement with the following statements about your organization's capabilities and efforts to tackle illicit trade in your country?

"Strongly agree" and "Agree" responses
Stakeholders



Source: Oxford Economics stakeholder survey, n=3,275

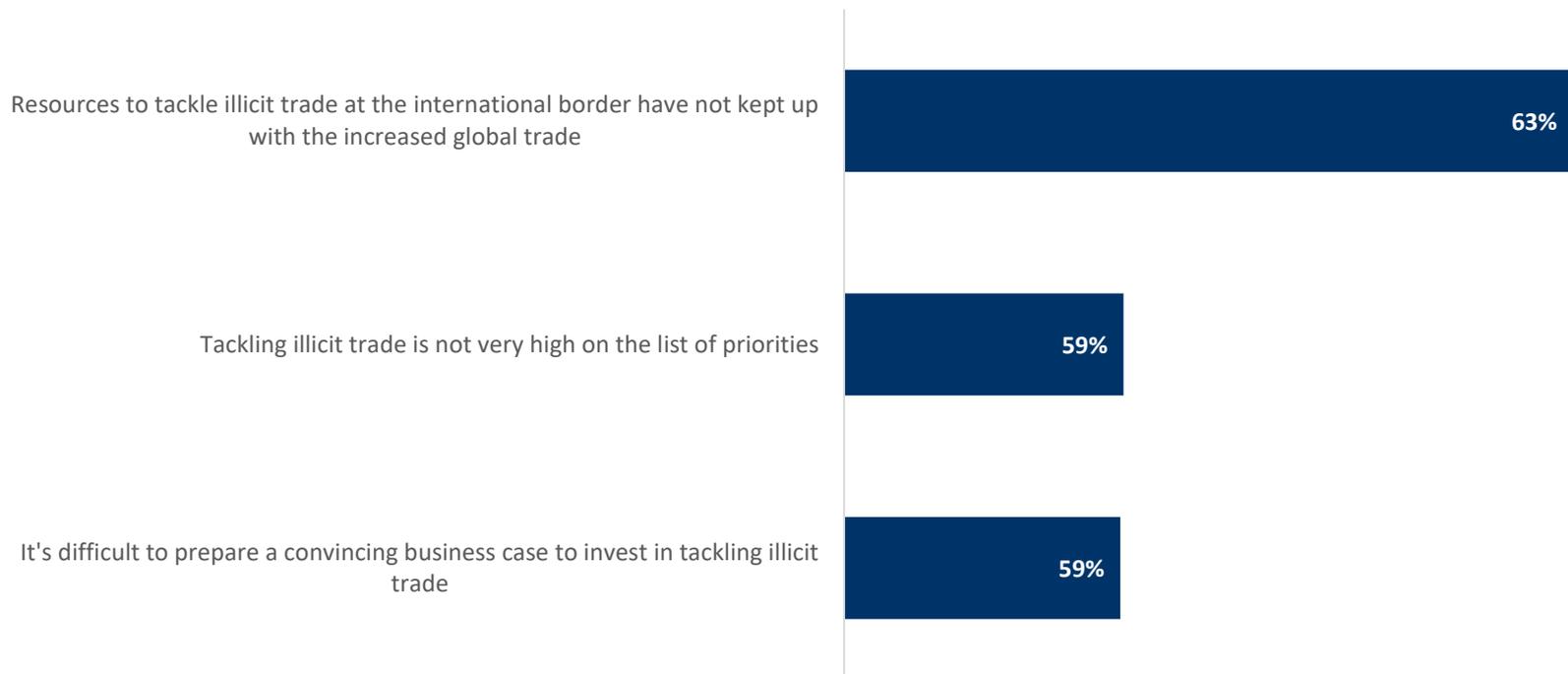
- Businesses highlight difficulties ensuring compliance with systems, policies and procedures (for 59% of stakeholders). Only a small majority say they have access to good data and intelligence to understand illicit trade and have effective practices in place.

...and have difficulty securing resources and sponsorship

Please rate your level of agreement with the following statements about your organization's capabilities and efforts to tackle illicit trade in your country?

"Strongly agree" and "Agree" responses

Stakeholders



Source: Oxford Economics stakeholder survey, n=3,275

- Stakeholders feel that the resources dedicated to fighting illicit alcohol have not kept up with the growth in trade volume.
- Most have difficulty securing resources to fight illicit trade, as it is not high up the priority list, or it is difficult to prepare a convincing business case.

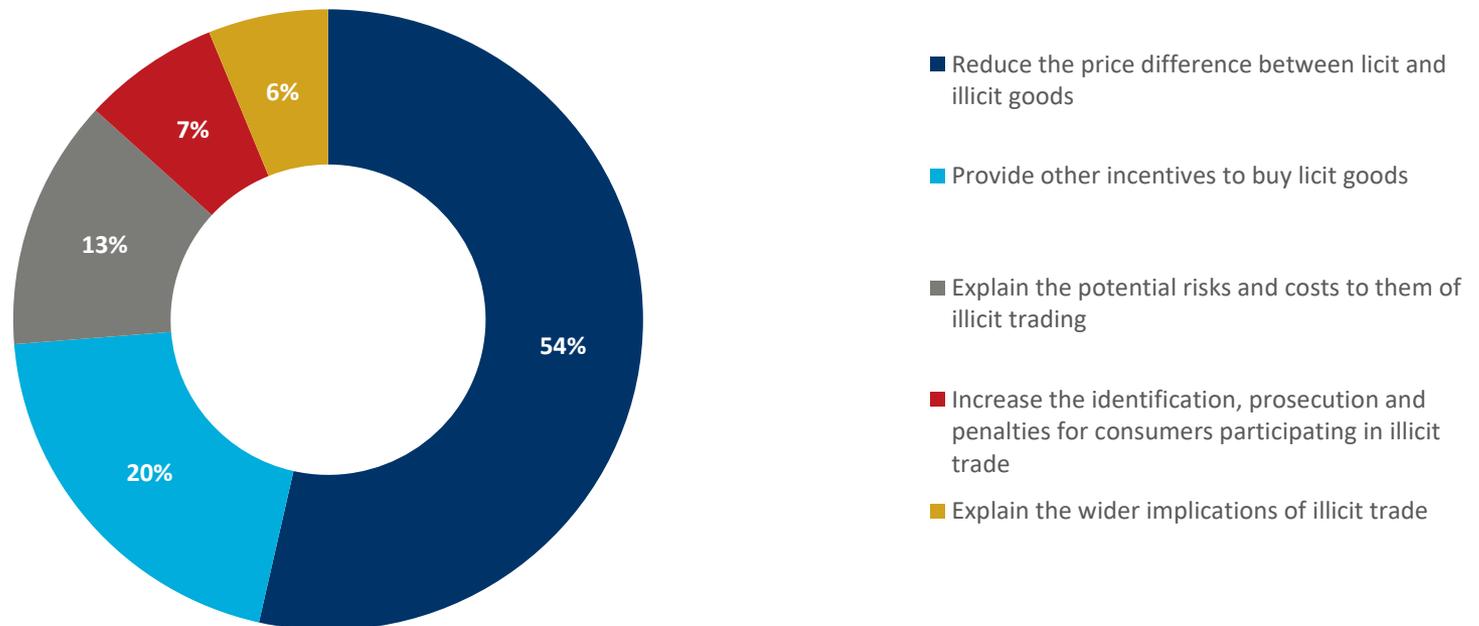


**THE STRATEGY GAP: CONSUMERS VS.
STAKEHOLDERS**

Stakeholders emphasize cost to influence consumers

Which of the following actions would be most effective in discouraging consumers from illicit trading?

Top-ranked responses
Stakeholders

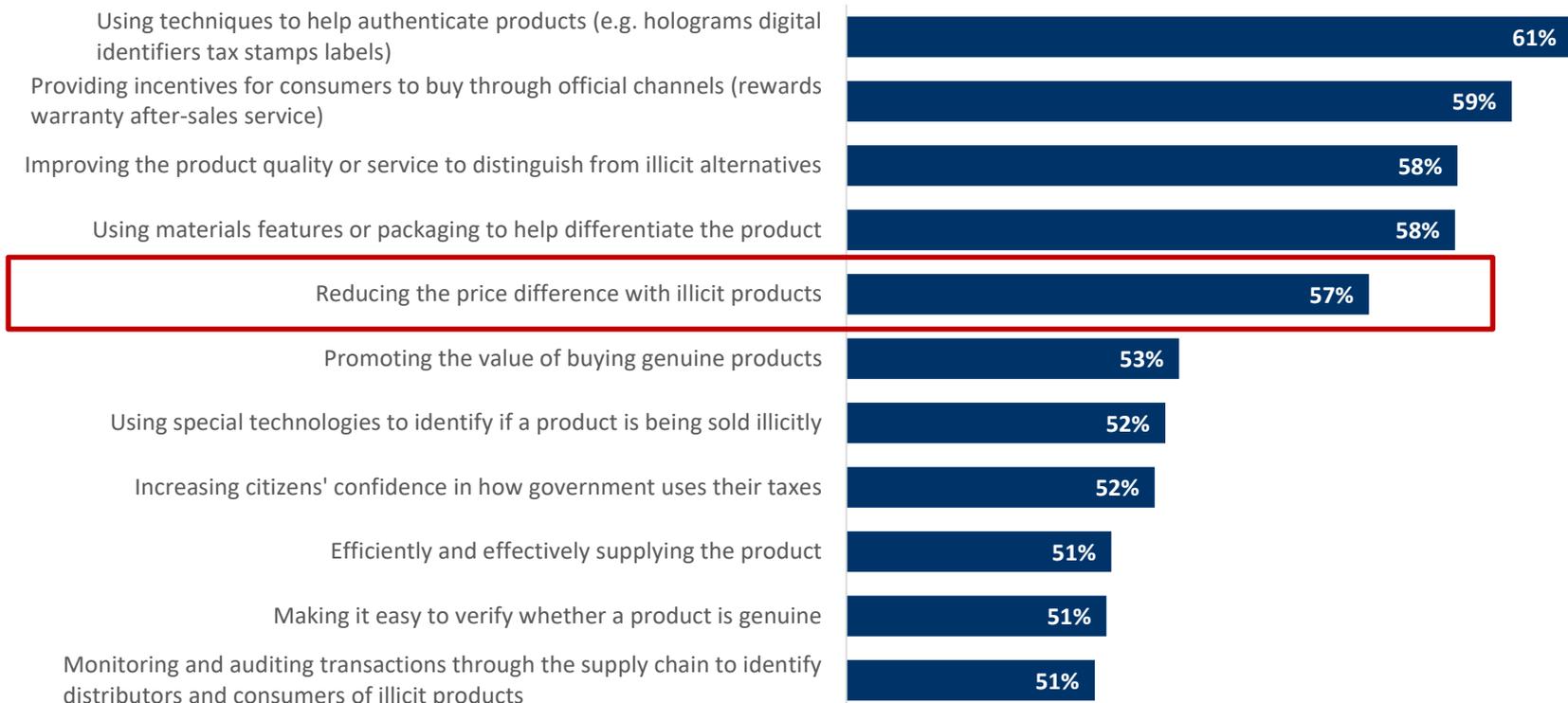


Source: Oxford Economics stakeholder survey, n=3,275

- The majority of stakeholders (54%) say reducing cost is the most effective action for reducing illicit trade, far ahead of other actions, with 20% prioritising education into the risks and implications, and a similar number providing other incentives to buy legitimate goods (e.g., improved quality or service).

Whereas consumers highlight several initiatives above cost

How effective are the following strategies for combatting illicit trade in your country?
“Very effective” and “Somewhat effective” responses
 Consumers



Source: Oxford Economics consumer survey, n=18,966

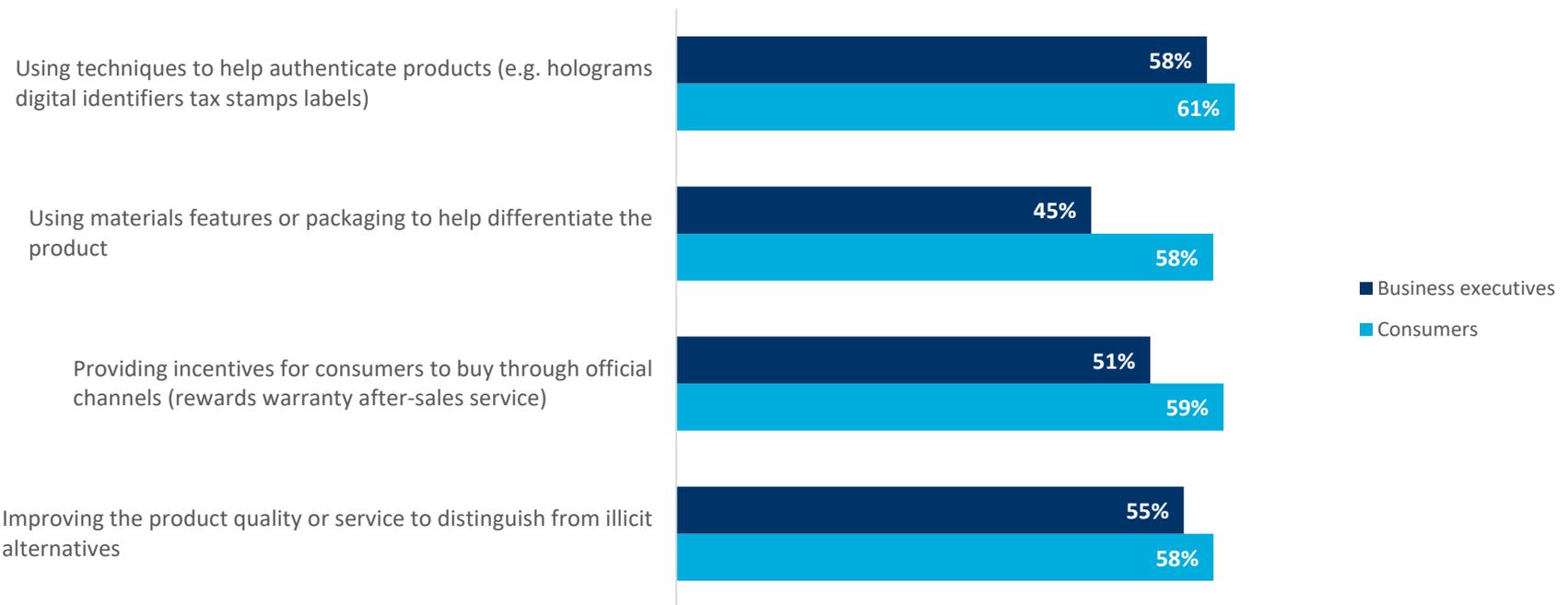
- According to consumers, reducing price is a mid-ranking action to tackle illicit trade in alcoholic drinks. Several actions score higher, including product authentication and incentivising through improving other aspects of the product (e.g., rewards, quality, service and support etc).

Businesses are less enthusiastic than consumers about initiatives to combat illicit trade

For each of the initiatives implemented please rate its effectiveness at reducing illicit trade?

"Very effective" and "Effective" responses

Business executives and consumers



Source: Oxford Economics stakeholder survey, n=1,993

Source: Oxford Economics consumer survey, n=18,966

- Businesses show a lack of enthusiasm in initiatives to combat illicit trade, such as using materials and packaging to distinguish legitimate products or providing incentives. Consumers are generally more positive about the effectiveness of all of these initiatives.

Stakeholders recognise the difficulty identifying illicit goods

Please rate your level of agreement with the following statements about consumer attitudes toward illicit trade in your country?

*“Strongly agree” and “Agree” responses
Stakeholders and consumers*

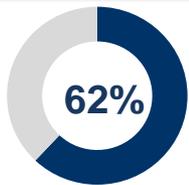


Source: Oxford Economics stakeholder survey, n=3,275

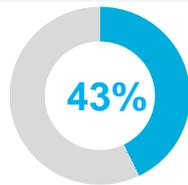
Source: Oxford Economics consumer survey, n=18,966

- Stakeholders have a good appreciation of the difficulty consumers face assessing whether their purchases are legitimate.

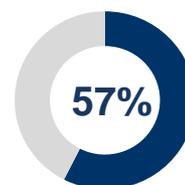
Stakeholders underestimate consumer awareness of the social impact of illicit trade



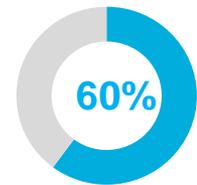
Consumers underestimate the personal risks of engaging in illicit trade



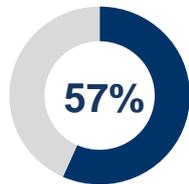
I'm not aware of the health risks of buying illicit goods



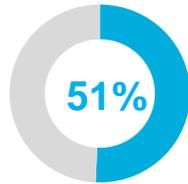
Consumers are unaware of the penalties for illicit trading



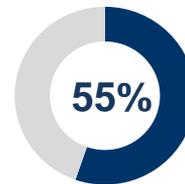
I'm not aware of the potential penalties for buying counterfeit products



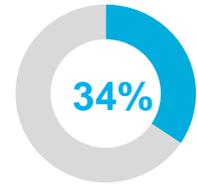
Consumers are unaware that buying illicit goods funds criminals and terrorists



Buying goods illicitly funds criminals and terrorists



Consumers see illicit trade as a victimless crime



Buying counterfeit or illicit goods is essentially a victimless crime

Source: Oxford Economics stakeholder survey, n=3,275

Source: Oxford Economics consumer survey, n=18,966

■ Stakeholders ■ Consumers

- Stakeholders may underestimate consumers' awareness of the implications of illicit trade and receptiveness to policies emphasising the social benefits of buying legitimate goods – with a difference of twenty percentage points in awareness of risks and whether illicit trade is a victimless crime.



ACTIONS TO COMBAT ILLICIT ALCOHOL

Actions to combat illicit alcohol

- The following pages summarise for business executives, policy makers and law enforcement officers:
 - The initiatives to combat illicit trade most implemented over the last three years
 - The relative effectiveness of each initiative
 - The priority initiatives planned for the next three years
- The responses show shifting priorities, often in-line with the change in consumer motivations presented here.
- All 37 initiatives are viewed as having been effective in reducing illicit trade. However, there clearly remains much to be done, with very few initiatives implemented by more than half of survey respondents.

Business executives are focusing on authentication

Rank	Strategy implemented last three years	Effective reducing illicit trade	Priority next three years
1	Change product design	Implement supply-chain contractual controls (e.g., Know Your Supplier/Know Your Customer)	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology
2	Use advertising and promotion to make official products and channels more attractive	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology	Collaborate with retailers law enforcement or others to combat illicit trade
3	Improve tracking monitoring and reporting through the supply chain	Collaborate with retailers law enforcement or others to combat illicit trade	Launch a campaign to educate and discourage consumers from illicit trade
4	Implement supply-chain contractual controls (e.g., Know Your Supplier/Know Your Customer)	Improve tracking monitoring and reporting through the supply chain	Change the price quality or service
5	Collect intelligence about consumer attitudes	Change the price quality or service	Collect intelligence about illicit trade patterns
6	Change the price quality or service	Share information with others to improve understanding of illicit trade	Share information with others to improve understanding of illicit trade
7	Share information with others to improve understanding of illicit trade	Collect intelligence about consumer attitudes	Change manufacture or packaging
8	Change manufacture or packaging	Collect intelligence about illicit trade patterns	Use advertising and promotion to make official products and channels more attractive
9	Collaborate with retailers law enforcement or others to combat illicit trade	Launch a campaign to educate and discourage consumers from illicit trade	Improve tracking monitoring and reporting through the supply chain
10	Collect intelligence about illicit trade patterns	Use advertising and promotion to make official products and channels more attractive	Implement supply-chain contractual controls (e.g., Know Your Supplier/Know Your Customer)
11	Launch a campaign to educate and discourage consumers from illicit trade	Change manufacture or packaging	Collect intelligence about consumer attitudes
12	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology	Change product design	Change product design

	Information and intelligence
	Secure supply chain
	Influence consumers
	Collaborating externally

Conclusions and recommendations – Business executives

- Business executives should consider:
 - Collating better information on consumer motivations
 - Considering a range of strategies beyond price, including initiatives to build trust in legitimate goods
 - Collaborating more actively with trade bodies, policy officials and law enforcers
 - Investing more in the fight against illicit trade

Policy officials will work more closely with businesses

Rank	Strategy implemented last three years	Effective reducing illicit trade	Priority next three years
1	Research and collect information to understand patterns of illicit trade	Change penalties for consumers	Provide businesses with guidance and/or discussion forums
2	Collaborate with international organizations	Change penalties for businesses	Change penalties for retailers
3	Update legislation and/or legal frameworks	Collaborate with international organizations	Coordinate policy with other departments
4	Change penalties for businesses	Use promotional or awareness campaigns to influence citizens' attitudes	Use promotional or awareness campaigns to influence citizens' attitudes
5	Coordinate policy with other departments	Change penalties for retailers	Change penalties for criminal networks (e.g., asset seizures)
6	Use promotional or awareness campaigns to influence citizens' attitudes	Change penalties for criminal networks (e.g., asset seizures)	Update legislation and/or legal frameworks
7	Change penalties for consumers	Provide businesses with guidance and/or discussion forums	Change penalties for businesses
8	Change penalties for criminal networks (e.g., asset seizures)	Update legislation and/or legal frameworks	Change penalties for consumers
9	Provide businesses with guidance and/or discussion forums	Research and collect information to understand patterns of illicit trade	Collaborate with international organizations
10	Change penalties for retailers	Coordinate policy with other departments	Research and collect information to understand patterns of illicit trade

	Information and intelligence
	Changes to legal & policy
	Promotion and awareness raising
	Collaborating externally

Conclusions and recommendations – Policy officials

- Policy officials should consider:
 - Investing in targeted awareness campaigns
 - Responding to the shifting patterns of illicit trade and growth of e-commerce
 - Co-ordinating policies and procedures more effectively
 - Developing joined-up business cases

Law enforcement officers plan to tackle e-commerce

Rank	Strategy implemented last three years	Effective reducing illicit trade	Priority next three years
1	Research and collect information to understand patterns of illicit trade	Train law enforcement officers about latest developments	Collaborate with e-commerce suppliers couriers and distribution depots
2	Increase use of random searches at new locations	Collaborate with other organizations	Use data analytics and risk assessments to target enforcement
3	Monitor and track shipments	Collaborate with policy-makers and other public-sector officials	Improve compliance with existing policies and procedures
4	Implement processes or technology to aid product authentication	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade	Train law enforcement officers about latest developments
5	Collaborate with other organizations	Collaborate with international organizations	Collaborate with international organizations
6	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade	Increase use of random searches at new locations	Collaborate with other organizations
7	Collaborate with policy-makers and other public-sector officials	Monitor and track shipments	Collaborate with policy-makers and other public-sector officials
8	Automate manual customs procedures	Implement processes or technology to aid product authentication	Monitor and track shipments
9	Measure the effectiveness of different enforcement initiatives in reducing illicit trade	Measure the effectiveness of different enforcement initiatives in reducing illicit trade	Measure the effectiveness of different enforcement initiatives in reducing illicit trade
10	Launch anti-corruption initiatives	Improve compliance with existing policies and procedures	Launch anti-corruption initiatives
11	Train law enforcement officers about latest developments	Automate manual customs procedures	Implement processes or technology to aid product authentication
12	Improve compliance with existing policies and procedures	Collaborate with e-commerce suppliers couriers and distribution depots	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade
13	Collaborate with international organizations	Use data analytics and risk assessments to target enforcement	Automate manual customs procedures
14	Use data analytics and risk assessments to target enforcement	Launch anti-corruption initiatives	Increase use of random searches at new locations
15	Collaborate with e-commerce suppliers couriers and distribution depots	Research and collect information to understand patterns of illicit trade	Research and collect information to understand patterns of illicit trade

	Information and intelligence
	Process compliance and improvement
	Technology solutions
	Collaborating externally

Conclusions and recommendations – Law enforcement

- Law enforcement should consider:
 - Collaborating with e-commerce suppliers and others, reflecting the shifting nature of illicit trade
 - Enforcing compliance with policies and procedures, including training, use of technology to automate processes and anti-corruption initiatives
 - Invest in the latest approaches, including data analytics and risk assessments
 - Quantify the benefits of effective actions to combat illicit trade, to secure support

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