



Product Spotlight: Clothing

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CONSUMER MOTIVATIONS TO BUY ILLICIT CLOTHING

The trade in illicit medicines is growing in all regions

Country	Estimated illicit trade	Growth
Austria	12.0%	3.1%
Belgium	12.9%	2.0%
France	13.2%	1.7%
Germany	13.4%	6.8%
Ireland	12.1%	-1.7%
Luxembourg	12.0%	-3.0%
Netherlands	14.5%	4.5%
Switzerland	13.3%	2.5%
United Kingdom	13.0%	6.1%
Western Europe	12.9%	2.4%

Country	Estimated illicit trade	Growth
Denmark	12.3%	-1.7%
Finland	10.7%	2.0%
Norway	11.7%	3.1%
Sweden	12.4%	1.3%
Nordics	11.8%	1.2%

Country	Estimated illicit trade	Growth
Bulgaria	11.0%	0.2%
Croatia	12.9%	5.3%
Czech Republic	14.1%	0.3%
Estonia	10.4%	-2.6%
Latvia	11.5%	2.8%
Lithuania	14.4%	0.2%
Slovakia	13.7%	8.0%
Slovenia	14.3%	4.7%
Hungary	14.5%	9.8%
Poland	11.8%	1.9%
Romania	11.1%	4.1%
Central/Eastern Europe	12.7%	3.2%

Country	Estimated illicit trade	Growth
Average all countries	13.2%	3.5%

Below all countries' average  Above all countries' average

Country	Estimated illicit trade	Growth
Azerbaijan	15.0%	10.9%
Belarus	14.9%	1.3%
Kazakhstan	12.4%	2.8%
Russia	15.4%	3.2%
Serbia	15.3%	8.5%
Turkey	16.5%	10.4%
Ukraine	14.2%	4.8%
Eastern borders (non EU)	14.8%	6.0%

Country	Estimated illicit trade	Growth
Cyprus	14.1%	6.8%
Greece	13.2%	4.1%
Italy	14.7%	7.8%
Malta	12.5%	0.3%
Portugal	12.1%	1.8%
Spain	13.2%	6.0%
Southern Europe	13.3%	4.5%

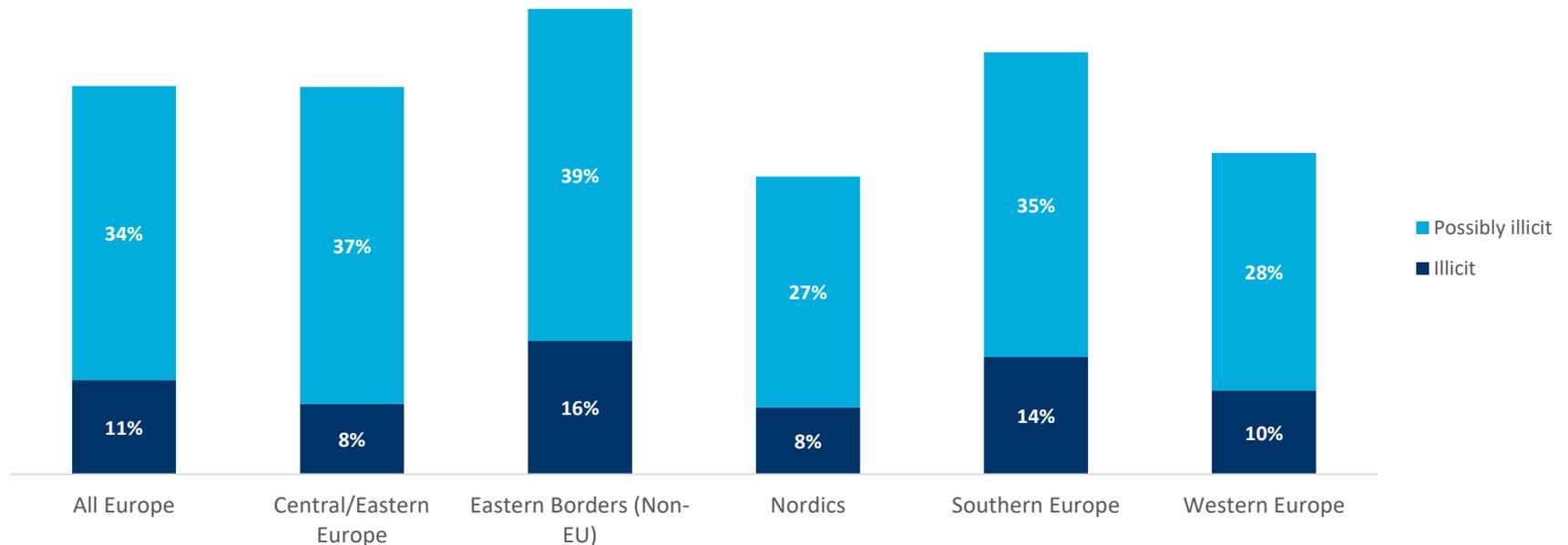
Source: Oxford Economics stakeholder survey, n=3,393

- The heatmap across 39 European countries highlights high levels of illicit clothing across Europe according to our respondents, from 10% in Estonia to 17% in Turkey, but variety in growth over the last three years (e.g., decrease of 3% in Luxembourg and Estonia vs. increase in Azerbaijan of 11%).
- Growth in illicit trade reported over last three years in all European regions, despite some country exceptions.

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

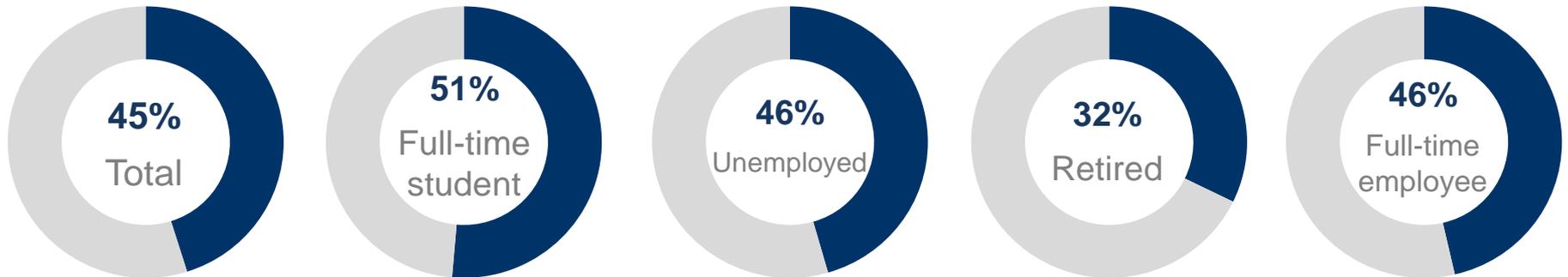


Source: Oxford Economics consumer survey, n=23,194

- Consumers’ estimates of illicit purchases highlight extent of “possibly illicit” purchases, where they lack confidence that they are buying legitimate clothing and accessories.
- Across Europe a third (34%) of purchases are possibly illicit, more than 3 times estimated illicit purchases of 11%.
- For this presentation, to understand consumers motivations for buying illicit medicines, we use this larger population, including possibly illicit (more than half of Eastern Borders’ consumers).

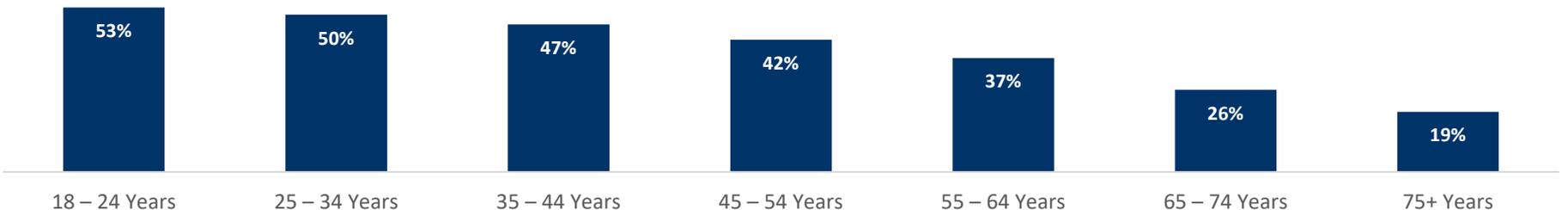
The young are more likely to buy illicit clothing

Percentage of illicit purchases by working role



Source: Oxford Economics consumer survey, n=23,194; Full-time student n=1,869; Unemployed n=1,816; Retired n=2,206; Full-time employee n=13,090

Percentage of total illicit purchases by consumer age

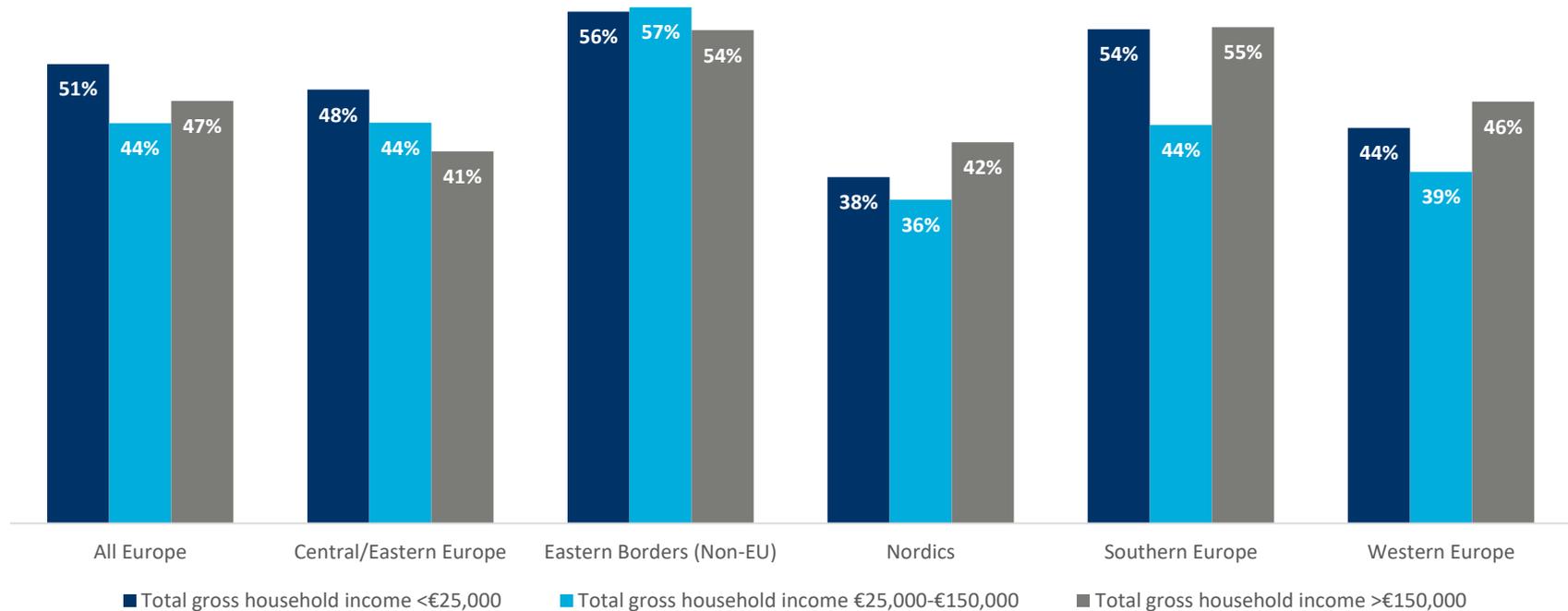


Source: Oxford Economics consumer survey, n=23,194; 18-24 n=2,648; 25-34 n=5,672; 35-44 n=5,927; 45-54 n=4,692; 55-64 n=3,040; 65-74 n=1,065; 75+ n=150

- The strongest correlation with respondents who regularly buy illicit clothing (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 (with more than half of students reporting illicit purchases vs 32% of those retired).

Illicit medicines are not only bought by 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=23,194 ; Total gross household income <€25,000 n=5,725; Total gross household income €25,000-€150,000 n=7,822; Total gross household income >€150,000 n=900

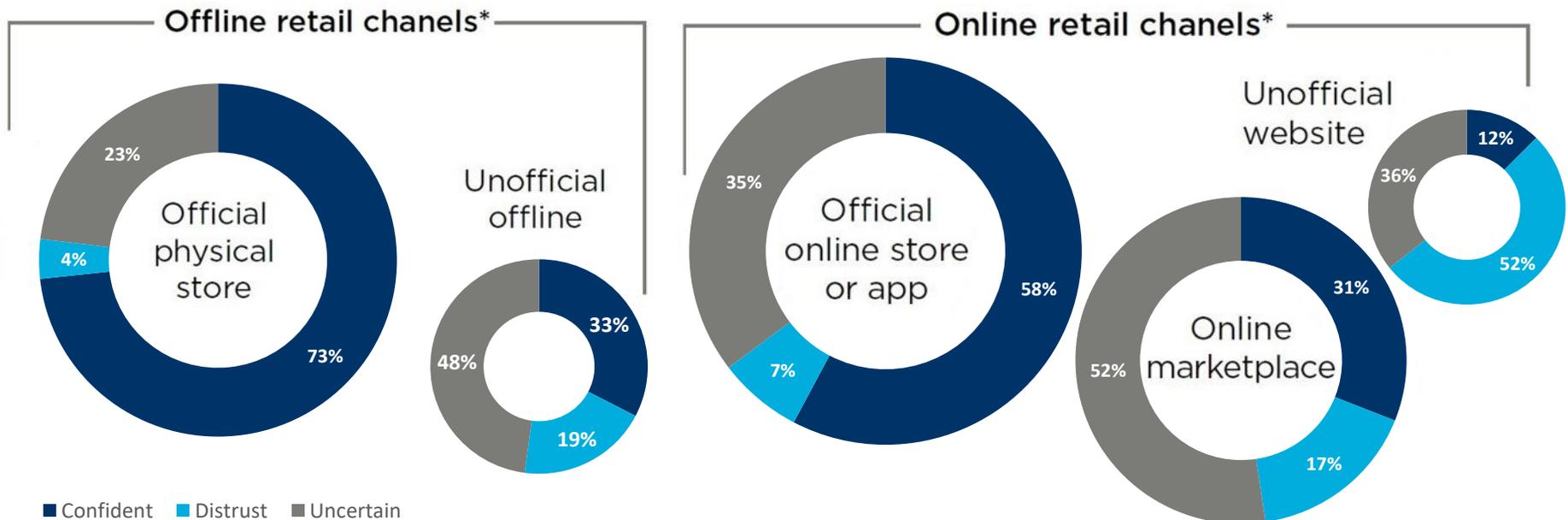
- The wealthy, earning > €150,000, are more likely to buy illicit clothing than all other income groups in Western Europe, the Nordics and Southern Europe.
- Possible explanations include higher use of e-commerce and scepticism of official distribution channels.



WHY DO CONSUMERS BUY ILLICIT CLOTHING?

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



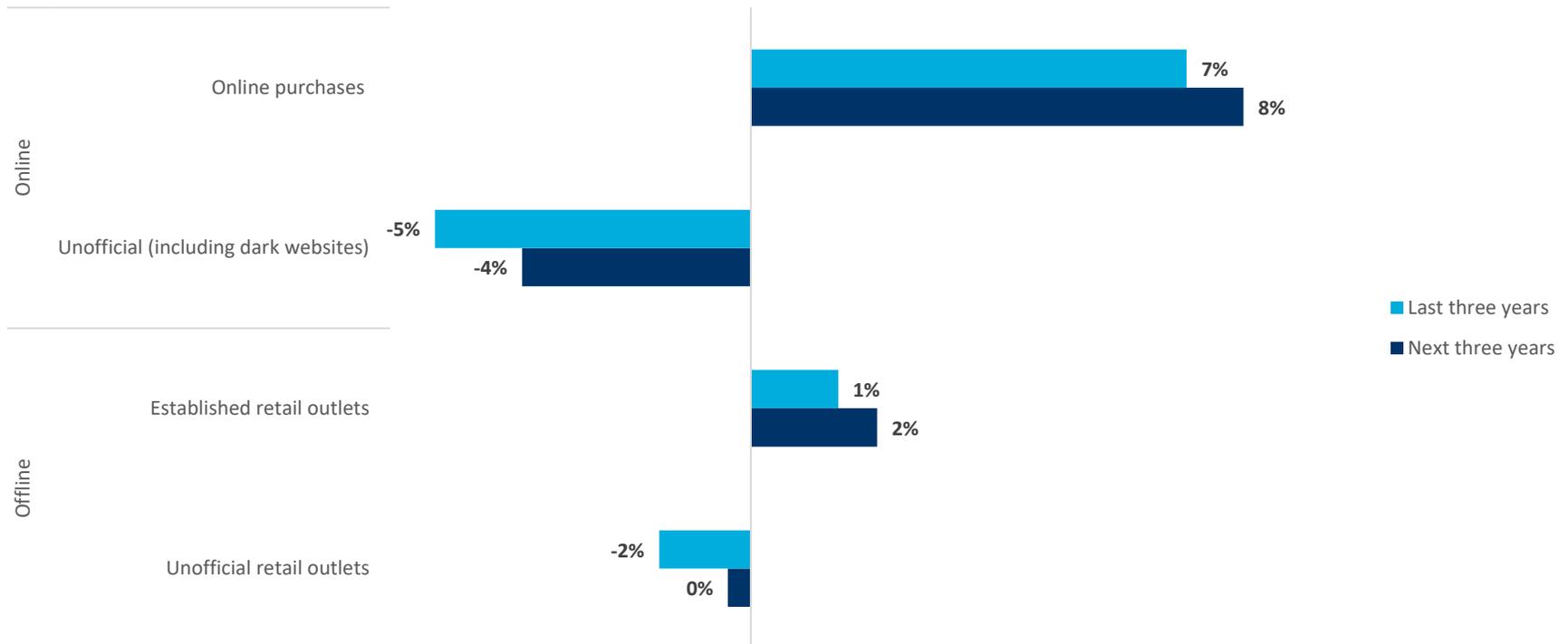
Source: Oxford Economics consumer survey; Official physical store n=23,136; Unofficial offline n=45,493; Official online store or app n=23,006; Online marketplace n=22,817; Unofficial website n=22,383

- 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 31% fully confident that they are buying legitimate clothing 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

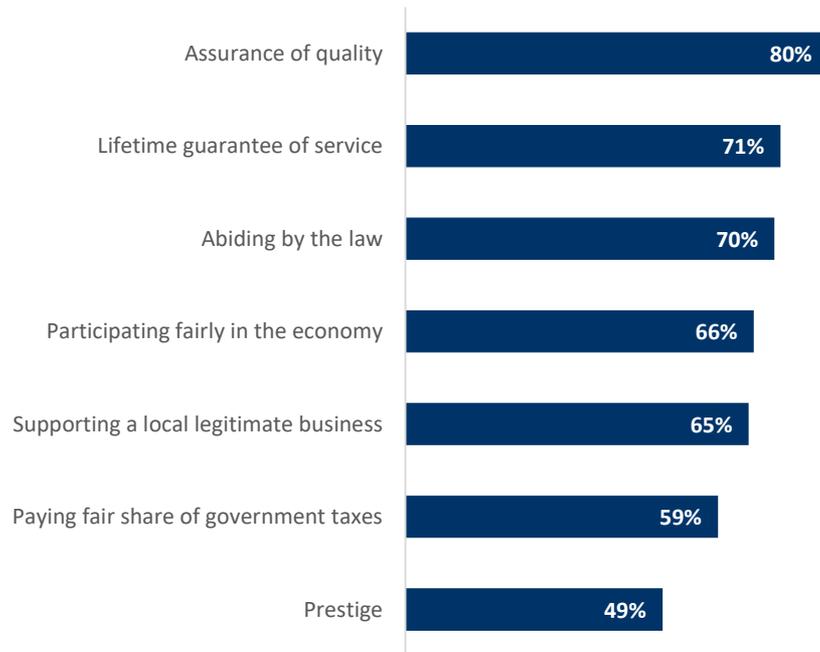


Source: Oxford Economics consumer survey, n=23,194

- This level of consumer uncertainty looks likely to persist, as consumers buy more clothing online.
- However, consumers say they are moving away from unofficial outlets, both online and offline. In fact, consumers predict that they will buy 5% less illicit clothing over the next three years.

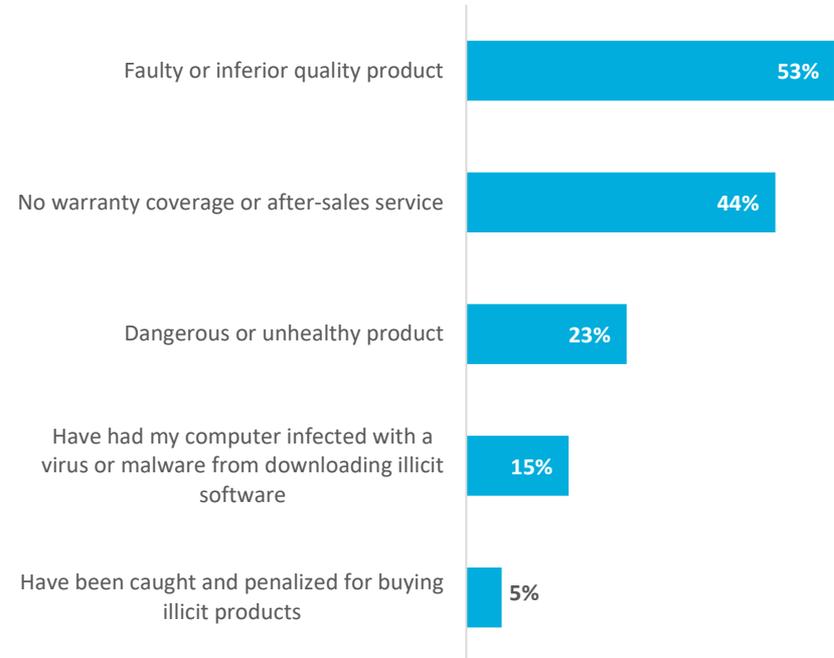
Consumers prefer official channels for many reasons

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=22,238

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

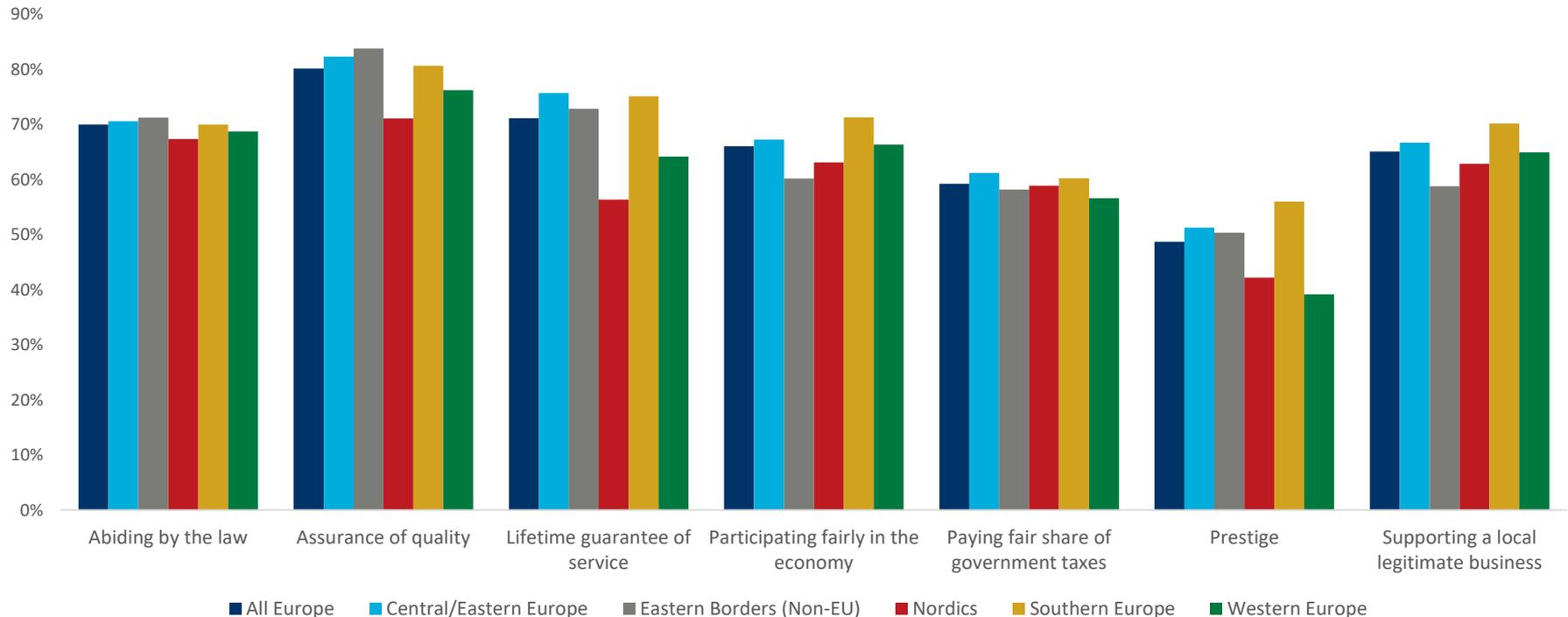


Source: Oxford Economics consumer survey, illicit responses, n=10,394

- Assurance of quality, with less risk of a dangerous or unhealthy product and better service, are the leading reasons given for preferring legitimate clothing (and avoiding illicit ones).
- "Social reasons", such as abiding by the law and participating fairly in the economy, even paying fair share of taxes 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=22,238; Central/Easter Europe n=7,045; Eastern Borders n=4,574; Nordics n=1,638; Southern Europe n=4,227; Western Europe n=4,754

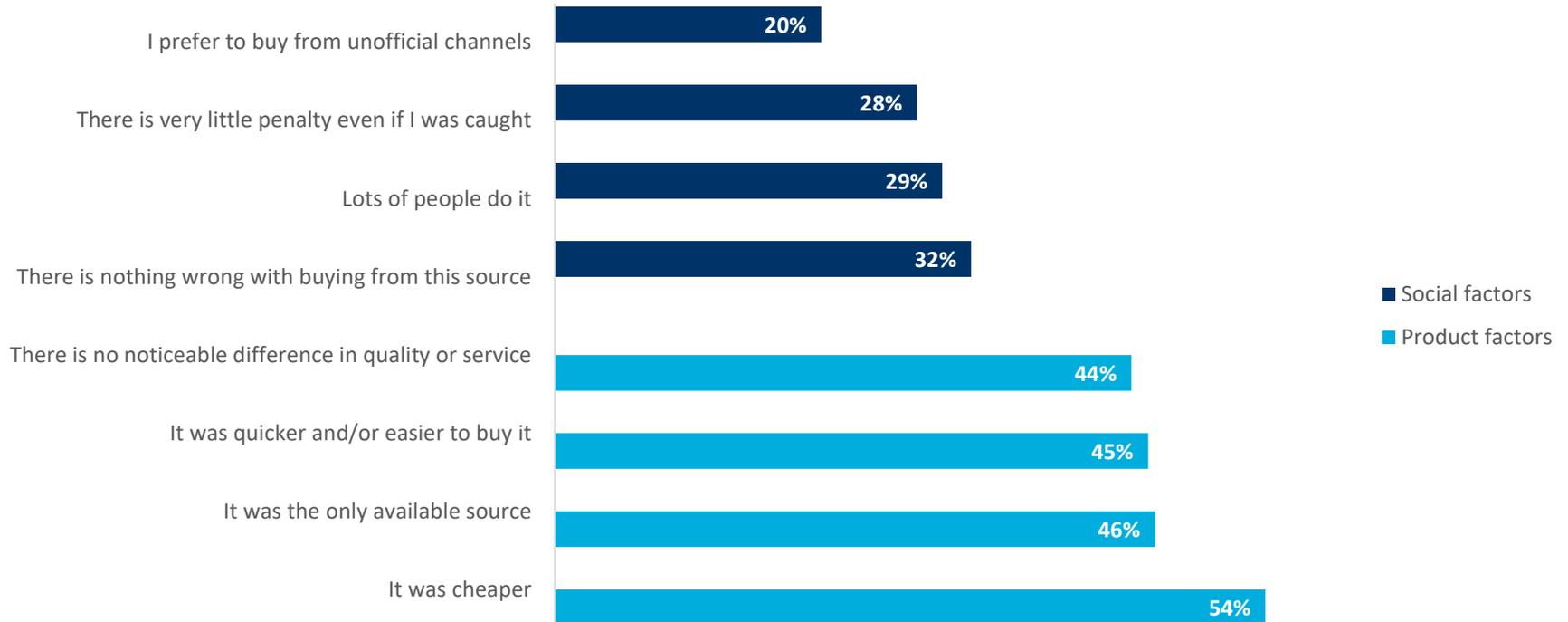
- There appears to be consistency across European regions in social attitudes towards illicit trade, e.g., regarding the importance of abiding by the law and paying taxes.
- There is greater regional variety to more product-centric reasons for preferring legitimate goods, e.g., higher scores in Southern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

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

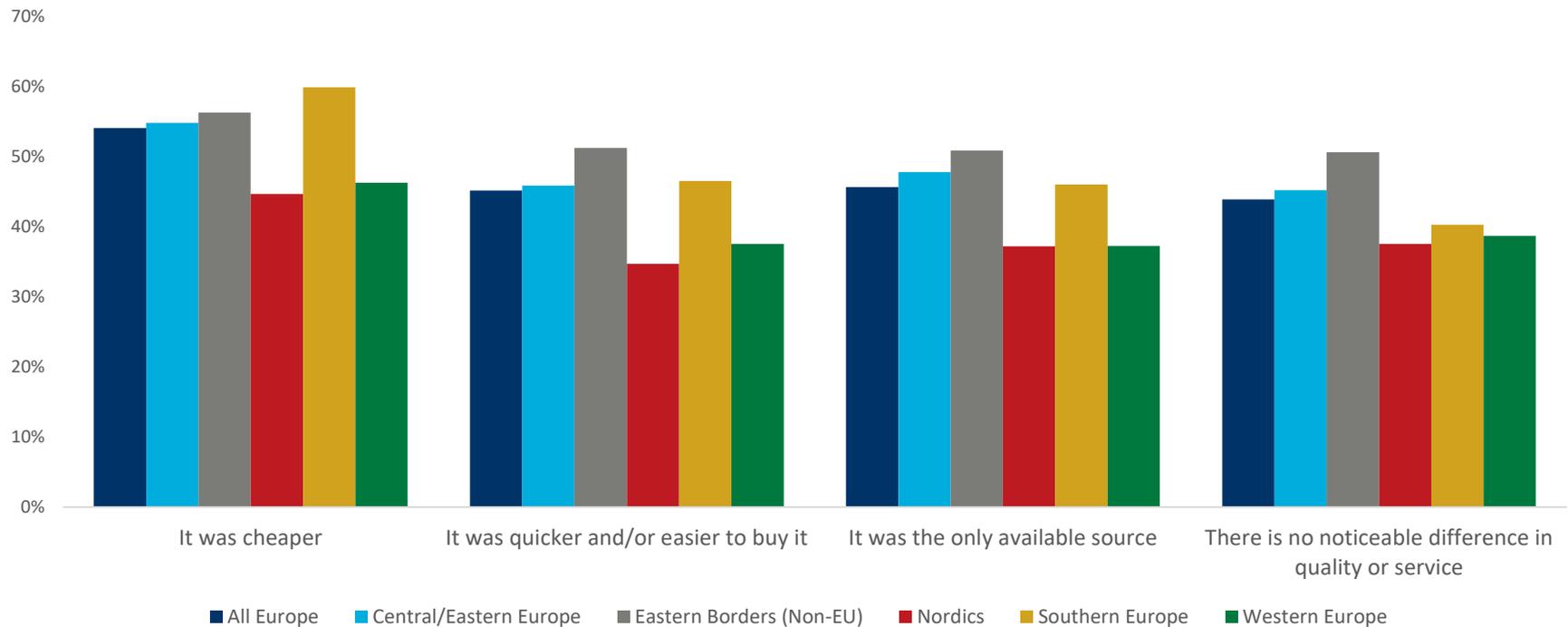


Source: Oxford Economics consumer survey, illicit purchases, n=10,394

- Cost is the most popular reason for buying illicit clothing, 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

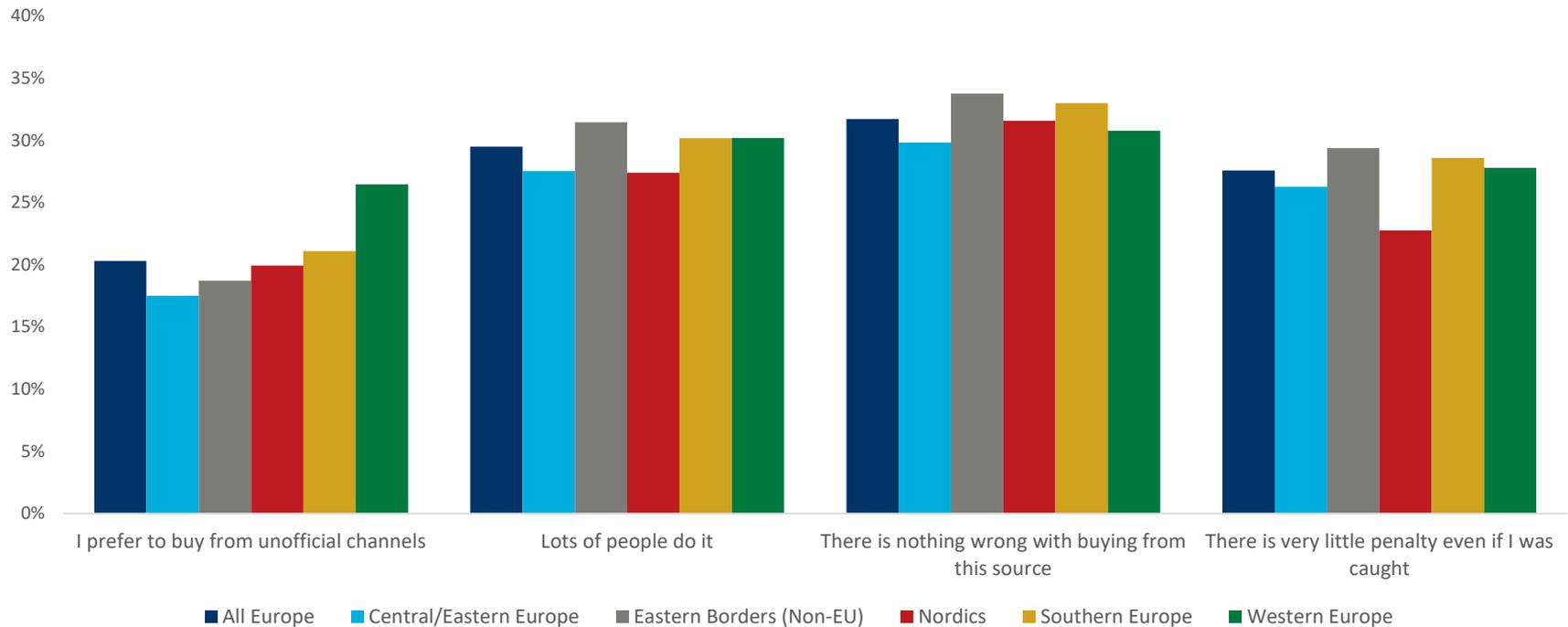


Source: Oxford Economics consumer survey, illicit purchases, n=10,394; Central/Eastern Europe n=3,273; Eastern Borders n=2,511; Nordics n=602; Southern Europe n=2,127; Western Europe n=1,881

- There is noticeable variety in regional responses as to why they buy illicit clothing, with Nordics and Western Europe rating factors lower than other regions.
- Cost is the leading reason overall. Reasons other than cost are behind in all regions, by five percentage points in Eastern Borders to thirteen in Southern Europe.

Social motivations for illicit purchases are more consistent

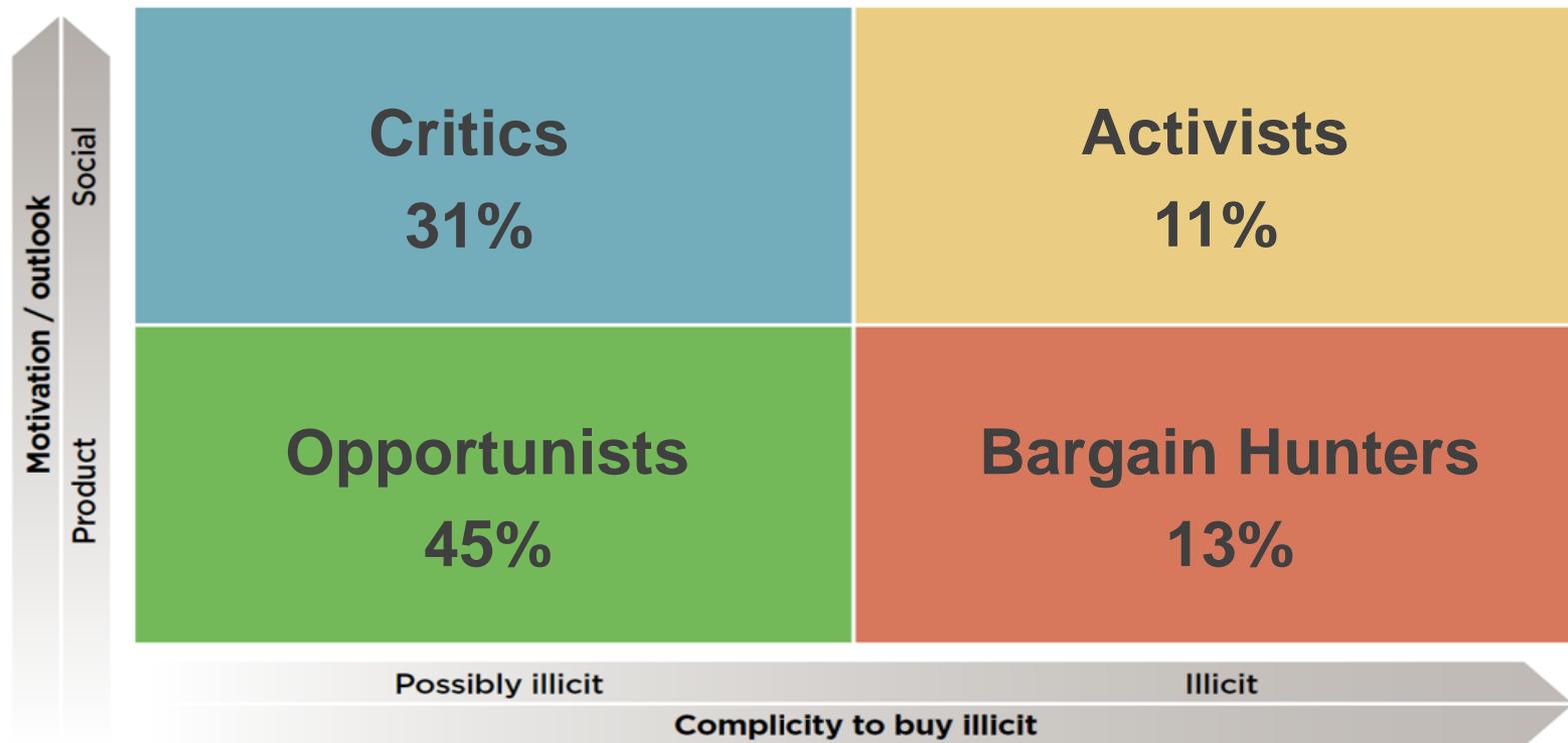
Please rate the importance of each of the following factors in buying from potentially unauthorized sources
“Very important” and “Important” responses
 Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=10,394; Central/Easter Europe n=3,273; Eastern Borders n=2,511; Nordics n=602; Southern Europe n=2,127; Western Europe n=1,881

- Similar to total purchases, there is less regional variety regarding the social reasons for buying clothing 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=10,394

- 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 clothing purchases and how consumer motivations differ by region.



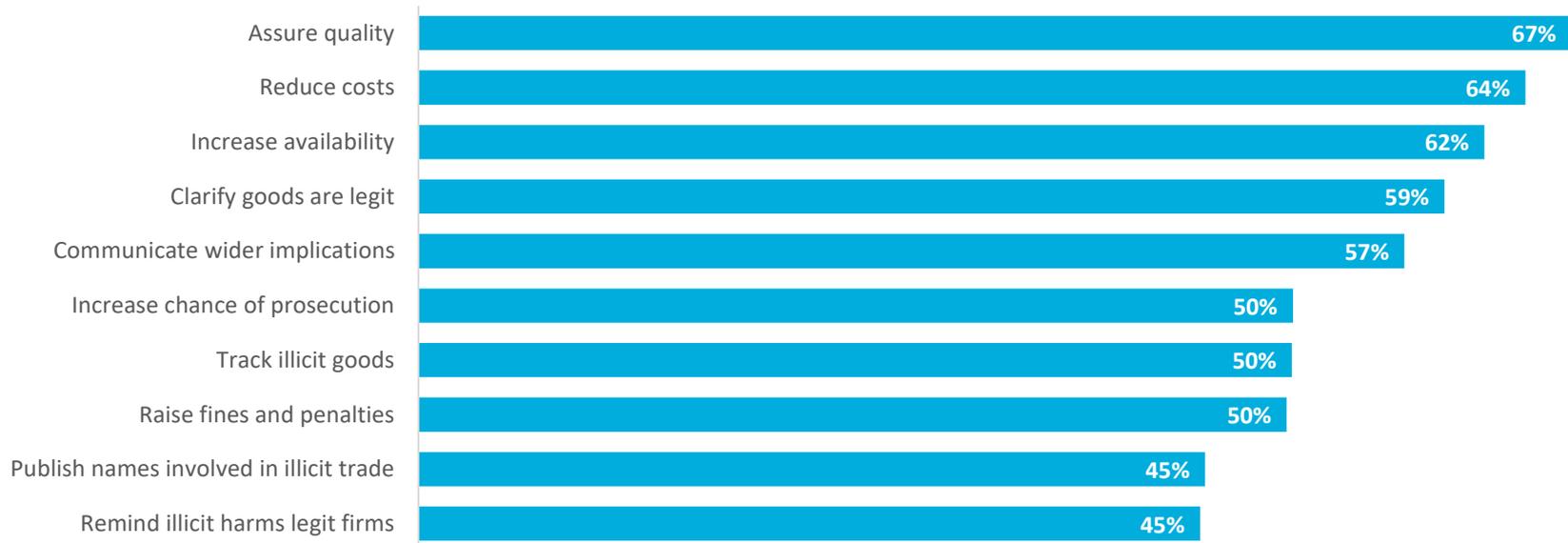
WHICH ACTIONS COULD DETER CONSUMERS?

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

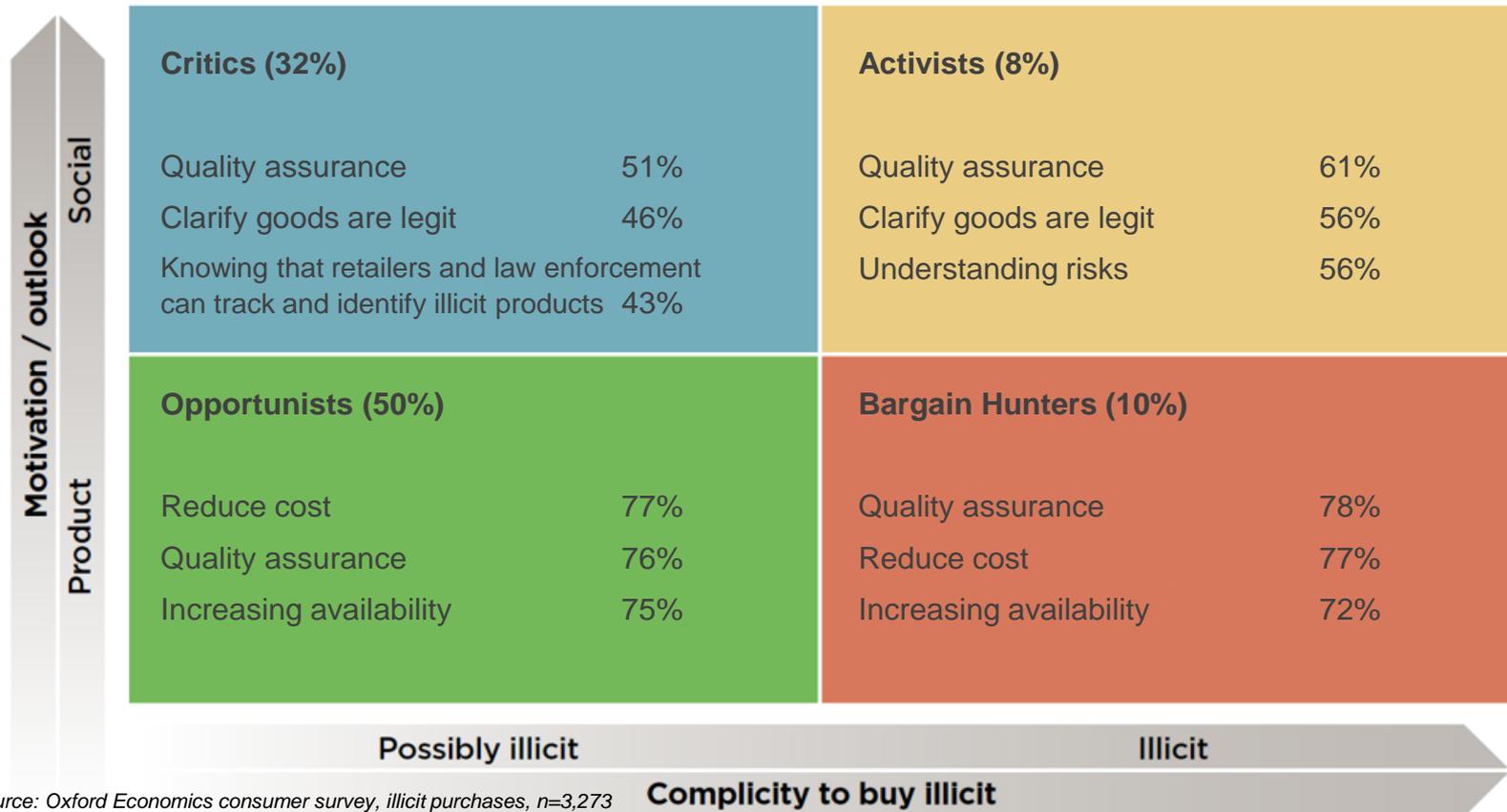
Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=10,394

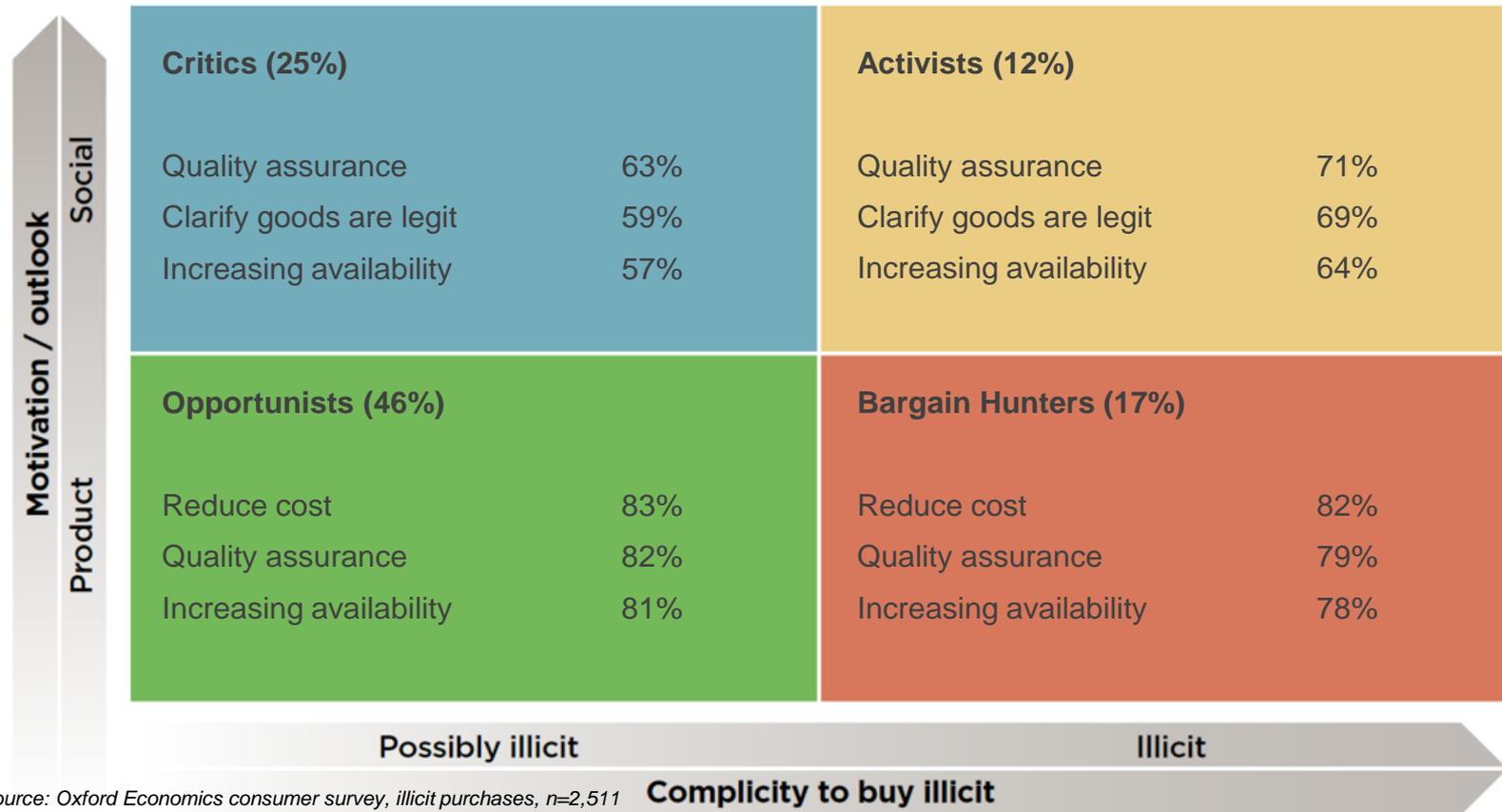
- The responses confirm the complexity of consumer motivations; that there may be several reasons why a consumer buys illicit clothing and a variety of effective interventions to deter them.
- The following charts list, for each region, the top three effective strategies for each segment, with the percentage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

For Central/Eastern Europe, quality assurance is key



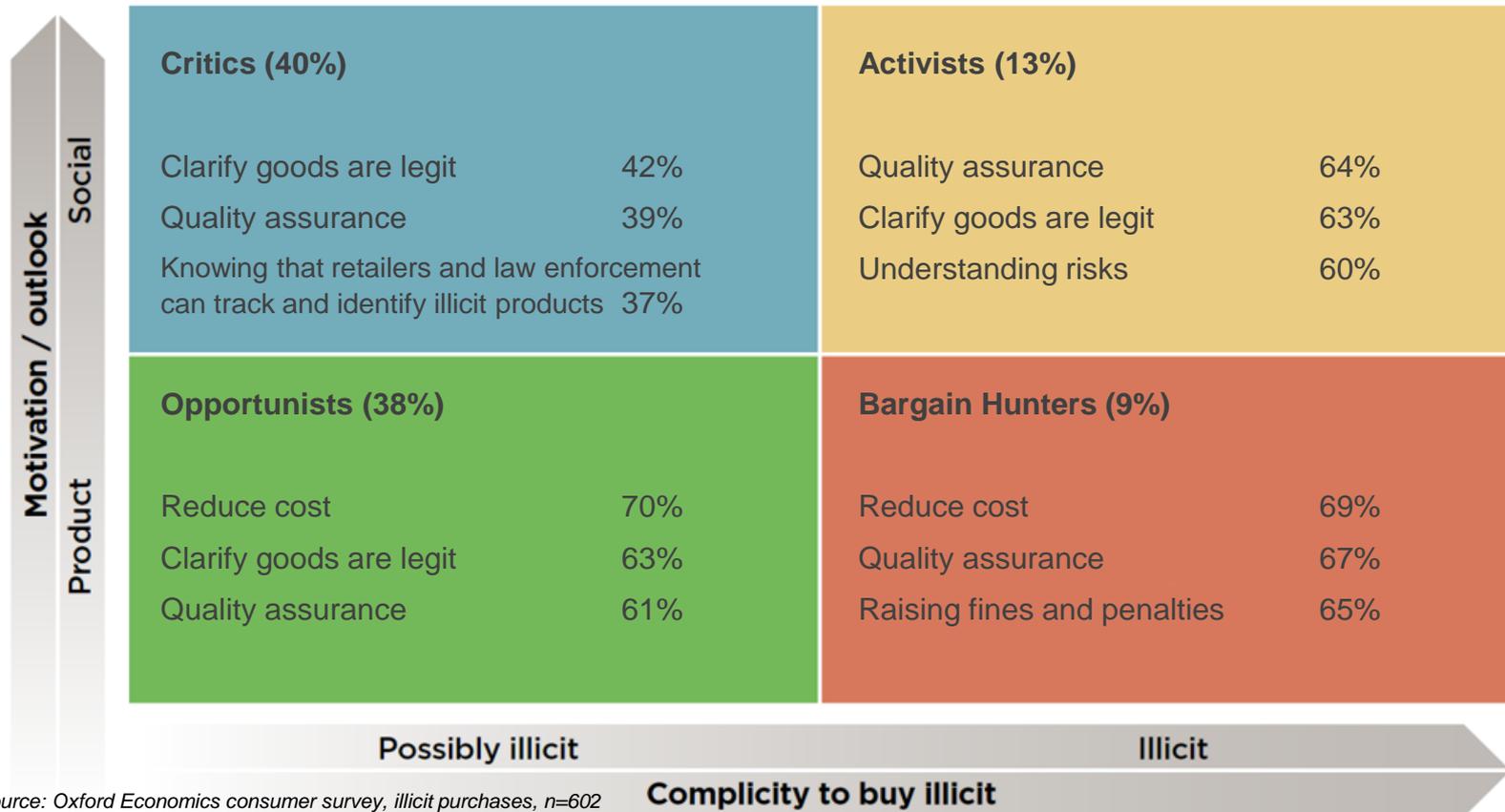
- Reducing cost is just ahead as the most effective strategy for the 50% of Opportunists, but doesn't feature in the top three for the 32% of Critics and 8% of Activists.
- Quality assurance and increasing availability are also important to deter product-focused buyers. For socially focused buyers, quality assurance and product authentication would be most effective.

For Eastern Borders cost, quality and availability are key



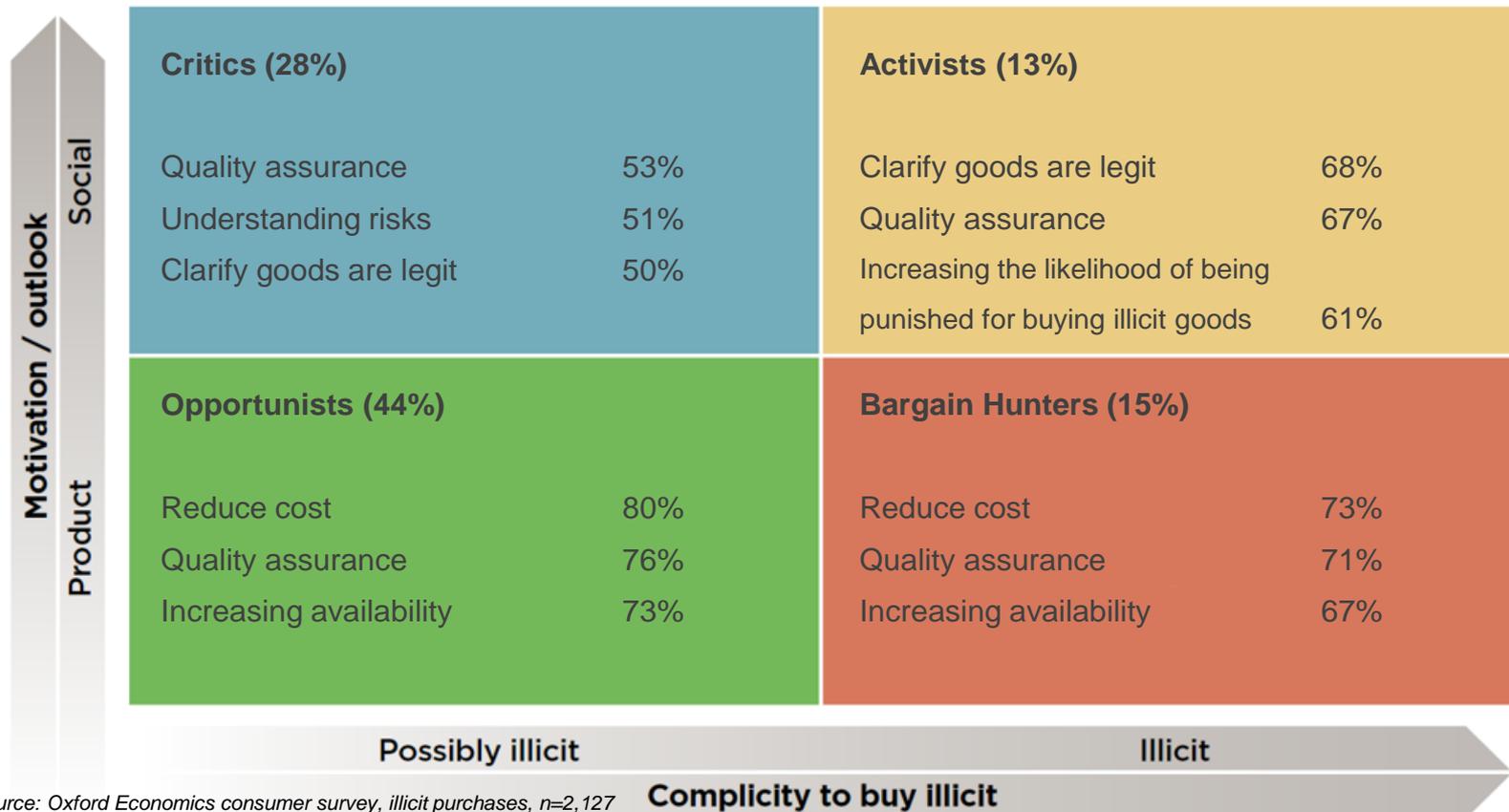
- A greater share of illicit purchases in Eastern Borders are product related (63%), where reducing cost, assuring quality and increasing availability would be the most effective deterrents.
- Clarifying clothing is legit, e.g., through improved product authentication, could be effective at deterring the 25% of critics and 12% of activists, where cost is less of an influence.

For Nordics, strategies should target the socially motivated



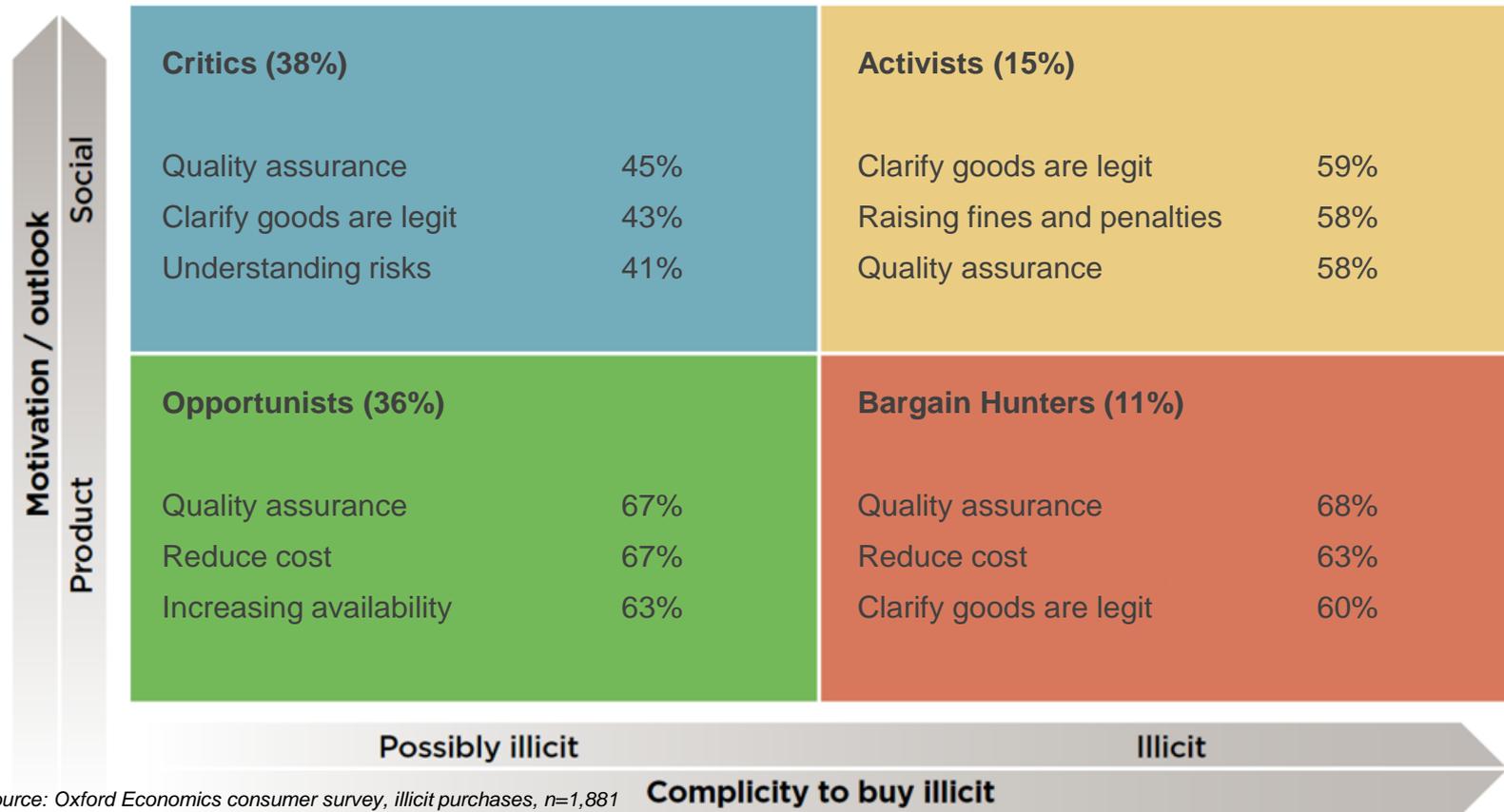
- Most illicit purchases in Nordics (53%) are for social reasons, where clarifying goods are legit, improved quality assurance, explaining risks and improving tracking of illicit purchases are most effective.
- Reducing cost is the top deterrent for the 38% of opportunists and 9% bargain hunters.

For Southern Europe quality assurance is most effective



- For the 44% of opportunists and 15% of bargain hunters, reducing cost is most effective, followed by quality assurance and increasing availability.
- For the 41% of socially motivated consumers, quality assurance is an effective deterrent, along with authentication, explaining risks and increasing chance of being punished.

For Western Europe, quality assurance and authentication beat cost



- Quality assurance just leads cost for product motivated consumers. Ways of clarifying goods are legit features for all segments except for opportunists.
- Explaining risks could deter the 38% of critics and raising fines and penalties would dissuade most of the 15% of activists.



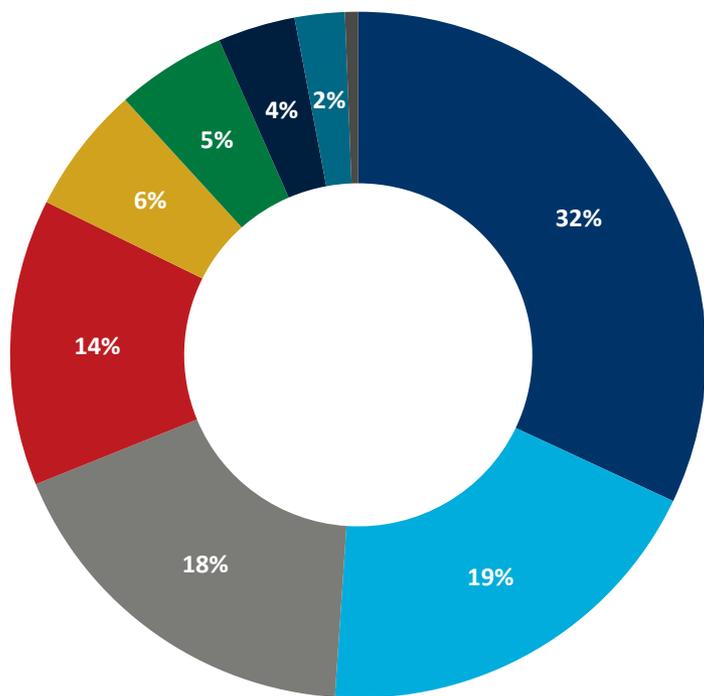
APPROACHES TO COMBATTING ILLICIT CLOTHING

Those fighting illicit clothing 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



- Changing customer attitudes
- Changes to product price/quality/availability
- Changing sales and distribution channels
- Increasing attractiveness of illicit goods
- Increasing sophistication or reach of organized crime
- Increasing corruption, including bribery and coercion of officials
- Declining resources for law enforcement
- Declining protection and deterrence as regulation, legislation, and/or sentencing do not keep pace with changing patterns of illicit trade
- Declining political prioritization of illicit trade
- Other

Source: Oxford Economics stakeholder survey, n=1,637

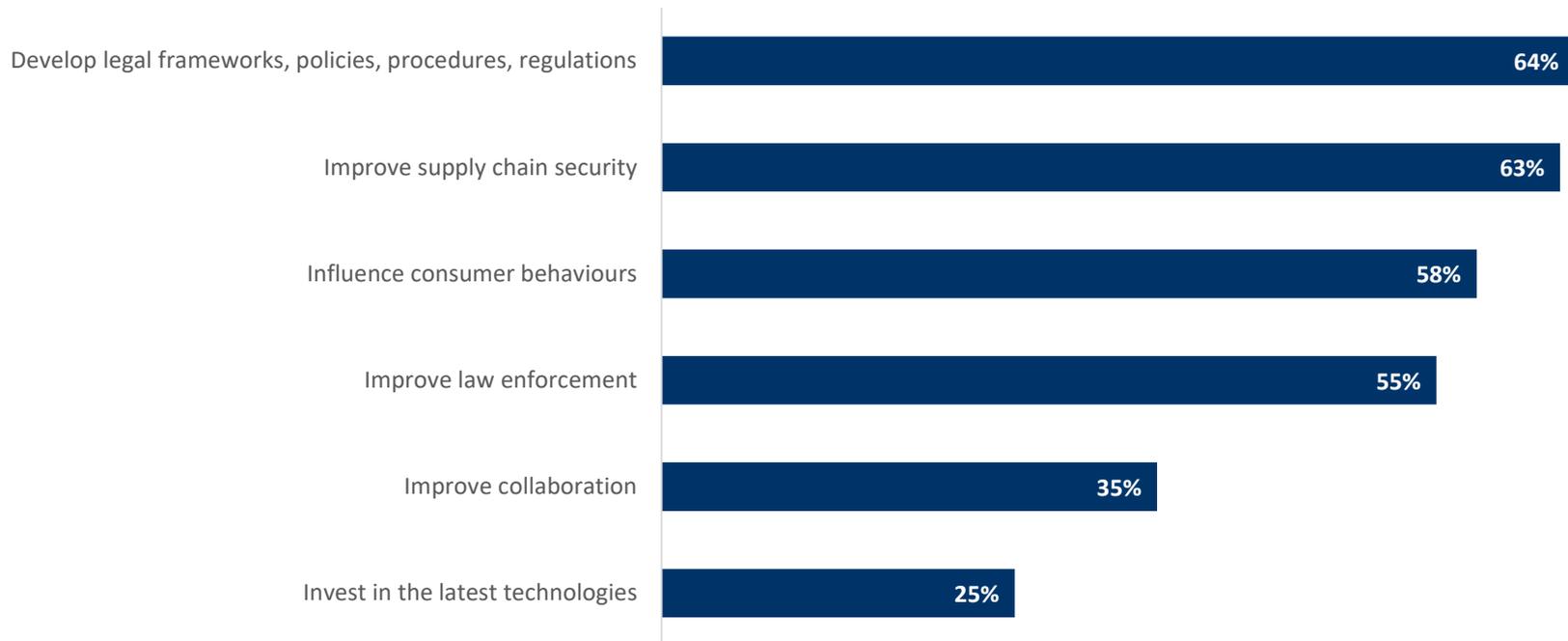
- Businesses, policy officials and law enforcers (stakeholders) recognise the shifting nature of illicit trade, in particular changes in customer attitudes, to products and distribution channels.

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=3,393

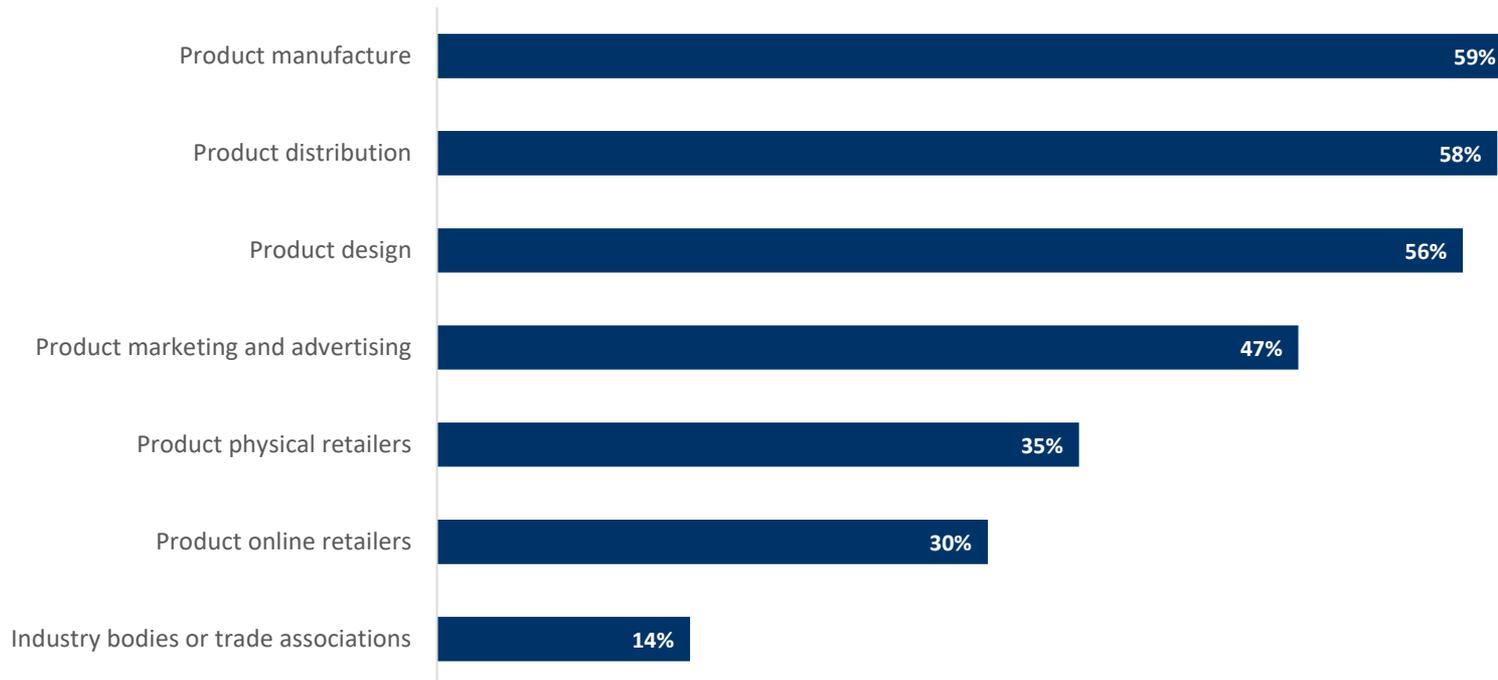
- Stakeholders prioritise policy interventions and supply chain improvements. Improving collaboration and investing in the latest technologies are prioritised by fewer respondents.

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



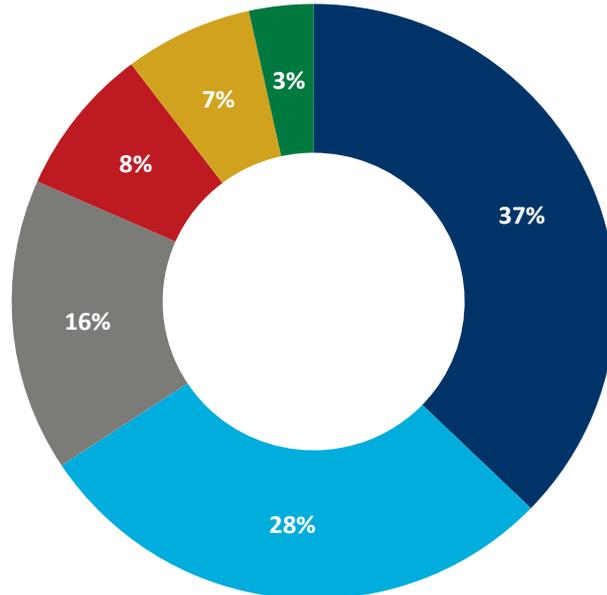
Source: Oxford Economics stakeholder survey, n= 3,393

- 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 medicines

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

*Top-ranked responses
Stakeholders*



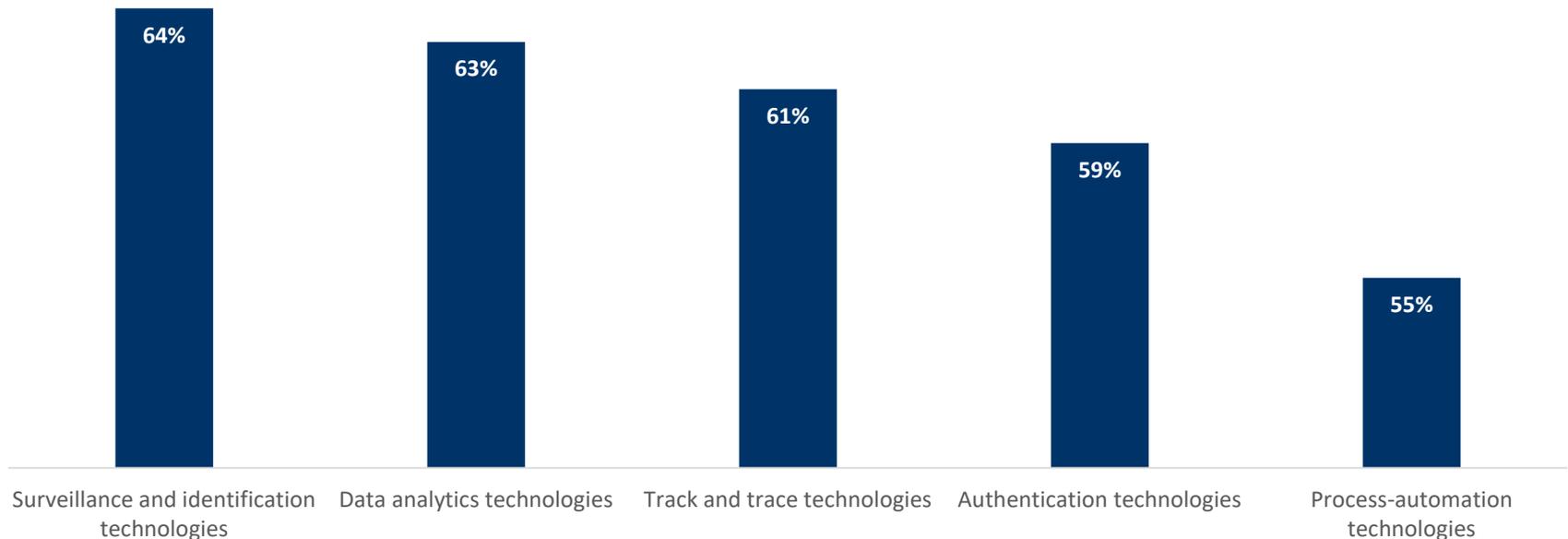
- Sharing data generated by modern trade networks with others to build intelligence on illicit trade patterns
- Sharing information/intelligence across national and regional enforcement agencies
- Sharing information/intelligence across international enforcement agencies
- Coordinating policies between national and regional departments and agencies
- Co-ordinating policies internationally
- Establishing forums where public and private sector representatives can share information and co-ordinate actions to combat illicit trade

Source: Oxford Economics stakeholder survey, n= 3,393

- 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 by far 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



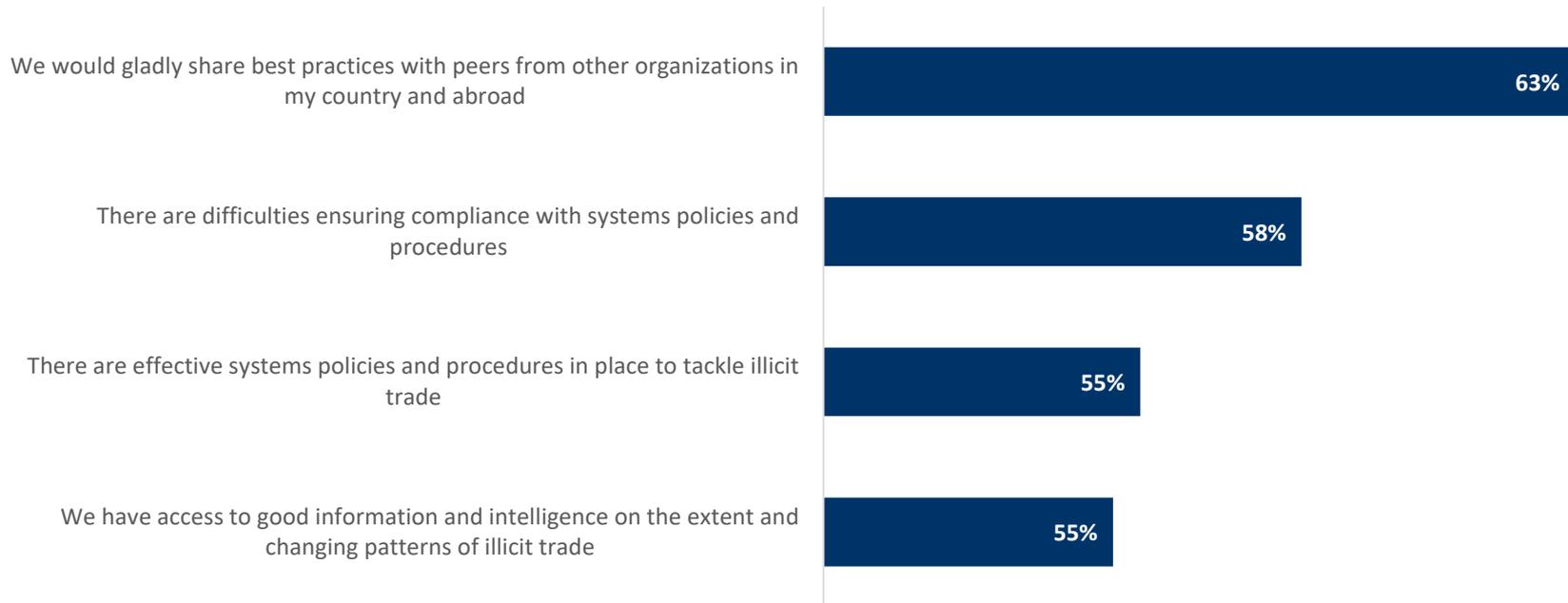
Source: Oxford Economics stakeholder survey, n= 3,393

- 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= 3,393

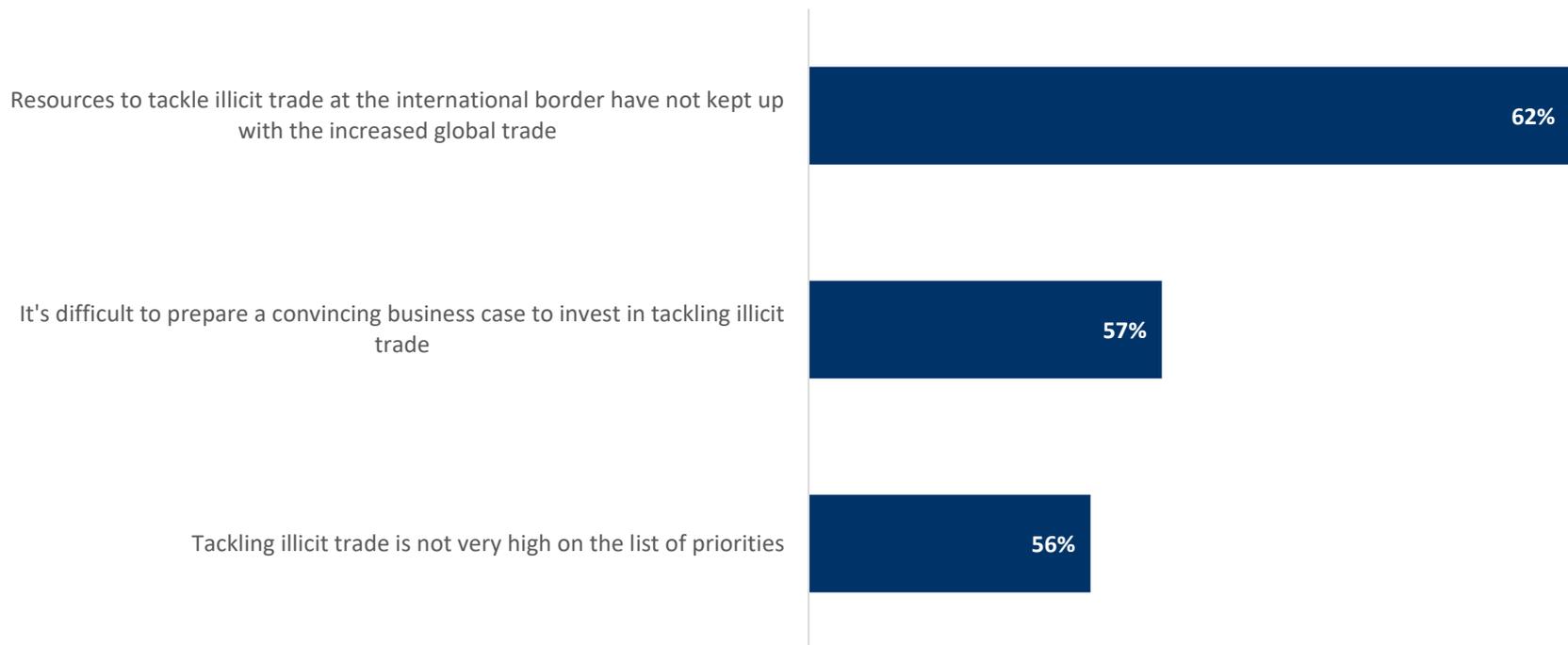
- Stakeholders highlight difficulties ensuring compliance with systems, policies and procedures (for 58% of stakeholders). Only a small majority say they have access to good data and intelligence to understand illicit trade and have effective practices in place (both 55%).

...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= 3,393

- Stakeholders feel that the resources dedicated to fighting illicit medicines 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.

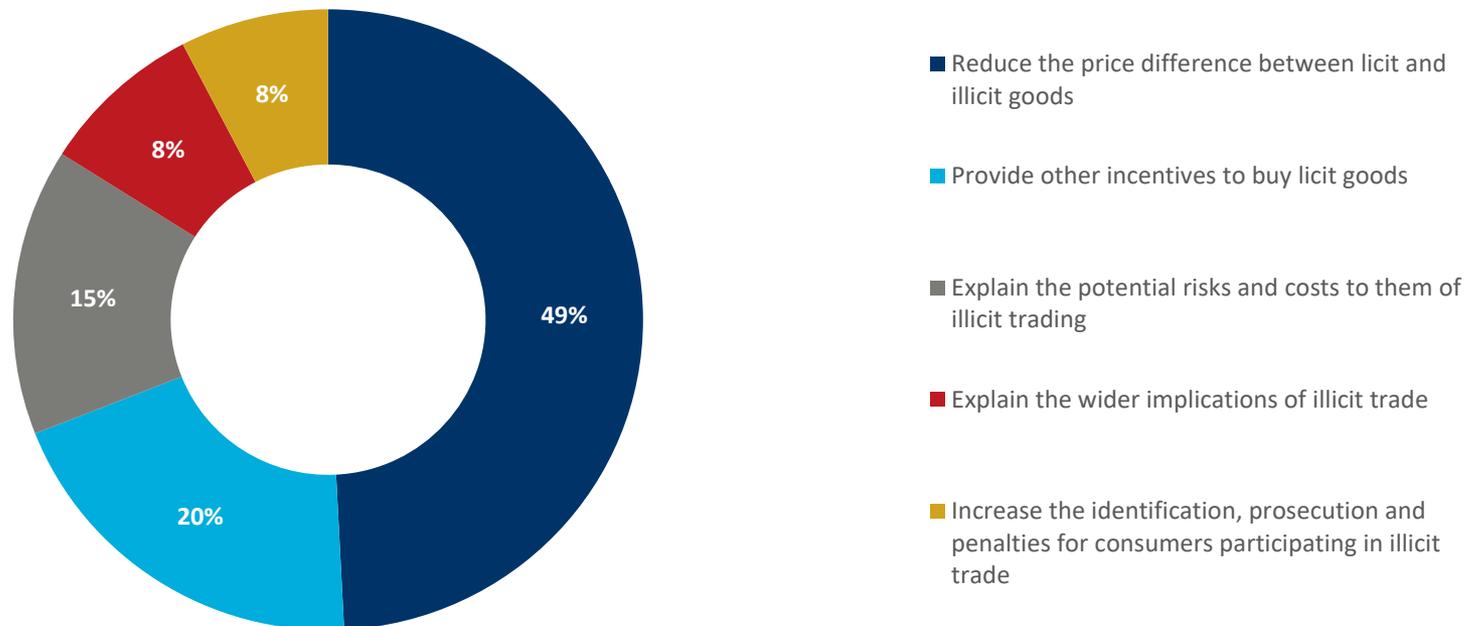


**THE STRATEGY GAP: CONSUMERS VS.
STAKEHOLDERS**

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=3,393

- Almost half of stakeholders (49%) say reducing cost is the most effective action for reducing illicit trade, far ahead of other actions, with 20% prioritising providing other incentives to buy legitimate goods (e.g., improved quality or service) and 23% education into the risks and implications of illicit trade. Only 8% say increasing penalties would be the most effective action.

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”

Consumers



Source: Oxford Economics consumer survey, n=23,194

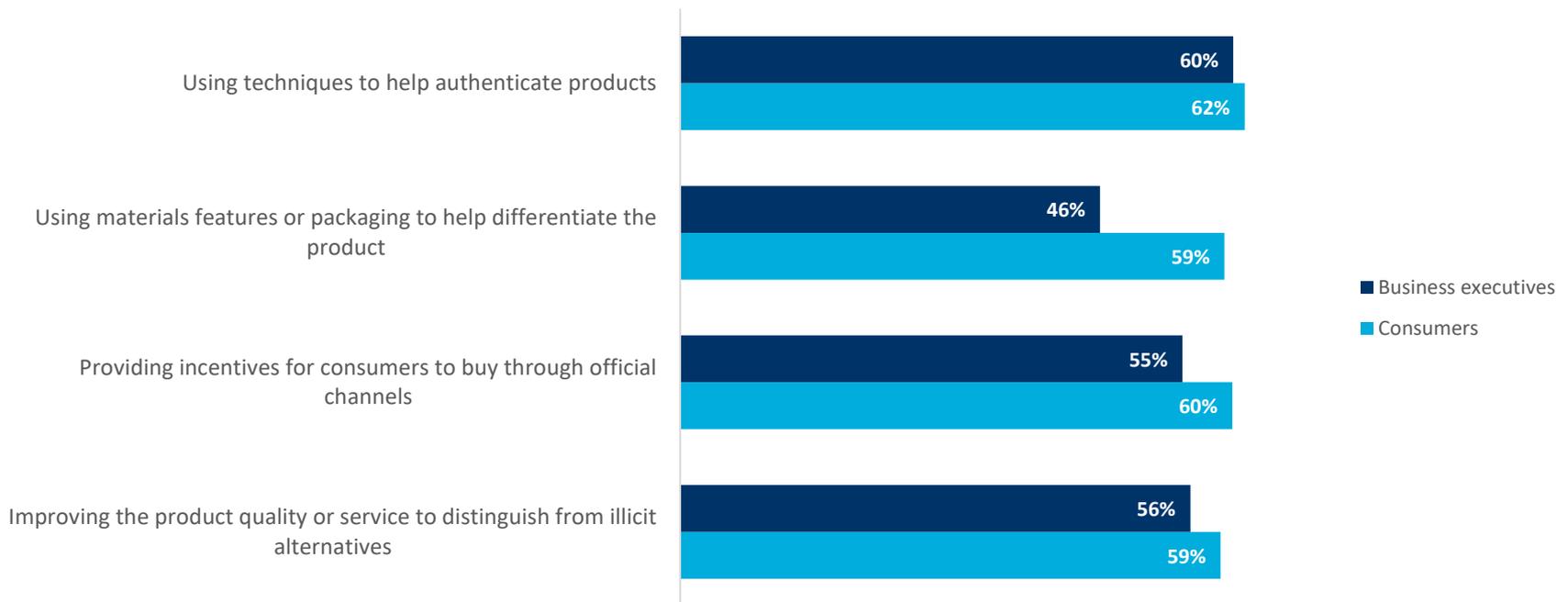
- According to consumers, reducing price is a mid-ranking action to tackle illicit clothing. Several actions score higher, including product authentication and incentivising through improving other aspects of the product (e.g., rewards, quality, service and support etc).

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

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, business executives, n=2,325

Source: Oxford Economics consumer survey, n=23,194

- Businesses show a lack of enthusiasm in initiatives to combat illicit clothing, 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=3,393

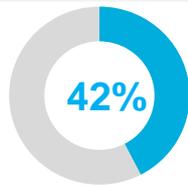
Source: Oxford Economics consumer survey, n=23,194

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

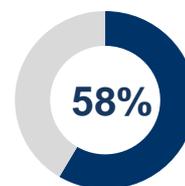
Stakeholders underestimate consumer awareness of the social impact of illicit trade



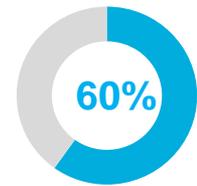
Consumers underestimate the personal risks of engaging in illicit trade



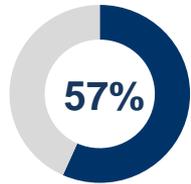
I'm not aware of the health risks of buying illicit goods



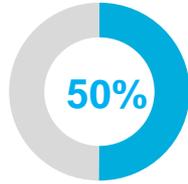
Consumers are unaware of the penalties for illicit trading



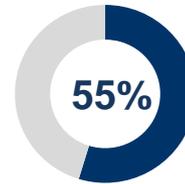
I'm not aware of the potential penalties for buying counterfeit products



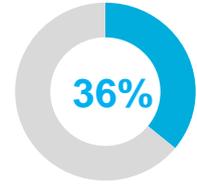
Consumers are unaware that buying illicit goods funds criminals and terrorists



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=3,393

Source: Oxford Economics consumer survey, n=23,194

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 nineteen percentage points in risk awareness, and in awareness of whether illicit trade is a victimless crime.



ACTIONS TO COMBAT ILLICIT CLOTHING

Actions to combat illicit clothing

- 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 thirty seven 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 shifting priorities towards authentication, collaboration and awareness raising

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

Policy officials seek to upgrade penalties to retailers and criminal networks and raise consumer awareness

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 businesses	Change penalties for retailers
2	Collaborate with international organizations	Change penalties for consumers	Change penalties for criminal networks
3	Update legislation and/or legal frameworks	Use promotional or awareness campaigns to influence citizens' attitudes	Use promotional or awareness campaigns to influence citizens' attitudes
4	Coordinate policy with other departments	Update legislation and/or legal frameworks	Provide businesses with guidance and/or discussion forums
5	Change penalties for businesses	Collaborate with international organizations	Coordinate policy with other departments
6	Change penalties for consumers	Research and collect information to understand patterns of illicit trade	Update legislation and/or legal frameworks
7	Use promotional or awareness campaigns to influence citizens' attitudes	Change penalties for criminal networks	Collaborate with international organizations
8	Provide businesses with guidance and/or discussion forums	Coordinate policy with other departments	Change penalties for businesses
9	Change penalties for criminal networks	Change penalties for retailers	Change penalties for consumers
10	Change penalties for retailers	Provide businesses with guidance and/or discussion forums	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 aim to shift priorities by using data analytics, risk assessments and collaborating more

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	Collaborate with other organizations to better identify high-risk imports	Use data analytics and risk assessments to target enforcement
2	Increase use of random searches at new locations	Train law enforcement officers about latest developments	Collaborate with e-commerce suppliers couriers and distribution depots
3	Monitor and track shipments	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade	Collaborate with international organizations on joint initiatives
4	Collaborate with other organizations to better identify high-risk imports	Increase use of random searches at new locations	Improve compliance with existing policies and procedures
5	Implement processes or technology to aid product authentication	Collaborate with policy-makers and other public-sector officials	Train law enforcement officers about latest developments
6	Measure the effectiveness of different enforcement initiatives in reducing illicit trade	Monitor and track shipments	Collaborate with other organizations to better identify high-risk imports
7	Collaborate with policy-makers and other public-sector officials	Automate manual customs procedures	Collaborate with policy-makers and other public-sector officials
8	Automate manual customs procedures	Implement processes or technology to aid product authentication	Implement processes or technology to aid product authentication
9	Launch anti-corruption initiatives	Collaborate with international organizations on joint initiatives	Monitor and track shipments
10	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade	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
11	Train law enforcement officers about latest developments	Measure the effectiveness of different enforcement initiatives in reducing illicit trade	Measure the effectiveness of different enforcement initiatives in reducing illicit trade
12	Improve compliance with existing policies and procedures	Use data analytics and risk assessments to target enforcement	Launch anti-corruption initiatives
13	Collaborate with e-commerce suppliers couriers and distribution depots	Improve compliance with existing policies and procedures	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 international organizations on joint initiatives	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:
 - Invest in the latest approaches, including data analytics and risk assessments
 - Collaborating with e-commerce suppliers and others, including international partners, 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
 - Quantify the benefits of effective actions to combat illicit trade, to secure support

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