



Product Spotlight: Medicines

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CONSUMER MOTIVATIONS TO BUY FALSIFIED MEDICINES

The trade in falsified medicines is growing in all regions

Country	Estimated illicit trade	Growth
Austria	13.5%	5.5%
Belgium	11.5%	4.7%
France	12.3%	4.2%
Germany	13.9%	6.4%
Ireland	9.3%	-10.8%
Luxembourg	10.9%	-4.1%
Netherlands	13.4%	3.4%
Switzerland	13.5%	8.7%
United Kingdom	12.3%	8.5%
Western Europe	12.3%	2.9%

Country	Estimated illicit trade	Growth
Denmark	14.1%	6.0%
Finland	12.9%	3.2%
Norway	10.9%	-2.6%
Sweden	12.0%	0.8%
Nordics	12.5%	1.9%

Country	Estimated illicit trade	Growth
Bulgaria	10.1%	-3.4%
Croatia	12.6%	4.4%
Czech Republic	13.0%	0.0%
Estonia	9.7%	-1.6%
Latvia	12.2%	3.4%
Lithuania	14.2%	3.9%
Slovakia	10.5%	-5.0%
Slovenia	13.0%	5.6%
Hungary	12.2%	6.8%
Poland	12.7%	8.7%
Romania	10.7%	2.9%
Central/Eastern Europe	11.9%	2.3%

Country	Estimated illicit trade	Growth
Average all countries	12.5%	3.1%

Below all countries' average  Above all countries' average

Country	Estimated illicit trade	Growth
Azerbaijan	11.9%	6.3%
Belarus	14.8%	4.0%
Kazakhstan	12.6%	4.7%
Russia	13.4%	0.6%
Serbia	11.9%	4.6%
Turkey	13.9%	6.5%
Ukraine	16.1%	8.3%
Eastern borders (non EU)	13.5%	5.0%

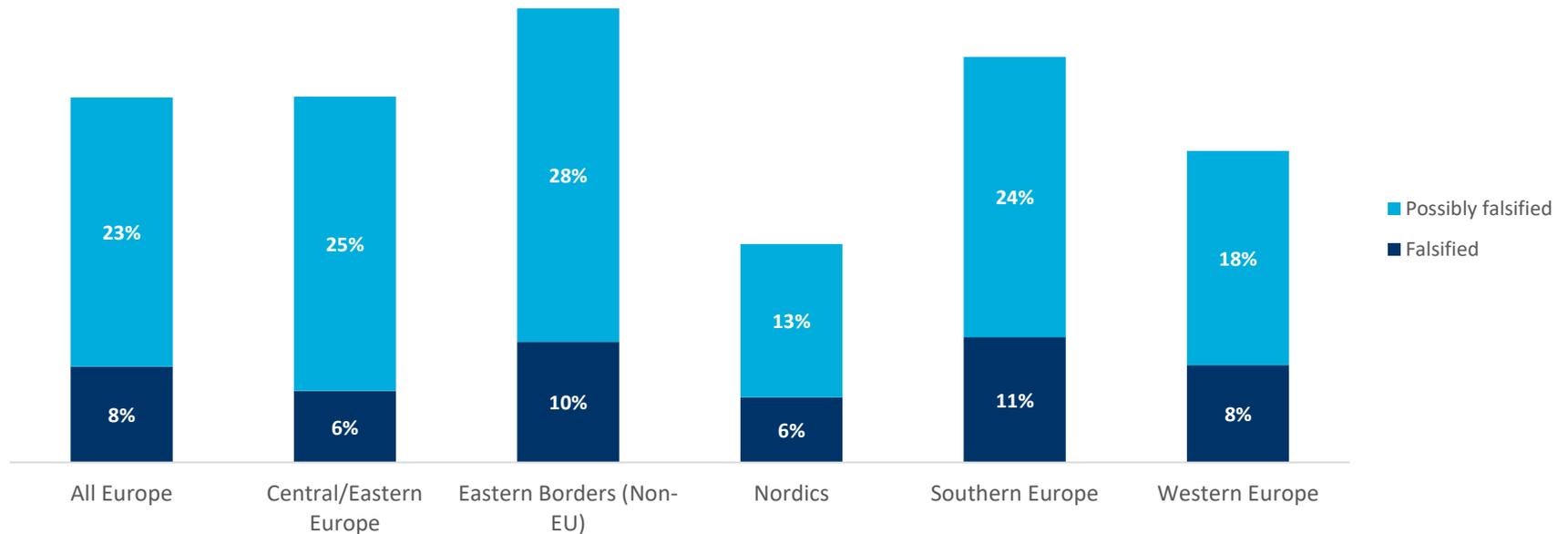
Country	Estimated illicit trade	Growth
Cyprus	12.1%	1.1%
Greece	14.1%	8.0%
Italy	13.3%	6.8%
Malta	9.8%	-3.7%
Portugal	13.4%	2.7%
Spain	12.1%	7.0%
Southern Europe	12.5%	3.7%

Source: Oxford Economics stakeholder survey, n=2,329

- The heatmap across 39 European countries highlights high levels of falsified medicines across Europe according to our respondents, from 9% in Ireland to 16% in Ukraine, but variety in growth over the last three years (e.g., decrease of 11% in Ireland vs. increases in Poland, Switzerland and the UK of 9%).
- Growth in falsified medicines reported over last three years in all European regions, despite some country exceptions.

Consumers indicate large amount of “possibly falsified” trade

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

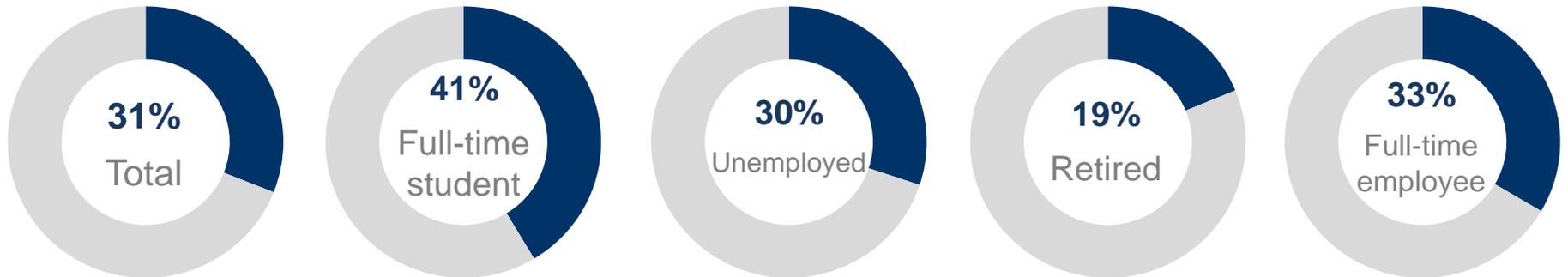


Source: Oxford Economics consumer survey, n=22,448

- Consumers’ estimates of falsified purchases highlight extent of “possibly falsified” purchases, where they lack confidence that they are buying legitimate medicines.
- Across Europe almost a quarter (23%) of purchases are possibly falsified, almost three times estimated falsified purchases of 8%.
- For this presentation, to understand consumer motivations for buying falsified medicines, we use this larger population, including possibly falsified.

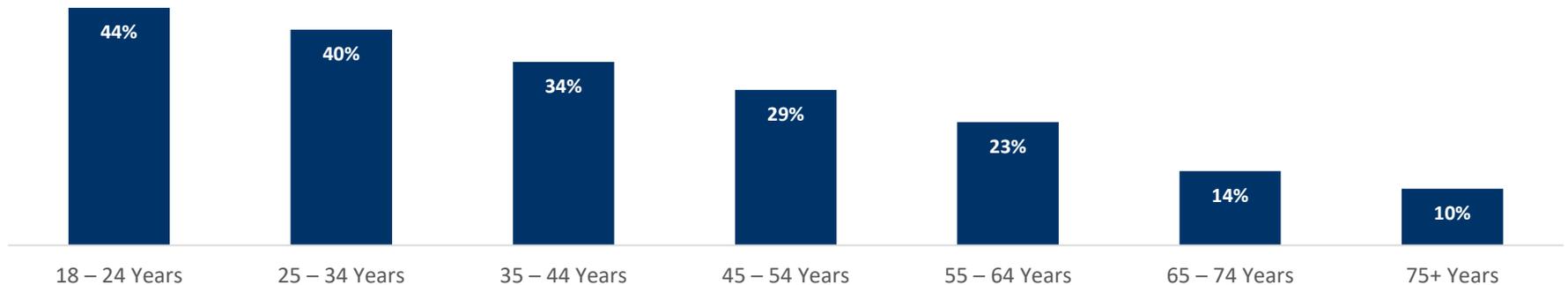
The young are more likely to buy falsified medicines

Percentage of falsified purchases by working role



Source: Oxford Economics consumer survey, n=22,448; Full-time student n=1,258; Unemployed n=2,026; Retired n=3,444; Full-time employee n=11,706

Percentage of falsified purchases by consumer age

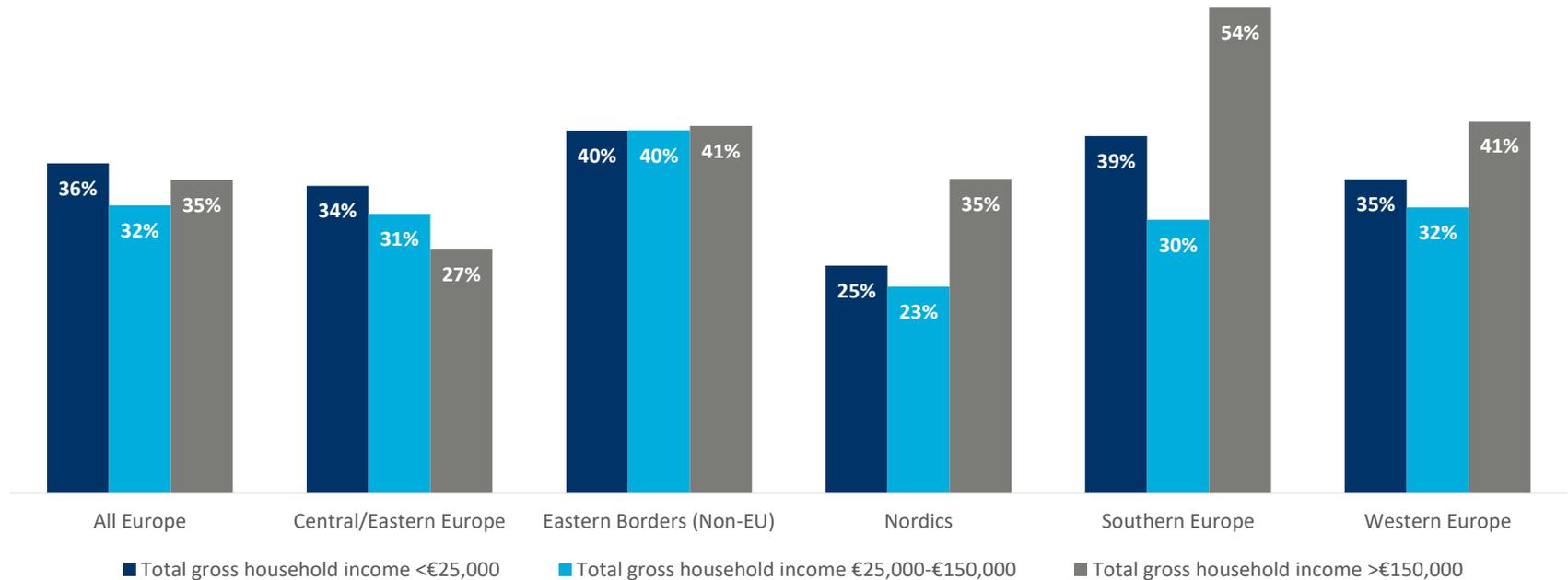


Source: Oxford Economics consumer survey, n=22,448; 18-24 n=1,728; 25-34 n=4,680; 35-44 n=5,372; 45-54 n=4,890; 55-64 n=3,946; 65-74 n=1,573; 75+ n=259

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

Falsified medicines are not only bought by the poor

In general, how likely do you think that some of the medicines you have purchased could have been falsified?
Consumers



Source: Oxford Economics consumer survey, n=22,448 ; Total gross household income <€25,000 n=5,447; Total gross household income €25,000-€150,000 n=6,798; Total gross household income >€150,000 n=841

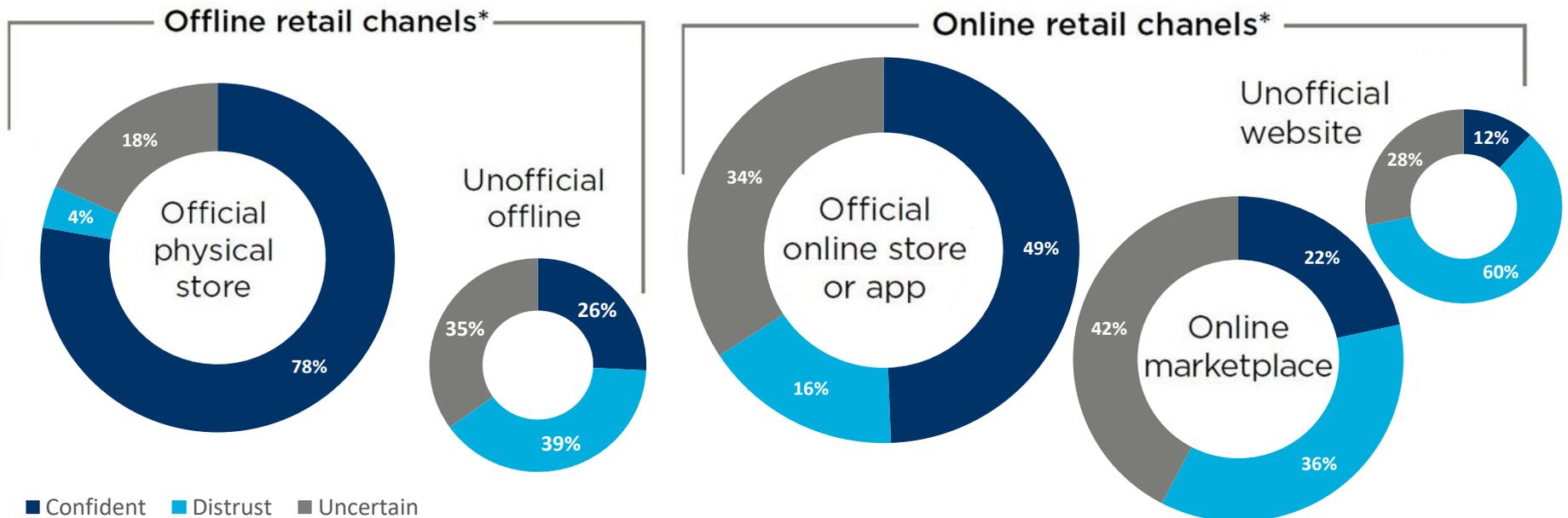
- The wealthy, earning > €150,000, are more likely to buy falsified medicines than all other income groups in all regions except for Central/Eastern Europe.
- Possible explanations include higher use of e-commerce and scepticism of official distribution channels.



WHY DO CONSUMERS BUY FALSIFIED MEDICINES?

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



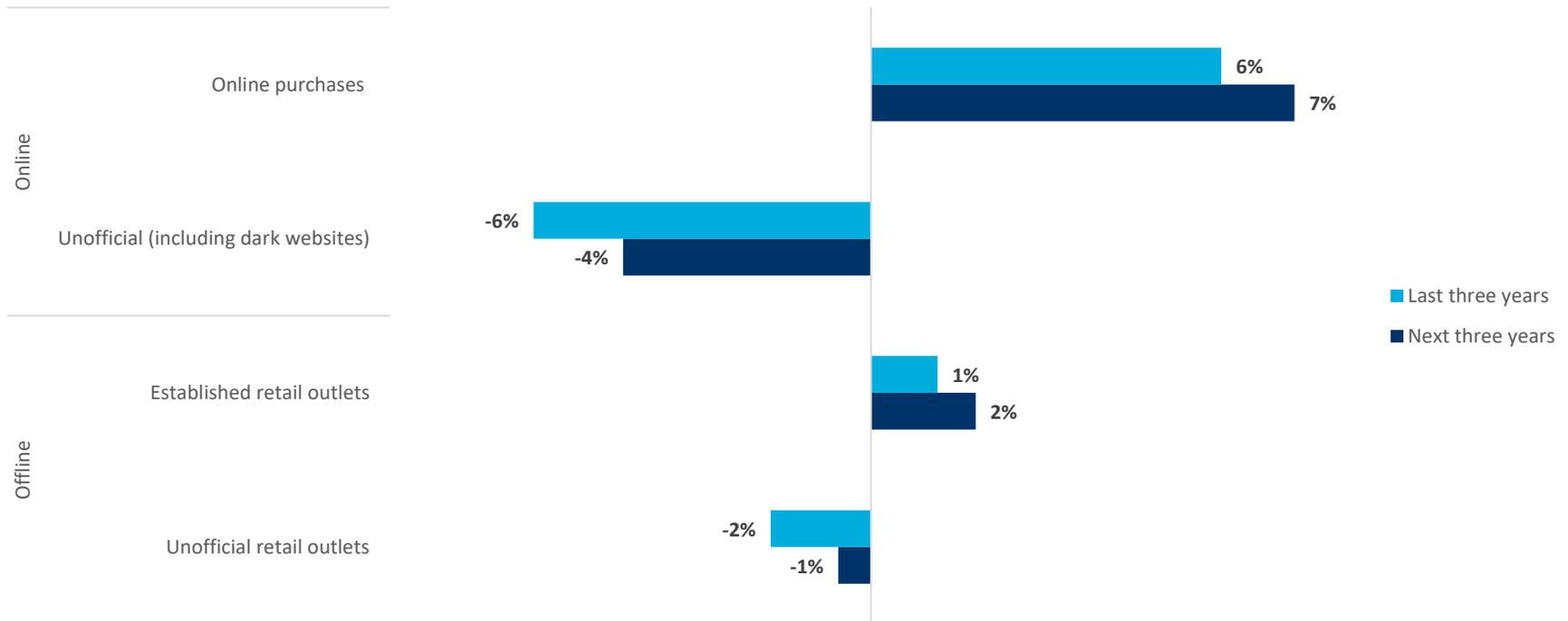
Source: Oxford Economics consumer survey; Official physical store n=22,337; Unofficial offline n=43,521; Official online store or app n=21,990; Online marketplace n=21,767; Unofficial website n=21,605

- 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 22% 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

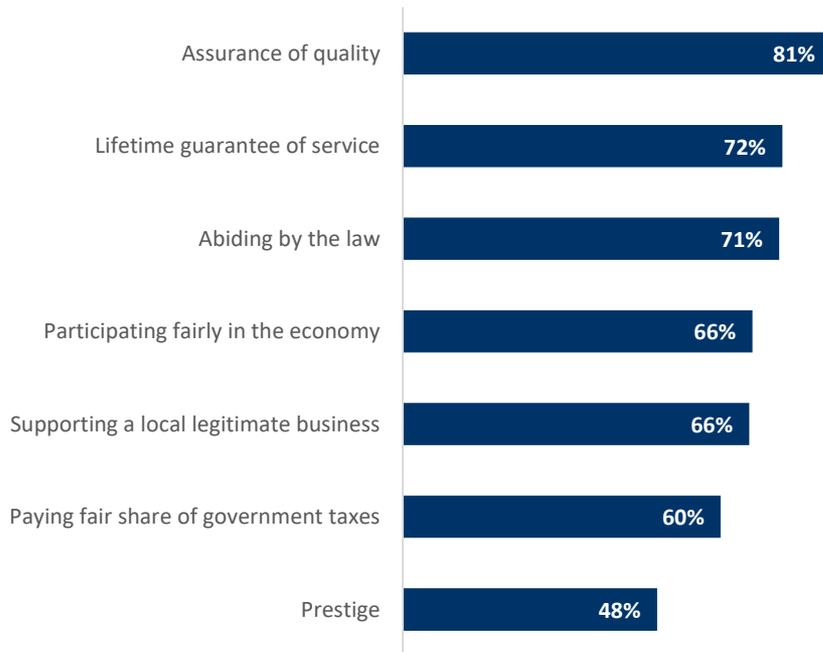


Source: Oxford Economics consumer survey, n=22,448

- 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 5% less falsified medicines over the next three years.

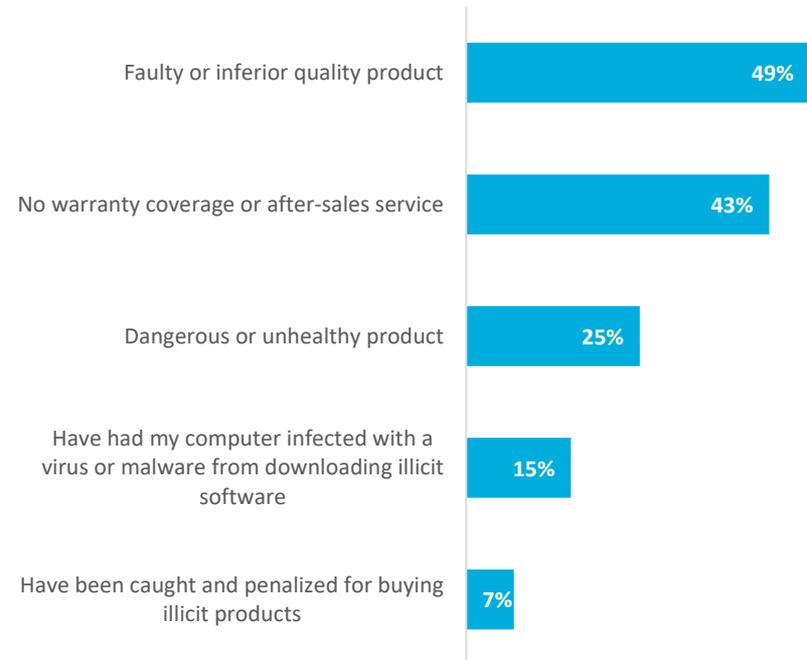
Consumers prefer official channels for many reasons

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=21,335

Have you ever experienced any of the following as a result of buying potentially falsified medicines
Consumers

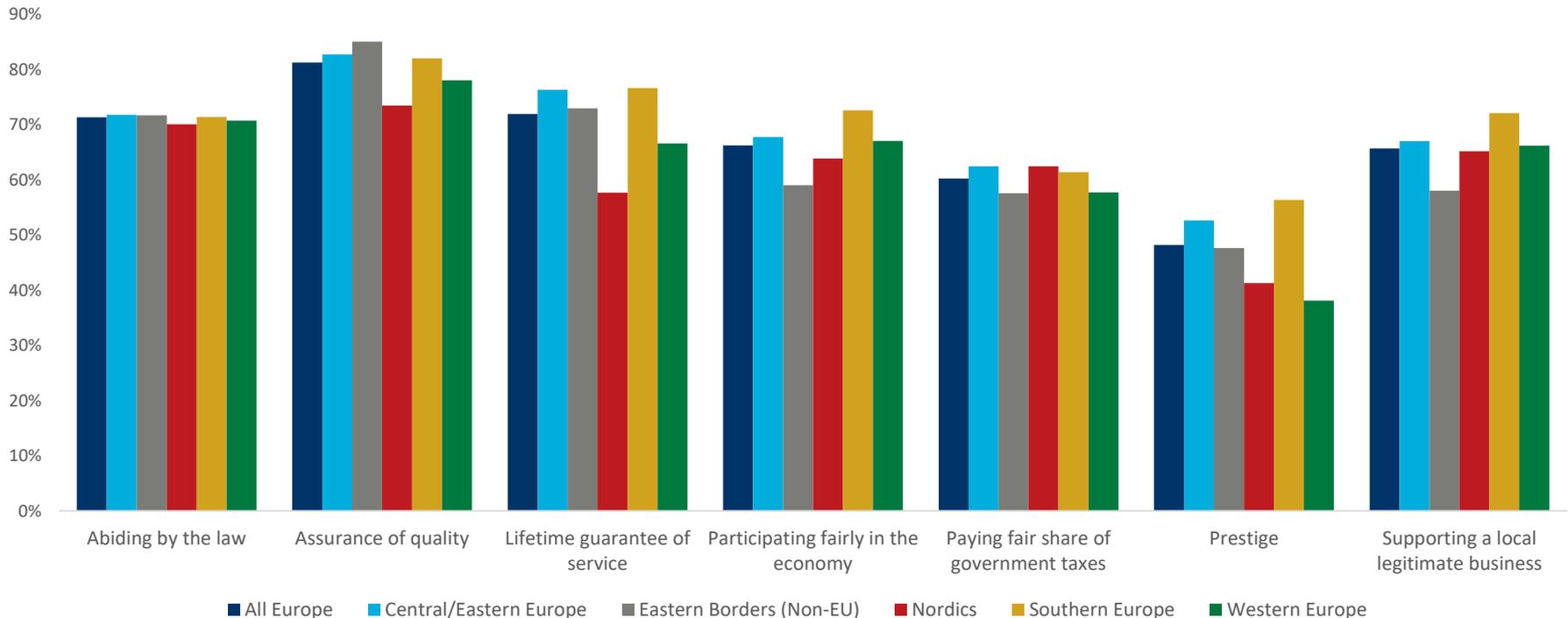


Source: Oxford Economics consumer survey, falsified responses, n=6,898

- Assurance of quality, with less risk of a dangerous or unhealthy product and better service, are the leading reasons given for preferring legitimate medicines (and avoiding falsified 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=21,335; Central/Easter Europe n=6,645; Eastern Borders n=4,518; Nordics n=1,983; Southern Europe n=3,805; Western Europe n=4,384

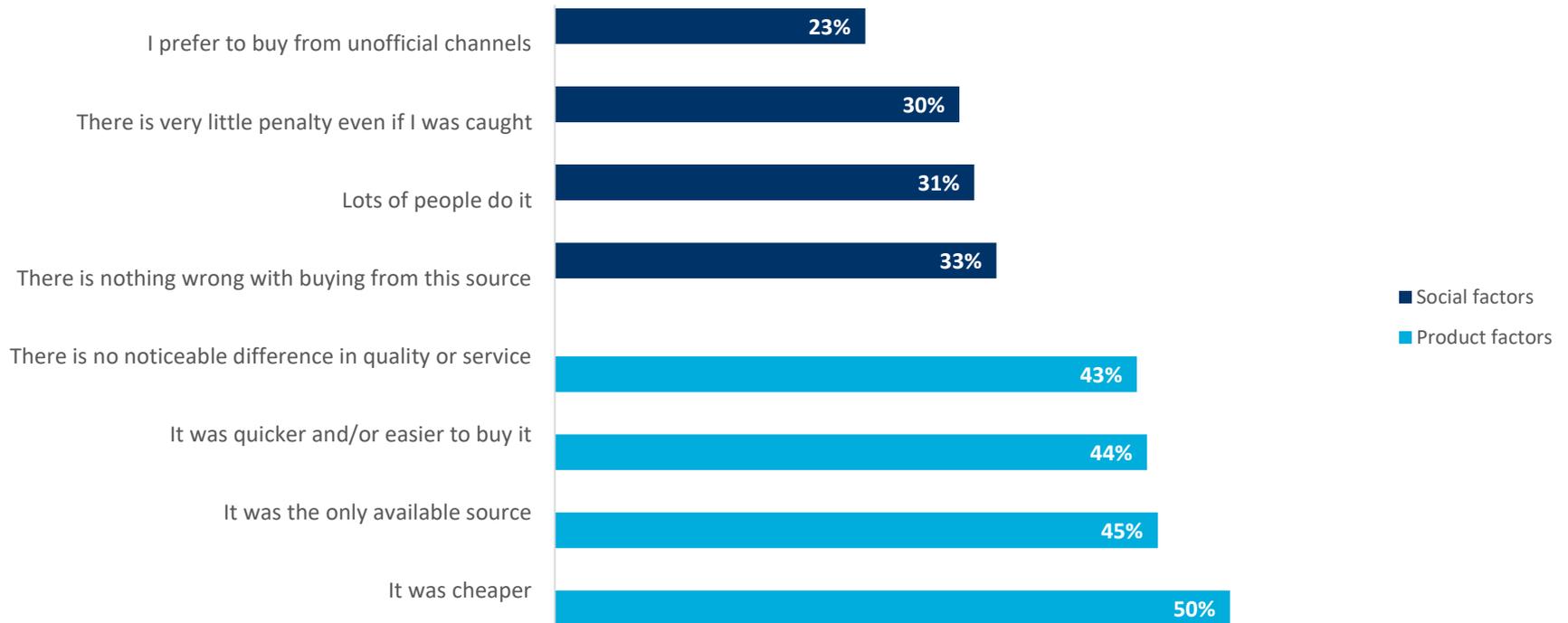
- There appears to be consistency across European regions in social attitudes towards legitimate trade, e.g., regarding the importance of abiding by the law and paying taxes.
- There is greater regional variety to more product-centric reasons for preferring legitimate goods, 12 e.g., higher scores in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

Product and social reasons also drive falsified purchases

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

“Very important” and “Important” responses

Consumers

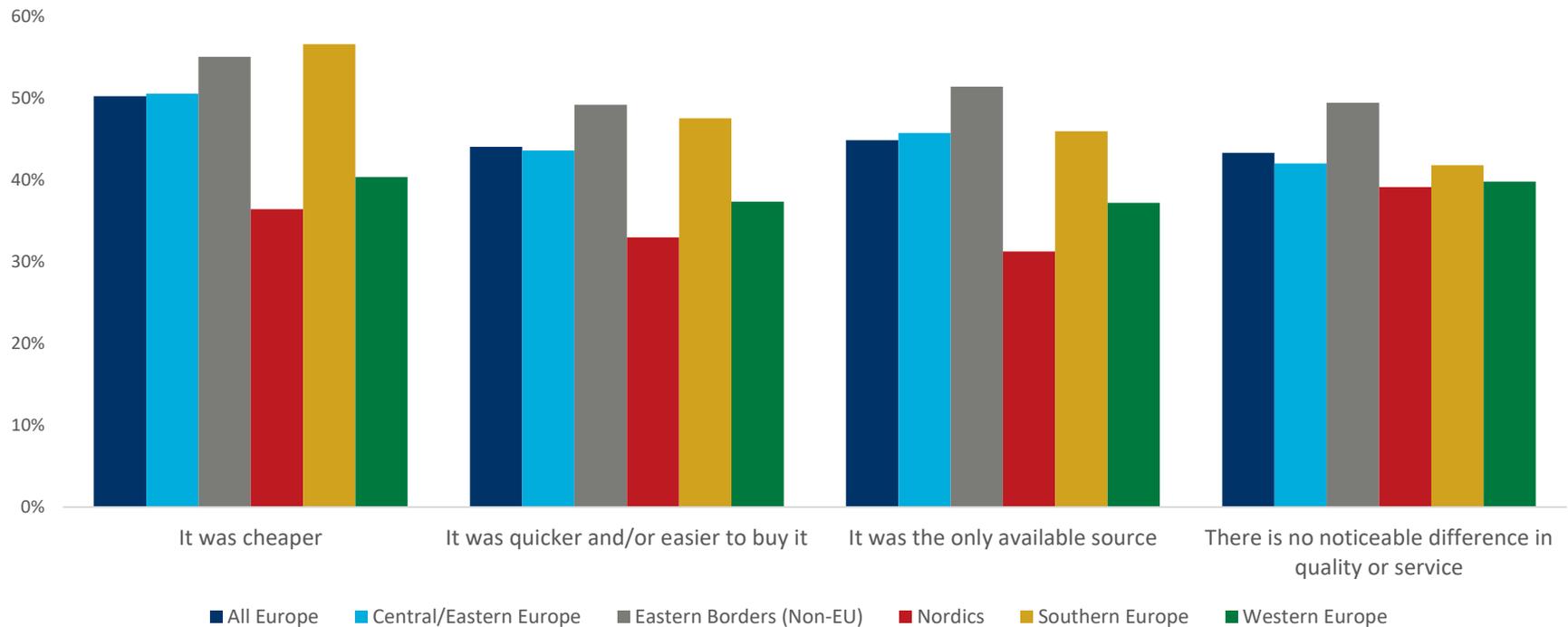


Source: Oxford Economics consumer survey, falsified purchases, n=6,898

- Cost is the most popular reason for buying falsified medicines, 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 falsified 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

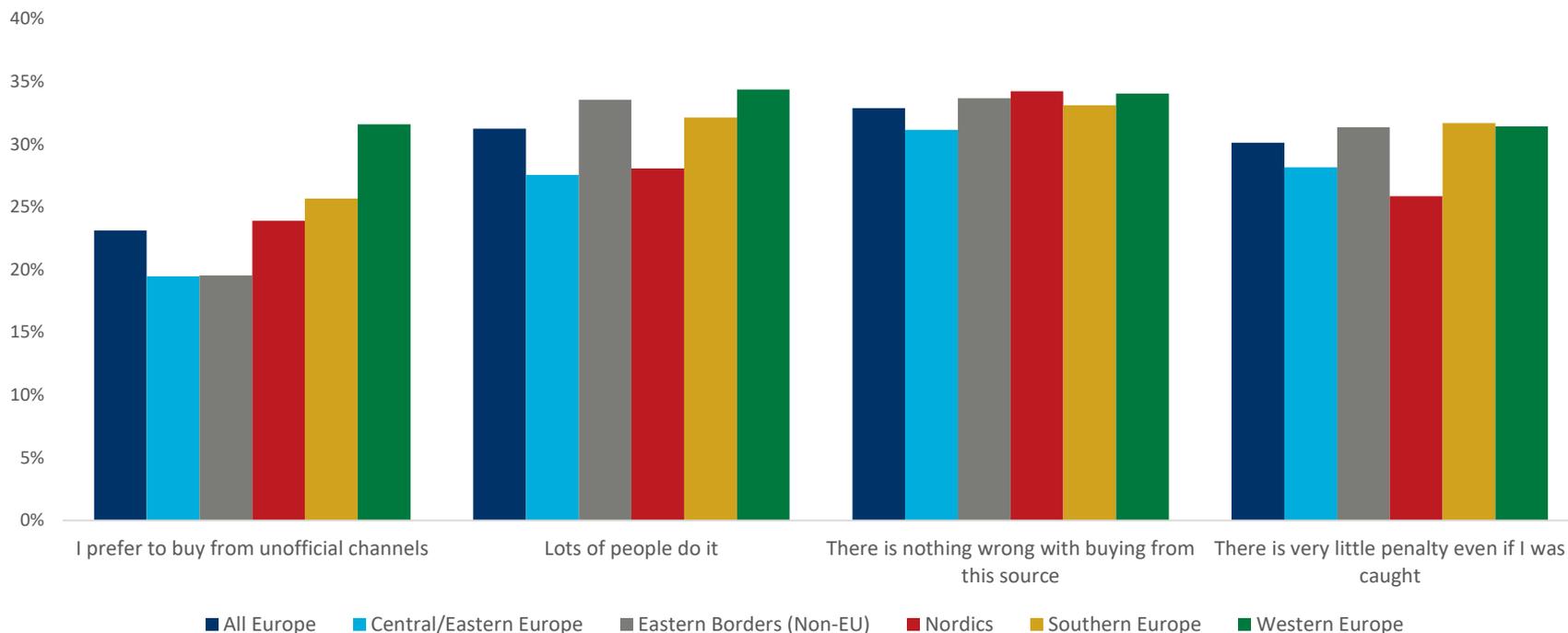


Source: Oxford Economics consumer survey, falsified purchases, n=6,898; Central/Easter Europe n=2,141; Eastern Borders n=1,776; Nordics n=406; Southern Europe n=1,344; Western Europe n=1,231

- There is noticeable variety in regional responses as to why they buy falsified goods, with Nordics rating factors lowest followed by Western Europe.
- Cost is the leading reason overall, though in Nordics, slightly more say there is no noticeable difference in quality. Reasons other than cost are very close behind in all regions except for Southern Europe 14 (with a gap of 9%).

Social motivations for falsified purchases are more consistent

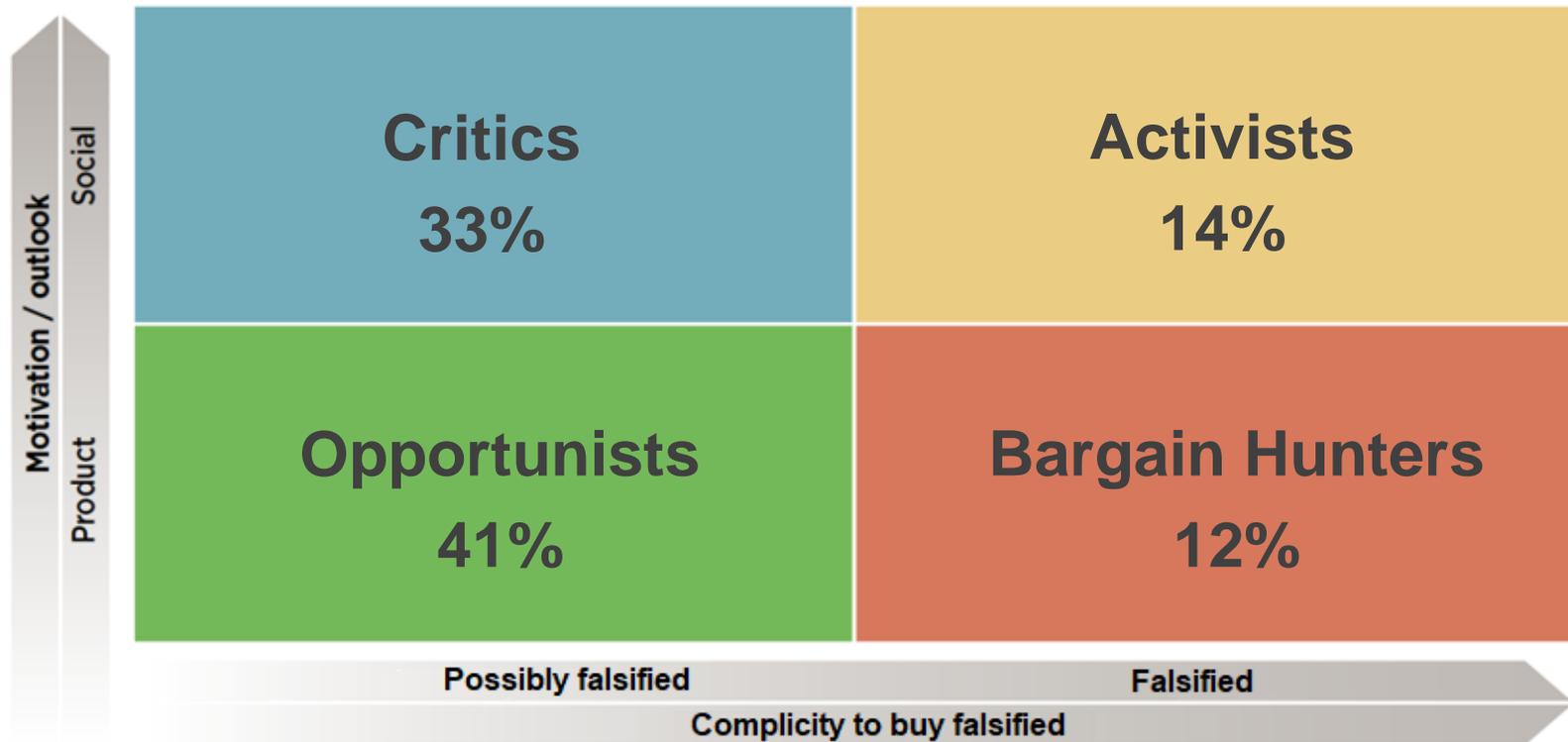
Please rate the importance of each of the following factors in buying from potentially unauthorized sources
“Very important” and “Important” responses
 Consumers



Source: Oxford Economics consumer survey, falsified purchases, n=6,898; Central/Easter Europe n=2,141; Eastern Borders n=1,776; Nordics n=406; Southern Europe n=1,344; Western Europe n=1,231

- Similar to total purchases, there is less regional variety regarding the social reasons for buying medicines 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 falsified purchases



Source: Oxford Economics consumer survey, falsified purchases, n=6,898

- To analyse falsified purchases, we can group them into four segments based on the complicity to buy falsified (i.e. whether it was a possible or probable falsified 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 falsified medicines purchases and how consumer motivations differ by region.



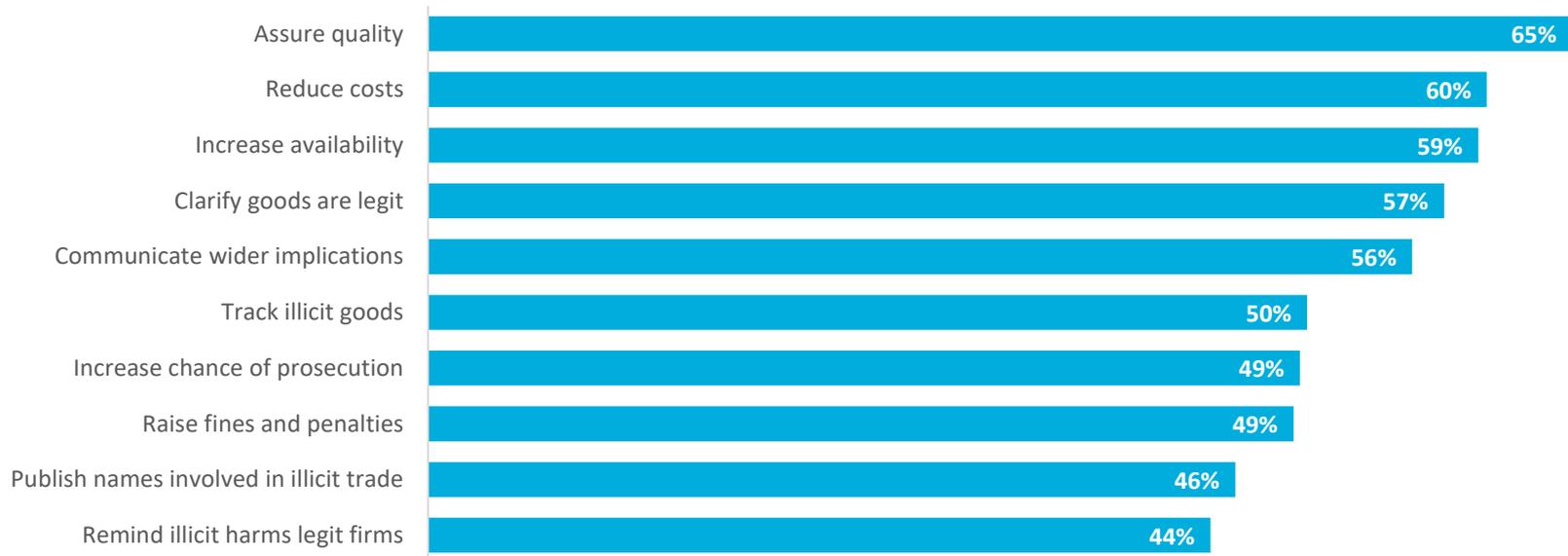
WHICH ACTIONS COULD DETER CONSUMERS?

A combination of initiatives can deter falsified 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

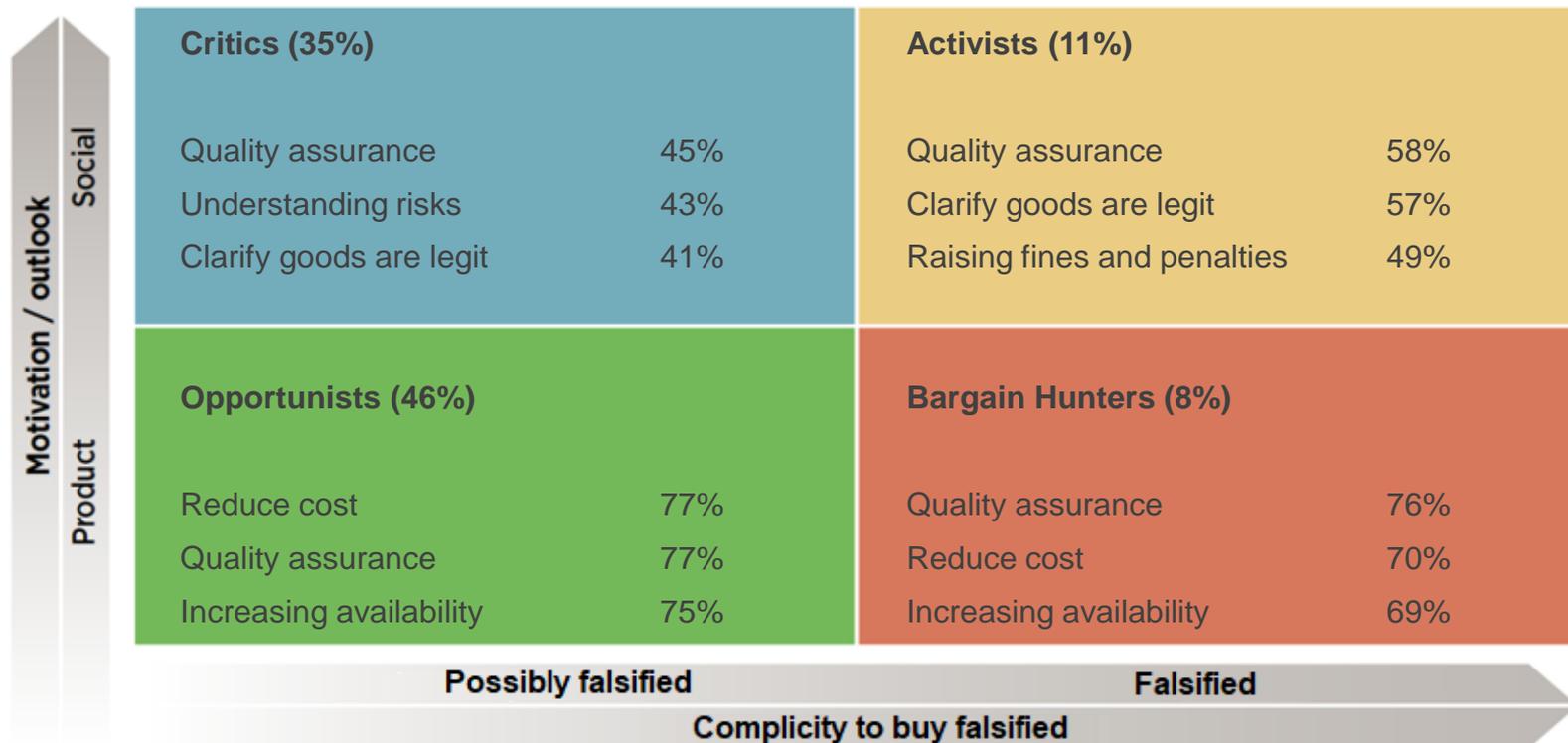
Consumers



Source: Oxford Economics consumer survey, falsified purchases, n=6,898

- The responses confirm the complexity of consumer motivations; that there may be several reasons why a consumer buys falsified medicines 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.

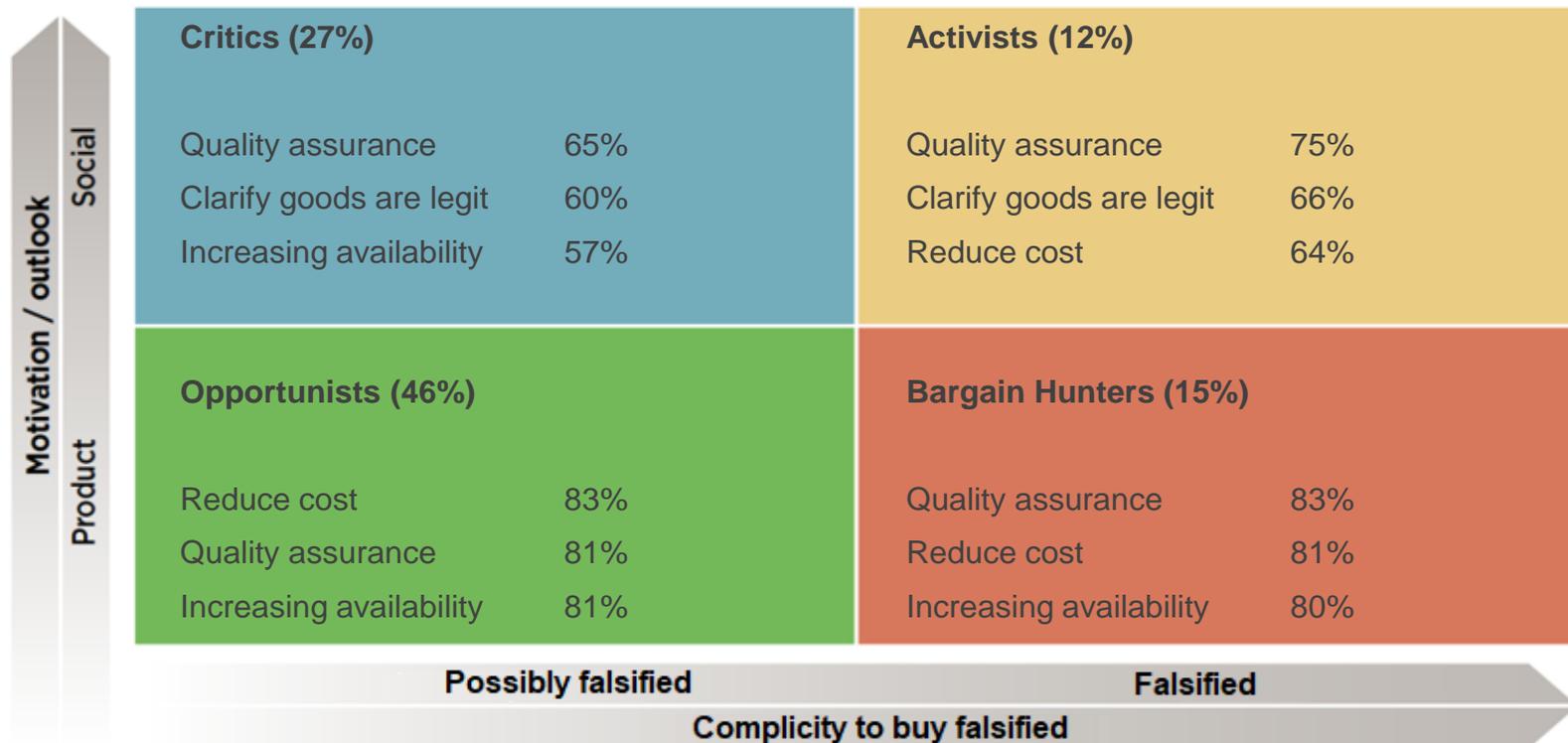
For Central/Eastern Europe, quality assurance is the top strategy for all segments



Source: Oxford Economics consumer survey, falsified purchases, n=2,141

- Reducing cost is the joint most effective strategy for the 46% of Opportunists, but doesn't feature in the top three for the 36% of Critics and 11% of Activists.
- Quality assurance and increasing availability are also important to deter product-focused buyers. For socially focused buyers, explaining risks, product authentication and raising fines could be effective

For Eastern Borders, cost, quality and availability are key



Source: Oxford Economics consumer survey, falsified purchases, n=1,776

- A greater share of falsified purchases in Eastern Borders are product related (61%), where reducing cost, increasing availability and assuring quality would be the most effective deterrents.
- Clarifying medicines are legit, e.g. through improved product authentication, could be effective at 21 deterring the 27% of critics and 12% of activists.

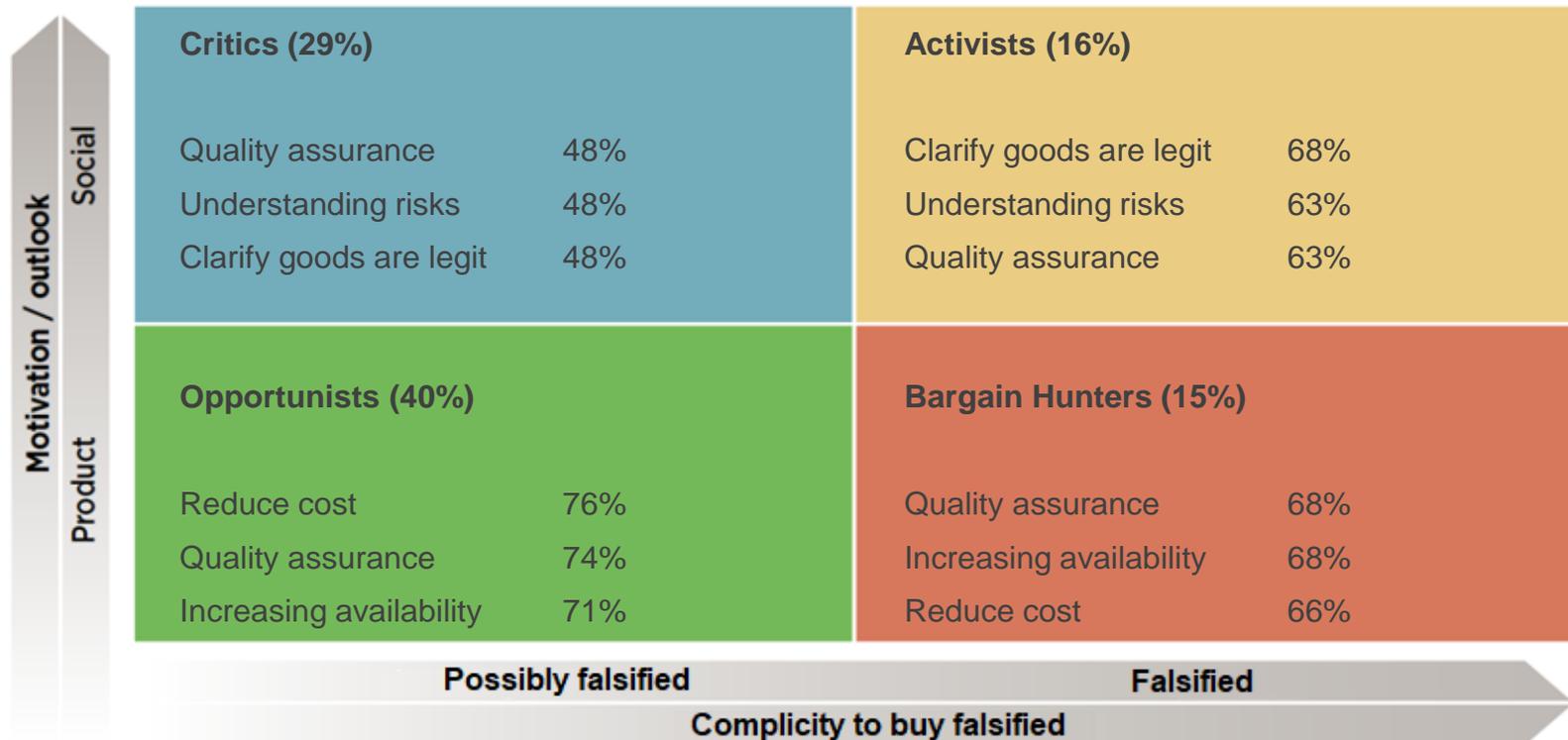
For Nordics, clarifying goods are legit, raising awareness and improved enforcement feature



Source: Oxford Economics consumer survey, falsified purchases, n=406

- Most falsified purchases in Nordics (63%) are for social reasons, where clarifying goods are legit, improved quality assurance, explaining risks and improving tracking of falsified purchases are most effective.
- Reducing cost only features as a top three deterrent for the 26% of opportunists.

For Southern Europe, product and socially focused consumers respond differently



Source: Oxford Economics consumer survey, falsified purchases, n=1,344

- For the 55% of product-focused falsified purchases improving the cost, quality and availability are most effective.
- For the 45% of socially focused falsified purchases, explaining risks, clarifying goods are legit and assuring quality would be most effective.

For Western Europe, improving quality is more effective than reducing cost



Source: Oxford Economics consumer survey, falsified purchases, n=1,231

- Most falsified purchases are for social reasons (61%) where quality assurance is most effective, followed by clarifying goods are legit.
- Awareness programmes could be effective for the 41% of critics and 10% of Bargain Hunters.



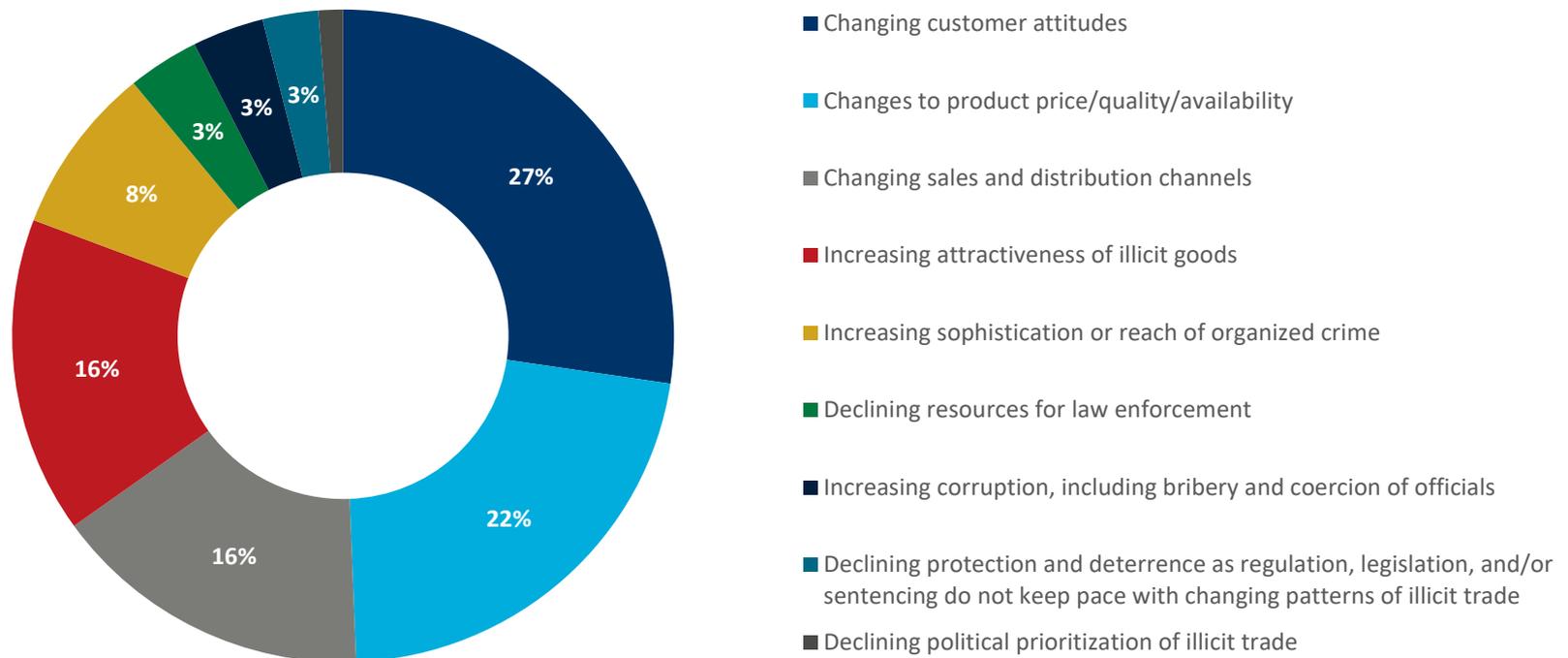
APPROACHES TO COMBATTING FALSIFIED MEDICINES

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

What are the top five reasons for the increase in falsified medicines?

Top-ranked responses

Stakeholders



Source: Oxford Economics stakeholder survey, n=1,430

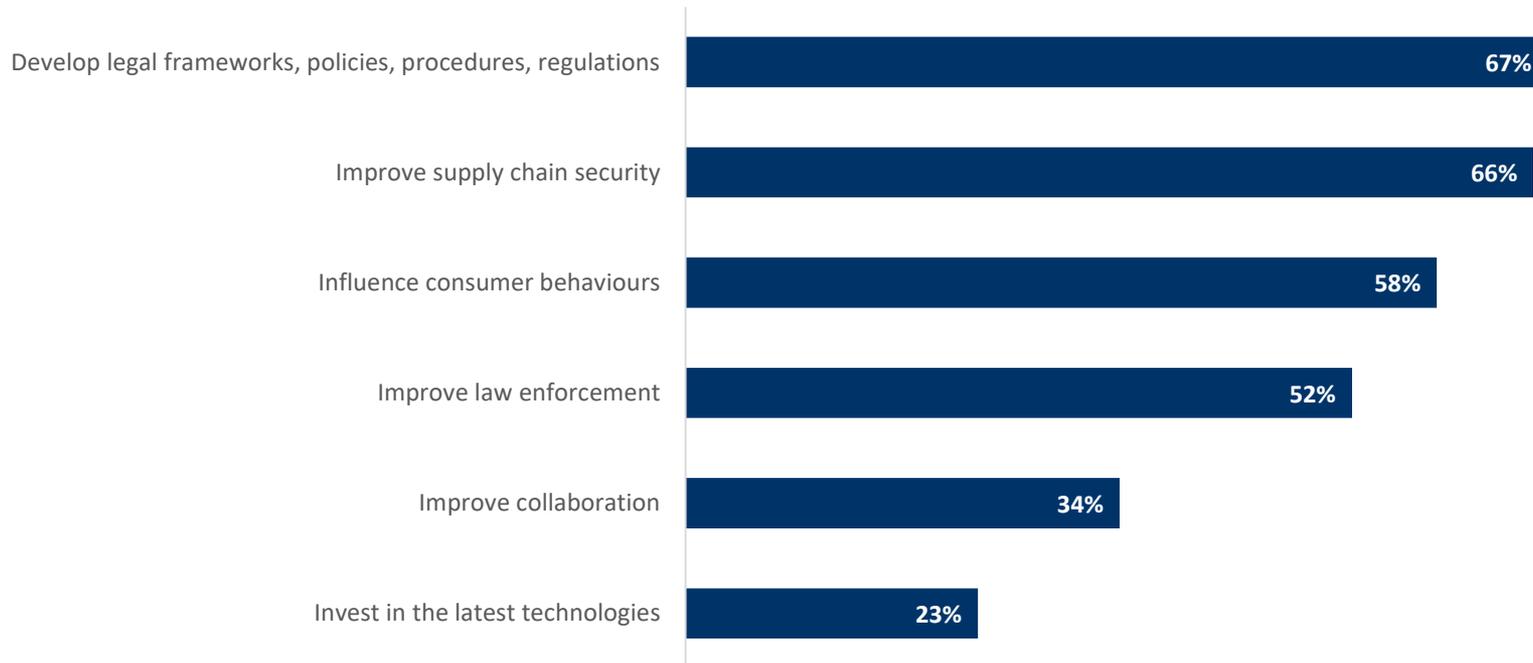
- Businesses, policy officials and law enforcers (stakeholders) recognise the shifting nature of falsified trade, in particular changes in customer attitudes, to products and distribution channels.

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



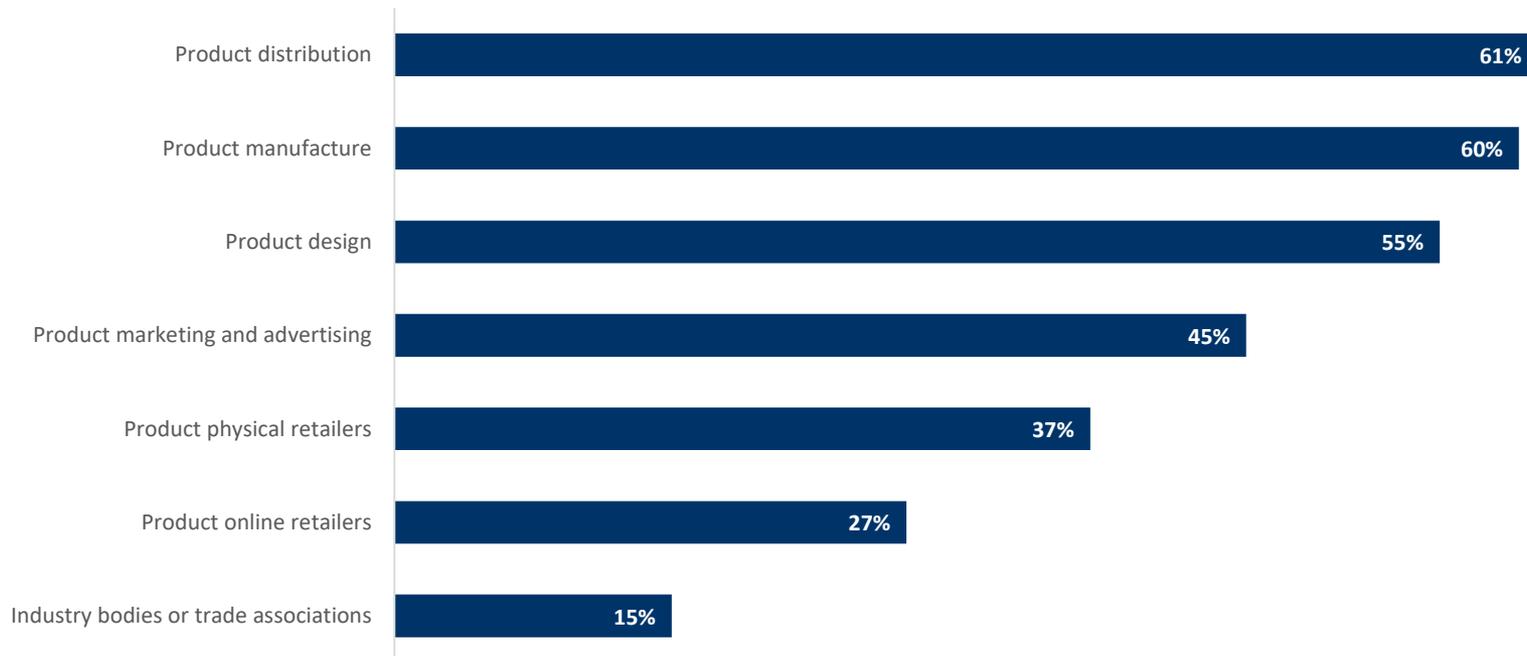
Source: Oxford Economics stakeholder survey, n=2,329

- 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*



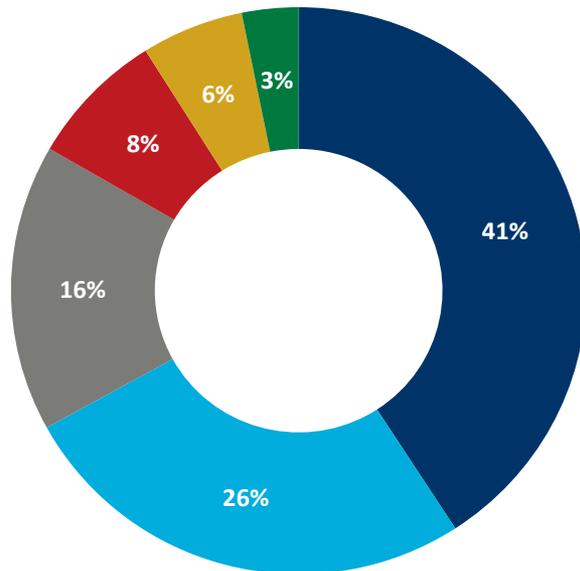
Source: Oxford Economics stakeholder survey, n=2,329

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

There are opportunities for stakeholders to work together to combat falsified medicines

Which actions would be most effective in improving collaboration among different parties involved in combatting falsified medicines?

*Top-ranked responses
Stakeholders*



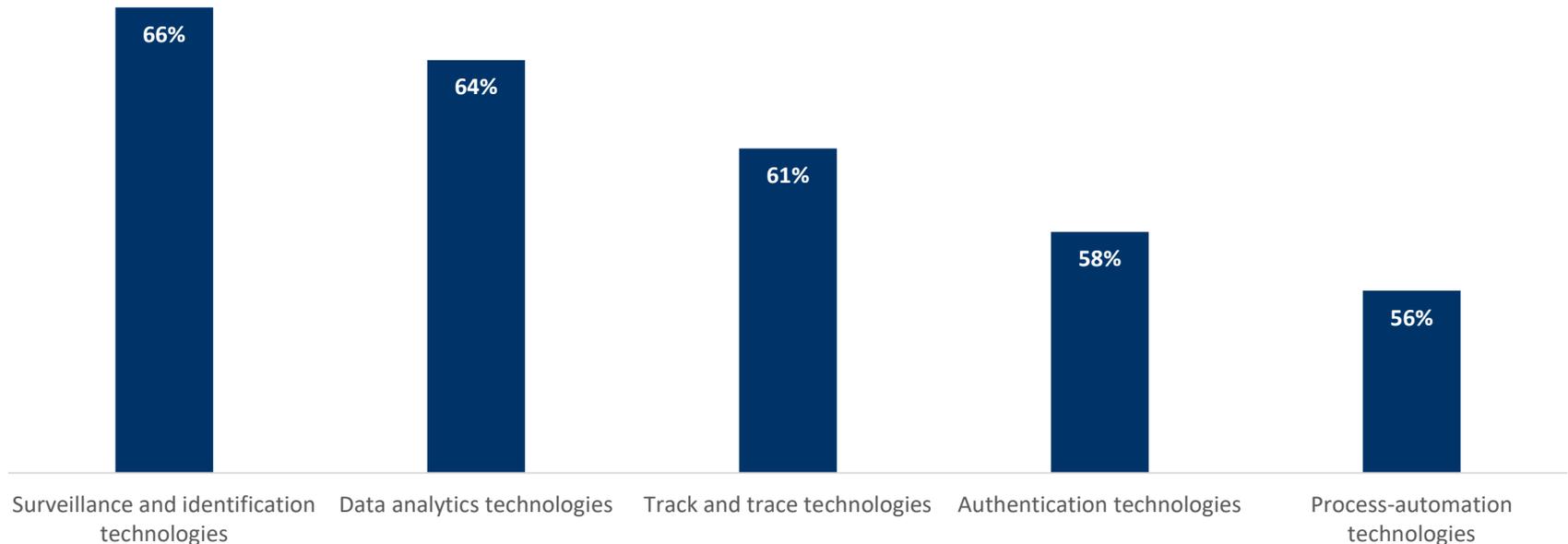
- Sharing data generated by modern trade networks with others to build intelligence on illicit trade patterns
- Sharing information/intelligence across national and regional enforcement agencies
- Sharing information/intelligence across international enforcement agencies
- Coordinating policies between 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=2,329

- Those working to combat trade in falsified medicines 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 falsified medicines?
“Extremely effective” and “Effective” responses
 Stakeholders



Source: Oxford Economics stakeholder survey, n=2,329

- 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 falsified medicines...

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

"Strongly agree" and "Agree" responses
Stakeholders



Source: Oxford Economics stakeholder survey, n=2,329

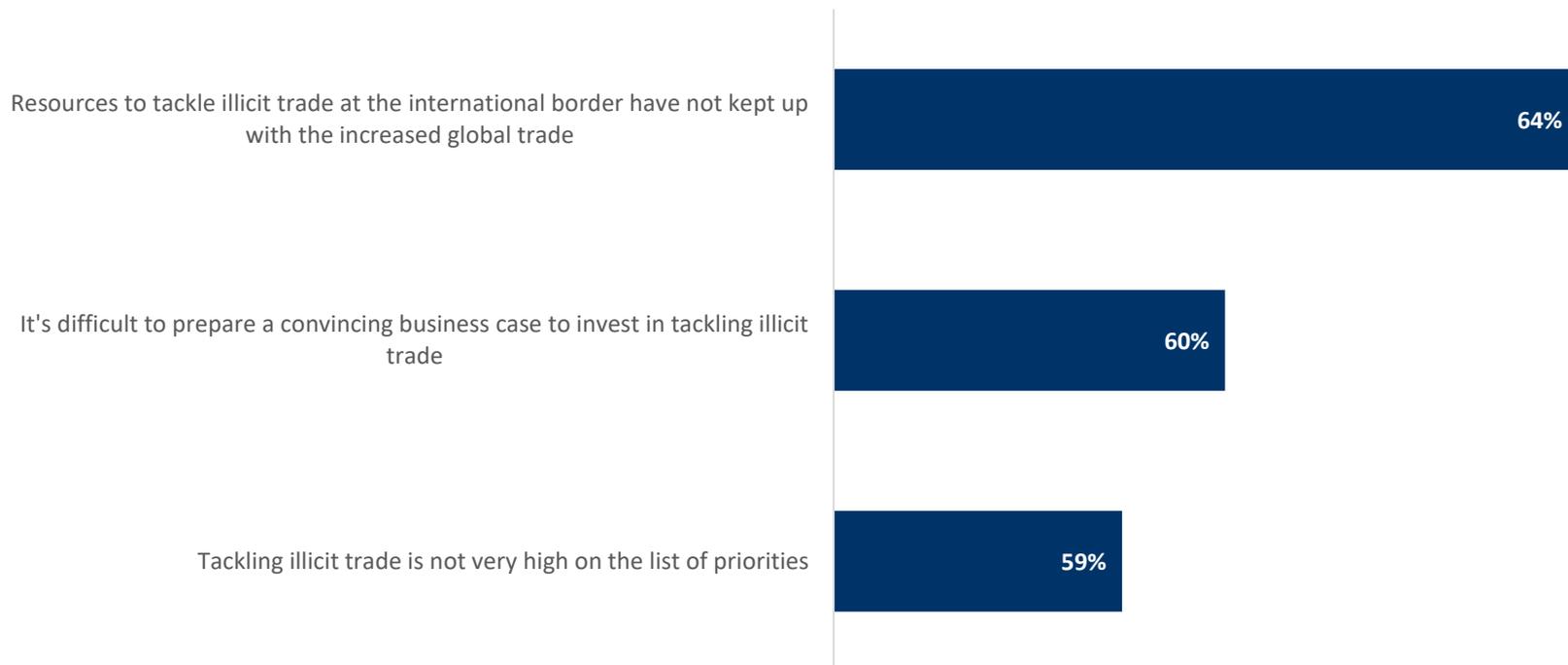
- Stakeholders highlight difficulties ensuring compliance with systems, policies and procedures (for 61%). Only a small majority say they have access to good data and intelligence to understand illicit trade (58%) and have effective practices in place (60%).

...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 falsified medicines in your country?

"Strongly agree" and "Agree" responses

Stakeholders



Source: Oxford Economics stakeholder survey, n=2,329

- Stakeholders feel that the resources dedicated to fighting falsified 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.

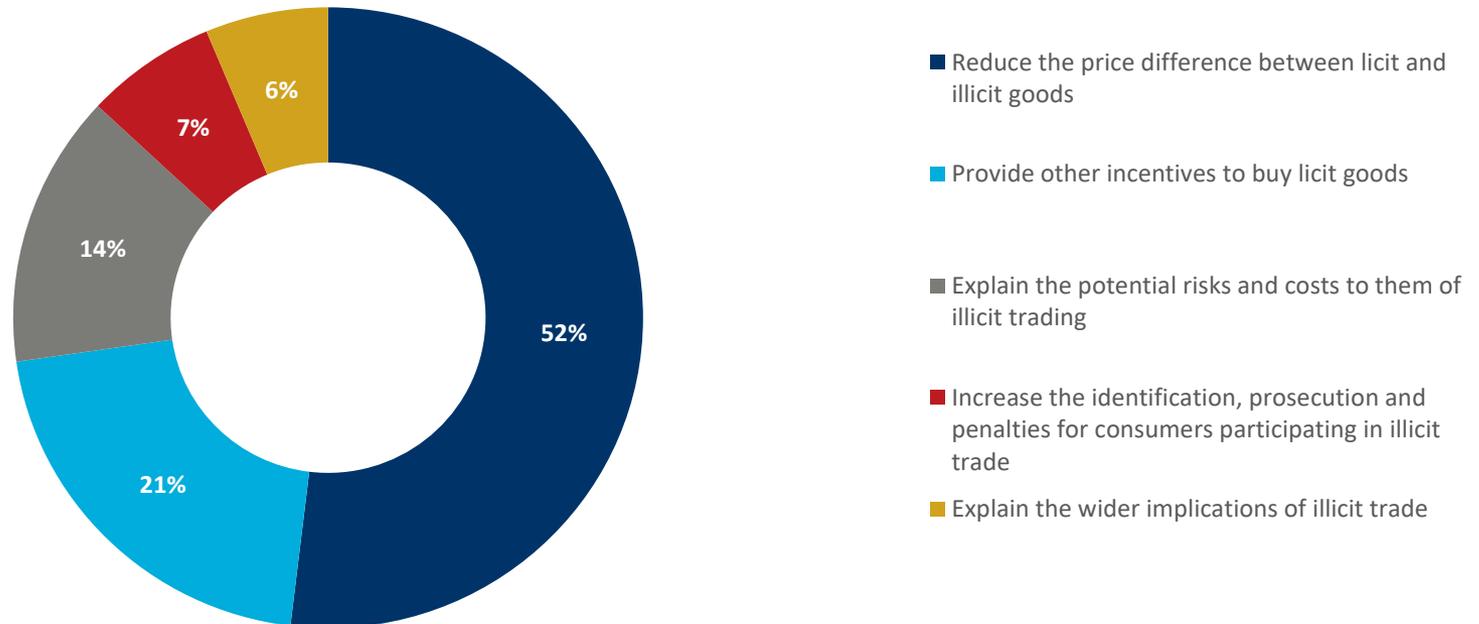


**THE STRATEGY GAP: CONSUMERS VS.
STAKEHOLDERS**

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=2,329

- The majority of stakeholders (52%) say reducing cost is the most effective action for reducing illicit trade, far ahead of other actions, with 21% prioritising providing other incentives to buy legitimate goods (e.g., improved quality or service) and a similar number education into the risks and implications of illicit trade. Only 7% 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

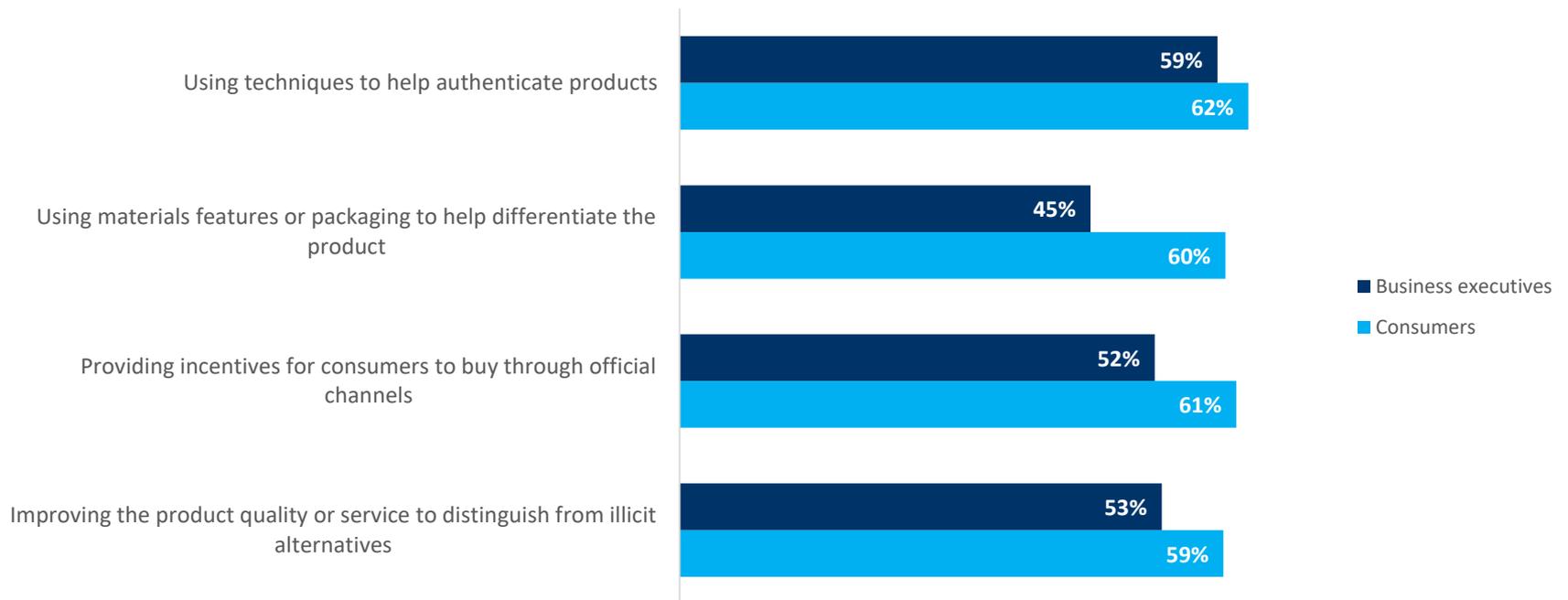


Source: Oxford Economics consumer survey, n=22,448

- According to consumers, reducing price is a mid-ranking action to tackle falsified medicines. 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 falsified medicines

For each of the initiatives implemented please rate its effectiveness at reducing trade in falsified medicines?
“Very effective” and “Effective” responses
Business executives and consumers



Source: Oxford Economics stakeholder survey, business executives, n=1,344

Source: Oxford Economics consumer survey, n=22,448

- Businesses show a lack of enthusiasm in initiatives to combat trade in falsified medicines, 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*

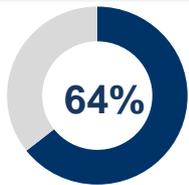


Source: Oxford Economics stakeholder survey, n=2,329

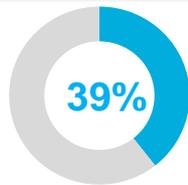
Source: Oxford Economics consumer survey, n=22,448

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

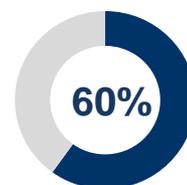
Stakeholders underestimate consumer awareness of the social impact of the trade in falsified medicines



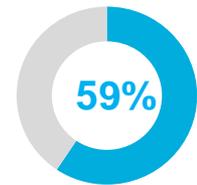
Consumers underestimate the personal risks of engaging in illicit trade



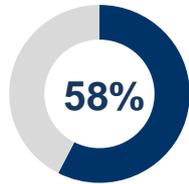
I'm not aware of the health risks of buying illicit goods



Consumers are unaware of the penalties for illicit trading



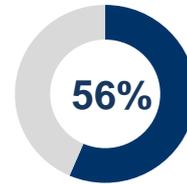
I'm not aware of the potential penalties for buying counterfeit products



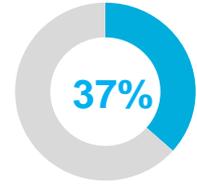
Consumers are unaware that buying illicit goods funds criminals and terrorists



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=2,329

Source: Oxford Economics consumer survey, n=22,448

■ Stakeholders ■ Consumers

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



ACTIONS TO COMBAT FALSIFIED MEDICINES

Actions to combat falsified medicines

- 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 prioritise authentication, intelligence gathering 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	Improve tracking monitoring and reporting through the supply chain	Improve tracking monitoring and reporting through the supply chain	Collect intelligence about illicit trade patterns
3	Use advertising and promotion to make official products and channels more attractive	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	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
5	Change manufacture or packaging	Collect intelligence about illicit trade patterns	Change the price quality or service
6	Collect intelligence about consumer attitudes	Share information with others to improve understanding of illicit trade	Share information with others to improve understanding of illicit trade
7	Change the price quality or service	Collect intelligence about consumer attitudes	Change manufacture or packaging
8	Share information with others to improve understanding of illicit trade	Change the price quality or service	Collect intelligence about consumer attitudes
9	Collaborate with retailers law enforcement or others to combat illicit trade	Use advertising and promotion to make official products and channels more attractive	Improve tracking monitoring and reporting through the supply chain
10	Launch a campaign to educate and discourage consumers from illicit trade	Launch a campaign to educate and discourage consumers from illicit trade	Implement supply-chain contractual controls
11	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology	Change manufacture or packaging	Use advertising and promotion to make official products and channels more attractive
12	Collect intelligence about illicit trade patterns	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 falsified medicines

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	Update legislation and/or legal frameworks	Use promotional or awareness campaigns to influence citizens' attitudes
4	Coordinate policy with other departments	Use promotional or awareness campaigns to influence citizens' attitudes	Provide businesses with guidance and/or discussion forums
5	Change penalties for businesses	Change penalties for retailers	Coordinate policy with other departments
6	Change penalties for consumers	Collaborate with international organizations	Change penalties for consumers
7	Use promotional or awareness campaigns to influence citizens' attitudes	Research and collect information to understand patterns of illicit trade	Update legislation and/or legal frameworks
8	Provide businesses with guidance and/or discussion forums	Change penalties for criminal networks	Change penalties for businesses
9	Change penalties for criminal networks	Coordinate policy with other departments	Research and collect information to understand patterns of illicit trade
10	Change penalties for retailers	Provide businesses with guidance and/or discussion forums	Collaborate with international organizations

	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 collaborate and keep up with latest trends

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