



Product Spotlight: Tobacco

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CONSUMER MOTIVATIONS TO BUY ILLICIT TOBACCO

The trade in illicit tobacco is growing in most regions

Country	Estimated illicit trade	Growth
Austria	12.5%	2.5%
Belgium	11.9%	1.1%
France	12.3%	1.6%
Germany	12.9%	3.9%
Ireland	9.1%	-8.7%
Luxembourg	10.0%	-7.6%
Netherlands	11.6%	-0.5%
Switzerland	12.2%	1.8%
United Kingdom	12.9%	2.4%
Western Europe	11.7%	-0.4%

Country	Estimated illicit trade	Growth
Denmark	13.8%	0.3%
Finland	13.9%	1.7%
Norway	11.9%	3.6%
Sweden	12.3%	-1.4%
Nordics	13.0%	1.1%

Country	Estimated illicit trade	Growth
Bulgaria	10.5%	-2.0%
Croatia	13.2%	3.1%
Czech Republic	12.8%	-0.6%
Estonia	11.3%	-3.2%
Latvia	11.9%	1.4%
Lithuania	12.3%	-1.9%
Slovakia	12.7%	2.8%
Slovenia	10.9%	-2.5%
Hungary	14.9%	10.1%
Poland	13.0%	2.1%
Romania	13.7%	2.6%
Central/Eastern Europe	12.5%	1.1%

Country	Estimated illicit trade	Growth
Average all countries	12.7%	1.4%

Country	Estimated illicit trade	Growth
Azerbaijan	14.9%	9.2%
Belarus	14.2%	3.6%
Kazakhstan	14.8%	2.6%
Russia	14.0%	-1.9%
Serbia	12.7%	4.1%
Turkey	14.3%	6.6%
Ukraine	16.4%	9.0%
Eastern borders (non EU)	14.5%	4.7%

Country	Estimated illicit trade	Growth
Cyprus	11.4%	1.5%
Greece	13.1%	0.2%
Italy	12.9%	2.7%
Malta	9.9%	-6.2%
Portugal	13.7%	4.1%
Spain	13.3%	4.7%
Southern Europe	12.4%	1.2%



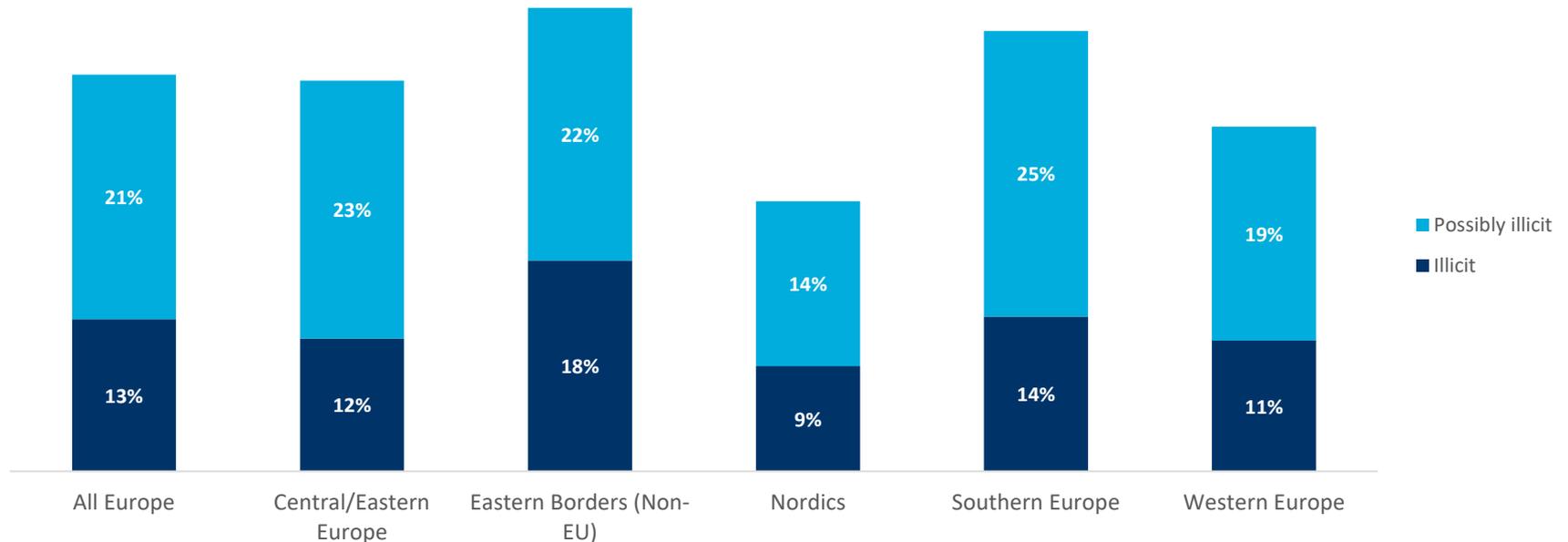
Source: Oxford Economics stakeholder survey, n=3,813

- The heatmap across 39 European countries highlights high levels of illicit tobacco 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 9% in Ireland vs. increases in Hungary of 10%).
- Growth in illicit tobacco trade in Europe reported over last three years of 1.4%, with regions ranging from a 0.4% decrease in Western Europe to a 4.7% increase in Eastern borders.

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

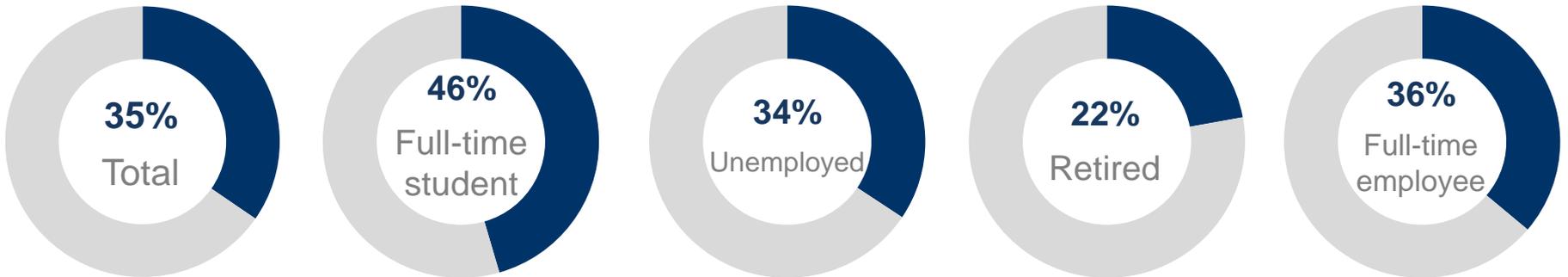


Source: Oxford Economics consumer survey, n=12,998

- Consumers’ estimates of illicit purchases highlight extent of “possibly illicit” purchases, where they lack confidence that they are buying legitimate cigarettes and tobacco (referred to throughout as tobacco).
- Across Europe over a fifth (21%) of purchases are possibly illicit, much higher than estimated illicit purchases of 13%.
- For this presentation, to understand consumers motivations for buying illicit tobacco, we use this larger population, including possibly illicit.

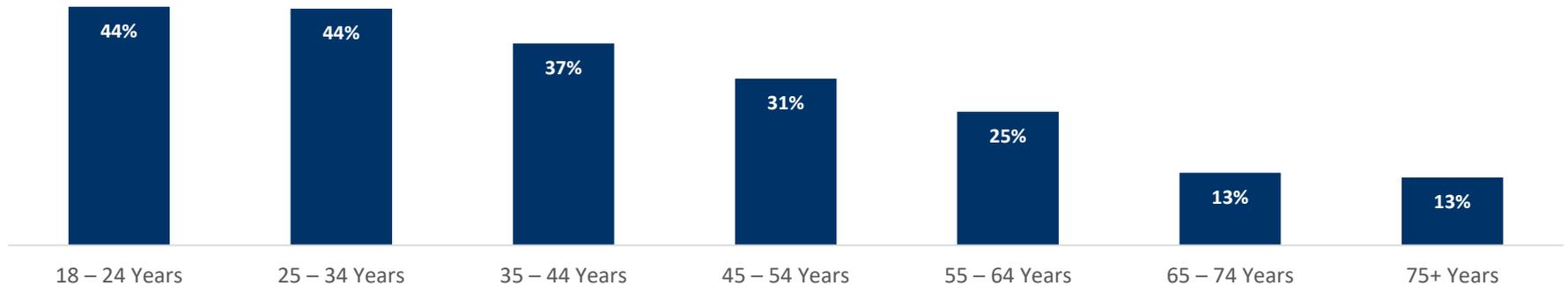
The young are more likely to buy illicit tobacco

Percentage of illicit purchases by working role



Source: Oxford Economics consumer survey, n=12,998; Full-time student n=701; Unemployed n=1,339; Retired n=1,410; Full-time employee n=7,290

Percentage of total illicit purchases by consumer age

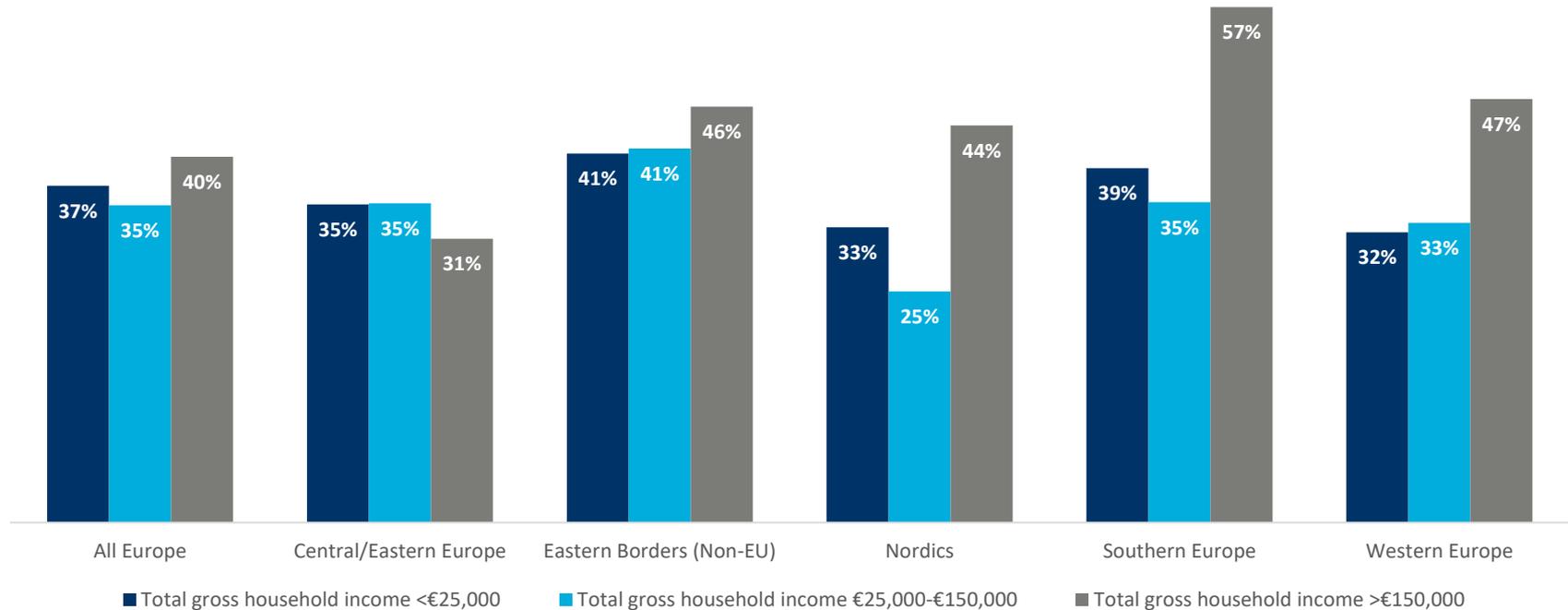


Source: Oxford Economics consumer survey, n=12,998; 18-24 n=1,075; 25-34 n=2,883; 35-44 n=3,398; 45-54 n=3,044; 55-64 n=2,049; 65-74 n=509; 75+ n=40

- The strongest correlation with respondents who regularly buy illicit tobacco (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.

All income groups buy illicit tobacco

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=12,998 ; Total gross household income <€25,000 n=3,329; Total gross household income €25,000-€150,000 n=4,284; Total gross household income >€150,000 n=516

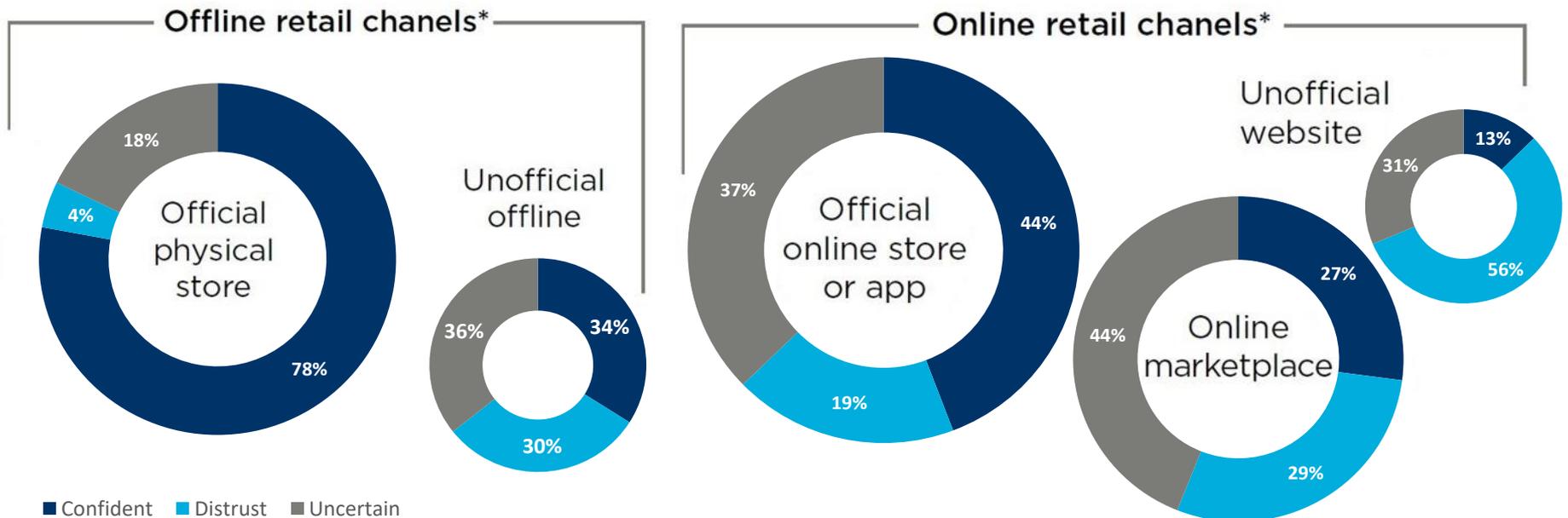
- Illicit purchases are not confined to the poor, with wealthy respondents (earning > €150,000) reporting high levels of illicit purchases, particularly in Southern Europe (but note smaller sample sizes for this income group).
- Possible explanations include higher use of e-commerce and scepticism of official distribution channels.



WHY DO CONSUMERS BUY ILLICIT TOBACCO?

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



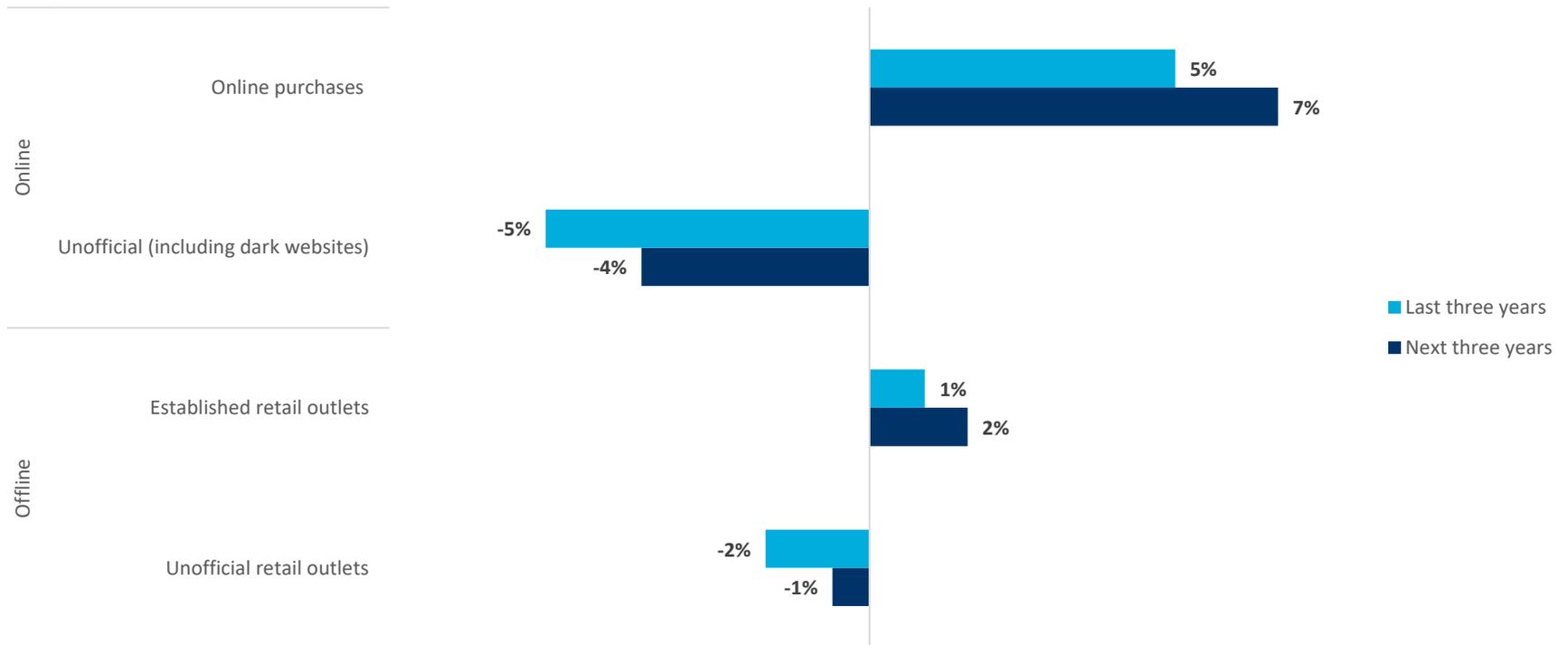
Source: Oxford Economics consumer survey; Official physical store n=12,940; Unofficial offline n=25,259; Official online store or app n=12,603; Online marketplace n=12,564; Unofficial website n=12,476

- 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 just over a quarter (27%) fully confident that they are buying legitimate tobacco 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

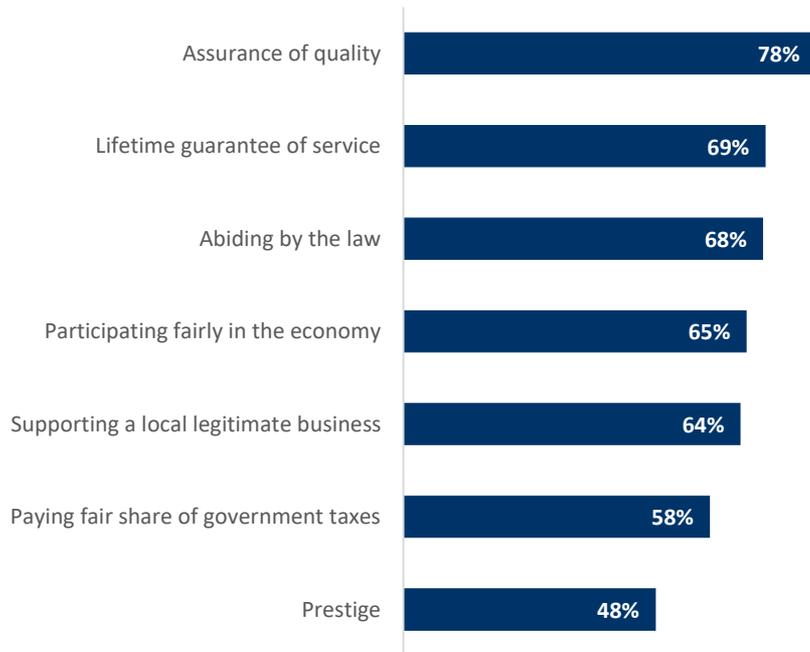


Source: Oxford Economics consumer survey, n=12,998

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

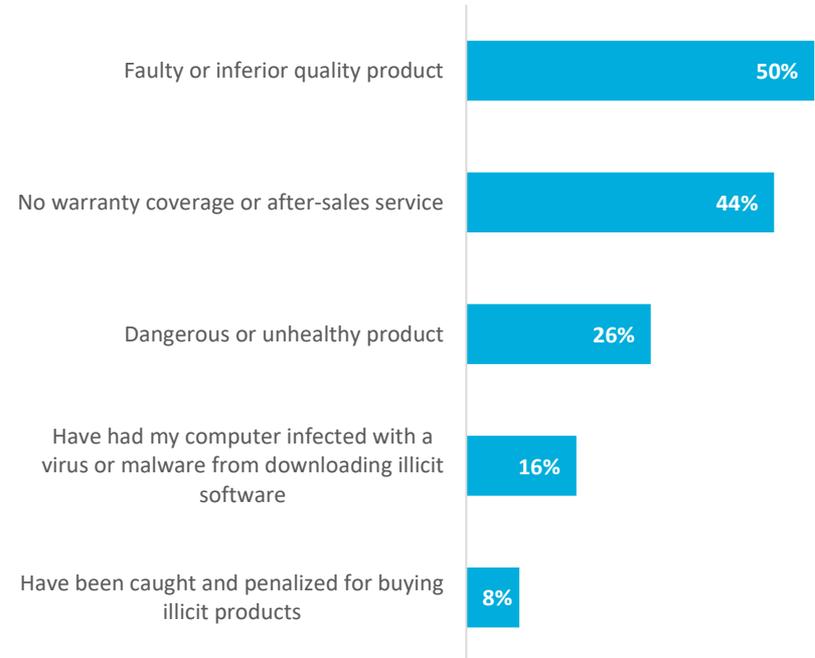
There are many reasons to prefer official channels

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=12,266

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

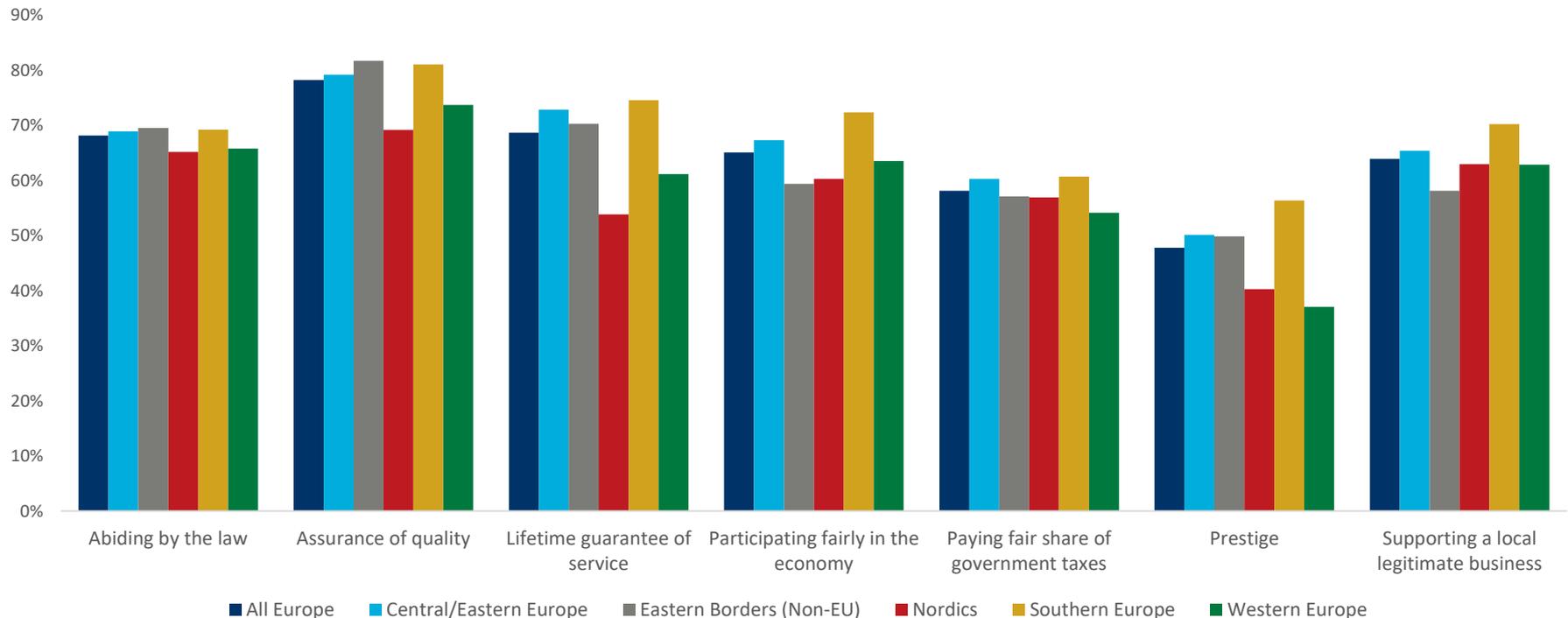


Source: Oxford Economics consumer survey, illicit responses, n=4,448

- 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 participating fairly in the economy, 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=12,266; Central/Easter Europe n=3,455; Eastern Borders n=2,896; Nordics n=1,005; Southern Europe n=2,408; Western Europe n=2,502

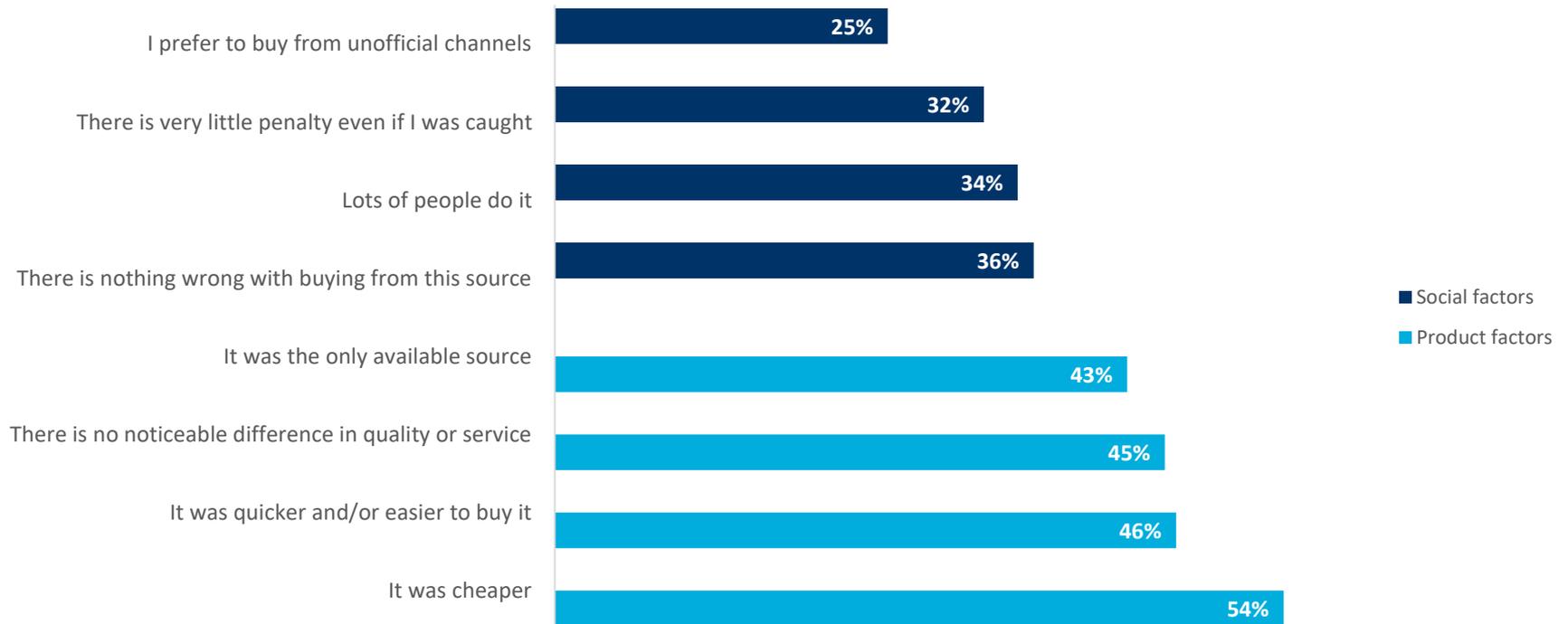
- There appears to be consistency across European regions in social attitudes towards illicit trade, e.g., regarding the importance of abiding by the law and paying taxes.
- There is greater regional variety to more product-centric reasons for preferring legitimate goods, 12 e.g., lower scores in Nordics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

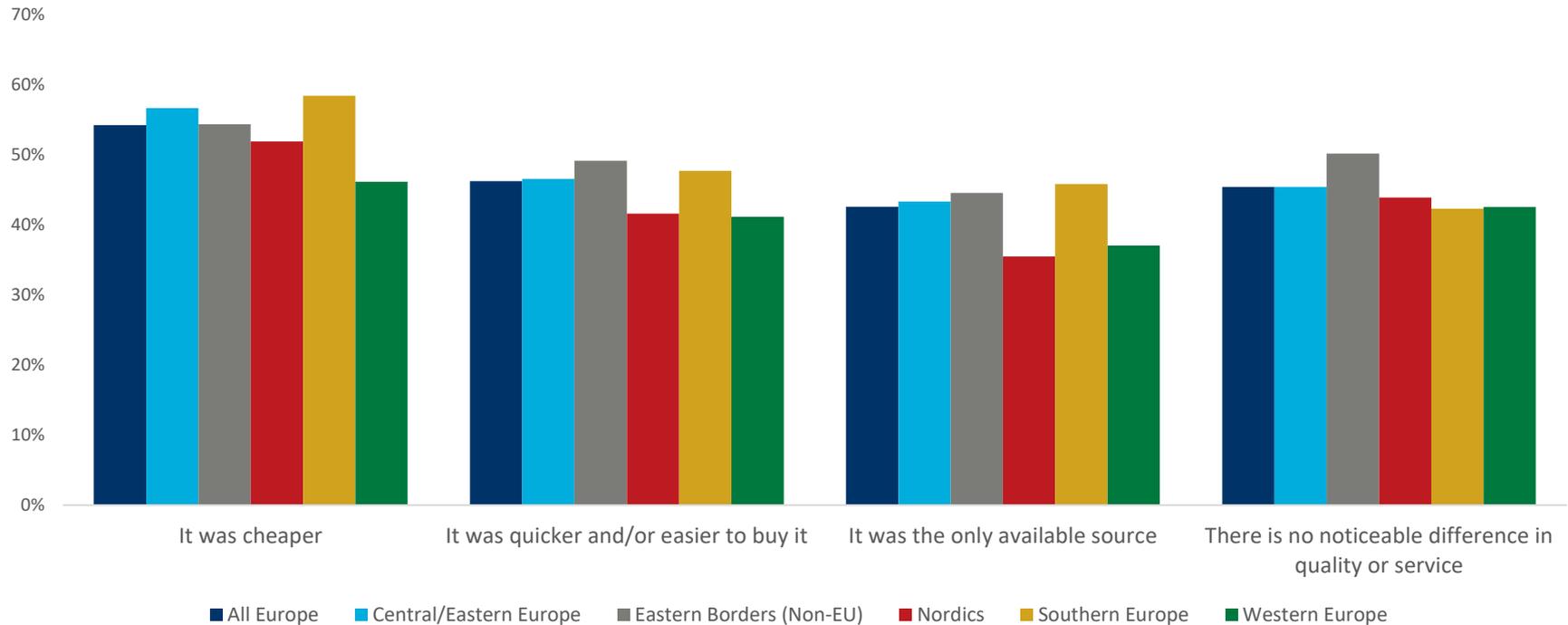


Source: Oxford Economics consumer survey, illicit purchases, n=4,448

- Cost is clearly the most popular reason for buying illicit tobacco. It is followed by other “product”-related reasons, like speed and ease of purchase, or no noticeable difference in quality.
- Social factors also feature, if some way behind product factors.

Motivations to buy from unauthorized sources vary by region

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

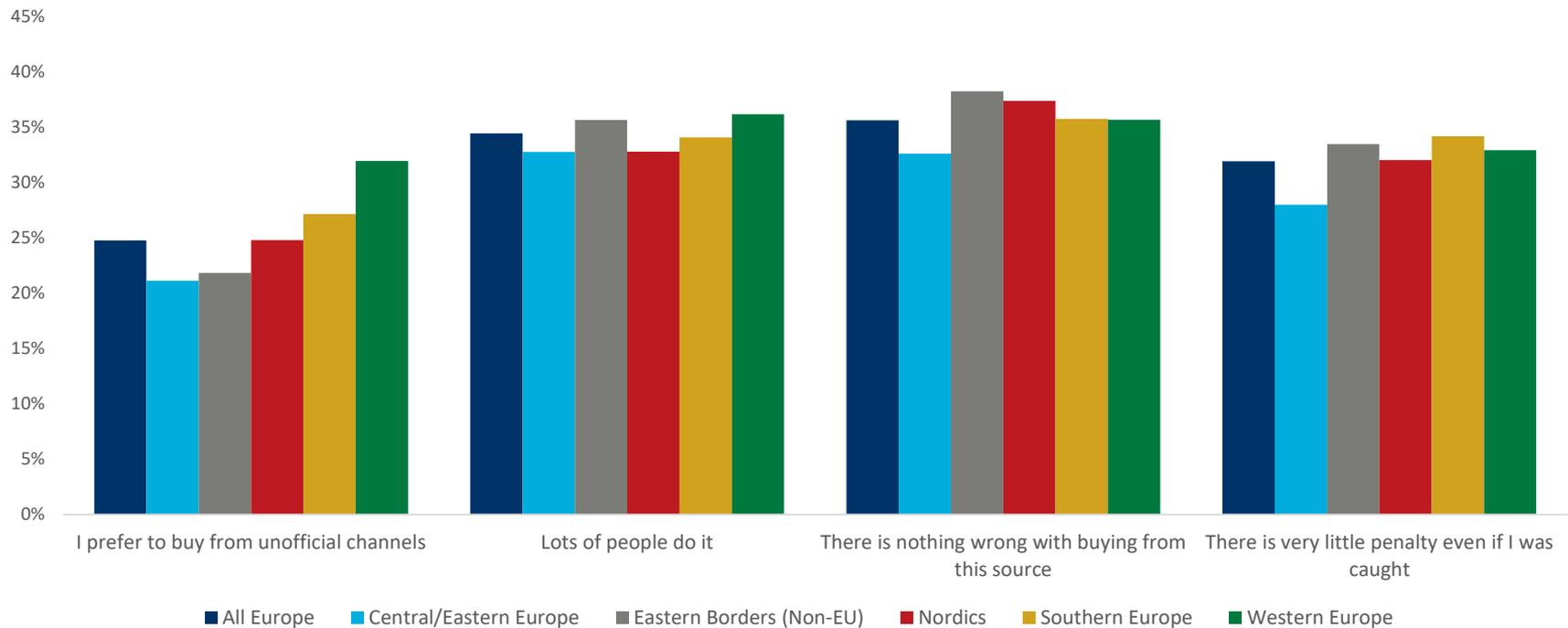


Source: Oxford Economics consumer survey, illicit purchases, n=4,448; Central/Easter Europe n=1,235; Eastern Borders n=1,194; Nordics n=262; Southern Europe n=953; Western Europe n=804

- There is some variety in regional responses as to why they buy from unauthorized sources, with Nordics and Western Europe generally rating factors lower, Southern Europe and Eastern Borders higher.
- Overall, cost is the leading reason in every region, but only just in Western Europe and Eastern borders.

Social motivations for illicit purchases are more consistent

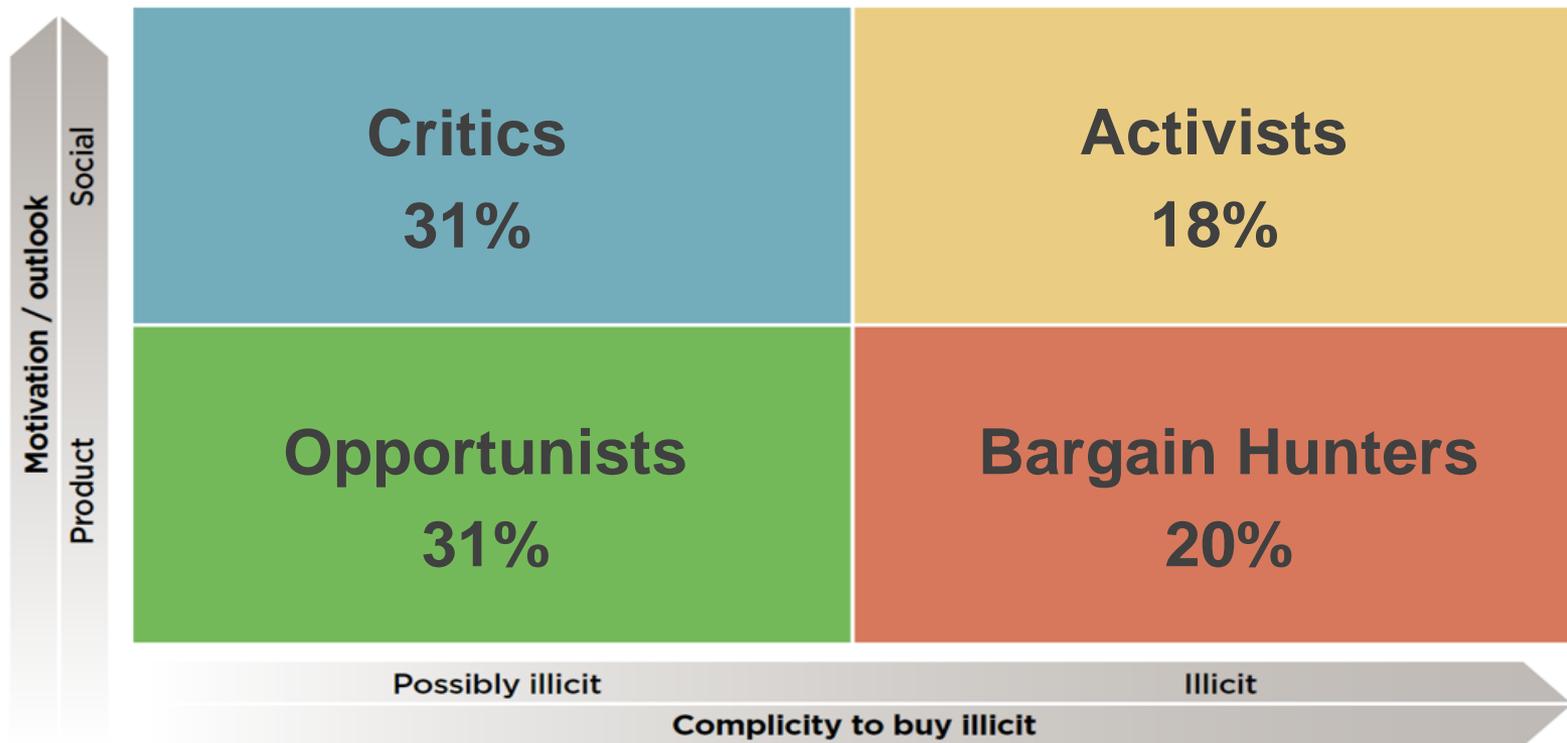
Please rate the importance of each of the following factors in buying from potentially unauthorized sources
“Very important” and “Important” responses
 Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=4,448; Central/Easter Europe n=1,235; Eastern Borders n=1,194; Nordics n=262; Southern Europe n=953; Western Europe n=804

- There is less regional variety regarding the social reasons for buying tobacco.
- An interesting exception is the large share of Western Europe’s consumers preferring to buy from illicit channels, and only a small share of Central/Eastern Europe feeling the same way.

We can use motivation and complicity to segment illicit purchases



Source: Oxford Economics consumer survey, illicit purchases, n=4,448

- 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 tobacco purchases and how consumer motivations differ by region.



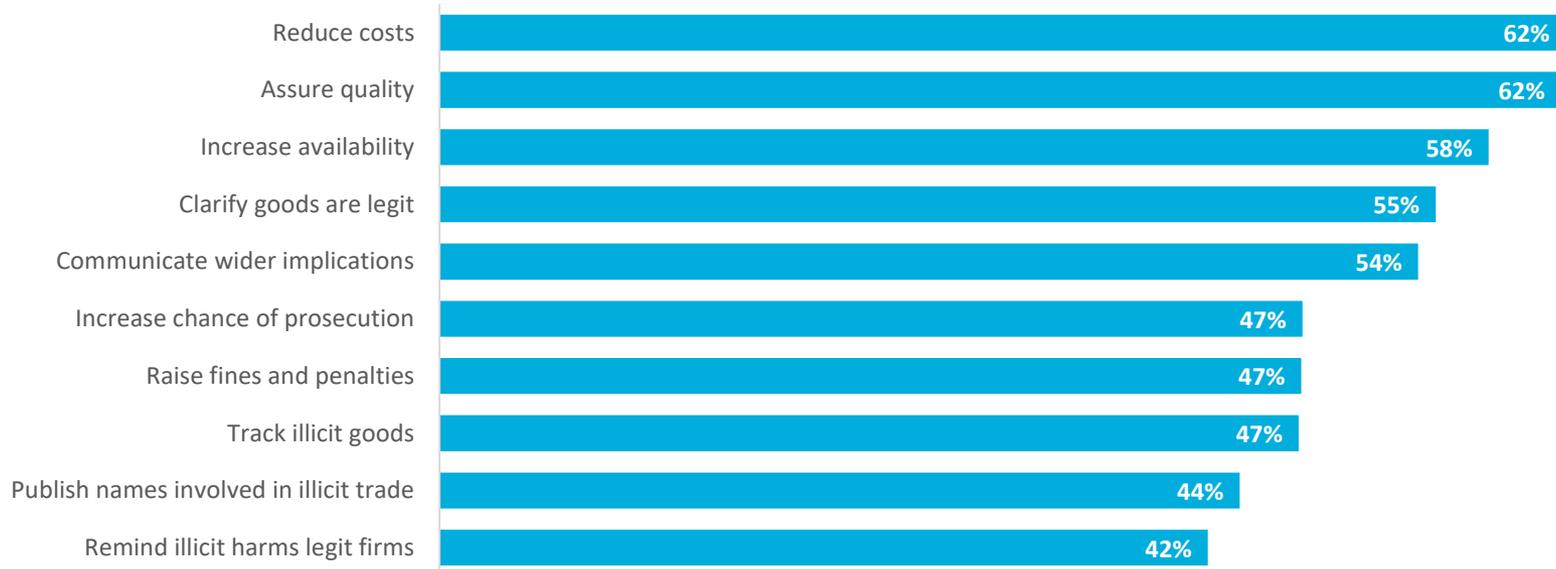
WHICH ACTIONS COULD DETER CONSUMERS?

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

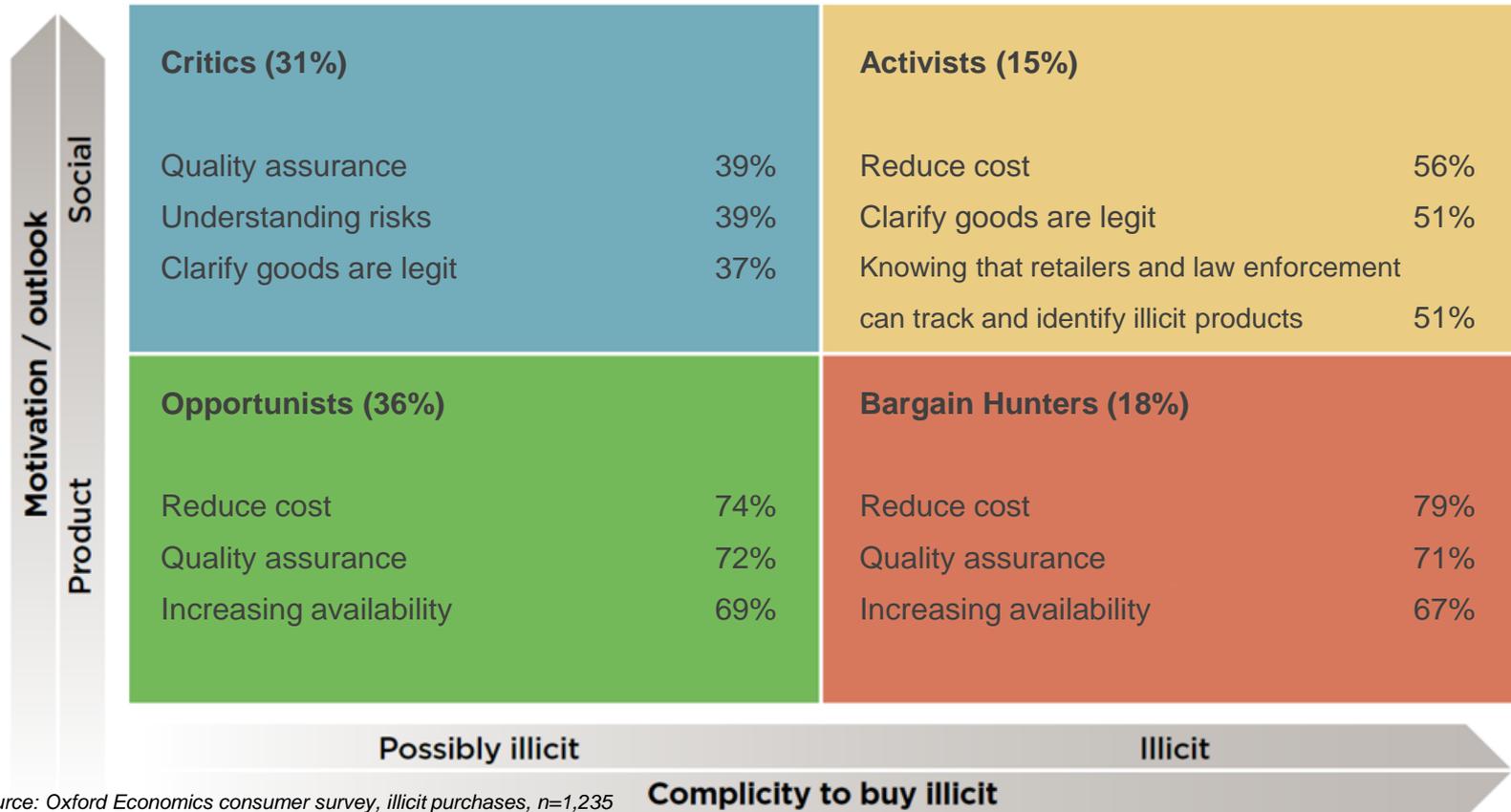
Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=4,448

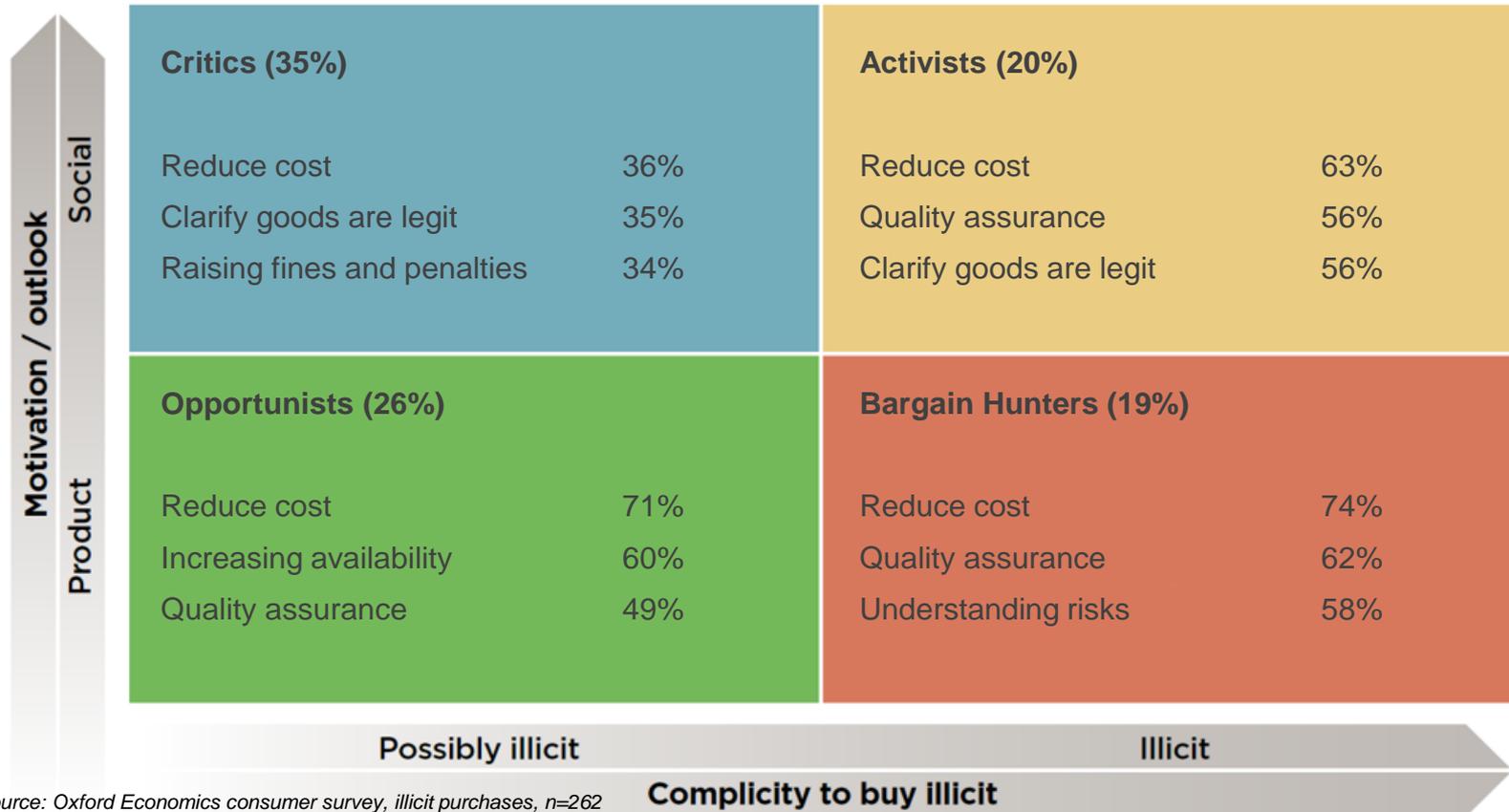
- The responses confirm the complexity of consumer motivations; that there may be several reasons why a consumer buys illicit tobacco and a variety of effective interventions to deter them.
- The following charts list, for each region, the top three effective strategies for each segment, with the percentage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

For Central/Eastern Europe, reducing cost and quality assurance could be effective



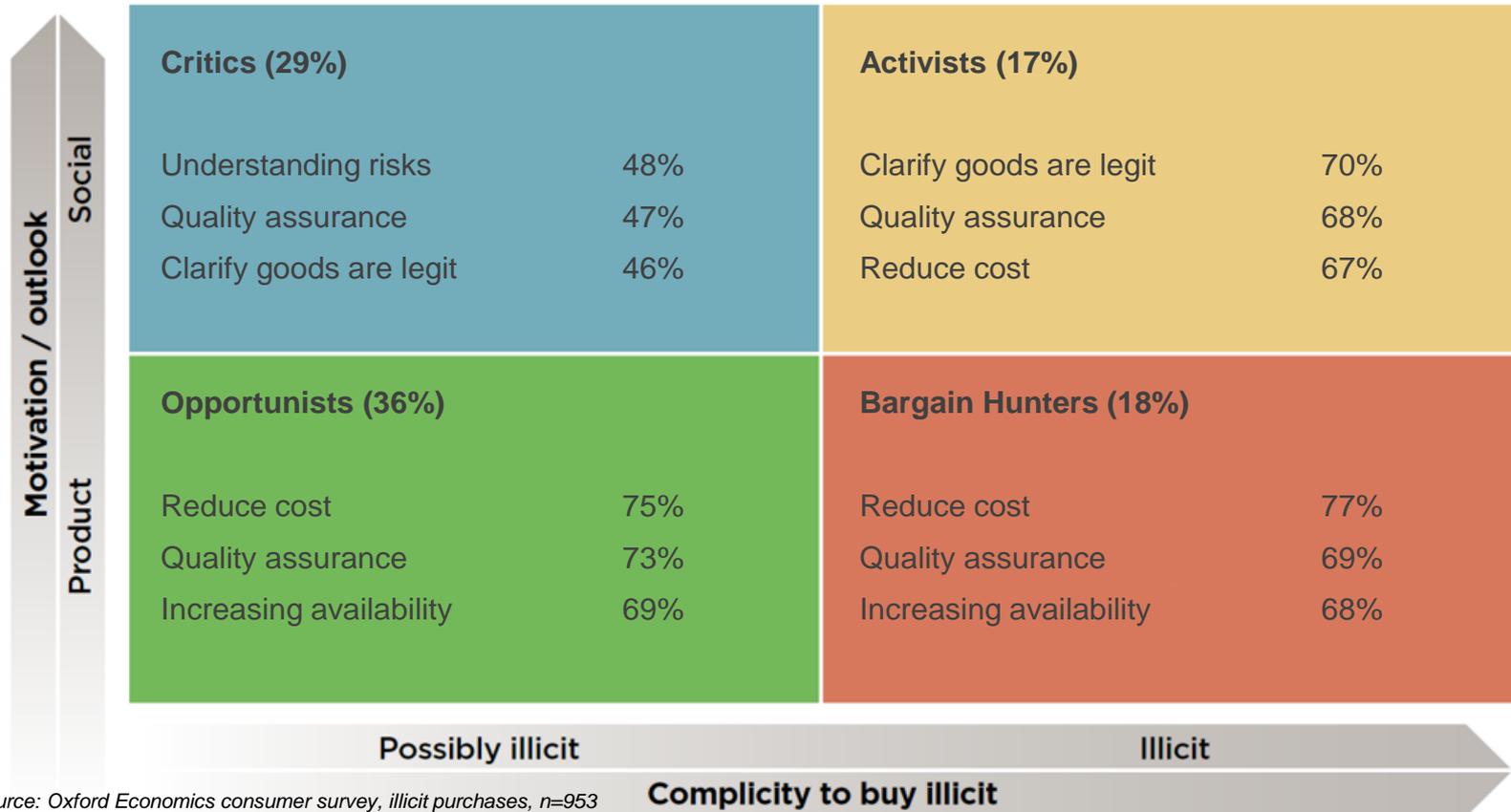
- Product-focused purchases show expected strategies, with reducing cost the most popular, followed by quality assurance and increasing availability.
- Strategies for the 31% of critics and 15% of activists show a different pattern. Clarifying goods are legit is the only shared strategy, with activists reporting law enforcement tracking as a deterrent.

For Nordics, cost and quality assurance are effective



- Reducing the cost of legitimate products is the most effective strategy for Nordics across the four groups.
- Quality assurance would have an impact on the likelihood of activists and opportunists using illicit tobacco.

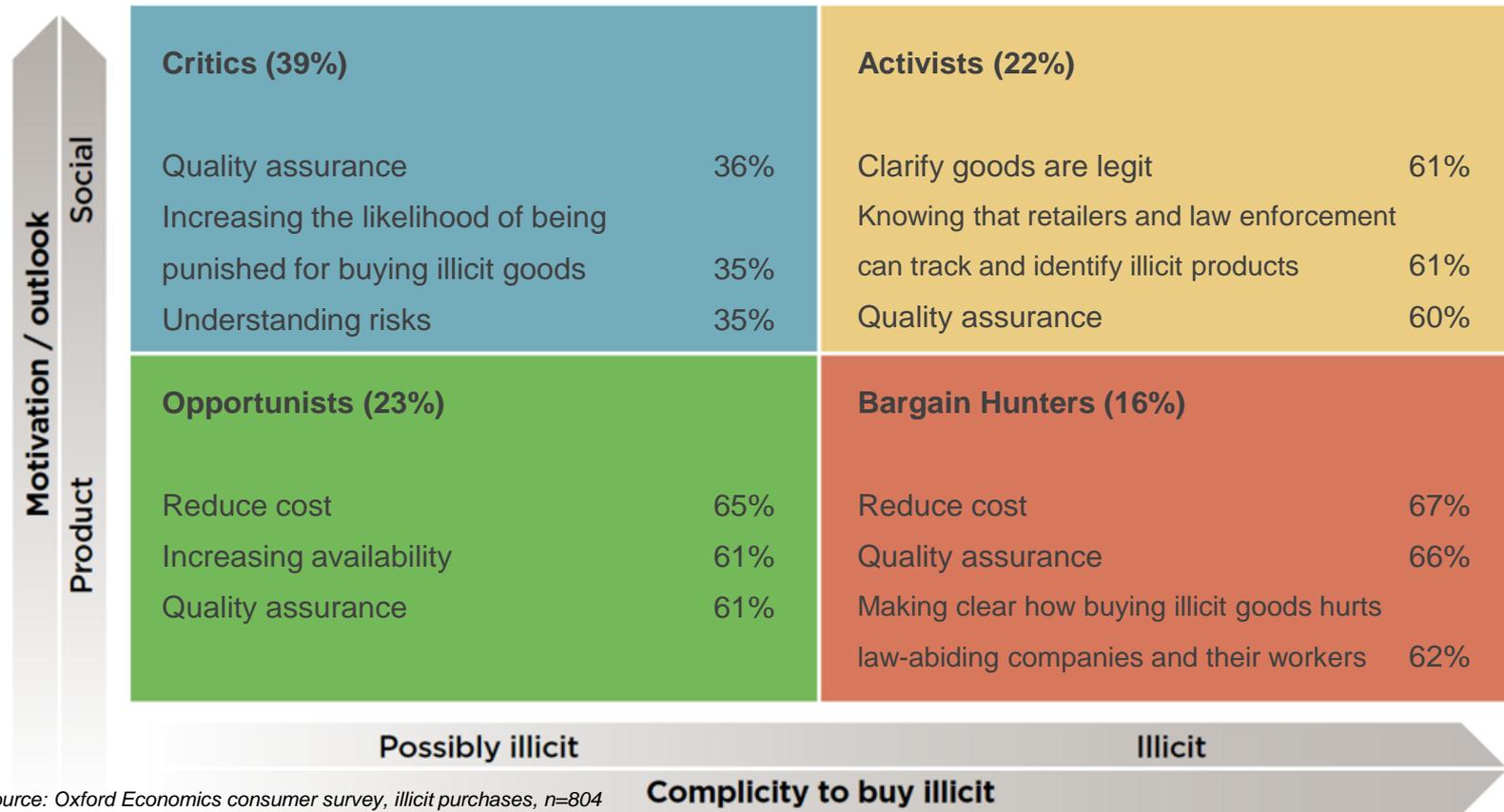
For S. Europe quality assurance would be effective



- For the 56% 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 17% of activists, clarifying goods are legit would deter illicit purchases of tobacco.

- Overall, the most successful strategy would be quality assurance, with all four consumer groups in agreement.

For Western Europe, cost is less of a motivation



- Western Europe has a majority of illicit purchases for social reasons (61%). Most effective strategies for critics is quality assurance and for activists, clarifying goods are legit.
- Quality assurance is the top strategy for two segments and features in all, whereas cost features 24 in only the two product-related segments.



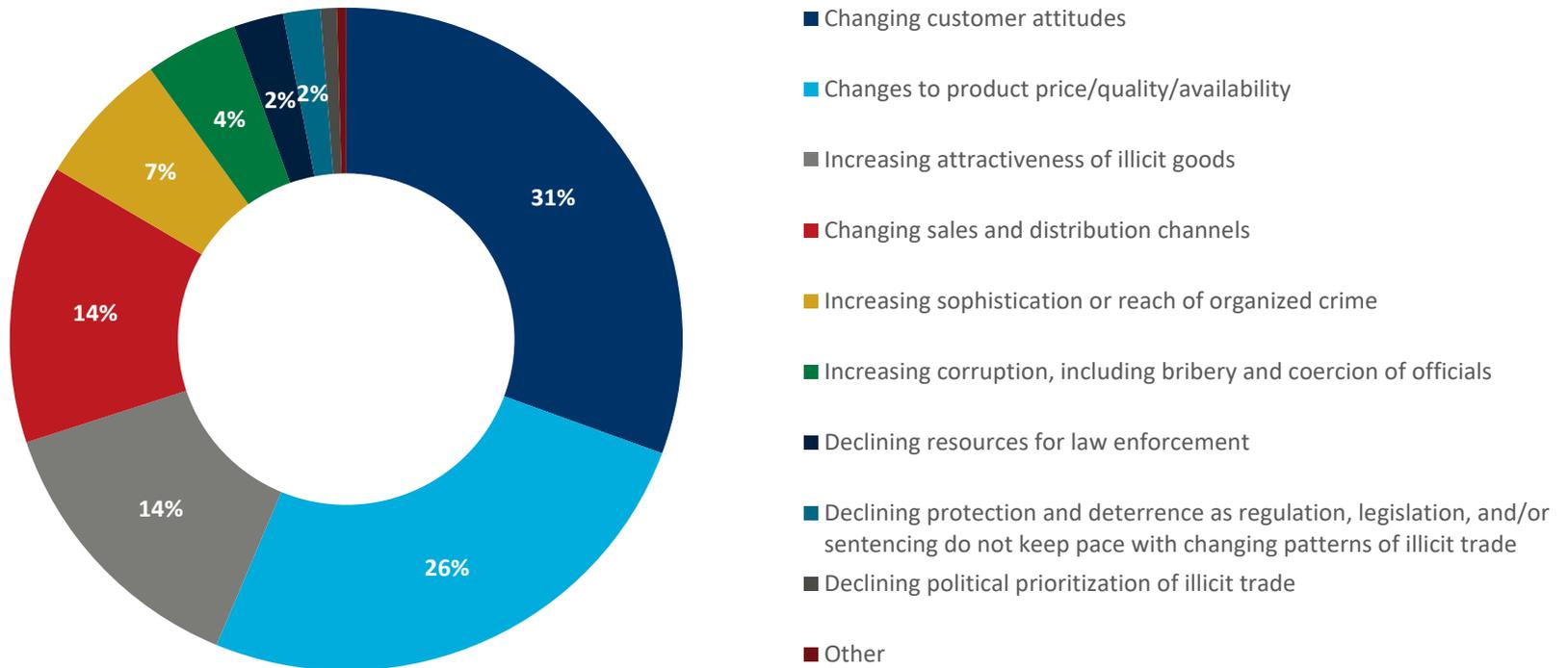
APPROACHES TO COMBATTING ILLICIT TOBACCO

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=1,794

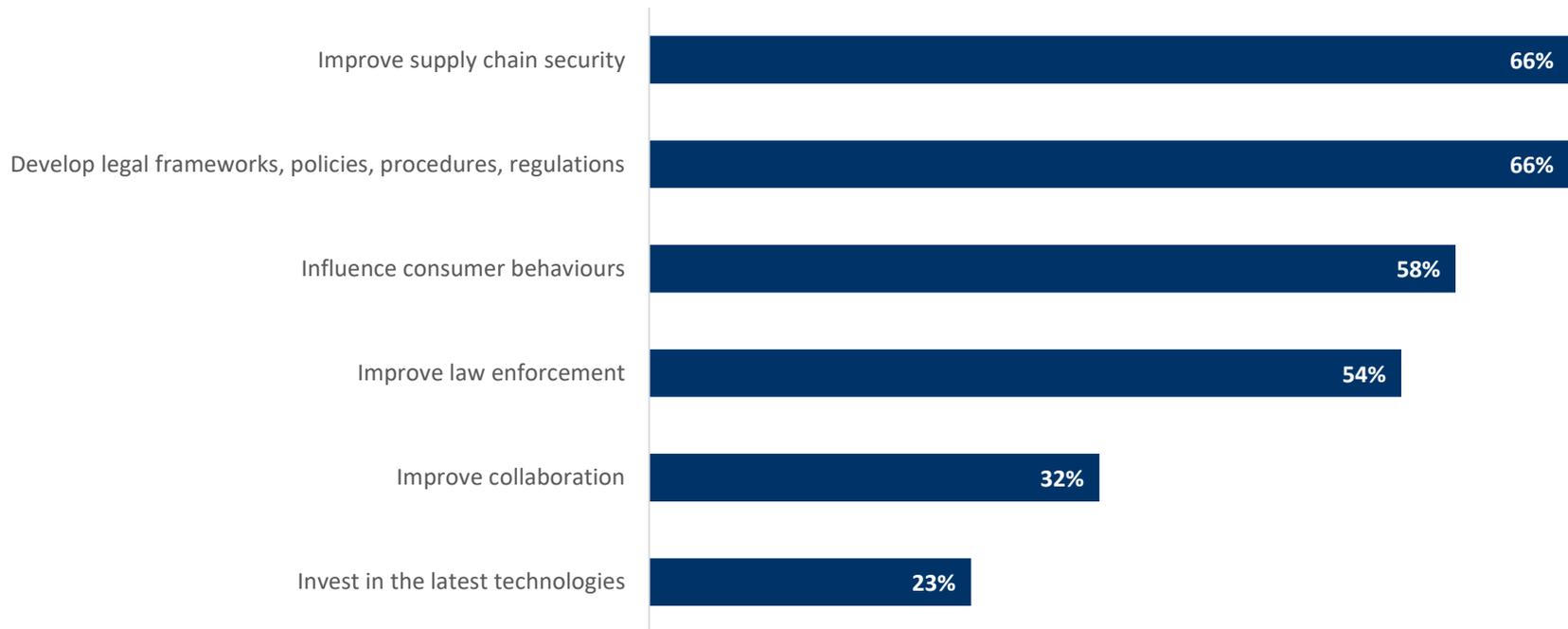
- Businesses, policy officials and law enforcers (stakeholders) recognise the shifting nature of illicit trade, in particular changes in customer attitudes, to products and distribution channels.

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=3,813

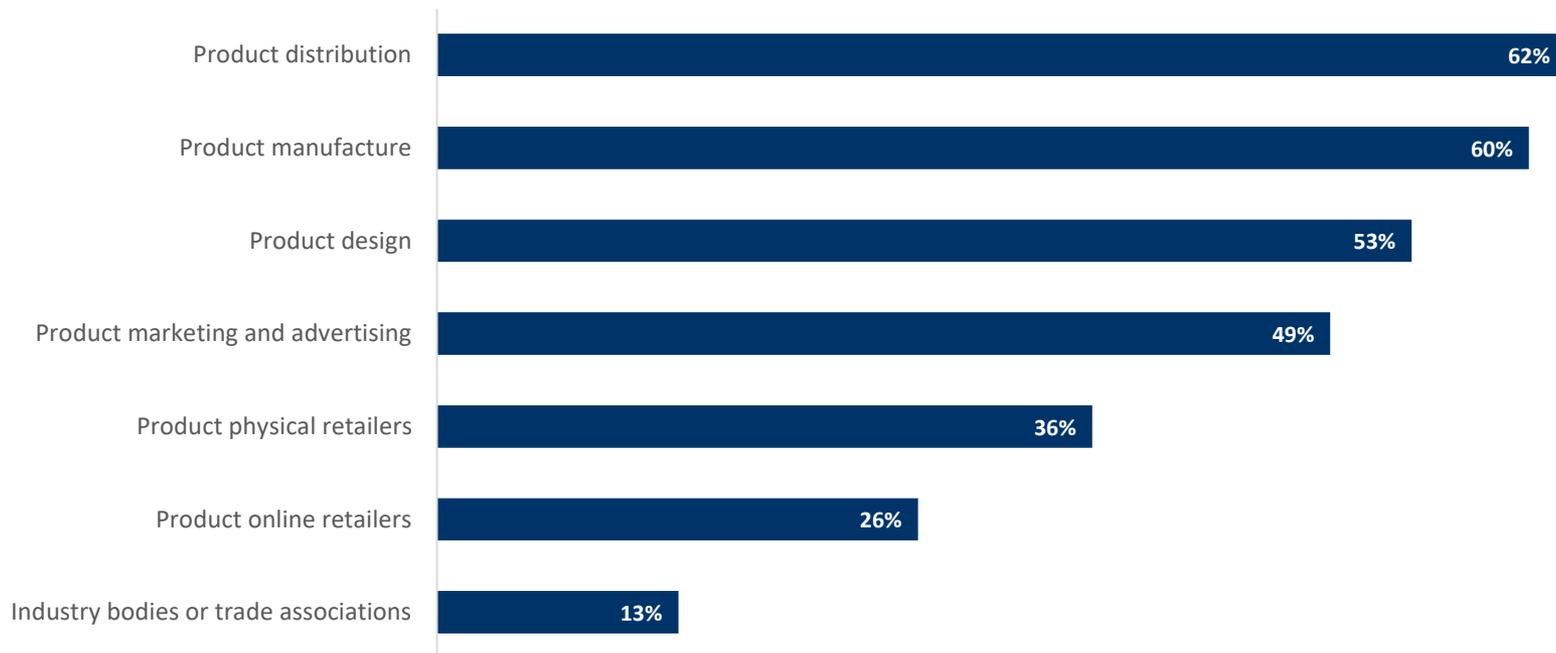
- Stakeholders prioritise supply chain improvements and policy interventions. Improving collaboration and investing in the latest technologies are prioritised by fewer respondents.

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



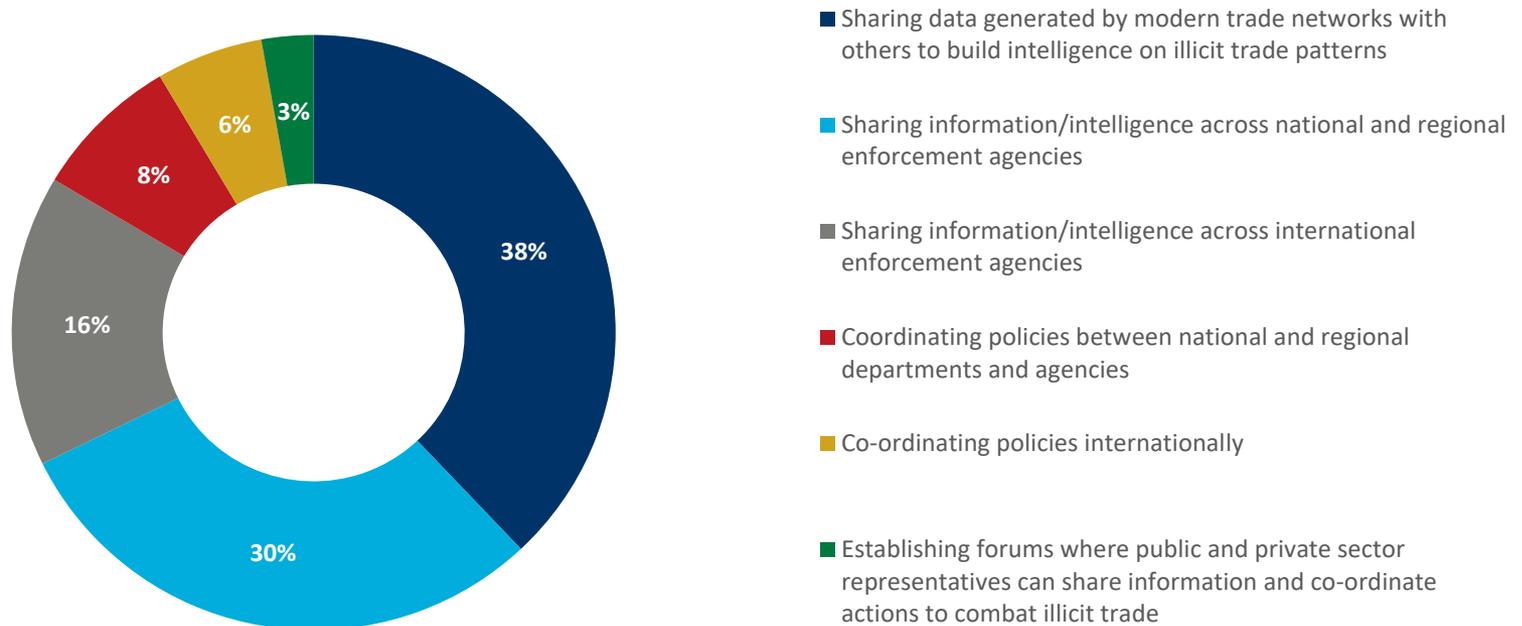
Source: Oxford Economics stakeholder survey, n= 3,813

- 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 tobacco

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

*Top-ranked responses
Stakeholders*

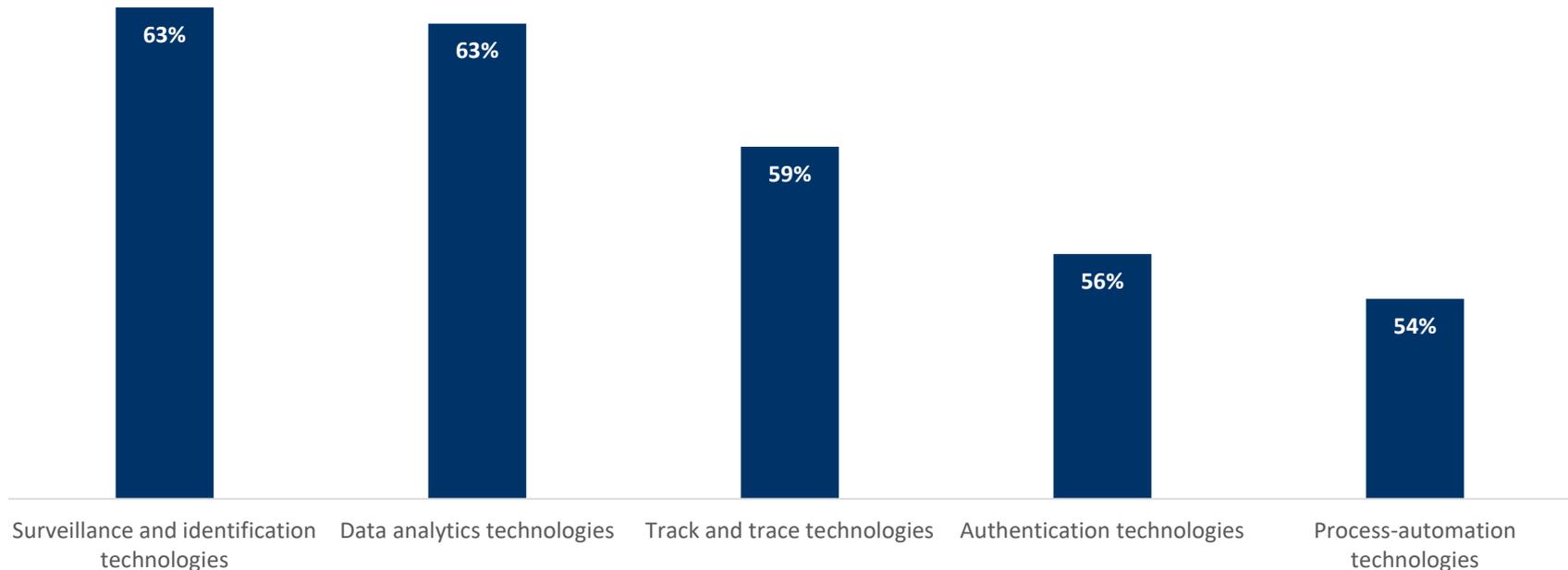


Source: Oxford Economics stakeholder survey, n= 3,813

- 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= 3,813

- 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 tobacco...

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= 3,813

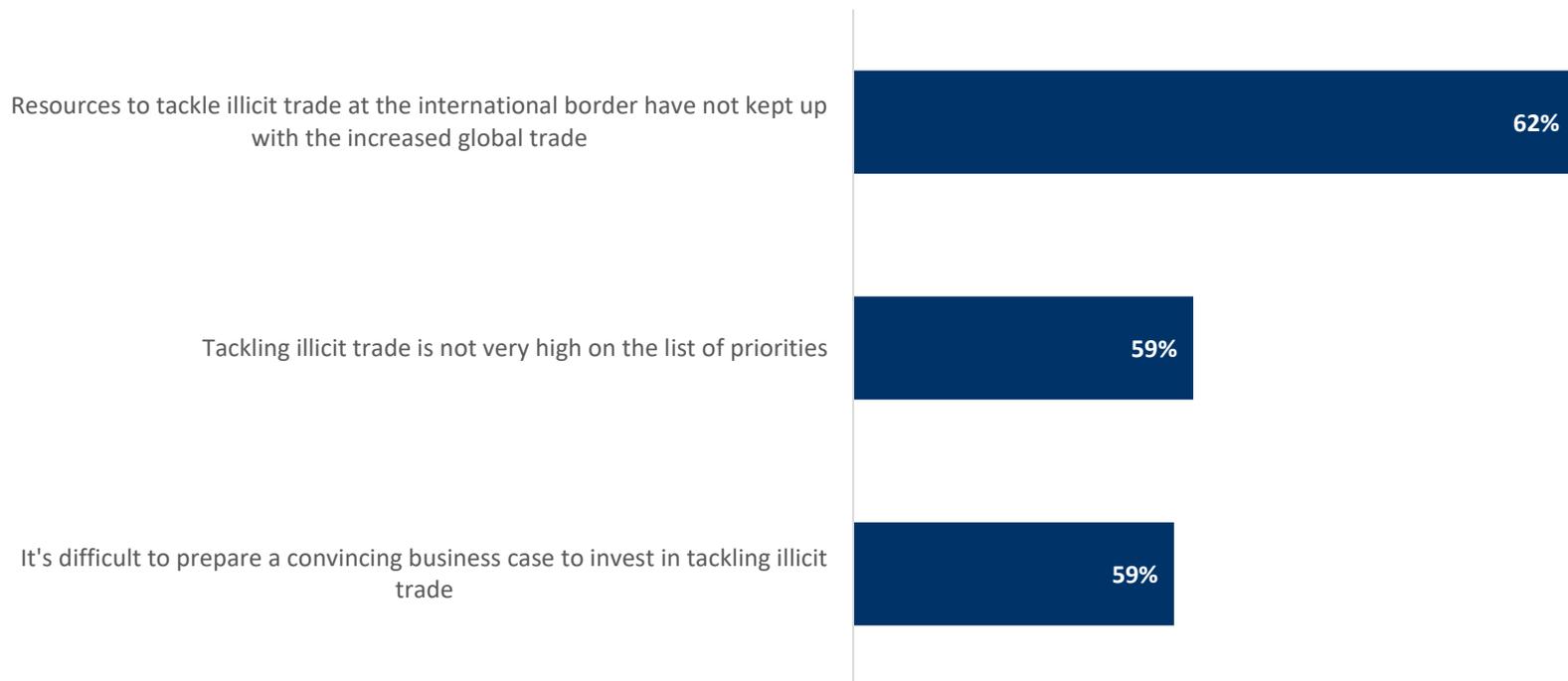
- Although almost two thirds of stakeholders (64%) are willing to share best practices with peers, only a small majority say they have access to good data and intelligence to understand illicit trade and have effective practices in place (59% and 58% respectively). Many highlight difficulties ensuring compliance with systems, policies and procedures (58%).

...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= 3,813

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

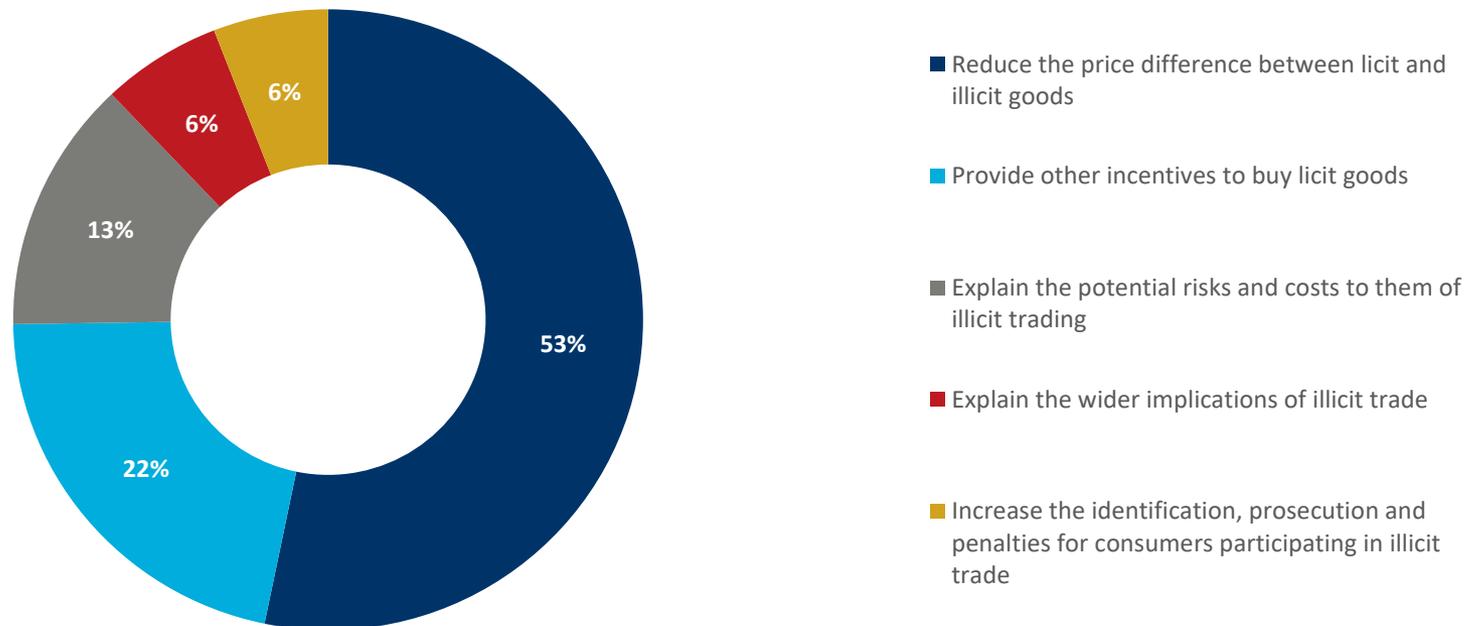


**THE STRATEGY GAP: CONSUMERS VS.
STAKEHOLDERS**

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*

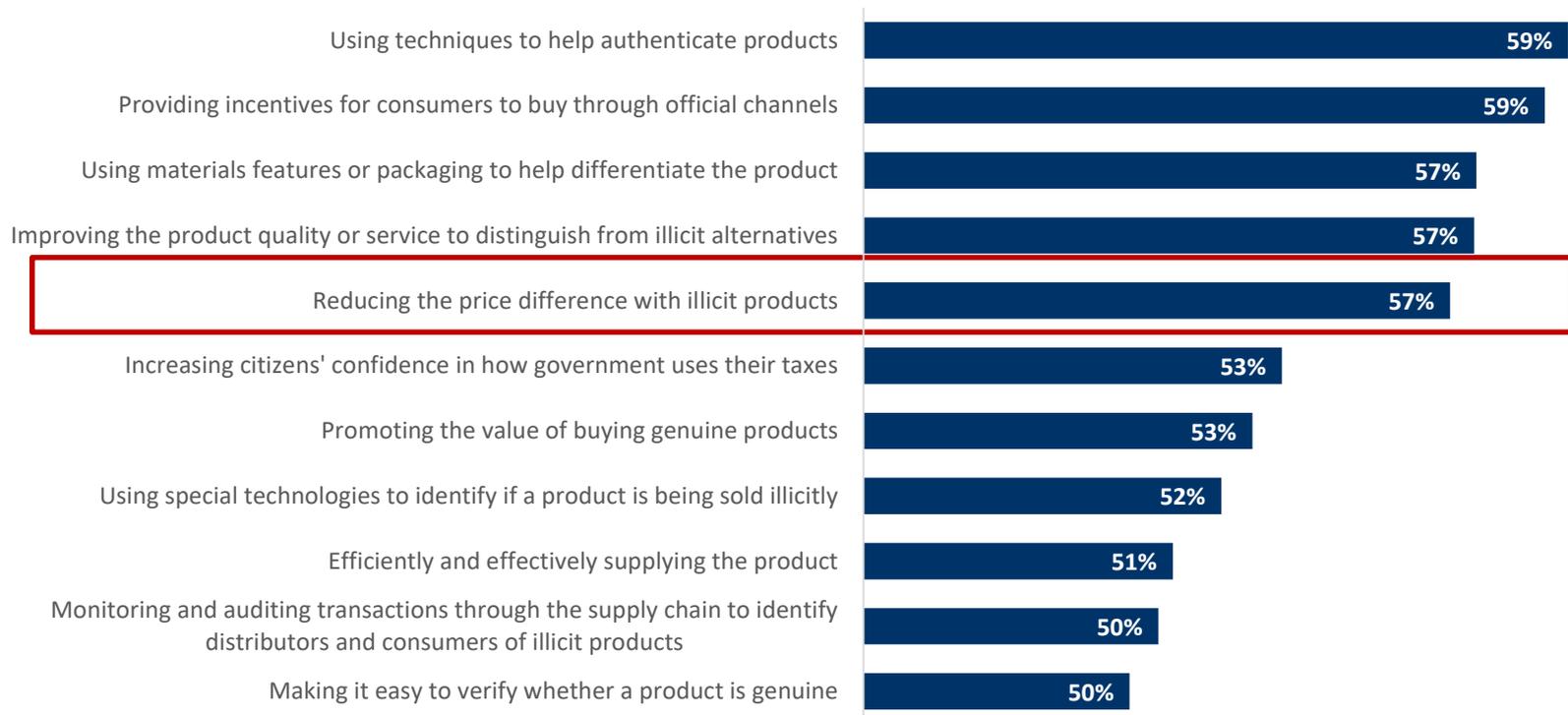


Source: Oxford Economics stakeholder survey, n=3,813

- The majority of stakeholders (53%) say reducing cost is the most effective action for reducing illicit trade, far ahead of other actions, with 22% 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 6% 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=12,998

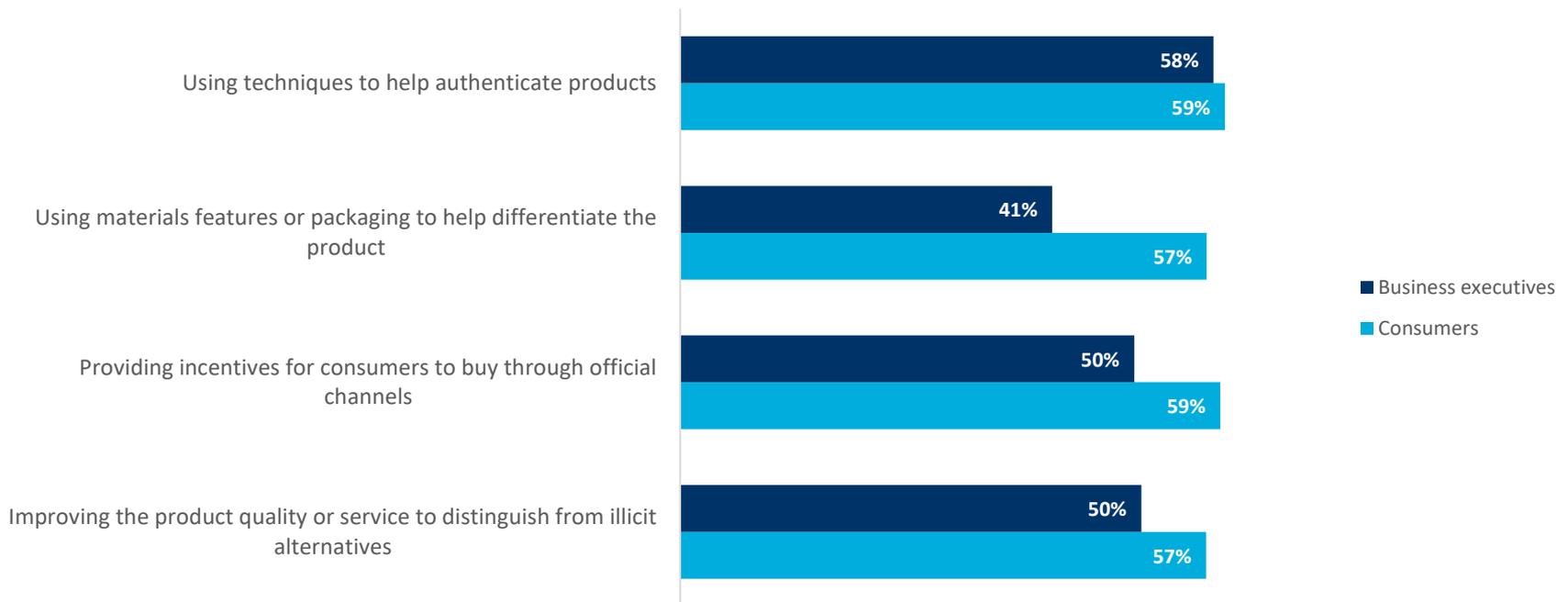
- According to consumers, reducing price is a mid-ranking action to tackle illicit trade in tobacco. Several actions score higher, including product authentication and incentivising through improving other aspects of the product (e.g., rewards, quality, service and support etc).

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, business executives, n=2,355

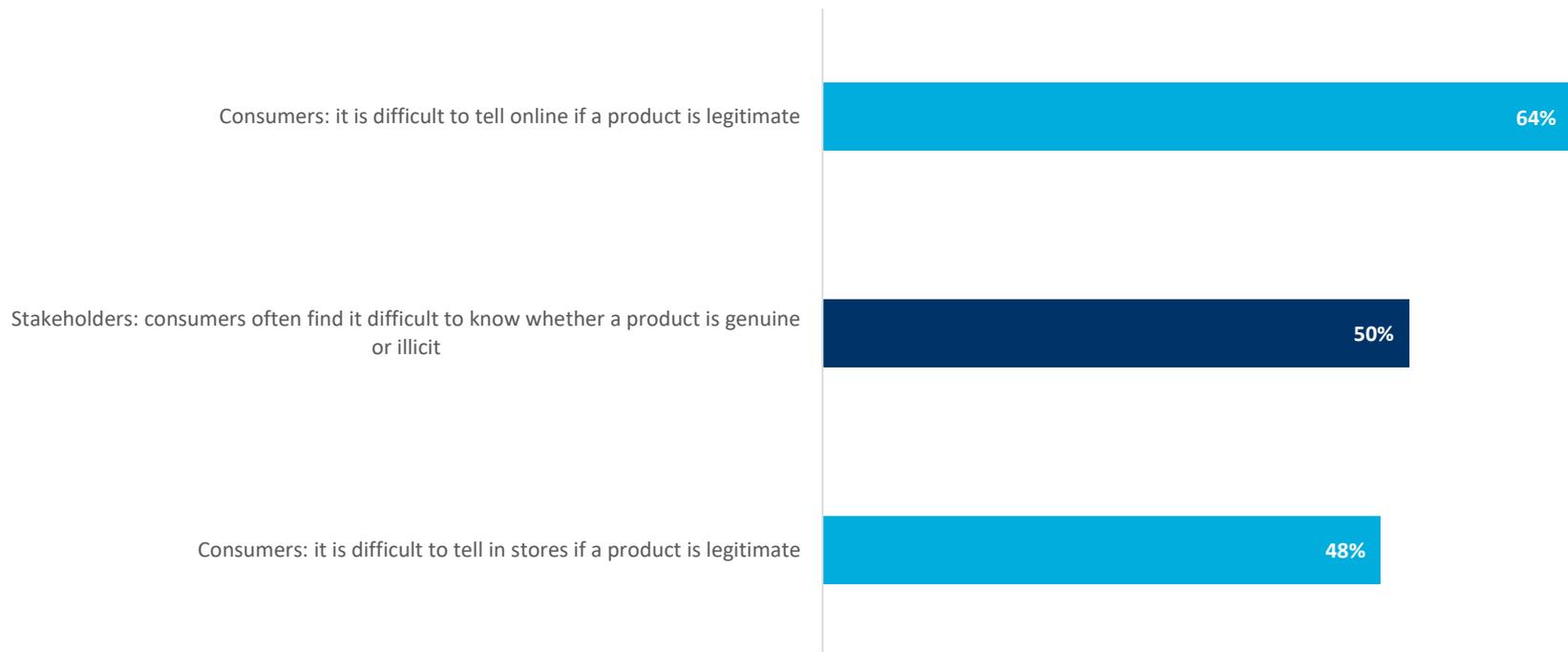
Source: Oxford Economics consumer survey, n=12,998

- Businesses show a lack of enthusiasm in initiatives to combat illicit trade in tobacco, 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*

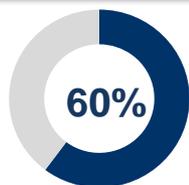


Source: Oxford Economics stakeholder survey, n=3,813

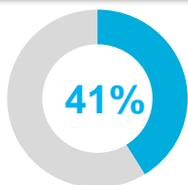
Source: Oxford Economics consumer survey, n=12,998

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

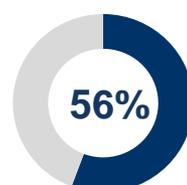
Stakeholders underestimate consumer awareness of the social impact of illicit trade



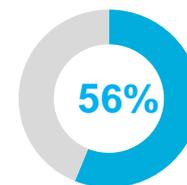
Consumers underestimate the personal risks of engaging in illicit trade



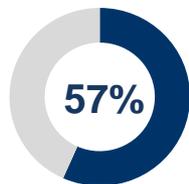
I'm not aware of the health risks of buying illicit goods



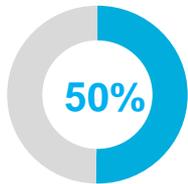
Consumers are unaware of the penalties for illicit trading



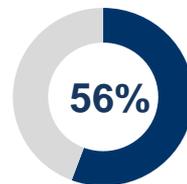
I'm not aware of the potential penalties for buying counterfeit products



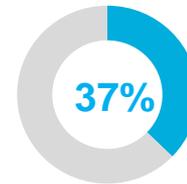
Consumers are unaware that buying illicit goods funds criminals and terrorists



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=3,813

Source: Oxford Economics consumer survey, n=12,998

■ 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 19 percentage points in both risk awareness, and whether illicit trade is a victimless crime.



ACTIONS TO COMBAT ILLICIT TOBACCO

Actions to combat illicit tobacco

- 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, awareness raising and price

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	Launch a campaign to educate and discourage consumers from illicit trade
3	Improve tracking monitoring and reporting through the supply chain	Collaborate with retailers law enforcement or others to combat illicit trade	Change the price quality or service
4	Change manufacture or packaging	Improve tracking monitoring and reporting through the supply chain	Collaborate with retailers law enforcement or others to combat illicit trade
5	Share information with others to improve understanding of illicit trade	Collect intelligence about illicit trade patterns	Collect intelligence about illicit trade patterns
6	Collect intelligence about consumer attitudes	Share information with others to improve understanding of illicit trade	Change manufacture or packaging
7	Implement supply-chain contractual controls	Change the price quality or service	Share information with others to improve understanding of illicit trade
8	Change the price quality or service	Collect intelligence about consumer attitudes	Implement supply-chain contractual controls
9	Collaborate with retailers law enforcement or others to combat illicit trade	Launch a campaign to educate and discourage consumers from illicit trade	Use advertising and promotion to make official products and channels more attractive
10	Launch a campaign to educate and discourage consumers from illicit trade	Use advertising and promotion to make official products and channels more attractive	Improve tracking monitoring and reporting through the supply chain
11	Collect intelligence about illicit trade patterns	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

Source: Oxford Economics stakeholder survey, business executives, n=2,355

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 seek to upgrade penalties to retailers, guide businesses 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 consumers	Change penalties for retailers
2	Collaborate with international organizations	Change penalties for businesses	Provide businesses with guidance and/or discussion forums
3	Coordinate policy with other departments	Use promotional or awareness campaigns to influence citizens' attitudes	Use promotional or awareness campaigns to influence citizens' attitudes
4	Update legislation and/or legal frameworks	Update legislation and/or legal frameworks	Change penalties for criminal networks
5	Change penalties for businesses	Collaborate with international organizations	Coordinate policy with other departments
6	Change penalties for consumers	Change penalties for criminal networks	Update legislation and/or legal frameworks
7	Use promotional or awareness campaigns to influence citizens' attitudes	Change penalties for retailers	Change penalties for businesses
8	Change penalties for criminal networks	Coordinate policy with other departments	Collaborate with international organizations
9	Provide businesses with guidance and/or discussion forums	Research and collect information to understand patterns of illicit trade	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 collaborate, use data analytics and improve compliance

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