

MAGHREB ROUTE

Mapping Cigarette Trafficking
Along the Maghreb Route

4 ITTP NEXUS
IN EUROPE
AND BEYOND

2019

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Acknowledgements and credits

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Preface

Cigarette trafficking is a global and complex crime. In the EU MSs, 40 billion illicit cigarettes are consumed originating from 128 countries spread across five continents. Most of these cigarettes originate from non-EU countries where cigarette prices are low, and there are weaknesses in the law enforcement, control, and regulatory systems.

Like cigarette trafficking itself, research on the topic must extend beyond national and regional borders. This transnational dimension calls for an analysis that considers the interaction between multiple countries to reveal, understand, and monitor cigarette trafficking in the EU. In particular, it should account for a wider context including the non-EU countries that are involved in the production, transit and consumption of illicit cigarettes. Only the combination of local and macro-regional perspectives enables the identification of the main factors behind the transnational illicit flows of cigarettes and the designing of effective policies to curb them.

In light of these considerations, *ITTP NEXUS in Europe and Beyond* includes an analysis of the illicit flows of cigarettes moving through EU countries, by also examining the role of and the connections with

relevant countries in North Africa, the Middle East, and Central Asia. The project identifies and quantifies these flows and highlights the existing connections within political, legislative and socio-economic frameworks. Through this process, *ITTP NEXUS in Europe and Beyond* provides an assessment of the enabling factors behind transnational cigarette trafficking.

The *ITTP NEXUS in Europe and Beyond* Report is presented in the form of 7 booklets, each focusing on a specific aspect of cigarette trafficking. Booklet 1 provides an overview of the main characteristics of the transnational cigarette trafficking network in Europe and beyond. Booklets 2, 3, 4 trace and explain the trafficking of cigarettes along the three main routes targeting European markets. These booklets are divided by route: Booklet 2 – the North-Eastern Route; Booklet 3 – the Extended Balkan Route; Booklet 4 – the Maghreb Route. Booklet 5 discusses the contextual factors and drivers behind cigarette trafficking and its evolution over time, relying on original estimates and analyses. Based on the total results of the analysis from Booklets 1-5, Booklet 6 puts forward policy implications to tackle the transnational illicit flows of cigarettes, overcome regulatory

gaps, and develop preventive measures for the reduction of specific risk-factors. Finally, Booklet 7 concludes the Report by detailing the methodological approach adopted to determine the estimates and analyses presented in this booklet series.

The results emerging from *ITTP NEXUS in Europe and Beyond* emphasise the importance of an integral and multilateral approach which involves multiple countries and simultaneously considers the demand, supply, and transfer of illicit cigarettes. The aim of the Report is to increase awareness about cigarette trafficking and its magnitude at regional and international levels. At the same time, the project's findings could be used to anticipate future scenarios, thus assisting governments and other stakeholders to forecast and prevent crime and to orient and support their regulatory choices. Finally, the comprehensive methodological approach suggested by this project could potentially be used for analysing other transnational illicit markets and criminal activities.

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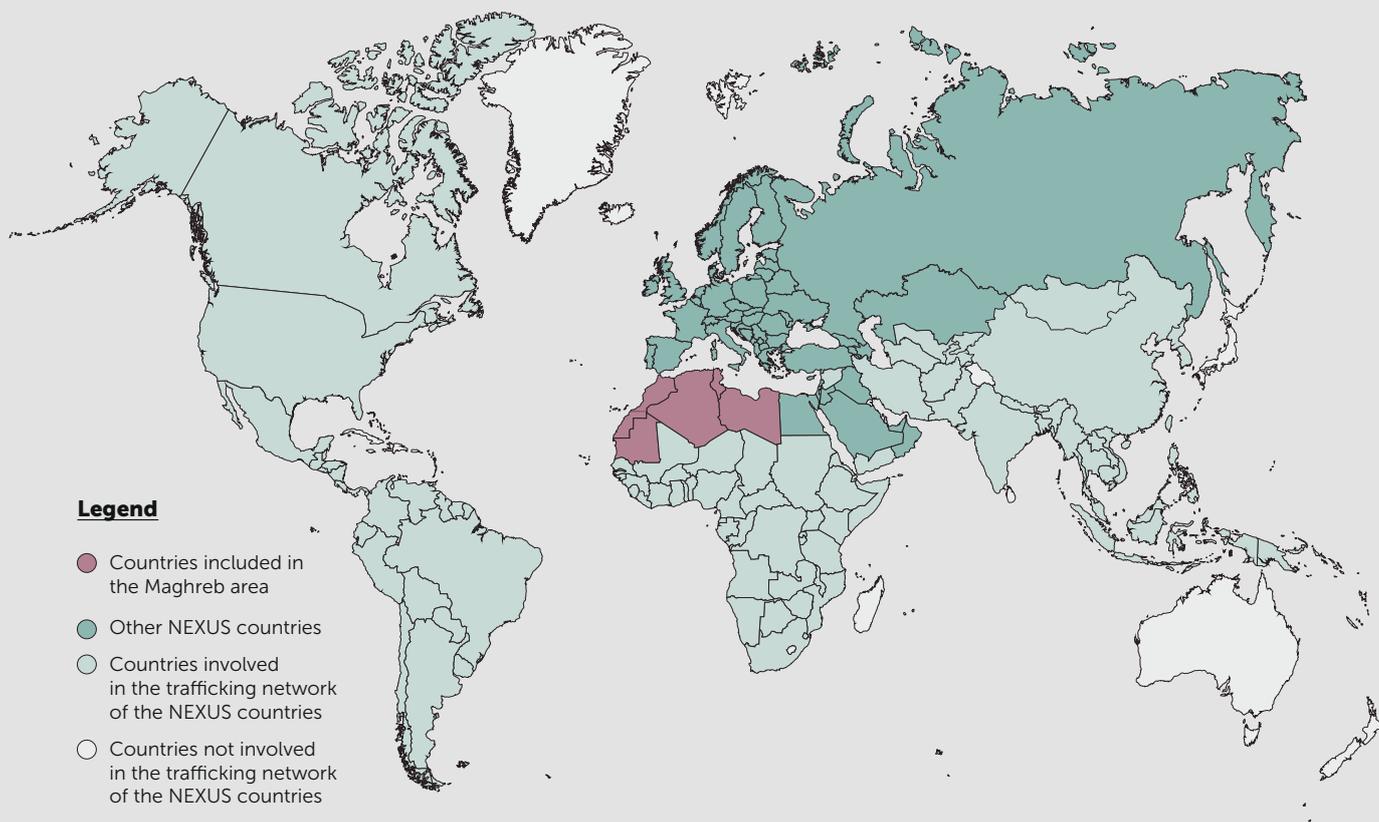
Within the context of the *Maghreb Route – Mapping the Cigarette Trafficking Along the Maghreb Route* booklet, the Maghreb area comprises—from East to West—Libya, Tunisia, Algeria, Morocco, Mauritania and Western Sahara. The ‘Maghreb Route’ refers to illicit flows of cigarettes transiting through these countries and destined mainly for the local illicit markets and the illicit markets in Europe. Estimates regarding the illicit market of cigarettes are not presented for Libya, Mauritania and Western Sahara, due to the lack of original data.

All analyses contained in the *ITTP NEXUS in Europe and Beyond* Report are based on the original estimates produced by Transcrime unless otherwise indicated by the reported references.

The following abbreviations have been used in the present booklet:

AQIM	Al-Qaeda in the Islamic Maghreb	FTZ	Free Trade Zone
EPS	Empty Pack Survey	MS	Member State
EU	European Union	OCG	Organised Crime Group

Countries of the Maghreb Route



Introduction

This booklet constitutes the fourth chapter of the *ITTP NEXUS in Europe and Beyond* Report. It maps the transnational traffic of cigarettes along the Maghreb Route.

Section 1 describes the main illicit cross-border flows of cigarettes along the Route.

Section 2 outlines the main types of illicit cigarettes trafficked along the Route.

Section 3 presents the main criminal actors involved in cigarette smuggling along the Route.

Section 4 focuses on two key nodes of the Route (i.e., Libya and Algeria), uncovering several country-level contextual factors and drivers behind cigarette smuggling.

Section 5 describes the evolution of the Route in the last ten years (2008-2017).

Section 6 discusses the potential changes and developments that may impact on the Route in the near future.

Section 7 graphically summarises the enabling factors identified as drivers behind the traffic of cigarettes along the Maghreb Route. The factors are divided among six macro dimensions, namely political, geographical, regulation and enforcement, socio-economic, cultural, and criminal factors.

Key facts



Overview

2017 figures

More than 10 billion illicit cigarettes are trafficked along the Maghreb Route.

The **United Arab Emirates is the main origin** of illicit cigarettes entering the Maghreb countries.

Libya is a key transit country for illicit cigarettes from the United Arab Emirates to Algeria and Tunisia.

Illicit cigarettes intended for the EU mainly **transit through Algeria, Tunisia and Morocco.**

France is the main destination for illicit cigarettes outflowing from the Maghreb region.



Illicit cigarettes

2017 figures

Illicit whites account for about **45%** of the illicit cigarettes consumed in the Maghreb area.

The most smuggled illicit white brands are Business Royals, Gold Seal, Pine, and American Legend.



Actors

Local tribes, such as Berber (Tuareg) and Saharan Bedouin (Tebu), **engage in cigarette trafficking.**

Terrorist groups (e.g., AQIM) **actively support** and exploit tribes and local communities in **smuggling practices** to finance their activities.



Evolution of the Route

The **total volume** of illicit cigarettes smuggled along the Maghreb Route **increased** by more than 10% between 2008-2012 and 2017.

Outflows towards Europe tripled from 2008-2012 to 2017.

Before the Arab Spring, **cigarette smuggling was tolerated** by several state authorities.

After the Arab Spring, **smuggling activities** flourished and were **characterised by rivalries between criminals**.



Main enabling factors

Political instability and lack of recognised state authority **in Libya**.

The **Algerian economic recession**, which led to violent protests and a state of chaos which facilitated trafficking practices.

Poor law enforcement and **cooperation** among the countries in the region.

Ineffective border controls due to the presence of long and porous borders and desert areas.

Widespread **poverty** and **underdevelopment**, which may induce marginalised citizens to engage in smuggling activities.

Presence of terrorist groups exploiting trafficking activities.

1. Illicit cross-border flows of cigarettes

Along the Maghreb Route illicit cigarettes from the Arabian peninsula and the Maghreb flow into Europe

Cigarettes, oil and pharmaceutical products are the goods most commonly smuggled in the Maghreb area.¹ The illicit cigarette trade is the most established and widespread of these trades, and it is considered a launching ramp for other transnational crimes in the area.² Some groups exploit the human and economic capital involved in cigarette smuggling to move into more profitable criminal activities (i.e., trafficking in firearms, human smuggling and drug trafficking).³

In 2017, more than 10 billion illicit cigarettes flowed along the Maghreb Route. The Maghreb Route is key for the smuggling of cigarettes from the Arabian peninsula to and through the Maghreb countries, and from there to Europe (see Figure 1 and Figure 2).⁴ The presence of long porous borders crossing the Sahara Desert facilitates cigarette smuggling among the Maghreb countries. The proximity to the EU eases smuggling by sea to EU countries. In addition, poor law enforcement and lack of cooperation within and among the countries along

the Route favour smuggling activities and complicate the implementation of shared and effective policies to fight against and prevent them.

Many of the cigarettes flowing into the Maghreb area have been produced in or have previously transited through the United Arab Emirates. Here the Jebel Ali FTZ is at the heart of the fast-growing illicit whites trade (see Box 1).

From the United Arab Emirates, cigarettes enter the region from two main areas:

1. transiting through Turkey, Southern Europe (mainly Greece) and then entering Libya;
2. through Egypt, either after flowing across the Arabian peninsula or directly from the Red Sea.

Box 1. United Arab Emirates' Jebel Ali FTZ

In the Jebel Ali FTZ in the United Arab Emirates there are at least 10 factories, with a combined manufacturing capacity of up to 63 billion cigarettes per year. Some of the factories produce "lookalike" brands that infringe on the trademark rights of existing brands. Moreover, cigarettes legally produced in Jebel Ali are often shipped to other countries evading import tax and sales duties.⁵

Besides directly producing illicit whites, FTZs act as "washing machines" by allowing criminals to conceal the origin of their products by re-packing or even re-branding cigarettes.⁶

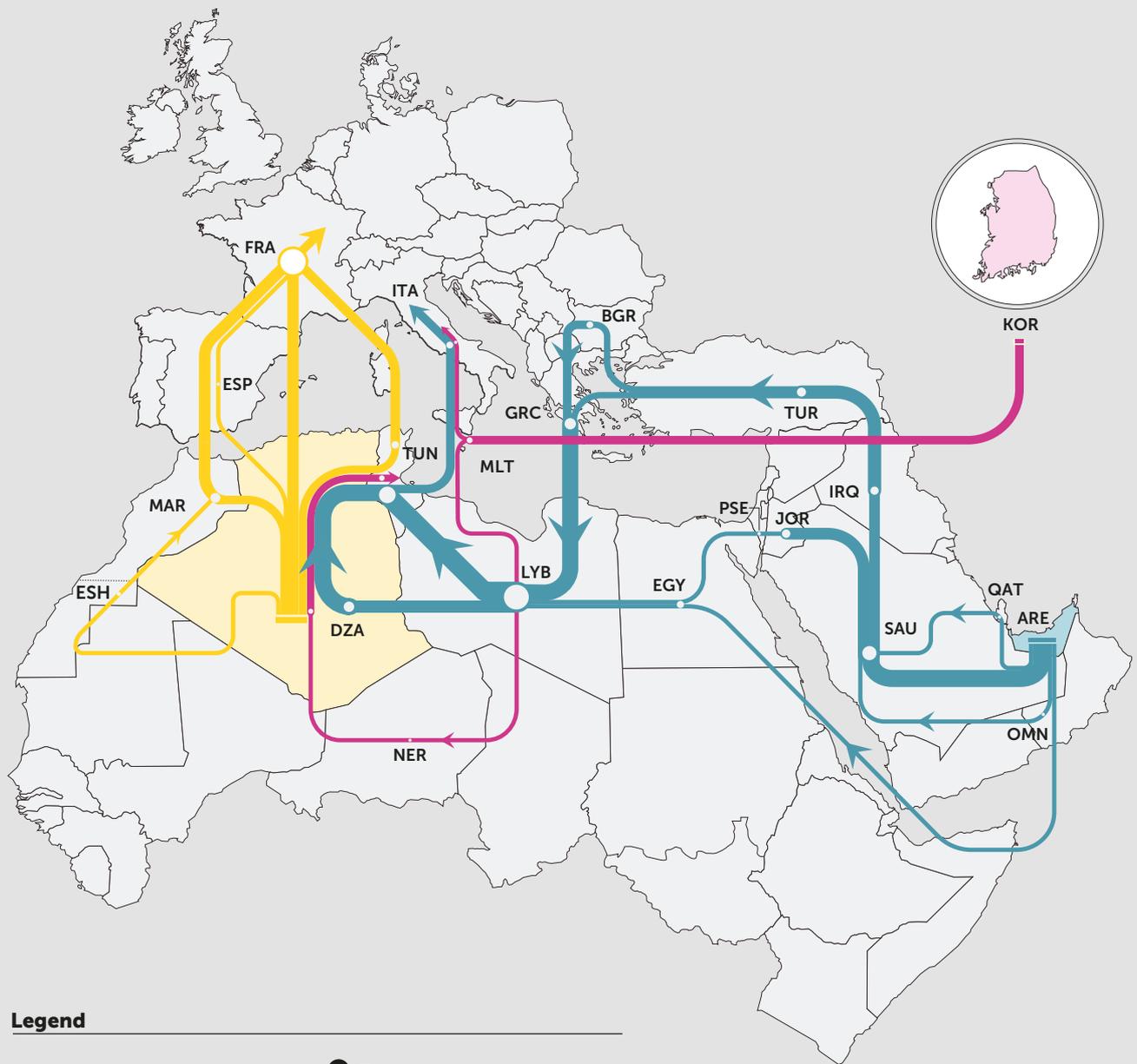
Other entry points are also exploited by smugglers of illicit cigarettes with origin in the United Arab Emirates, i.e. Western Africa and the Gulf of Guinea (see Box 2 and Box 3).

Box 2. Cigarette transiting through Mauritania and Western Sahara

Some of the cigarettes from the United Arab Emirates and other Arab countries enter Western Africa through the ports of Nouakchott and Nouadhibou in Mauritania. The latter has been a FTZ since 2013. Then, on the one hand, the cigarettes travel to Atar and Zouérat before reaching Algeria. On the other hand, cigarettes leave from Mauritania to Morocco passing through Dakhla (Western Sahara) and Tan-Tan (Morocco).⁷

In 2017, more than 2 billion illicit cigarettes transited through either Mauritania or Western Sahara. About 0.2 billion of them were produced in the United Arab Emirates. Illicit flows from Mauritania to Algeria and from Western Sahara to Algeria (regardless of cigarette origin) amounted to about 300 and 80 million, respectively. In Morocco, approximately 1 billion illicit cigarettes produced in Mauritania were smoked in 2017. About one third of them reached Morocco through Western Sahara, while the remaining part exploited Algeria as a transit country.

Figure 1. The Maghreb Route of cigarette trafficking (2017)



Legend

Volume - Number of sticks

Graphic reference scale

-  4 billion
-  2 billion
-  1 billion
-  ≤ 0.5 billion

 Transit and destination country

Origin of the cigarette flows

-  ARE: United Arab Emirates
-  DZA: Algeria
-  KOR: South Korea

Note: The map represents the main illicit flows of cigarettes transiting through the Maghreb countries. The flows represented should be considered indicative and based on estimates rather than exact values. Such estimates rely upon data related to official cigarette seizures along the trafficking paths and data on the consumption of cigarettes obtained through EPSs. Paths may deviate to other countries along the Maghreb Route and there are numerous secondary flows that are not represented. Arrowheads on paths' extremes indicate that further smaller flows might leave the country.

Box 3. Cigarette transiting through the Gulf of Guinea (Togo, Benin, Ghana)

Many illicit cigarettes enter in Africa through the ports of Lomé (Togo), Cotonou (Benin) and Tema (Ghana): in 2017, about 0.2 billion illicit cigarettes transited through these countries, of which 40 million originated in the United Arab Emirates. Imported cigarettes are declared “for transit”, thus avoiding custom controls and taxes upon entry, reaching Algeria and Libya through Mali, Niger and Burkina Faso.⁸ Nearly all the 40 million United Arab Emirates illicit cigarettes transiting through Togo, Benin and Ghana in 2017 were bound for Algeria and reached their final destination through Mali. However, total flows between Mali and Algeria amounted to approximately 0.6 billion illicit cigarettes, proving this connection to be pivotal for illicit cigarettes originating in different areas.

The Maghreb area is also a key smuggling region for illicit whites originating in South Korea.

Cigarettes enter the region through Malta and then move to Libya or flow directly into Europe.

Libya is a key intermediate transit point for cigarettes travelling to Europe: most of them transit through Algeria or Tunisia before being shipped to Southern Europe.

Cigarettes leave the Maghreb from three main countries—Algeria, Morocco and Tunisia—to reach Southern Europe—especially France, but also Italy and Spain. Proximity to the EU and the high price differential are the main drivers of these illicit flows.

The role of Libya

Libya is a key hub for cigarette smuggling along the Maghreb

Route mainly due to political instability, the high number of active terrorist groups and local tribes engaged in illicit trades, and the presence of long and hard-to-surveil borders.

Libya is a crucial transit country. 2017 estimates show that cigarettes produced in about 100 different countries transit through Libya before reaching 47 different final destinations. **From Libya illicit cigarettes proceed mainly to Tunisia and Algeria before reaching the EU.** In 2017, Libya was a transit point for 2.1 billion illicit cigarettes flowing to Tunisia and for 1.3 billion illicit cigarettes moving to Algeria.

Libya has also a marginal role as country of origin for illicit cigarettes consumed in North Africa or smuggled across the Mediterranean to consumer markets in Europe. In 2017, about 0.3 billion illicit cigarettes originating from Libya were smoked in the Egyptian market. In the same year, smaller volumes of illicit Libyan cigarettes were consumed also in Ukraine, France, the United Kingdom and Malta.

Mafia groups operating in Southern Italy and Malta exploit their networks in Libya to distribute cigarettes across the Mediterranean.⁹ Recent journalistic investigations suggest connections between Islamic State armed groups in Tripoli and Italian OCGs involved in the trafficking of cigarettes, weapons and drugs.¹⁰

The role of Algeria

Algeria is the principal outflow country in the region towards

Europe, mainly France and Spain, where the price of cigarettes is considerably higher. In particular, almost half of the illicit cigarettes consumed in France in 2017 originated from Algeria (about 3.4 billion illicit cigarettes). The maritime connection between the port of Algiers and the port of Marseille ensures that illicit cigarettes have direct access to France through sea transhipments.

Illicit flows from Algeria to Spain amounted to approximately 0.3 billion cigarettes in 2017, but two of out three of these cigarettes did not originate in Algeria.

Algeria is also a transit and destination country. In 2017, cigarettes produced in—among others—the United Arab Emirates (1.4 billion), Mauritania (0.9 billion) and Korea (0.7 billion) transited through Algeria before reaching the EU. In the same year, about 0.4 billion illicit cigarettes from the United Arab Emirates were destined to Algerian consumption.

Marseille is one of the main ports of entry into the EU for illicit cigarettes coming from the Maghreb region¹¹

The role of Morocco

Morocco is partially isolated from the other countries in the region with respect to cigarette trafficking. Indeed, in 2014, **Morocco built a security fence to strengthen its defences against cigarette and human smuggling from Algeria.**¹²

Algeria also took security measures and constructed a trench and sand barriers along its borders.¹³ Besides security personnel, the control of the Algerian-Moroccan border relies on movement sensors, radar, and cameras.

Despite the introduction of these measures, estimates indicate that cigarette illicit flows from Algeria to Morocco decreased by only about

4% between 2008-2012 (average of the five years) and 2017 (from 1.64 billion to 1.57 billion). One of the possible reasons is that the Algerian-Moroccan frontier covers terrain that is difficult to secure, such as deserts and mountains.¹⁴

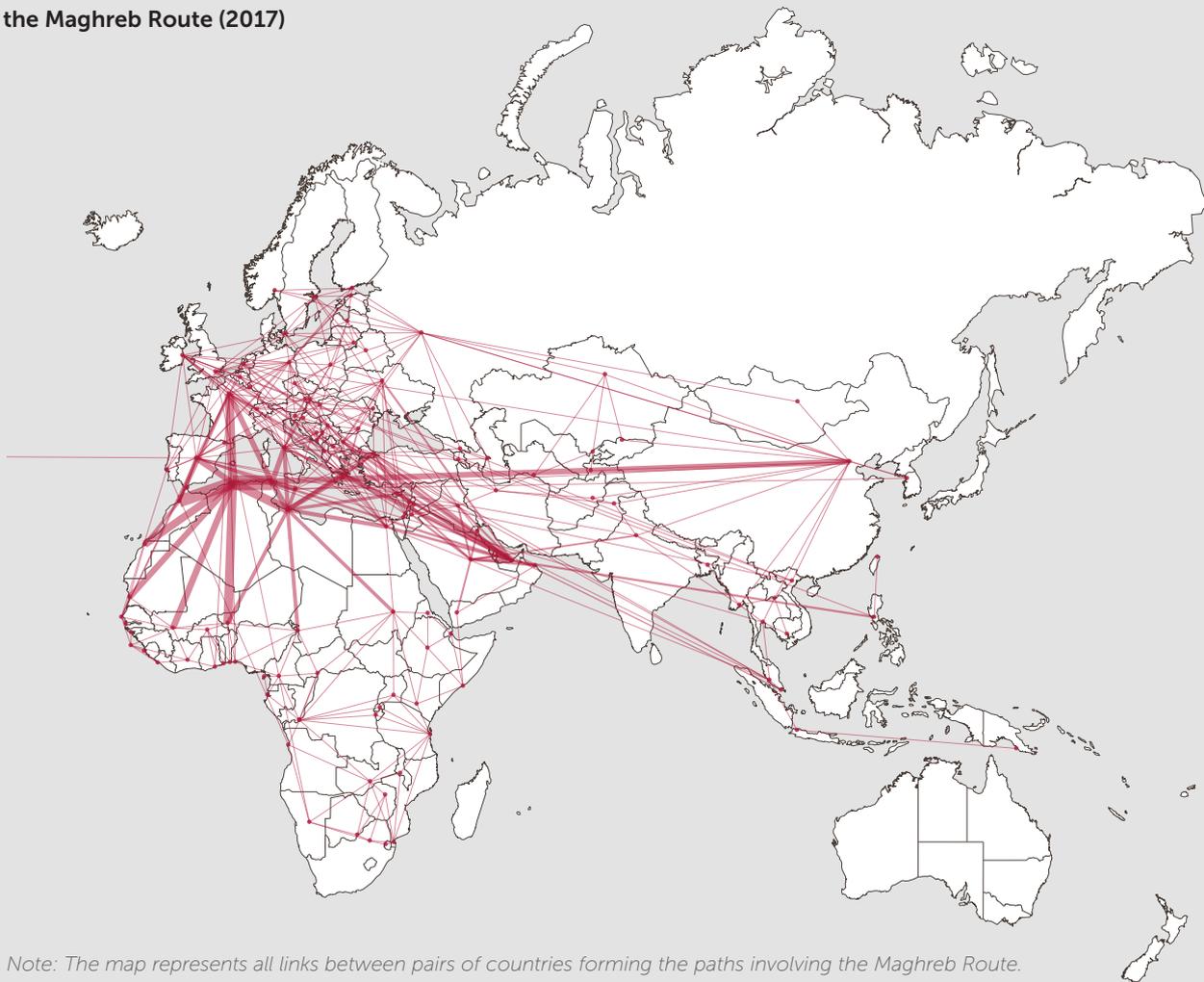
Illicit cigarettes flow into Morocco also from Western Sahara before reaching Spain, via Gibraltar.¹⁵ In particular, estimates indicate that almost 1 billion illicit cigarettes flowed from Western Sahara to Morocco in 2017. Key entry points in Spain are Cadiz and the Bahía de Algeciras.¹⁶ The geographic proximity between Morocco and Spain and the possibility to have direct sea transshipments facilitate cigarette smuggling activities.

The role of Tunisia

Tunisia is a transit point for illicit cigarettes originating from—among others—Algeria (0.9 billion), the United Arab Emirates (0.1 billion) and Mauritania (0.1 billion) and intended mainly for EU markets. The main outflows from Tunisia target France (about 1 billion of illicit cigarettes principally originating in Algeria) and Italy (about 0.2 billion principally originating in the United Arab Emirates).

Tunisia is also a key destination country for illicit cigarettes originating from the United Arab Emirates. In 2017, 2.6 billion illicit cigarettes arrived in Tunisia from the United Arab Emirates. In the same year, Tunisian smokers also consumed about 0.7 billion illicit cigarettes produced in Korea and 0.1 billion illicit cigarettes originating in Algeria.

Figure 2. All links of cigarette trafficking involving the Maghreb Route (2017)



Note: The map represents all links between pairs of countries forming the paths involving the Maghreb Route. Larger lines between pairs of countries indicate larger flows of illicit cigarettes between those countries.

2. Trafficked cigarettes

Illicit whites are the most commonly trafficked cigarettes in the Maghreb area

In 2017, illicit cigarettes accounted for about 20% of the total cigarette consumption in the Maghreb area.

Cigarette traffic in the Maghreb area mainly concerns illicit whites.

In 2017, over 45% of illicit cigarettes consumed were illicit whites of known origin and 15% were contraband cigarettes of known origin. The consumption of cigarettes from unspecified origins constitutes a sizable share of total illicit consumption (about 40% in 2017). Illicit whites are likely to account also for a large part of cigarettes of unspecified origin. A residual part were counterfeits (see Box 4 for country-specific figures).

The main illicit whites brands trafficked are Business Royals (whose production is based in the United Arab Emirates), Gold Seal (also produced in the United Arab Emirates), Pine (a South Korean brand) and American Legend produced by Karelia Tobacco (whose main production facilities are in Greece). In addition, Regina branded cigarettes coming from the Maghreb area have recently been seized along Italian and Spanish coasts.¹⁷ In most cases, the true origin of all these cigarette brands is not identifiable or is disguised as "duty-free". Locally produced illicit cigarettes are also smuggled in the Maghreb area, in particular the Algerian brand Rym.¹⁸

Legally produced cigarettes from well-known international brands are also smuggled in the area and to the EU, especially Marlboro and L&M.¹⁹

Box 4. Types of illicit cigarettes consumed in the countries of the Maghreb in 2017

In Morocco, illicit cigarettes account for 13% of the total consumption. About 41% of the illicit cigarettes consumed are contraband genuine cigarettes, and 45% are illicit whites.

In Algeria, counterfeit and contraband cigarettes account for only 2% of the total illicit cigarettes consumed, which mainly consist of illicit whites (50%) and cigarettes of unspecified origin (48%).

In Tunisia, illicit cigarettes constitute 43% of the total consumption. Of these illicit cigarettes, 44% are illicit whites.

In Libya, 93% of cigarettes consumed are illegal.²⁰

3. Criminal actors

Local tribes and terrorist groups are the main criminal actors involved in cigarette trafficking along the Maghreb Route.

Before the Arab Spring, the informal economy—including cigarette smuggling—was often tolerated by border officials and state authorities in the Maghreb.²¹ Economic rivalries over smuggling routes spread after the Arab Spring as a consequence of the collapse of many state institutions.²²

On occasion, new governments partly turn a blind eye to the smuggling activities (e.g., the Egyptian government presumably tolerates limited smuggling activities by the tribes in return for their political loyalty and certain security guarantees).²³

Local tribes

Cigarette smuggling represents a substantial source of income for local tribes due to the widespread poverty and unemployment. They are largely present in the Maghreb countries, especially in Libya, Mali and Algeria.

The Tuareg mainly operate between Mali, Libya (in the region of Fezzan) and Algeria, **along the Niger corridor**. This route is also controlled by Al-Qaeda in the Islamic Maghreb (AQIM), which supports and exploits the Tuareg tribes.²⁴

Contraband is the main source of subsistence for many communities and nomadic groups²⁵

The Tebu (or Toubou) **are active in the south of Libya**, especially in the south-eastern Cyrenaica (Kufra) region.²⁶ From late 2014 to early 2016, the Tebu were involved in a war against the Tuareg for the control of Ubari, in the Fezzan region, situated near the country's second-largest oil production site, and close to the city of Sebha, key for the smuggling route.²⁷

Other tribes involved in illicit transnational trades are the Qadhafda tribes active in Libya and Awlad 'Ali tribes in Libya and in Egypt.²⁸ The Awlad 'Ali control the lands on Egypt's northern coast, between El Salloum to El-Hamam—a stretch of land of about 450 kilometres along the Mediterranean—to the Siwa Oasis, which is situated inland. The Awlad 'Ali's territory extends also in Libya, with the harbour city Tobruk representing an important base.²⁹

Terrorist groups

Cigarette smuggling finances the activities of terrorist groups³⁰

The presence of terrorist groups especially in Libya, Algeria, Tunisia and Morocco favours the development of established smuggling practices. These groups exploit their criminal expertise and the control over several borderlands to carry out cigarette smuggling. They benefit from this illicit trade to finance their criminal activities.

Armed groups offer—or impose—protection services to local tribes active in transnational traffics³¹

Al-Qaeda in the Islamic Maghreb

(AQIM) supports the local community and **acts as a catalyst for disaffected youth** who start to gravitate toward transnational crimes, especially in Algeria and southern Libya. The lack of social welfare—particularly scant access to education—increases radicalization towards this terrorist group. Cigarette smuggling provided the bulk of financing for AQIM in the late 2000s and in the early 2010s. Members used to earn money mostly from charging protection fees to local tribes, such as Tuareg and Tebu, moving illicit cigarettes through the Sahara.³²

Other terrorist organisations involved in illicit transnational trades are in Algeria (e.g., al-Mourabitoun, set up by Mokhtar Belmokhtar, see Box 5), in Libya and in Tunisia (e.g., Ansar al-Sharia Darnah, Ansar al-Sharia Benghazi, al-Tunusi), and in Morocco (e.g., Moroccan Islamic Combatant Group).³³

Box 5. Smuggling of cigarettes by AQIM leaders

Mokhtar Belmokhtar is the Algerian leader of the al-Mourabitoun and former military commander of AQIM. Belmokhtar is well-known for allegedly running lucrative tobacco smuggling operations across the Sahel region to finance the Jihad in the '00s. Belmokhtar was dismissed from AQIM for being excessively focused on the financial benefits of the transnational trafficking and less on the religious and political ideologies of the group.³⁴ He then created his own terrorist organisation in 2013, where he continued his engagement in illicit trade activities by offering protection services to Berber tribes, including the Tuareg.³⁵

4. Key nodes of the Route

Libya

Based on 2017 data



ILLICIT INFLOWS

N. of inflows
11

Tot. inflowing volume transiting through Libya
4.7 billion

Main inflow
1.5 billion sticks from Greece (32% of tot. inflows)

N. of countries of origin of the inflowing cigarettes
100



ILLICIT OUTFLOWS

N. of outflows
7

Tot. outflowing volume
5.1 billion

Main outflow
2.2 billion sticks to Tunisia (43% of tot. outflows)

Tot. illicit cigarettes originating in Libya
0.4 billion

Main final destination of the outflowing cigarettes
Tunisia

MAIN ILLICIT INFLOWS AND OUTFLOWS BY COUNTRY OF ORIGIN

The visualization depicts the 5 main inflows and the 5 main outflows of cigarettes transiting through Libya disaggregated by origin of the cigarettes flowing.

Legend

○ Transit and destination country -○- Indirect connection

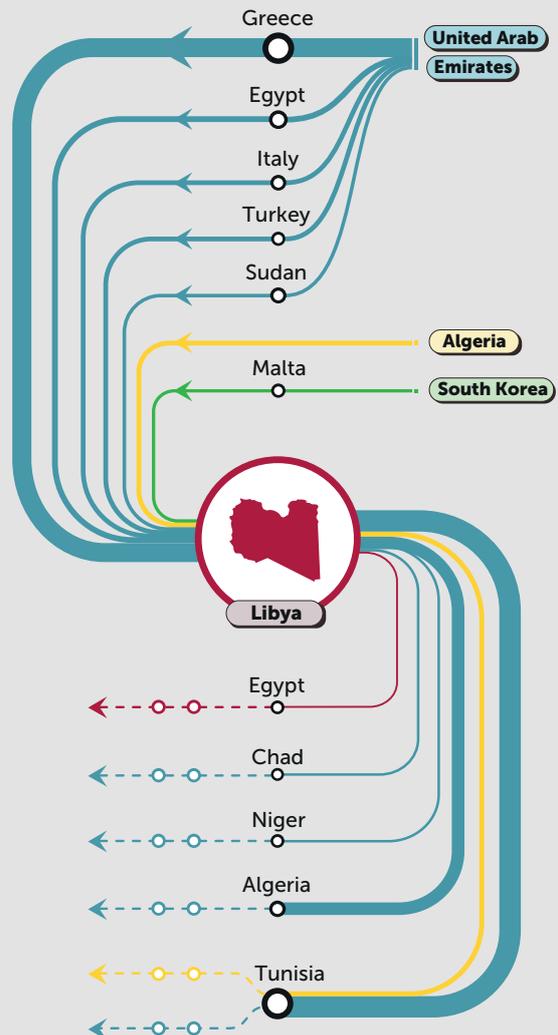
Origin of the cigarette flows

- United Arab Emirates
- Algeria
- South Korea
- Libya

Volume (N. of sticks)

Graphic reference scale

- 4 billion
- 2 billion
- ≤ 0.2 billion



Organised crime groups profit of state's dysfunction³⁶

In the course of the last decade, cigarette smuggling in Libya changed from state-tolerated contraband to under-the-radar and heavily armed

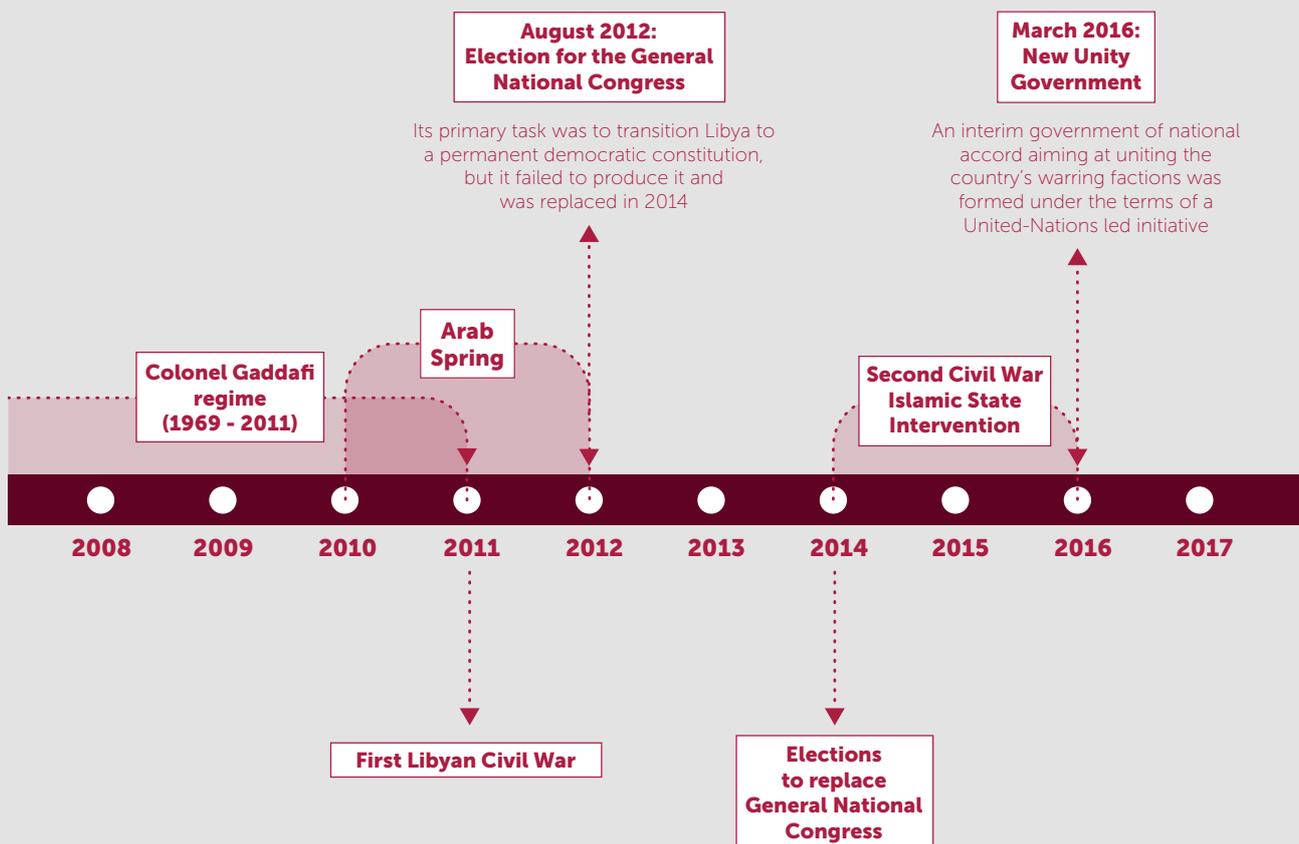
smuggling. During the Gaddafi regime (see Figure 3), the Libyan government did not oppose the smuggling of cigarettes across its territory, both from/to Egypt and to Tunisia.³⁷ **From 2011**—after the fall of Gaddafi and with the start of the Arab Spring uprisings in the same year—**Libya retained its role as a key hub for illicit cigarettes along the Maghreb Route.**

The instability of the country and the lack of recognised authorities

increased the level of violence and fuelled illicit trades.³⁸ Since 2011, politics in Libya has been characterised by the absence of a unifying power able to extend control over the national territory.³⁹

High political tensions among militias, tribes and jihadists provide the ideal circumstances for the development of a pervasive war economy in which **criminal networks profit from the state's dysfunction.**⁴⁰

Figure 3. Key events in Libya (2008-2017)



Note: The visualization summarises the main political events which took place in Libya between 2008 and 2017—i.e., the year corresponding to the NEXUS estimates. After Gaddafi's fall in 2011, the General National Congress elected in 2012 did not manage to provide the country with a democratic constitution; thus, in 2014, elections were held to replace it. Thereafter, the country was plagued by conflicts between the rival parliaments, which culminated in a second civil war. Efforts to create a new government of national accord were put in place and resulted in the formation of a New Unity Government in 2016.⁴¹ However, still in September 2018, the UN declared a state of emergency in Tripoli in confirmation of the fragile context of the last years.

Other reasons explain the importance of Libya in cigarette smuggling:

- the presence of active terrorist groups (e.g., AQIM) able to attract youth suffering from the scant access to education and the lack of legal employment opportunities;
- the presence of local tribes engaged in illicit cross-border trades to cope with poverty and unemployment. Different tribes fought for the control of border points to exercise their own authority.⁴² In particular:
 - the Tuareg took control of the south-western borders;
 - the Tebu are involved in trades in south-eastern Cyrenaica;
 - the Qadhadfa tribe controlled the smuggling route in Sirte (north of Libya);
 - Awlad 'Ali tribes are involved in smuggling activities across the Egyptian-Libyan border;
- the high degree of social acceptance of cigarette smuggling (see Box 6);⁴³
- the proximity to the borders of the EU—where cigarettes are more expensive;
- the presence of long and porous borders.

Libya is a key transit and destination country for illicit cigarettes originating mainly from the United Arab Emirates.

In 2017, 4.7 billion illicit cigarettes transiting through Libya. According to KPMG's estimates, in 2016, 6.5 billion illicit cigarettes entered in Libya to be consumed locally.⁴⁴

Box 6. The sub-culture of smuggling within Libyan borders

A recent ethnographic study conducted in the borderlands of Egypt and Libya followed the Awlad 'Ali Bedouin tribes. It highlighted how Bedouin tribes have a positive perception of their involvement in trafficking activities, which are necessary and unavoidable to sustain their community. The young members

of the Bedouin tribes depict themselves as entrepreneurs, recording their achievements—usually the act of smuggling and the illegal crossing of borders—in short video clips, accompanied by Bedouin music. An example of these videos is available at this link: <https://www.youtube.com/watch?v=mhp6Znk7Yd0>.⁴⁵

Libya registers the highest consumption share of illicit cigarettes among the Maghreb countries⁴⁶

The main **borders exploited for smuggling cigarettes into Libya** are the following:

- **the Egyptian-Libyan border**, mainly because of the tolerance of the Egyptian government towards smuggling activities;⁴⁷
- **the Mediterranean border**, which is exploited in both directions—illicit cigarettes both enter and leave Libyan ports en route to their final destination;
- **the Libya-Niger border**, which is a key transit point for cigarettes and other commodities entering Libya and converging in Sebha,

also known as “the capital of the South for traffickers”. The route is the subject of a dispute between Tuareg and Tebu tribes;⁴⁸

- **the Tunisian-Libyan border**, where smuggling profits have increased in the absence of a unified Libyan and Tunisian government response. In fact, although Tunisia has sought to reinforce border security by completing a planned 200 kilometres barrier along its border with Libya, incentives and capacities to contrast the traffics have diminished due to a lack of political unity after the exile of former President Ben Ali.⁴⁹

Outflows of cigarettes towards Southern Europe tend to transit through Tunisia or Algeria before reaching their final destination countries—mainly France, Spain and Italy, which together consume about half a billion illicit cigarettes that transited from Libya. These flows benefit from the close relationships between transnational terrorist groups active in the country and OCGs operating in the Mediterranean Sea, such as the Italian Mafia.⁵⁰



ILLICIT CONSUMPTION

Tot. illicit cigarettes consumed

0.9 billion

Tot. illicit cigarettes consumed of unknown origin

0.5 billion

Main origin of illicit cigarettes

United Arab Emirates



ILLICIT INFLOWS

N. of inflows

8

Tot. inflowing volume

3.8 billion

Main inflow

1.3 billion sticks from Libya (34% of tot. inflows)

N. of countries of origin of the inflowing cigarettes

80



ILLICIT OUTFLOWS

N. of outflows

9

Tot. outflowing volume

7.6 billion (about half of the inflows)

Main outflow

2.6 billion sticks to Tunisia (34% of tot. outflows)

Tot. illicit cigarettes originating in Algeria

4.2 billion

Main final destination of the outflowing cigarettes

Tunisia

MAIN ILLICIT INFLOWS AND OUTFLOWS BY COUNTRY OF ORIGIN

The visualization depicts the 5 main inflows and the 5 main outflows disaggregated by origin of the cigarettes flowing.

Legend

○ Transit and destination country

-○- Indirect connection

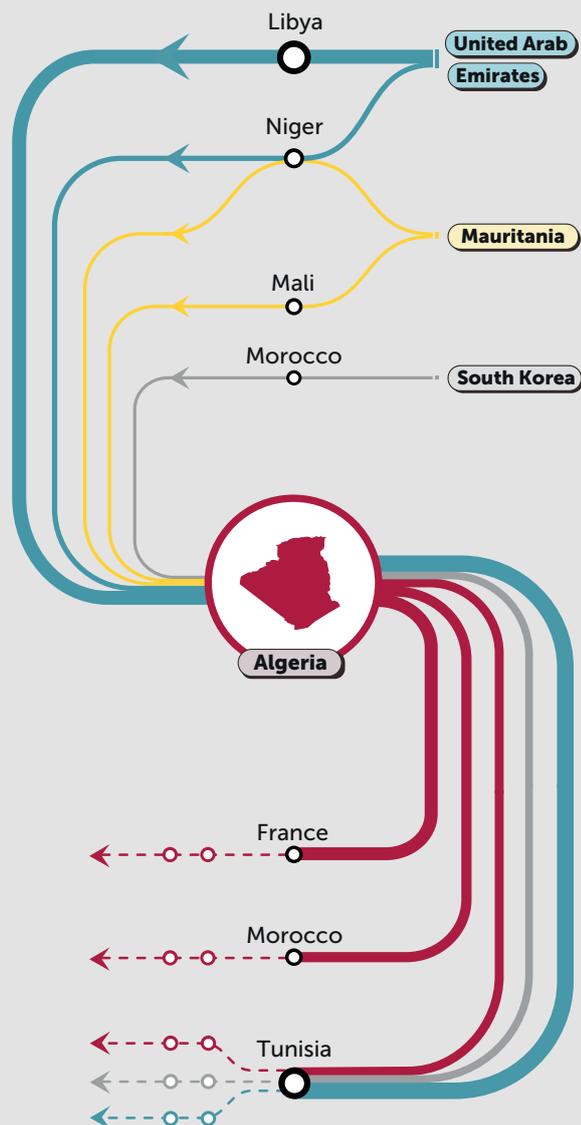
Origin of the cigarette flows

- United Arab Emirates
- Mauritania
- South Korea
- Algeria

Volume (N. of sticks)

Graphic reference scale

- 4 billion
- 2 billion
- ≤ 0.2 billion



The consumption of cigarettes is relatively low and it has decreased further in recent years, even though Algerian cigarettes have the lowest prices in the region

Algeria is the largest country in the Maghreb region. It is **an important country of origin for illicit cigarettes** due to its geographical proximity to the EU and because it has the lowest cigarette prices in the region.

In 2017, the consumption of illicit cigarettes accounted for less than 4% of total consumption. **Algeria is mainly a transit and outflow country for illicit cigarettes towards its neighbours**, with 2.6 billion cigarettes flowing to Tunisia and 1.5 billion to Morocco in 2017. Most of the 2.6 billion illicit cigarettes flowing to Tunisia were produced in the United Arab Emirates, Algeria itself, or South Korea. A small amount of these illicit cigarettes were consumed in Tunisia, but the majority transited through Tunisia to reach their final destination. Overall, total outflows of illicit cigarettes are larger than inflows, meaning that Algeria acts also as the origin of illicit cigarettes due to the lower cigarette price.

France and Spain are the primary EU final destinations of illicit cigarettes originating from or transiting through Algeria. The maritime connection between the port of Algiers and the port of Marseille has facilitated cigarette smuggling to France. In 2017, France consumed 2.5 billion illicit cigarettes that were either produced or transited in Algeria, about three times the annual average over 2008-2012. This same number amounted to 0.2 billion for Spain in 2017.

The presence of long and permeable borders facilitates cigarette smuggling in Algeria. In 2017, the illicit inflow of cigarettes amounted to 3.8 billion. This volume includes both illicit cigarettes consumed in Algeria and illicit cigarettes transiting through Algeria before reaching their final destination. **Illicit cigarettes enter Algeria from three main points:**

1. **the eastern border with Libya;**
2. **the southern borders with Mauritania** (Tindouf), **Mali** (Tamanrasset), **and Niger** (Guezzam), after cigarettes entered from the Mauritanian ports of Nouakchott or Nouadhibou;⁵¹
3. **the western border with Morocco**, reached after transiting through the Mauritanian cities of Atar and Zouérat and then through Dakhla (Western Sahara) and Tan-Tan (Morocco). This third path is exploited in both directions.

In the last twenty years, both **Morocco and Algeria have undertaken several attempts to reinforce their borders** (i.e., closed frontiers, visa restrictions, a fence and trenches). These measures should have disrupted the flow of cigarettes in both directions across their shared—1,559 kilometres long—

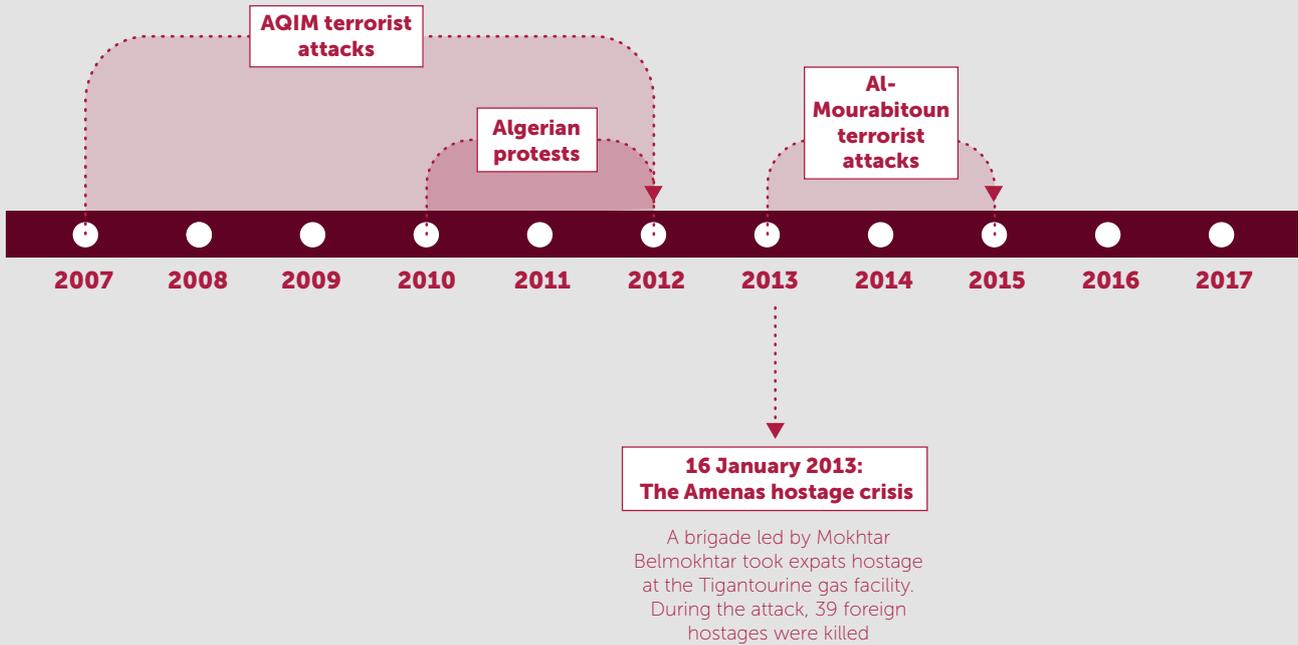
border.⁵² Despite these increased security measures, illicit flows from Algeria to Morocco decreased only from about 1.64 billion cigarettes in 2008-2012 (average of the five years) to 1.57 billion in 2017. The ability to navigate the mountainous terrain on the border between Algeria and Morocco, coupled with the widespread corruption among the low-paid border officials, have enabled smugglers to continue their operations in the region.⁵³

In Algeria, smuggling is a source of daily subsistence⁵⁴

Different actors are active in cigarette smuggling in the country. Some of them engage in this illicit activity to cope with poverty and underdevelopment. For the Tuareg, for example, cigarette smuggling is an opportunity to earn their livelihoods.⁵⁵

The jihadists exploited the economic recession, which led to violent riots and protests around the country between 2010 and 2012, to foster their illicit activities (see Figure 4). Terrorist attacks carried out by AQIM and Al-Mourabitoun militant organisations further contributed to creating a state of chaos that facilitates trafficking practices. Jihadists encouraged the involvement of youths in illicit traffics and started supporting the Berber tribes—especially Tuareg—that were involved in smuggling activities. In exchange for providing protection, they collected “taxes” levied on the illicit transnational trades, thus financing their jihad.⁵⁶

Figure 4. Key events in Algeria (2007-2017)



Note: The visualization summarises the main political events which took place in Algeria between 2007 and 2017—2008-2017 are the year corresponding to the NEXUS estimates. Between 2007 and 2015, in particular, Algeria was suffering because of terrorist attacks. At the same time, in those years, the government led by Abdelaziz Bouteflika had to confront several political protests questioning its legitimacy.

Engagement in cigarette smuggling offers the opportunity to exchange commodities: **Algerian provincial officers illegally sell subsidised fuel, food and humanitarian aid to northern Mali and Mauritania in return for cigarettes** from Sahrawi networks.⁵⁷

To face these challenges, the Algerian government has undertaken, and is currently undertaking several policies, related to the tobacco industry:

- it is seeking to privatise the state-owned firm *National Society of Tobacco and Matches* (SNTA), which is the leading producer in Algeria;

- it has opened the market to Arab investors;
- it has imposed a tax increase of 10% on imported goods.⁵⁸

5. Evolution of the Route

Between the years 2008-2012 and 2017, routes and the amount of cigarette smuggling in the Maghreb region changed following political and economic shifts.

In the past ten years, the volume of illicit cigarettes flowing along the Maghreb Route has increased

The overall volume of cigarettes smuggled along the Maghreb Route increased by more than 10% from 2008 to 2017, from approximately 9 billion illicit cigarettes over 2008-2012 (average per year) to 10 billion in 2017.

The overall increase was mainly due to the growth in the outflows towards Europe. Over the years 2008-2012, about 1.4 billion cigarettes were outflowing from Maghreb countries directed to Europe every year. These cigarettes increased to 4.3 billion cigarettes in 2017—i.e., outflows to Europe more than tripled.

Conversely, the total flows targeting other regions decreased by about 1.9 billion between 2008-2012 and 2017. Especially, **the traffic of cigarettes**

targeting countries in North Africa declined during the last five years—from 7.7 billion cigarettes to 6.0 billion, a contraction of 1.7 billion. This decline was mainly due to the narrowing price gaps among countries within the region and borderlands reinforcement, especially in Morocco and Tunisia.

Outflows to other regions—i.e., Middle East—also decreased by about 0.2 billion in the period considered.

Outflows of illicit cigarettes from Algeria to any other country increased from 5.4 billion over 2008-2012 (annual average) to 7.6 billion in 2017 (see Figure 5). Outflows towards EU MSs—especially France—increased by about 5 times between 2008 and 2017. Outflows towards Spain also increased.

Over the years 2008-2017, **Libya retained its role as a key transit hub.** However, its importance as a transit point for cigarettes flowing to Europe slightly decreased—outflows of cigarettes towards Europe declined from about 0.8 billion over 2008-2012 (average of the five years) to 0.7 billion in 2017.

In Morocco, inflows from Algeria slightly decreased—from an average of 3.5 billion over 2008-2012 to about 3.2 billion in 2017. However, **total illicit outflows from Morocco have increased** in recent years from approximately 1 billion cigarettes (annual average 2008-2012) to over 1.6 billion cigarettes in 2017.

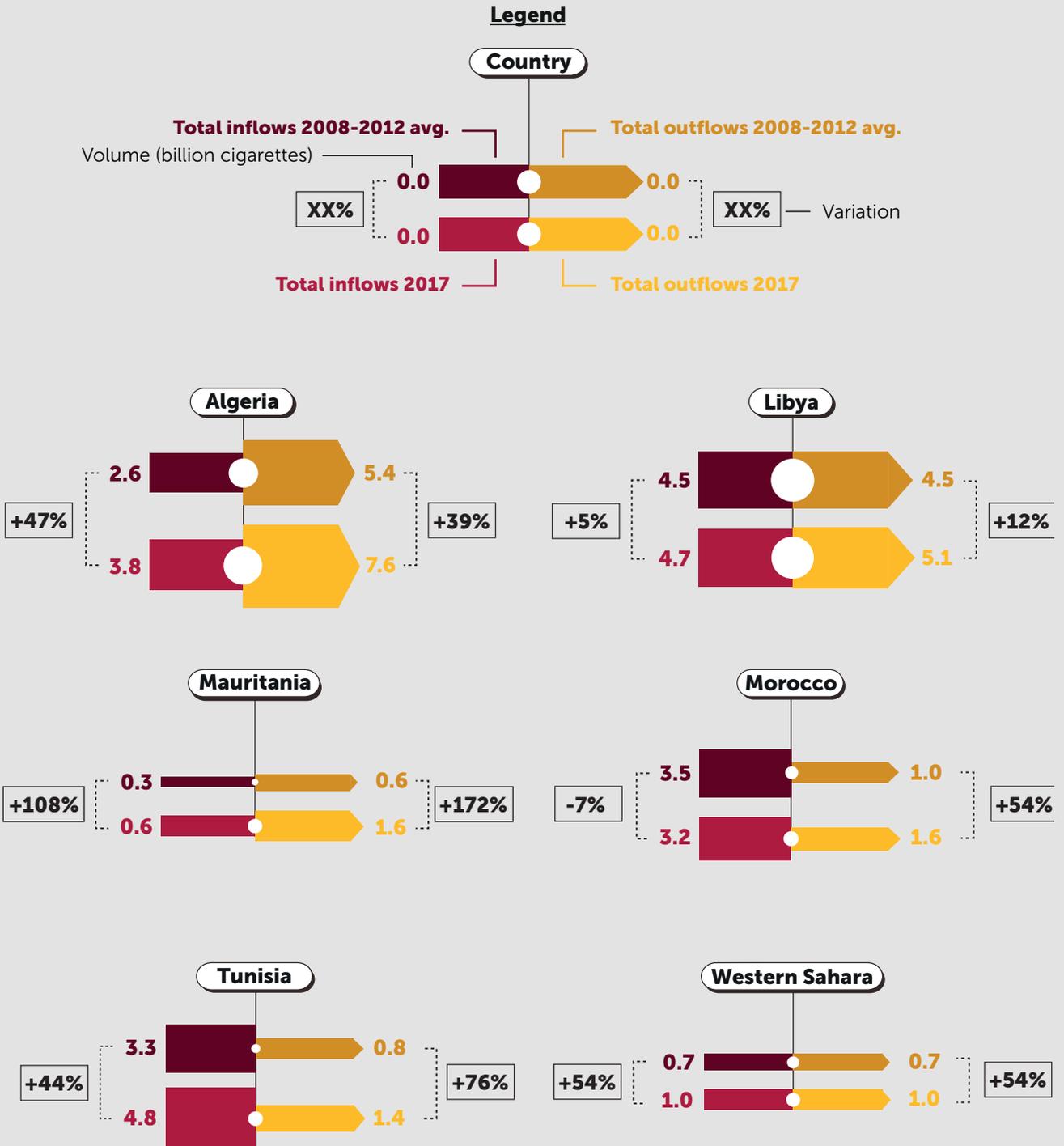
In Tunisia, total inflows increased by 44% over the period 2008-2017. In particular, flows from Algeria and Libya to Tunisia registered a strong expansion, increasing by 26% and 73% respectively. **Outflows from Tunisia towards Europe—especially France—almost tripled.**

Until 2011—and the Arab Spring—Western Africa was the main entry point in Africa for cigarettes flowing in the Maghreb area from the Arabian Peninsula. Specifically, Mauritania, Ghana, Togo and Benin were key transit countries for illicit cigarettes reaching Algeria and Libya.⁵⁹

After the Arab Spring, Egypt became a transit country for illicit cigarettes flowing from the United Arab Emirates to Libya

Illicit cigarette flows from the United Arab Emirates to Egypt were three times as large in 2017 compared to the annual average in 2008-2012. Using this new route, traders smuggle cigarettes towards the European Mediterranean countries, mainly France, Italy, and Malta.

Figure 5. Comparison of inflows and outflows of illicit cigarettes in the countries of the Maghreb Route (2008-2012 avg. and 2017)



Note: The graph provides a comparison of the illicit flows (inflows and outflows) traversing the countries in the Maghreb area in different points in time. For each country the estimate of the flows in 2008-2012 (annual average) and the estimate of the flows in 2017 are provided. Note that illicit cigarettes outflowing from a country may be included in the estimate of the inflows of another country depending on the overall structure of the trafficking Route.

6. Future challenges and perspectives

In the next years, the volume of inflows and outflows of cigarettes circulating in the Maghreb area may change in accordance with national and international policies.

The lack of regional cooperation pushes countries to sign their own agreements with the EU (or EU MSs) instead of developing a regional agreement. **Lack of coordinated operations in the area may escalate the risk of violence and smuggling activities in the future.**⁶⁰

The evolution of trafficking along the Maghreb Route will depend on future joint actions between the Maghreb countries and the EU

In 2017, Algeria increased taxes on cigarettes.⁶¹ This policy is likely to reduce the amount of cigarettes passing from Algeria to the European markets. At the same time, **tax increases may induce communities to work even more in the smuggling market**, as prices for genuine cigarettes will rise. Besides the tax reform, the Algerian government is seeking to privatise the national tobacco firm and it has recently opened to Arab investors.⁶²

Algeria, Tunisia and Morocco are trying to tackle cigarette smuggling reinforcing their border security

Algeria expects to reduce the inflows of illicit cigarettes by opening the markets to foreign investors, thus increasing internal competition in the market

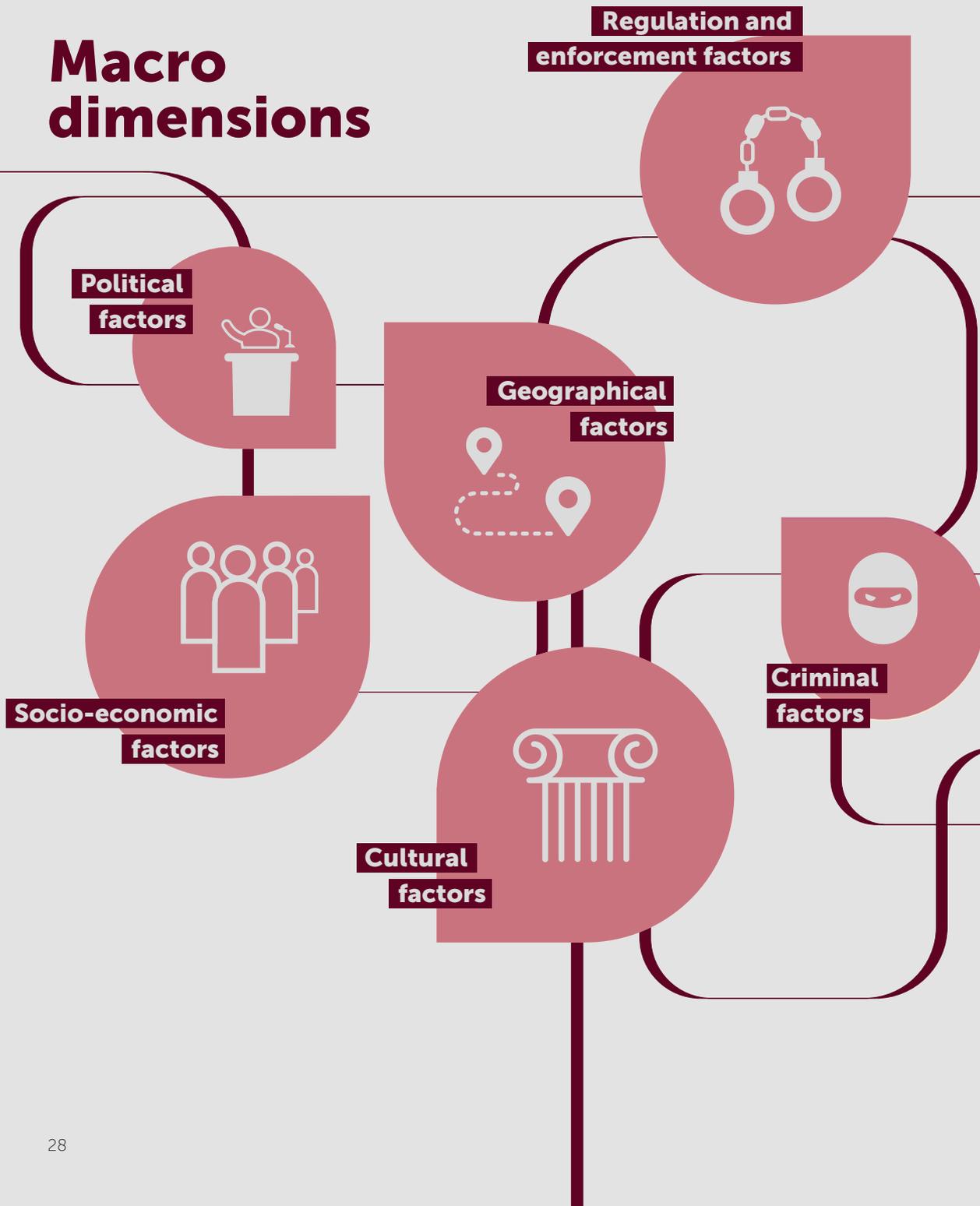
Governments in Morocco, Algeria and Tunisia have sought to reinforce border security through the construction of new barriers.⁶³ From one side, these barriers might strengthen defences against illicit activities, especially human smuggling and terrorists' infiltrations (AQIM from Algeria, and Islamic State from Libya). From the other side, **increased controls could shift the smuggling routes**. They might also not be seen as a positive development by local population (cross-border trades are a financial resource), enhancing the level of violence.

Due to the persisting instability and lack of recognised authorities in some countries (e.g., Libya), radical reductions in the flows of illicit cigarettes are unlikely to occur in the foreseeable future.

7. Enabling factors in brief

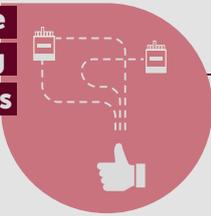
Several factors and incentives drive smuggling activities in the area.⁶⁴ All of them are interconnected and influence each other. For clarity, they have been divided into six macro dimensions.

Macro dimensions



Political factors

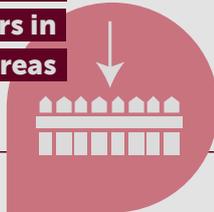
Government
tolerance
of trafficking
activities



Lack of recognised
state authority

Geographical factors

Long porous
borders in
desert areas



Short sea
connections to
EU markets

Regulation and enforcement factors

Poor law
enforcement



Ineffective
border control



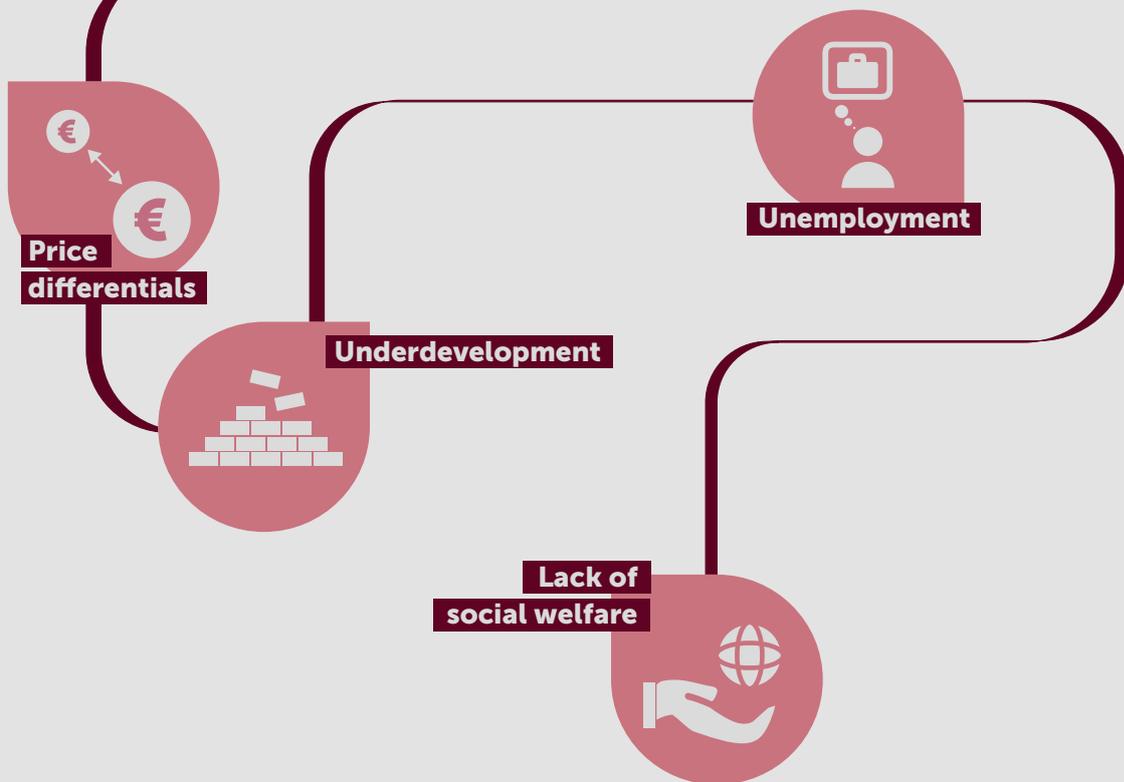
Limited judicial
consequences
of trafficking



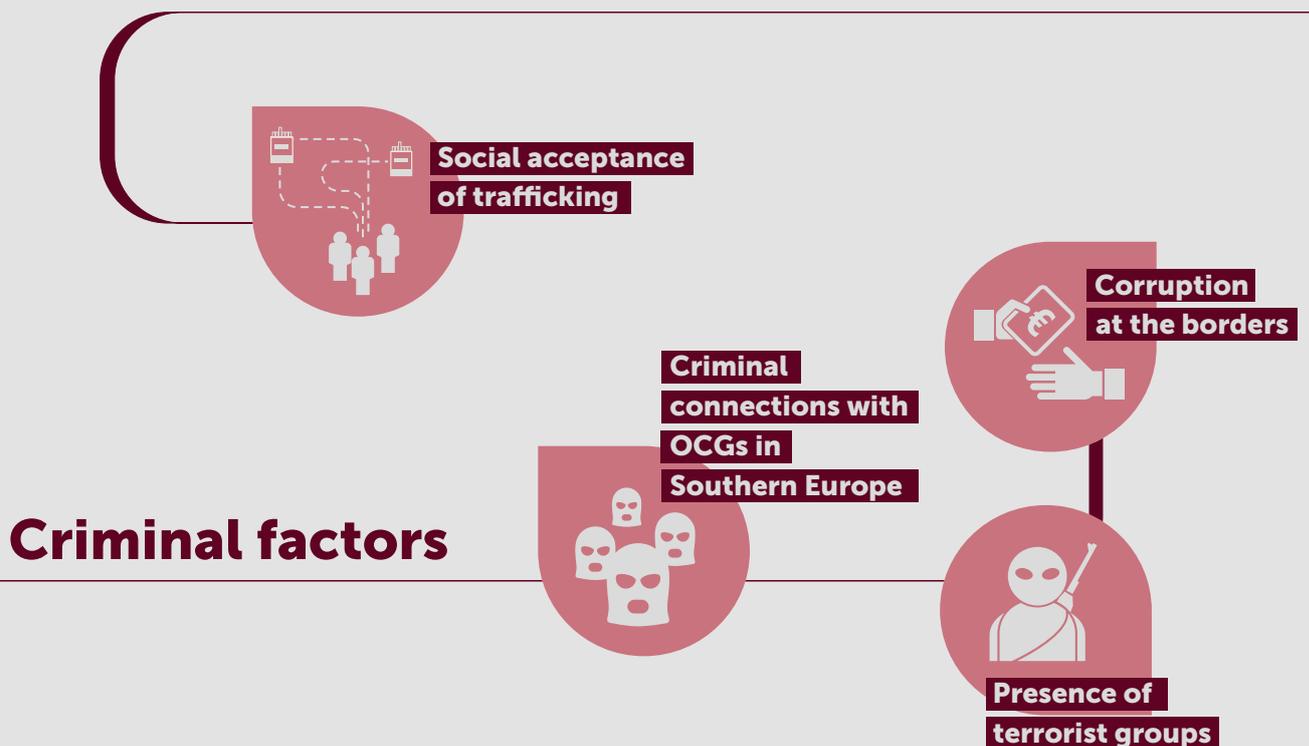
Fragile
international
cooperation



Socio-economic factors



Cultural factors



Criminal factors

Glossary

The following terms have been used in the present booklet with the following meaning:

Contraband or smuggling:

the unlawful movement or transportation of cigarettes from one tax jurisdiction to another without the payment of applicable taxes or in breach of laws prohibiting their import or export.⁶⁵

Counterfeits: cigarettes illegally manufactured and sold by a party other than the original trademark owner. Counterfeits can be sold in the source country or smuggled into another country, both without paying taxes.⁶⁶

Destination country: country in which illicit cigarettes originating in another country are finally consumed.

Duty-free cigarettes: cigarettes bought without payment of customs or excise duties. Consumers may buy duty-free cigarettes when travelling into or out of the EU (including Switzerland and Norway) by land, air or sea at legal duty-free shops.⁶⁷

Empty pack survey (EPS): survey collecting and analysing empty cigarette packs to estimate the share of domestic, non-domestic and counterfeit packs in each country.

Flow: the movement of cigarettes between two countries.

Illicit whites: cigarettes manufactured legally in a country but intended for smuggling into other countries where they usually have limited or no legal market. While their exportation may occur legally—or may not—and taxes in manufacturing countries are usually paid, their import into and sale in destination countries is always illegal and takes place without the payment of applicable taxes.⁶⁸

Inflow: the inward flow of cigarettes.

Origin country: country from which the illicit flow of cigarettes originates.

Outflow: the outward flow of cigarettes.

Path: the ordered sequence of countries through which illicit cigarettes transit while going from their country of origin to their final destination.

Route: the broad combination of paths and flows connecting different macro regions in the transnational trafficking of cigarettes.

Transit country: country through which cigarettes pass to flow from their country of origin to their country of destination.

Unspecified: cigarette packs which do not bear specific market labelling.⁶⁹

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