



**GLOBAL  
INITIATIVE**  
AGAINST TRANSNATIONAL  
ORGANIZED CRIME

# MAPPING ORGANIZED CRIMINAL ECONOMIES IN EAST AND SOUTHERN AFRICA

Wildlife  
Narcotics  
Extractives  
Humans

JULY 2025



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*In memory of Jenni Irish-Qhobosheane.*

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# INTRODUCTION: THE GEOGRAPHY OF ORGANIZED CRIME IN EAST AND SOUTHERN AFRICA

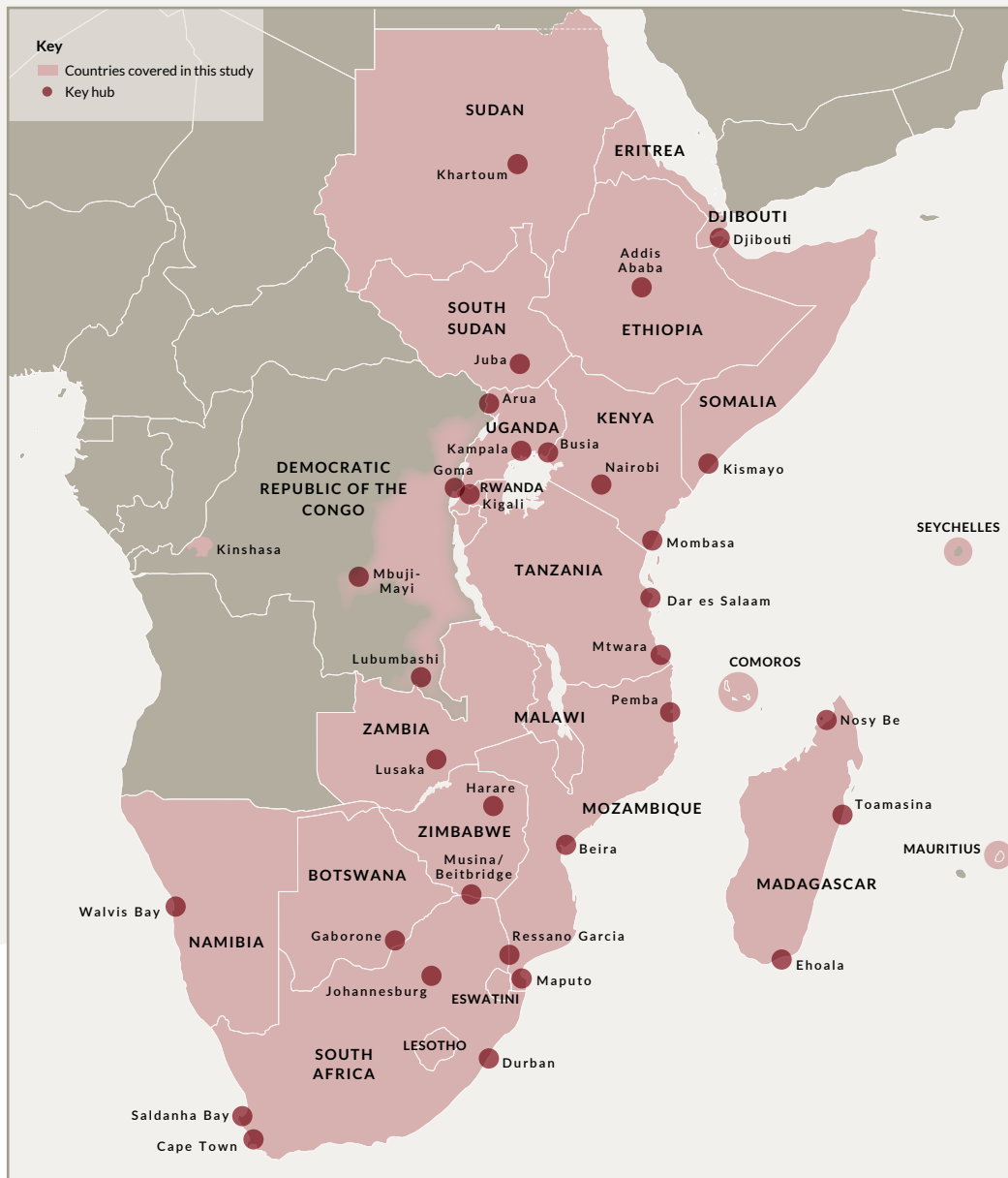
**E**ast and Southern Africa (henceforth 'ESA') is a pivotal node for organized crime, connecting regional criminal markets to global networks. From the shores of Somalia to border crossings and international air and seaports in Ethiopia, Kenya, Tanzania, Mozambique, Zimbabwe, South Africa and Namibia, the region serves as a thriving source, hub and conduit for a wide variety of illegal commodities.

For example, heroin trafficked from Afghanistan via Pakistan and Iran is shipped across the Arabian Sea and Indian Ocean by dhow before it is deposited in northern Mozambique and Tanzania.<sup>1</sup> There, it splits into two primary supply lines: one of higher purity bound for international markets in Europe and Australia, and another that is significantly adulterated and consumed in towns and villages across ESA.

Rhino horn is smuggled by air from Johannesburg and Addis Ababa, routed through Dubai<sup>2</sup> and Doha and sometimes Paris and London to throw off law enforcement.<sup>3</sup> Ivory departs in shipping containers from ports in Dar es Salaam, Nampula<sup>4</sup> and Durban,<sup>5</sup> ending up in Singapore, Sihanoukville, Huangpu and Haiphong.<sup>6</sup> Gold mined illegally in Zimbabwe's mineral-rich Kwekwe gold fields and deep shaft mines in the towns of Krugersdorp, Carletonville, Klerksdorp and Welkom on South Africa's Vaal Reef is processed and eventually laundered through Dubai. Gold is smuggled by the tonne into countries along the strife-torn Democratic Republic of Congo (DRC)'s eastern border and laundered through Rwanda, Burundi, Uganda, Tanzania and the United Arab Emirates (UAE).<sup>7</sup> In northern Mozambique and South Africa's KwaZulu-Natal province, Islamic State-aligned insurgents and supporters have been implicated in criminal economies, gold smuggling, and kidnapping and extortion schemes to raise funds.<sup>8</sup>

In addition to local criminal actors, the region has attracted a coterie of international criminal players. For instance, networks from China, Pakistan and Iran are known to interface with African intermediaries for drug trafficking (drug precursor chemicals, methamphetamine and heroin) and wildlife smuggling (notably of abalone and ivory). In Southern Africa, Nigerian and Congolese syndicates, often operating from hubs such as Johannesburg, coordinate regional drug distribution and financial fraud schemes while also connecting to global diaspora networks.





**FIGURE 1** The countries covered by this study and main organized crime hubs in East and Southern Africa.

Yet this chaotic mixture of different criminal commodities and networks is, in many ways, shaped by geography and coalesces around a spider's web of regional hubs and economic centres. Environmental, social and regional dynamics in hinterlands allow warlords and smugglers to thrive, while bustling trade hubs provide cover for clandestine flows and access to key transport links. In urban slums, neglected towns and remote rural communities, criminal actors and parallel illicit economies rapidly fill the void left by an often absent state. Ancient trade and migratory routes over mountains and along rivers and coastlines that long pre-date colonial borders allow for the largely untrammelled movement of people and goods, both licit and illicit. This means many of these trafficking networks and criminal groups are found concentrated in certain illicit hubs.

The challenges in countering this are enormous. For example, Bole International Airport in Ethiopia, a key smuggling hub for extractives, wildlife products, people and drugs, handles more than 24 million passengers, 100 000 flights, 50 million pieces of luggage and around 226 000 tonnes of cargo every year. Yet it lacks sufficient screening equipment, staff and sniffer dogs.<sup>9</sup> The South African port of Durban, notorious for its inefficiency, corruption and drug trafficking, handles around 60% of South Africa's container traffic: 2.9 million 20-foot-equivalent units per year.<sup>10</sup> Only a fraction can feasibly be scanned or searched.

This report aims to define where the illicit hubs of the region are and explain which factors shape the geography of organized crime in ESA across four main markets: drugs, wildlife, extractives, and human trafficking and smuggling. These illicit markets are often looked at in isolation by enforcement bodies, policymakers and analysts. While this is often justified, as it means action can be taken against a particular form of illicit trade, looking at a range of illicit markets together can better demonstrate where convergence occurs and illuminate the common factors that shape the geographical concentrations of these criminal markets.

## Main markets

The four markets were selected because of their scale, impact and connectivity across borders, communities and economies. They represent some of the most entrenched and destabilizing forms of organized crime in the region, each with distinct drivers, but often converging on trafficking routes and hubs:

- Drug trafficking in ESA has grown rapidly in recent years, and the region is now a major transit and consumer destination for heroin, cocaine and synthetic drugs.
- The trade in extractives such as gold represents a comparatively high-value, low-risk opportunity for organized crime groups. In the DRC, Zimbabwe and South Sudan, informal and illegal gold mining is linked to armed groups, state actors and transnational smuggling networks.
- People smuggling and trafficking are acute in the Horn of Africa and Southern Africa, often involving vulnerable populations in Eritrea, Ethiopia, Somalia, Mozambique, Zimbabwe and Lesotho, among others.
- Illegal trade in wildlife and wildlife products, notably elephant ivory, rhino horn, pangolin scales, rare plants and reptiles, has made ESA a significant conservation and security concern. Armed poachers and insurgent groups target parks and reserves across the region. The trade fuels violence and undermines rural livelihoods, particularly in cases where it intersects with other forms of criminality.

These four markets provide a strategic lens through which to map and understand crime hotspots in the regions more broadly. They reflect the complex, adaptive nature of criminal ecosystems that thrive in environments marked by weak institutions, poverty and fragility. Their impact and their harms extend far beyond Africa.

This report considers these markets in consecutive sections. An analysis of crime convergence in the ESA hubs then follows, setting out commonalities among the four markets (i.e. the factors that lead to convergence between different forms of organized crime). The report concludes with key recommendations for policymakers.



## Methodology

The analysis covers 22 countries in ESA, traversing the region north–south from Somalia to South Africa, as well as westwards from the Indian Ocean coast to the Atlantic (see Figure 1).<sup>11</sup> Members of the Global Initiative Against Transnational Organized Crime (GI-TOC) Network of Experts, thematic leads and data provided by fieldwork teams on the ground were crucial to the primary research. The study also draws on an extensive literature review, including the GI-TOC's existing body of research on the region.<sup>12</sup> This includes the Organized Crime Index, which is published biannually and ranks countries based on the prevalence of organized crime and their resilience to it. This evidence base was used to identify illicit hubs according to three broad types:

- Hotspots: places where there is a strong presence of criminal actors, which may be involved in various kinds of illicit markets and criminal activities, and which are often backed by political capital. These should be understood as hubs of illicit activity that feed into national and regional instability and security dynamics.
- Transit points: border crossings, ports, airports and trafficking corridors used for trafficking illicit commodities.
- Crime zones: broader geographic subregional areas that have a high concentration of criminal activities and criminal groups. These include areas where security is weak and fragmented (for example, a region in conflict where the state's presence is weak) or an area where illicit commodities are produced (for example, where there is a high concentration of illicit mining or wildlife poaching).

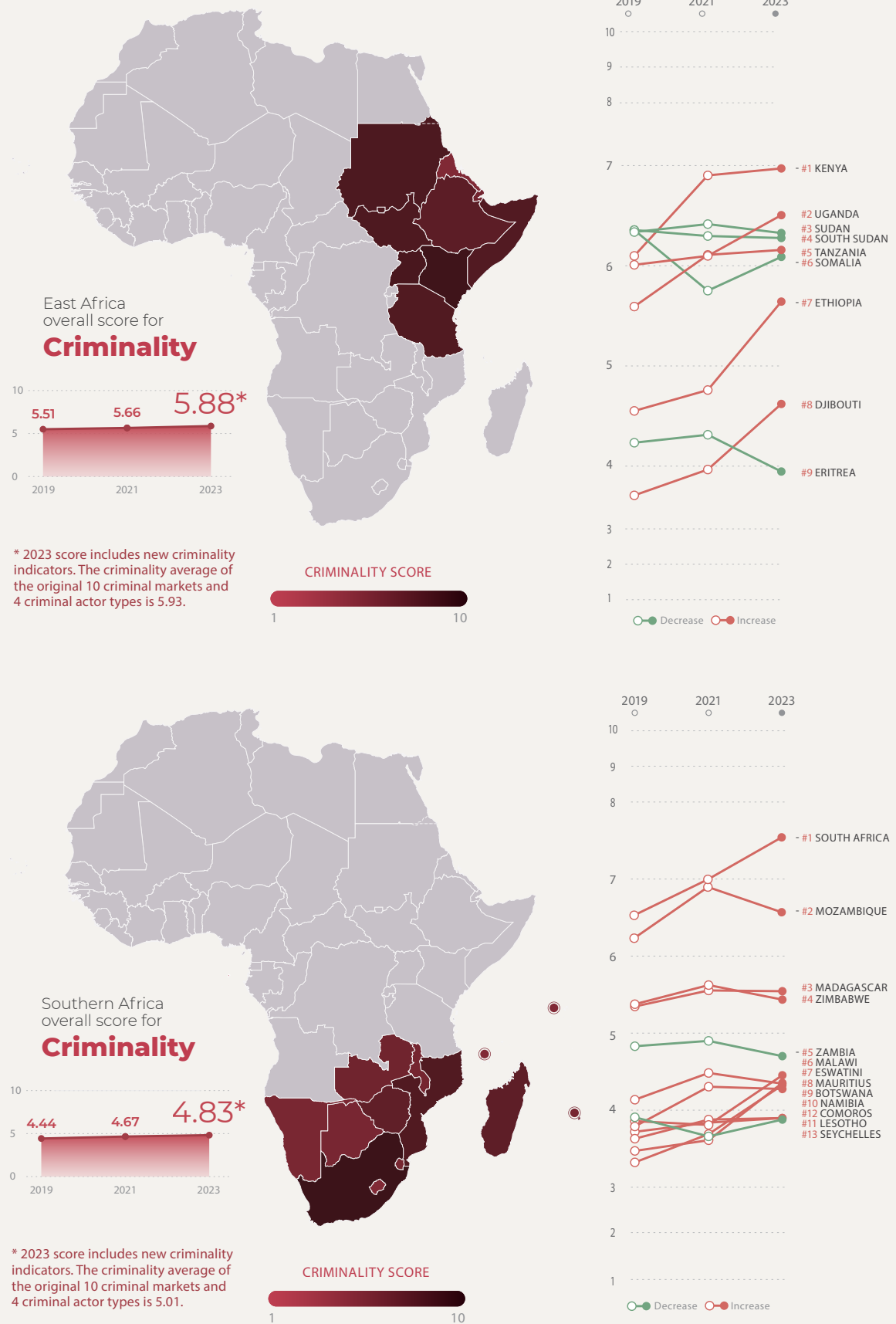
This methodology draws on the GI-TOC's illicit hub mapping exercises in West Africa<sup>13</sup> and the Western Balkans.<sup>14</sup>

## Key dynamics and drivers of organized crime in the region

The GI-TOC's Organized Crime Index provides a launchpad for understanding the overall dynamics of organized crime in ESA. A defining characteristic of the region is diversity, both of illicit markets and criminal actors.

According to the Index, East Africa exhibits high criminality across nearly all measured illegal markets, the majority of which have experienced an increase in criminality over the past six years. Kenya scores worse than the continental average in all criminal markets assessed, from human exploitation to counterfeit goods and cybercrime. Prolonged conflicts in the region, the presence of an array of non-state armed groups in Somalia, Ethiopia and Sudan, entrenched corruption, weak governance and judicial systems, political instability, high levels of poverty and unemployment, and sparsely controlled borders all contribute to this.<sup>15</sup>

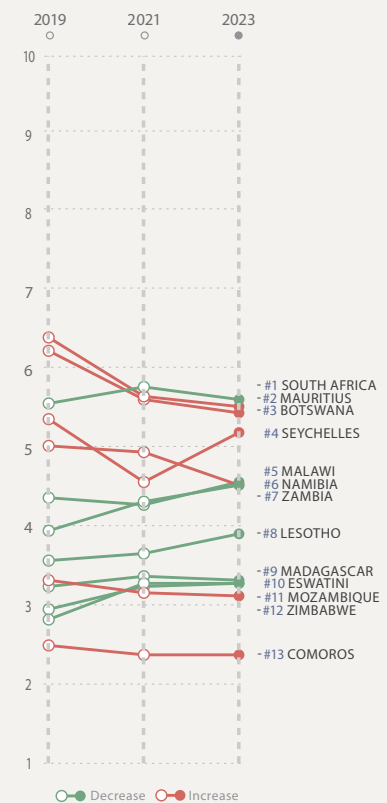
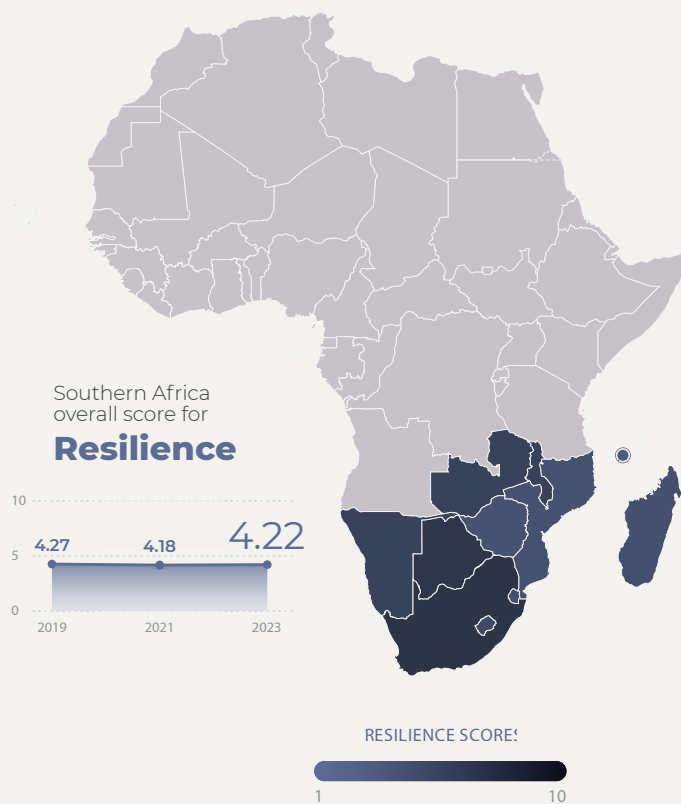
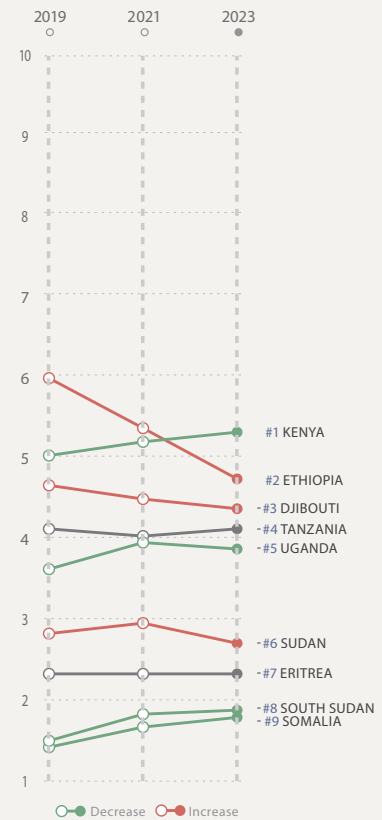
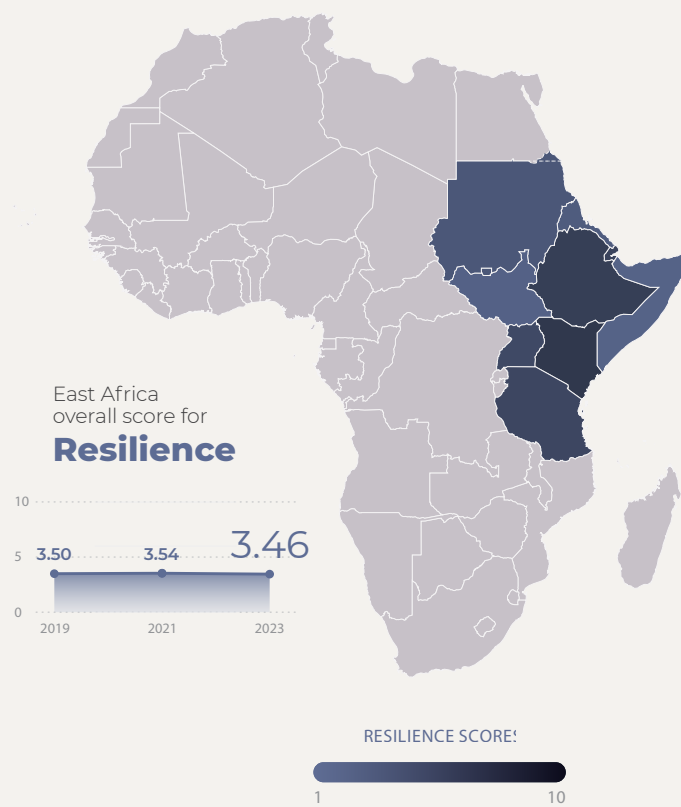
Southern Africa's criminal markets are slightly less diverse on average but still pervasive: within the Southern African Development Community (SADC), the most widespread illicit economies are human trafficking, wildlife crime, drug trafficking (notably heroin and cocaine) and financial crimes. Given the region's rich fauna and flora, wildlife crimes are particularly significant.



**FIGURE 2** Criminality scores for East and Southern Africa.

SOURCE: Africa Organised Crime Index 2023





**FIGURE 3** Resilience scores for East and Southern Africa.  
SOURCE: Africa Organised Crime Index 2023

Illicit arms trading is another significant market. Decades of civil war and insurgency in parts of the Horn of Africa and the Great Lakes have left a glut of small arms that fuel both local crime and cross-border smuggling. For instance, arms trafficked from Somalia – where the government and African Union troops continue to battle al-Shabaab, an insurgent group linked to al-Qaeda – find their way into Kenya, arming cattle-raiding militias and criminal gangs. South Africa is awash with illegal firearms, aggravated by deep levels of institutional corruption and the diversion of legal guns from the state and private owners to criminal groups.<sup>16</sup> Fraud and the counterfeit goods trade are also pervasive, from fake pharmaceuticals in East Africa to illicit tobacco in Southern Africa.

Criminal actors and networks range from local gangs and insurgent groups to transnational criminal syndicates. On one end of the spectrum, non-state armed groups profit from illicit markets by perpetrating highly sophisticated forms of organized crime. One example is al-Shabaab, which extorts trade through the territories it controls at road checkpoints and taxes Somali businesses even where it does not control territory, including in the capital Mogadishu, making it a mafia-style group as well as a terrorist organization.<sup>17</sup>

There are well-organized street gangs and mafia-style groups embedded in urban slums and townships – for example, the gangs of the Western Cape in South Africa that dominate Cape Town's Cape Flats, among other areas.<sup>18</sup> These gangs control micro-territories and engage in drug dealing, extortion and street-level violence, implementing a form of parallel governance in areas long neglected by the state. In Nairobi's informal settlements and Mombasa's poorer districts, politically connected Kenyan gangs similarly run protection rackets targeting local transport, utilities and markets, often in collusion with corrupt officials.<sup>19</sup> At the other end of the spectrum, flexible transnational networks connect Africa to criminal groups from overseas. Foreign criminal organizations have penetrated local contexts.

The following three factors can be highlighted as fundamental drivers of this diverse array of criminal actors and markets:

- 1. State fragility and corruption:** A core theme across the illicit hubs profiled in this report is that weak governance and corruption enable organized crime to flourish.<sup>20</sup> This spans police officers accepting payoffs to derail investigations, and offering protection and safe passage in exchange for bribes, to high-level politicians facilitating illicit enterprises or colluding in money-laundering operations. For example, GI-TOC research into gang dynamics in Kenya has found that collusion between gangs and public officials undermines state responses, poisons democratic politics and allows extortion rackets to persist with impunity.<sup>21</sup>
- 2. Conflict and crime nexus:** Armed conflicts and insecurity in parts of ESA have bred a nexus between conflict and organized crime. War and instability create ungoverned spaces that illicit actors exploit for profit.<sup>22</sup> Chronic conflict in Somalia has also fuelled arms trafficking throughout the Horn of Africa, as weapons leak from conflict zones into criminal markets.<sup>23</sup> In the Great Lakes area, militia groups in eastern DRC smuggle gold, diamonds and wildlife products via other East African countries to finance their insurgencies, blurring the line between rebel activity and organized crime.<sup>24</sup> Southern Africa has its own examples: the insurgency in northern Mozambique's Cabo Delgado province has demonstrated some limited linkages to illicit trades in gemstones and timber.<sup>25</sup> The result is a cycle in which conflict creates opportunities for organized crime, while profits from crime (e.g. illegal resource extraction or trafficking fees) in turn fuel further violence and instability. In Sudan, meanwhile, the illicit gold trade helps fund a paramilitary group in a war with the army that has been raging since April 2023. That conflict has displaced millions, further fuelling human trafficking and smuggling networks.



3. Transcontinental trafficking corridors: Another key dynamic is the status of ESA as a transit point for global illicit flows. The region has long been a major source of illicit commodities destined for global markets, whether this is smuggled gold destined for Dubai or elephant ivory and rhino horn for consumer markets in Asia. In more recent years, it has increasingly also become a crucial conduit for multiple illicit drugs flows, driven by the region's location between supply and demand markets. Southern Africa is facing an influx of cocaine trafficking,<sup>26</sup> with South African ports and airports being used to channel cocaine from Latin America into Africa or onward to lucrative markets in Australia and, in some instances, to Europe.<sup>27</sup> Traffickers adapt to enforcement pressure by shifting to regions perceived as lower risk, so parts of ESA with long coastlines, land frontiers and limited naval patrol capabilities have been targeted. Meanwhile, Afghan heroin has for decades been trafficked to the East African coast en route to international markets. This has, in turn, contributed to domestic heroin consumption in the region.<sup>28</sup>

The geography of ESA – featuring global shipping lanes and rich biodiversity – therefore facilitates a range of illicit flows. In mapping these flows, along with transit points and crime hotspots, this study seeks to provide a comprehensive analysis of illicit markets in ESA that will serve as an indispensable tool for policymakers. The ultimate goals are to help shape interventions that target illicit hubs where many criminal markets converge, target criminal networks involved in multiple illicit markets and expose the brokers who facilitate illicit flows.



## MAPPING DRUG FLOWS

Once largely transit points to destination countries downstream, ESA drug markets have become much more sophisticated and continue to change rapidly. A wide array of illicit substances are now produced, consumed, distributed, stored and transported across the region. While cannabis remains the most widely consumed illicit substance in ESA, the volume of synthetic drug availability, production and use has expanded significantly since the COVID-19 pandemic.<sup>29</sup> Synthetic opioids have emerged, as have cannabinoids and other synthetic stimulants.<sup>30</sup> Methamphetamine use and production have grown sharply, alongside sustained local production of methaqualone and synthetic cathinones.<sup>31</sup>

The region intersects west to east flows of cocaine and methamphetamine from Brazil and its Latin American neighbours; the east to west flow of illicit synthetic precursors and pre-precursors from Indian and Chinese sources; and the north to south flow of heroin and methamphetamine coming from Afghanistan.

In a context where ESA is itself a significant consumer market for drugs, these flows move both to and through the region by sea, land and air. Transit flows abound, with illicit drug cargoes exploiting very weak surveillance capacities at airports and seaports in the region. Firmly embedded state-based criminal actors facilitate an environment of corruption and complicity that eases and proliferates these illicit flows.

### Trends and drivers

The regional movement of cocaine is somewhat different to that of other drugs. Much of the cocaine that enters ESA is trans-shipped to destination markets downstream, mainly through container ports, where 're-containering' of drug loads is common in order to disguise the shipment's 'real' point of origin. This occurs at key port locations such as Durban (South Africa), Mombasa (Kenya), Maputo (Mozambique) and Dar es Salaam (Tanzania).<sup>32</sup>

Saldanha Bay, a harbour town 105 kilometres north-west of Cape Town in South Africa, has emerged as an increasingly important secondary hub for cocaine. In 2021, police seized 973 bricks of cocaine found in the hull of a fishing vessel.<sup>33</sup> Three Bulgarian nationals and several men from Myanmar were arrested. According to field interviews with senior Western Cape gang bosses and members, two British nationals involved in a container company 'do big business with Mexican, Colombian and Brazilian cartels ... repacking international containers into local containers with updated serial numbers to hide their origin ... that are then shipped off to Australia'.<sup>34</sup> In recent years, Saldanha Bay has seen a dramatic increase in gang violence as drug turf wars have grown in frequency in impoverished communities.<sup>35</sup>

Balkan criminal groups, long established in South Africa, are using the country and, to a lesser extent, East African countries as transit points for cocaine shipments from Latin America. The shipments are then



routed – often after being ‘re-containerised’, to Australia, China, South Korea and the UAE. The so-called ‘Tito and Dino’ cartel<sup>36</sup> – a major global player in cocaine trafficking, particularly targeting markets in the European Union (EU) through the Western Balkans – has strong operational links in both South Africa and Australia. A key South African transit hub is the port of Durban (see box below on Durban’s maritime port), where cocaine shipments are repackaged before onward shipment to final destinations in Europe and Australia. There is strong criminal protection around the port, which is channelled through a prominent Durban businessperson.<sup>37</sup> Control over specific terminals in Durban has enabled this person and Balkan networks to manipulate shipping procedures and minimize detection.<sup>38</sup>

There is also growing concern that ports in Madagascar are becoming susceptible to accommodating such transit traffic. These include the ports of Toamasina in the east, Nosy Be in the north and Ehoala in the south. Contaminated container shipments are reported to continue on their voyage to destination markets in eastern Europe/the Balkans (including Türkiye), East Asia (particularly Chinese ports), Australia and New Zealand.<sup>39</sup>

The movement of smaller loads concealed in baggage or on/in a person’s body is arguably an underestimated mode of international export transit from the region. Undertaken by drug couriers who are often recruited from the vast populations of economically disadvantaged and marginalized people in ESA, this method is largely employed to move cocaine, but sometimes also methamphetamine and heroin.<sup>40</sup> A network of courier-based ‘cut-outs’ (i.e. people who have no other connection to the trafficking enterprise) exist to populate a drug courier business model that has proven very effective in moving product by air from the region. High-end destination markets include the EU, United Kingdom (UK), Middle East, East Asia, United States (US), Canada, Australia and New Zealand.<sup>41</sup>

Exploiting corrupt airline and ground-based staff including customs and security officers – as well as national surveillance systems that are incapacitated and ineffective – these transport networks move between 1 and 5 kilograms per person on a regular basis.<sup>42</sup> Interviews with couriers indicate that a significant number of those who have succeeded on their first voyage tend to repeat the smuggling effort thereafter on an ongoing basis. The activity is seen as financially lucrative and the perception of risk appeared to diminish with subsequent successful efforts. Contrary to popular perception, most couriers interviewed in the region admitted that they knew what they were doing, knew that it was illegal and knew that they would be imprisoned if they were caught.



The South African harbour town of Saldanha Bay has emerged as an increasingly important secondary hub for cocaine. © Peter Titmuss/UCG/ Universal Images Group via Getty Images

## Heroin trafficking from East Africa to the UK

Most Afghan heroin is transported to Kenya by sea, either through the major port of Mombasa or the smaller coastal ports of Lamu, Kilifi and Faza. Recent interviews indicate that the product is also moved overland by truck or using local public transport from Tanzania, after arriving through ports in Dar es Salaam and Zanzibar.

Upon arrival at Kenyan ports, the heroin consignments are immediately transferred to nearby storage facilities, known locally as 'go downs'. There, each shipment is broken down and subdivided according to its market destination before being packaged for overland transport. Most of the heroin that arrives in Mombasa is eventually shipped to the Nairobi area.

Heroin from Tanzanian ports is transported to Kenya by truck or public transport vehicles, such as buses. The journeys typically involve crossing at Lungu Lungu via the A14 road or passing through Arusha and crossing further north at Namanga via the A23 and A104.<sup>43</sup> Both routes eventually terminate in the Kenyan capital of Nairobi, where the heroin is delivered to storage locations for repackaging and redistribution.

The imported heroin is divided into two batches for onward distribution. The portion intended for the domestic and regional markets is adulterated with filler material, including paracetamol powder and a variety of other largely benign substances. This increases its volume and decreases its potency. It is then shipped to Kenya-based distributors for sale in the domestic market, or transported by truck to neighbouring countries such as Uganda, Zambia, Zimbabwe, Botswana and South Africa. The second portion remains unadulterated and is smuggled to international markets, including the UK.

According to local informants, heroin is smuggled into the UK in a variety of ways. As a result of the Red Sea crisis, the use of maritime transport using cargo vessels on this route to the British and Irish coasts and ports appears to have decreased. Another option is a longer journey around Cape Town in South Africa. While the greater volume of traffic in this region enables compromised loads to be hidden more easily, it also generates some challenges. Additionally, the recent scrutiny of inbound maritime trade, intended to identify and thwart growing European cocaine flows, increases the perceived risk of the container-based load being screened for a secondary search, despite the presence of Kenyan diaspora assets on site at the ports of destination. While such trafficking continues to some extent, it has not been quantified by this research. Informants suggest, however, that there is a growing focus on alternative routes.

The first alternative is to ship heroin overland, and in smaller quantities by air, to destinations in West Africa. From there, the product is transported to the coast and loaded onto private vessels for routing to UK waters. It is then transferred to smaller vessels at sea and transported to the Irish and UK coasts, bypassing formal border points. It is also alleged that loads are jettisoned at sea for later collection by fishing vessels. These consignments are said to weigh a few hundred kilograms or less, unlike cocaine, which is measured in tonnes. In a May 2025 interview, a Johannesburg-based gang leader heavily involved in the drug trade claimed that Tanzanian, Nigerian, Pakistani and Bangladeshi nationals were involved in heroin trafficking. He said: 'There's a new trend to push the Afghanistan drugs through African borders first and then they get moved across the continent



Heroin seized in the Kenyan coastal city of Mombasa. © Tony Karumba/AFP via Getty Images

for worldwide consumption. Are African border officials more likely to be corrupt? What do you think? When I had dealings with Zimbabwean and Namibian border officials, and even some of those idiots on Botswana's border, it was easy to pay them to look away, and we could bring anything across – guns, cocaine, anything!'

The second alternative method involves the use of human couriers. This appears to be a growing trend for both heroin and cocaine. Previous research has identified the existence of professional courier services – small groups of individuals who can be hired by smugglers to move drugs in small quantities from the region to an international import point. This is a common method of transporting cocaine from East Africa to southern and eastern Asia, for example. According to a small number of informants, couriers are also employed to carry heroin to the UK by air.

The UK buyer usually coordinates courier shipments in association with Kenyan acquaintances. The buyer reportedly sends a third-party representative to Kenya to make arrangements.<sup>44</sup> This is often an import service provider whose work straddles the licit and illicit markets. The couriers conceal the drugs in various ways. They may ingest heroin in pellet form, transporting roughly 1 kilogram at a time. It is not uncommon for there to be several couriers on the same flight, and they are paid upon successful delivery. This is a popular method of concealment, as although it requires many individual trips to transport large loads, it is generally perceived to involve a lower risk of detection.



The third method is concealment in luggage. This entails a greater degree of perceived risk, but enables higher volumes to be moved at a time. This results in fewer trips, and thus less time spent on the operation. With this approach, a courier can transport between 5 and 10 kilograms. Informants allege that this technique is widely used by Kenya Airways staff, particularly cockpit crew. Although some Kenya Airways employees have been arrested for smuggling in the past, recent informant interviews, including one with a staff member, suggest that this method remains somewhat common.<sup>45</sup>

The fourth method is the use of unaccompanied baggage, also known as the 'ramp rat' method. This involves less risk than using accompanied luggage. In this case, a complicit baggage handler or other ramp-based airport employee loads a bag containing heroin into the hold of an outbound aircraft. A second complicit employee then collects the bag at the destination airport and transports it outside the facility. This technique is common globally and challenging for law enforcement to disrupt. Birmingham and Manchester airports were identified as preferred destinations for this practice.

The fifth method is concealment on the body, often chosen by couriers who prefer not to ingest the drugs. This technique enables the transport of larger quantities of heroin – up to around 5 kilograms – but increases the likelihood of detection. According to interviewees, this technique is the least common, and is believed to be used by less organized or experienced entrepreneurial smuggling groups.

One common feature of these methods is that the courier typically has no direct links to the exporting or importing criminal groups. Most are tertiary cut-outs, whose capture would not pose a significant risk to the group involved. In addition, apart from Kenya Airways crew, the vast majority of couriers do not travel directly to the UK. Instead, they transit via Addis Ababa or Johannesburg, and then often again via Doha or Dubai. Onward transit through EU-based airports also enables couriers to distance themselves from their point of origin, further reducing risk. Many do not begin their journeys in Kenya, but in neighbouring countries such as Malawi, Zambia, Uganda and Zimbabwe. This is allegedly in response to the use of newer scanning machines at Nairobi airport. While London is thought to be a favoured destination, many couriers appear to target Manchester and Birmingham airports, due to the proximity of arrival assistance from diaspora contacts, and the perception that there is less scrutiny upon arrival.

Several informants mentioned that postal and courier services are used to send small quantities of heroin concealed among other goods. However, it was difficult for researchers to quantify the popularity of this method. There have certainly been some seizures of contaminated packages sent by courier to the UK. Furthermore, the increasing volume of postal and courier traffic between Africa and the UK may have created an impression of diluted risk. However, researchers were unable to empirically define the characteristics of this form of concealment due to an inability to speak to individuals directly involved in the practice. As such, specifics beyond confirmation of the alleged transport threat cannot be provided. A similar caveat applies to the use of private aeroplanes to transport heroin to the UK. Some Mombasa-based informants indicated that this was a technique employed by UK-based Kenyan traffickers. However, the absence of interviewees with direct involvement means that researchers have been unable to confirm whether this method is effective. ■

## Regional drug routes

There are four major maritime drug routes to and through ESA,<sup>46</sup> namely the southern route, lusophone route, Asian route and Indo-Pacific route (see Figure 4).

The southern route<sup>47</sup> supplies South Asian heroin and methamphetamine from Iranian and Pakistani supply networks using dhows, ships and containers. The route originates on the Makran coast and terminates along the eastern seaboard of South Africa.

Consignments are most commonly offloaded along the coast of Mozambique. Small boat deliveries are constant outside the monsoon season.

Larger seafaring dhows are also used on this route. These vessels sail in wide, arcing loops that take them deep into international waters, far away from surveillance along the East African coast, until they turn westward across the Seychelles archipelago to land along Mozambique's coastline.<sup>48</sup>

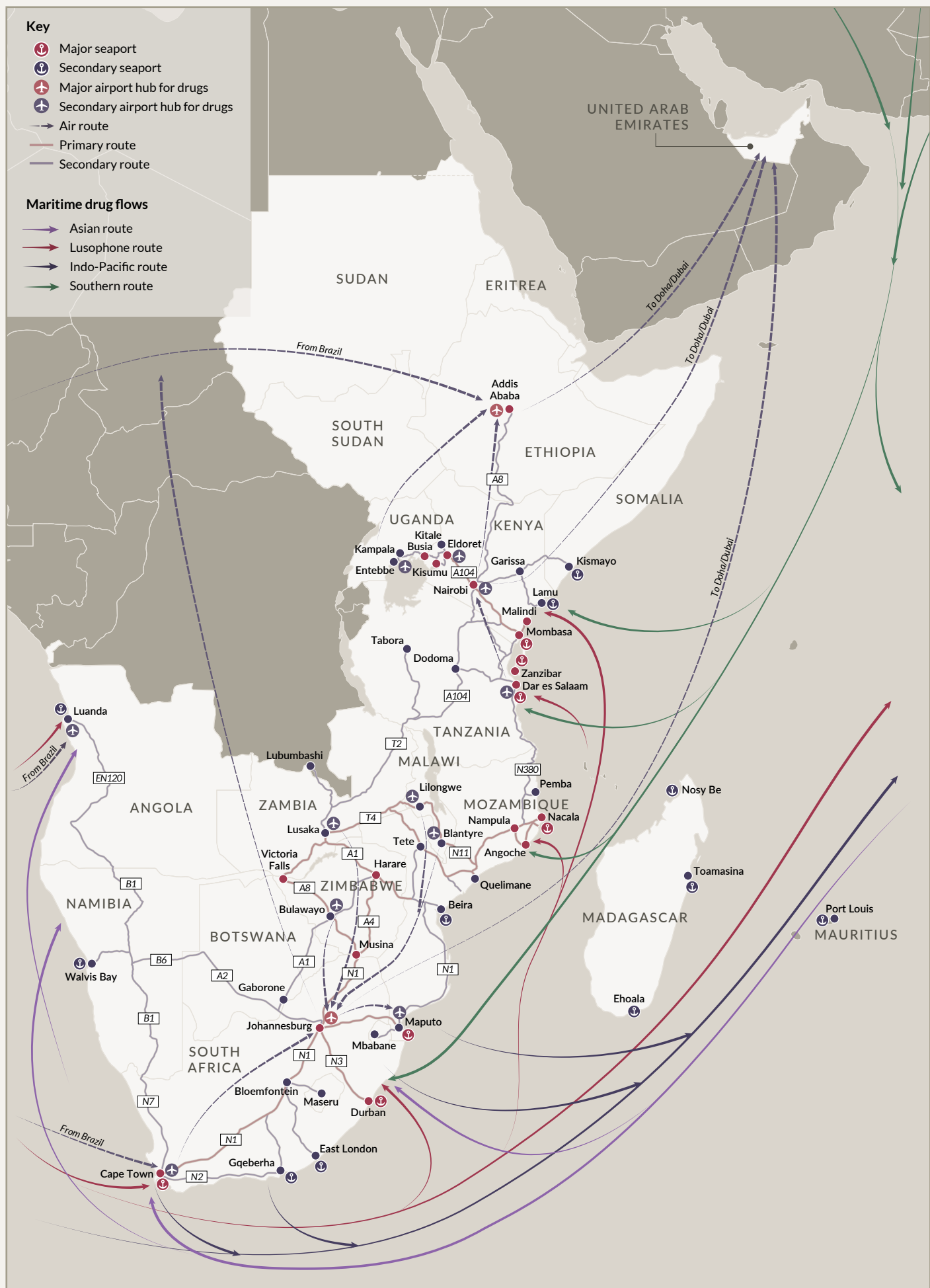
Much larger loads of heroin and methamphetamine are thought to be shipped in state-flagged and steel-hulled vessels to the major seaports of Dar es Salaam, Maputo and Durban.<sup>49</sup> These vessels are not subject to the interdiction rules of engagement employed by both the Combined Maritime Forces and the EU Naval Force, enabling them to transit international waters safely even through drug trafficking maritime surveillance zones.

The lusophone route refers to maritime traffic originating in Latin America that transports drug shipments across the southern Atlantic Ocean to Angola in south-western Africa, as well as to primary landing points at several ports in Mozambique.<sup>50</sup> Cargoes are also shipped to ports in South Africa, Tanzania and Kenya. Other drug-laden vessels plying this route simply transit the region as they make their way further eastward beyond the western Indian Ocean to ports in East Asia, particularly China.

There is increasing concern about Toamasina, Nosy Be and Ehoala ports in Madagascar and their potential role as emerging nodes along this route. Various Brazilian ports, but Santos chief among them, are the major embarkation points for this transnational trade route. Other Latin American ports are also used on the lusophone route, but most boardings and successful seizures tend to focus on ships that originate from Brazilian ports.<sup>51</sup> Freighters, container ships and other large ocean-going vessels are most common along this route, although there have been instances where moderately large personal watercraft have been used for the direct carriage of drug loads.

Cocaine is the primary drug found on this route. In recent years, methamphetamine from Mexican producers, shipped to and through Brazilian ports, has been found in shipments to South Africa. The expansion of Mexican methamphetamine production to locations in Brazil has further spurred concern about a potential increase in methamphetamine arriving alongside cocaine.<sup>52</sup>

The Asian route originates in China, but it also includes shipments that come via other ports in South East Asia and, more recently, from the Indian subcontinent in South Asia. This route involves the movement of synthetic substances, and particularly precursor and pre-precursor chemicals necessary for the synthesis of illicit substances in ESA labs and beyond.<sup>53</sup> While many of these substances – including caffeine and hydrochloric acid – have legitimate industrial uses, they possess highly desirable secondary uses in illicit drug production. This includes the production of methamphetamine, 3,4-methylenedioxymethamphetamine (MDMA), methcathinone, methaqualone and a variety of cannabinoids.



**FIGURE 4** Regional and international drug routes, ports and hubs.

SOURCE: GI-TOC



The Chinese and Indian chemical and pharmaceutical industrial bases are the two largest in the world and are responsible for supplying a great deal of the diverted licit or overtly illicit chemicals that are fed into the synthesis of established and new synthetic drugs around the world.<sup>54</sup> From the supply of fentanyl and fentanyl analogues that contribute to the opioid crisis currently plaguing North American drug markets, to the synthetic cannabinoids that have become dominant substances in many western Indian Ocean island drug markets, China and India stand out as the points of origin. A great deal of this synthetic drug traffic has transited the Asian route from factories in Asia to labs in ESA and beyond.<sup>55</sup>

Unlike the other three routes, the Indo-Pacific route originates in ESA. Grounded in the movement of cocaine and methamphetamine, this channel emerged out of the Lusophone route. Cocaine shipped to the region from Brazil and methamphetamine originating from regional production – but also from production points in West Africa (e.g. Nigeria) and from Afghanistan – is transported along this route to the final destinations of Australia and New Zealand (collectively known as the AUS–NZ drug market).<sup>56</sup>

There is an insatiable appetite for both cocaine and methamphetamine in the AUS–NZ market, and the retail prices for both are among the highest in the world. This is due as much to the distance of these countries from high-volume production and supply points as to the success of law enforcement surveillance operations in intercepting high-volume drug shipments.<sup>57</sup> This makes the AUS–NZ drug market a significant target for many transnational organized criminal groups.

Southern Africa, therefore, increasingly serves as a filter through which the origins of illicit drug loads are disguised. This is achieved by placing drugs in new containers or transferring loads to other ocean-going vessels, contaminating licit loads originating from locations perceived to be low risk from a drug-profiling perspective, and using private vessels. The existing substantial licit trade relationship between South Africa and Australia may also factor into the rise of this route.

Field interviews have described a supply chain environment in which large maritime-based drug shipments arrive in ESA either by container, concealed in state-flagged cargo vessels, or by small boat through ship-to-ship transfer at sea. Sea-based transfers that rely on private coastal-based small fishing or pleasure vessels tend to be undertaken near the 12 nautical miles territorial waters limit.

However, such transfers are also sometimes undertaken further out to sea. Recent examples have included transfers between vessels in waters near the exclusive economic zone limit (i.e. close to 200 nautical miles) and in the high seas beyond. Such deep-sea transfers tend to involve a single commercial vessel, such as a fishing trawler or tug and large loads (often more than 1 tonne). They are often characterized by periods of transponder deactivation as the two vessels intersect. Transponders are not required for small coastal craft. Consequently, these smaller volume drug transfer operations (often limited to hundreds of kilograms) can be undertaken in waters closer to the target coastline.

## Peter Jagers and the floating cocaine drop-off

Collaboration between Latin American cartels and criminal gangs in Southern Africa is evident in the handling of large drug shipments. Drug deliveries are often made in the form of 'floating drop-offs' along South Africa's west and south-west coasts. The consignments are then collected by local gangs or their affiliates using small fishing vessels and taken ashore for storage before being trafficked out of the country.<sup>58</sup> This was allegedly an arrangement between Peter Jagers, the suspected leader of a Western Cape gang known as the Terrible Josters, and a Colombian cocaine cartel in 2024.

Jagers was apparently tasked with overseeing the collection of a cocaine consignment of around half a tonne, which had been dropped at sea about 80 nautical miles off the Western Cape coast.<sup>59</sup> Jagers stole the consignment and, according to interviews conducted by the GI-TOC with high-level gang members and other sources, used police officers to carry out the theft under the guise of a law enforcement operation. He was reportedly later summoned to a meeting in South Africa's Gauteng province to explain the disappearance. His body and that of an associate were found bound and cuffed in a river in the Free State province in October 2024. There were clear signs of torture.<sup>60</sup>

The episode highlights the reach that foreign cartels have in the region and how the cartels enforce terms with local criminal actors. ■

Some regional maritime drug traffic merely transits the region's sea routes, destined for locations further afield, including India, China and Australia to the east; the US and Canada to the west; and the EU and UK to the north. Offloaded onto the shores of ESA, these shipments are often subdivided among a small number of importers, stored locally for a period and/or moved inland to urban centres, or prepared for further re-shipping.

Within ESA, heroin generally moves overland from north to south, and South Africa is the anchor market for regional and international flows.<sup>61</sup> Methamphetamine moves overland south to north, from its origin points in the Western Cape and Johannesburg to as far north as Kenya, Uganda and Somalia.

## Hotspots

### Synthetic drugs: South Africa predominates

Synthetic drug production in clandestine labs, predominantly of methamphetamine, but also methaqualone, methcathinone, synthetic cannabinoids and MDMA, occurs in large volumes in South Africa and to a lesser degree in Mauritius, Mozambique, Zimbabwe, Tanzania and Kenya. These production locations are linked to precursor and pre-precursor supply chains that are characterized by two elements: first, continental diversion of licit chemicals, particularly from West African suppliers into the region; and secondly, direct flow of scheduled and non-scheduled precursor chemicals in volume from Indian and Chinese suppliers, through corrupted ports and to domestic lab locations. The ports of Durban, Gqeberha and Cape Town in South Africa; Walvis Bay in Namibia; Maputo in Mozambique and Port Louis in Mauritius are especially susceptible to accommodating these flows. Toamasina and Ehoala in Madagascar are also likely to be involved in this flow, although further surveillance is required.<sup>62</sup>

## Synthetic drug production in Southern Africa

On 20 July 2024, a police operation uncovered a large synthetic drug manufacturing plant in the remote farming town of Groblersdal, in South Africa's north. Police seized methamphetamines worth an estimated street value of more than US\$100 million and arrested four people, including two Mexican nationals. A third Mexican was later arrested.<sup>63</sup> Another drug lab involving a Mexican national was uncovered in Rietfontein, west of Johannesburg, three months later; on this occasion, methamphetamine worth a little over US\$5 million was seized.<sup>64</sup>

South Africa has a large consumer market for synthetic drugs (methamphetamine in particular). However, the scale of these busts and the involvement of Mexican cartels points to local operations supplying international markets and comes amid the proliferation of 'Mexican meth' labs around the globe to supply international markets over the past decade.<sup>65</sup> The high-profile bust in 2016 of a Nigerian lab capable of producing industrial quantities (and the arrest of four Mexicans) was one of the first cases.<sup>66</sup>

A month before the Groblersdal bust, a production facility in Vundica, Mozambique, was discovered. This facility was operated by nationals from Mexico, Nigeria and Mozambique.<sup>67</sup> One of the arrested Nigerians had a lengthy criminal record for drug trafficking and had been deported from Brazil in connection with drug crimes in 2012.<sup>68</sup> This was not the first significant bust in Mozambique. In 2023, two Mexican nationals, identified by the US Drug Enforcement Agency as belonging to the Sinaloa Cartel, were arrested in connection with clandestine drug production in the country.<sup>69</sup> The year before, two Chinese nationals were apprehended at a Mozambican lab in Katembe, a suburb of Maputo, where they were allegedly manufacturing methamphetamine.<sup>70</sup>

The busts in South Africa and Mozambique are emblematic of the expansion of Latin American cartels into Africa and cooperation with local criminal groups as well as other foreign collaborators in production and trafficking. ■



A drug laboratory with an estimated value of R100 million uncovered in Rietfontein, west of Johannesburg.  
*Photo: South African Police Service*



## Durban's maritime port

**D**urban's maritime port has become a major trafficking hub for illicit goods entering and leaving South Africa, particularly extractives, drugs and wildlife products. Hundreds of millions of rands worth of illicit goods have been discovered at the port.<sup>71</sup>

Illicit goods are often smuggled through the port in containers that are either mislabelled or have false documentation. Illicit extractives are regularly mislabelled as other goods (such as textiles) and then exported under those codes.<sup>72</sup> The lack of capacity to police the port adequately makes it relatively easy for dealers to export mislabelled goods undetected.<sup>73</sup> Even when containers come under suspicion, inspections are complex and time consuming. 'It is almost impossible to search containers at the port because once you've identified the suspect box, you need a special crane to extricate it from the stack,' one expert explained. 'Once you have done that, you must unpack the container manually. It takes a day to unpack one container.'

In the case of illicit drugs, the port has become a prominent trafficking hub for cocaine and heroin into the region and globally, including to Australia, the EU, the UK and Asia. The smuggling channel between Durban and the Brazilian port of Santos has been on the authorities' radar since the early 2000s, but these links became abundantly clear in 2021.<sup>74</sup> South Africa's Directorate for Priority Crime Investigation noted that more than 4 tonnes of cocaine were seized between March 2021 and February 2022, with many of the consignments originating in Santos.<sup>75</sup> More recently, in December 2024, police discovered over R80 million worth of pure cocaine concealed in a shipment of kidney beans from Brazil.<sup>76</sup> At least 20% of this cocaine would have remained in the domestic market; the rest would have been shipped onwards.<sup>77</sup>

A Durban drug smuggler interviewed in April 2025 claimed that Tanzanian and Nigerian nationals were the 'primary distributors' of heroin through the city's port. 'Some of the heroin goes up through African borders and exits Egypt for Britain. Both the Tanzanians and the Nigerians have Egyptian sources that move heroin in Egyptian citrus fruit bundles that enter the UK. In the past, they would also move the heroin with various peanut packages destined for Britain.' The GI-TOC was unable to independently verify these claims. However, Egypt has long served as an important transit hub for heroin bound for Europe or Türkiye.<sup>78</sup>

In most cases, illicit drug seizures at the port are the result of lengthy investigations or intelligence, with only a few cases detected through random inspections. Aging infrastructure and operational problems, coupled with criminal networks placing corrupt officials at terminals, have made detection of illicit goods smuggled through the port even more difficult. A 2023 survey of port performance by the World Bank Group ranked Durban in the bottom 10 globally in terms of overall performance.<sup>79</sup>

Adding to the port's vulnerabilities is the network of bonded warehouses located nearby. These warehouses receive and store containers that have not yet been cleared by customs, and although they are licensed by customs, they are privately run. Ensuring the integrity and security of goods stored in a bonded warehouse is an ongoing concern. Some employ limited security, particularly outside working hours, leaving them exposed to theft or tampering.<sup>80</sup> According to a senior freight company official, smugglers have entered these warehouses outside working hours and removed the illicit goods before customs could verify them.<sup>81</sup> During the July 2021 unrest in KwaZulu-Natal, ammunition worth more than R3 million (US\$200 000) was looted from what appears to have been one of these bonded warehouses.<sup>82</sup>

In response to security concerns, the government announced in April 2024 the establishment of a task force that would focus in part on improving operations at Durban's port. In the same year, South Africa's ports authority announced a two-year plan to improve infrastructure, performance and security at the port. It is too early to tell what impact these initiatives will have on smuggling risks at this port. ■

## Addis Ababa and OR Tambo airports

The industrial production of methamphetamine, methaqualone, MDMA and methcathinone in ESA, particularly in geographic areas that possess large export facilities, is likely to supply overseas markets increasingly. The corruption of systems at these airports by organized criminal networks and an eventual saturation of domestic market demand stand out as key drivers of this probable shift to an export-oriented model.

These exports are likely to involve increased courier-based transit to EU and UK markets. Locations of concern include the two primary global air hubs of Addis Ababa Bole International Airport in Ethiopia and OR Tambo International Airport in South Africa, which serve as flow chokepoints for export traffic towards Doha and Dubai. These two key airports also carry much of the transcontinental import traffic (mostly cocaine), particularly from São Paulo/Guarulhos International Airport, a transport node where illicit traffic is heavily influenced by the Brazilian organized crime group Primeiro Comando da Capital (PCC).<sup>83</sup>

## Madagascar

Madagascar is under-examined and often ignored by international authorities when it comes to drug trafficking. Regional security assessments tend to focus on drug trafficking through the coastal ESA countries of the mainland, the historical backbone of the Swahili coast's trading environment. The ignorance of Madagascar's presence in the trade is believed to be a key reason behind an apparent growing migration to Malagasy ports by international trafficking networks. A strong component of the regional trade between Indian Ocean island states and the markets of the continental mainland, Madagascar's ports are believed to handle a growing volume of transnational flows.<sup>84</sup> One notable location is Ehoala port. Built to service QIT Madagascar Minerals' ilmenite and rare earth mineral production facilities (and operated in conjunction with Rio Tinto), the port outclasses the limited facilities available at the nearby port of Taolagnaro. Located on the southern coast, 1 000 kilometres from the capital, Ehoala port is a potentially valuable node abutting the east-west and west-east maritime drug flows that are ferried through the Mozambique Channel.



Built to service ilmenite and rare earth mineral production facilities, Ehoala port in Madagascar is a potentially valuable node in maritime drug trafficking flows. © Roberto Schmidt/AFP via Getty Images

## Transit points: major airports

Both Addis Ababa Bole and OR Tambo airports have a reputation for security complacency and complicity, especially when it comes to monitoring transit travellers. Upon reaching the global air transit hubs of Doha and Dubai, ESA drug couriers successfully blend into a globalized diversity of travellers and are within reach of any major onwards destination.

The use of so-called 'ramp rats' (corrupt or compromised baggage handlers or other ground-based staff) also facilitates the transit of drugs to global consumer markets. It is well known that one such crew has worked out of OR Tambo airport for several years. This outfit is reputedly able to move suitcases containing up to 5 kilograms of any illicit substance to any airport in the world within three to five days. Those involved exploit a lucrative price arbitrage between the relatively low retail prices in South Africa and much higher prices in the markets the drugs are dispatched to. Authorities in South Africa and elsewhere arrested several people in connection with this trade over the last year, purportedly disrupting the network. Recent information, however, indicates that this 'ramp rat' flow persists.<sup>85</sup>

Drugs are sometimes also moved in and out of ESA on direct air connections. One such example is a direct route between São Paulo and Cape Town that is flown daily by South African Airways. Couriers using regional air connections from Cape Town to other cities in Southern Africa before taking some of this cocaine deeper into the region.

## Transit points: minor airports

Relatively minor airports have been found to be particularly vulnerable to person-based and luggage-based transit methods, notably Blantyre and Lilongwe in Malawi, Lusaka in Zambia and Dar es Salaam. Most of these routes tend to transit in either Johannesburg or Addis Ababa as couriers make their way to the major global air transit points of Dubai and Doha and onward to global markets.

## Extrapolating future trends

The banning of poppy cultivation and opium in Afghanistan by the Taliban in 2022 appears to be having a modest but growing impact on the availability and purity of heroin and methamphetamine imports originating from South Asia.<sup>86</sup> There have been reports of significantly less potent heroin appearing in some markets (including Tanzania and South Africa), although this might be due to domestic wholesalers and distributors diluting their product in anticipation of an eventual supply chain shortage.

Two dominant importation streams of South Asian heroin to ESA domestic markets have been identified through recent chemical analysis research.<sup>87</sup> The first is a flow of 'near pure' heroin, while the second is a highly adulterated product flow. The former tends to be located in urban settings while the latter tends to be distributed in rural settings. If the current Afghan ban remains in place for the foreseeable future, there is a growing likelihood that imports of both heroin and methamphetamine from South East Asia will begin to infiltrate ESA in some quantity, as South East Asian heroin did during the last Afghan ban of 2000.

Cocaine remains a strong regional commodity flow, due to embedded regional demand for both powder and crack varieties, although regional demand as a whole for cocaine appears to be

waning moderately, supplanted by growing regional demand for crystal methamphetamine. Increasing geographic availability, the longer 'high' and cheapness of methamphetamine relative to cocaine appear to be key drivers here.

However, the most significant market trend remains the rapidly expanding use and inventory of synthetic drugs across the region. While amphetamines, methamphetamines, MDMA and methaqualone remain regional consumer staples, their domestic production and availability has expanded, particularly since the COVID-19 pandemic. The diversion to regional clandestine labs of licit precursors and pre-precursors from both Chinese and Indian chemical supply chains is a structural feature of this expansion. Reports persist of chemical supply and diversion from EU suppliers, including the importation of powder preparations of illicit substances that are then locally tableted and distributed.<sup>88</sup>

There is also increased production and supply of methcathinones, ketamine and significant supplies of synthetic pharmaceuticals (e.g. benzodiazepines, antipsychotics, stimulants and hallucinogens) diverted from official government medical settings in ESA.<sup>89</sup> These are all substances that have seen significant market growth in the EU, particularly among online vendors.<sup>90</sup> The risk of movement of these substances from ESA to EU, UK and Commonwealth destination markets persists.

Most concerning is the confirmed presence of fentanyl and nitazene compounds in the region, as well as the rapid proliferation of regionally synthesized synthetic cannabinoids. Research suggests that the fentanyl has appeared in conjunction with caffeine in two separate supply chains to Southern Africa that originate in China and are controlled by Chinese groups. The nitazene compounds appear to originate from Chinese producers in mainland China.<sup>91</sup> The proliferation of synthetic cannabinoids is likewise driven by Chinese groups that have switched from shipping finished product to supplying four licit precursors to the region. These precursors are then combined to synthesize cannabinoids locally.<sup>92</sup> Originating in Mauritius, this production process now appears to have begun to take root on the continental mainland, notably in South Africa, Mozambique and possibly Kenya (as well as West Africa) over the past two years.

Shifting focus to long-term implications, the role of Indian chemical manufacturers in the supply of precursors to ESA and beyond is an important trend to watch. Expanding methamphetamine demand in ESA may influence an emergence of South East Asian-style tablets in the rapidly expanding urban centres of the region and from there to emerging locations beyond. Interviews reveal that the regional tableting of meth-caffeine combinations remains small scale and relatively infrequent. However, massive overproduction of South East Asian methamphetamine amid saturated local demand there, an overlap of South East Asian drug commodity flows through westward expansion into India and rapid population growth in ESA make this a near inevitability.

Worryingly, surveillance programming and the capacities of ESA states to identify, quantify and mitigate the public health and security threats caused by the proliferation of synthetic drugs are exceedingly poor.<sup>93</sup> Of particular concern was the detection in a sample from South Africa of 2,5-dimethoxy-4-chloroamphetamine (DOC) – a substance that had not been identified in Africa previously.<sup>94</sup> The lack of surveillance capacity within ESA has deeply concerning implications for the potential flows of these novel substances to downstream consumer markets in Europe and beyond.





## ILLEGAL TRADE IN FAUNA AND FLORA

**E**ast and Southern Africa is at the heart of a destructive illegal trade in fauna and flora, supplying lucrative black markets worldwide with high-value animal products such as rhino horn, elephant ivory, pangolin scales, rare plants and reptiles. Trafficking networks exploit a web of air, land and sea routes centred on significant ports and airports to smuggle contraband from source countries to consumers in parts of Asia, notably China, and collectors in Europe and the US.<sup>95</sup>

The impacts of this trade are severe, not only leading to the large-scale depletion of biodiversity but also fuelling violence and organized crime.

Since 2008, more than 12 000 rhinos have been killed by poachers in Africa, the vast majority of them in South Africa, which is home to 81% of the continental population of white rhinos.<sup>96</sup> The slaughter has also come at a terrible human cost, with rangers, police, soldiers and poachers killed in deadly confrontations in state and private reserves.<sup>97</sup> Criminal syndicates have assassinated park rangers and police officers.<sup>98</sup> In Kenya, a vast criminal network trafficked tonnes of elephant ivory and nearly 200 kilograms of rhino horn over seven years and plotted to ship heroin to the US.<sup>99</sup> Wild cheetah populations are declining markedly across the continent; only 7 000 remain in the wild. In East Africa and the Horn, at least 300 cheetahs are smuggled to the UAE and other parts of the Middle East every year.<sup>100</sup>

Beyond wildlife, illegal logging is decimating Africa's forests. In Mozambique alone, 500 000 tonnes of timber are illegally exported to China every year, an amount equal to the size of 1 000 football pitches. Much of it is rosewood and some of it comes from northern Mozambique, where a deadly Islamic State-aligned insurgency continues to rage.<sup>101</sup> Millions of hectares of Miombo forest (stretching from southern Mozambique across eight African countries) have been lost.

In Europe, law enforcement agencies have seized or intercepted thousands of tortoises, snakes, lizards, crocodiles, parrots and owls in recent years, many of them originating in ESA.<sup>102</sup>

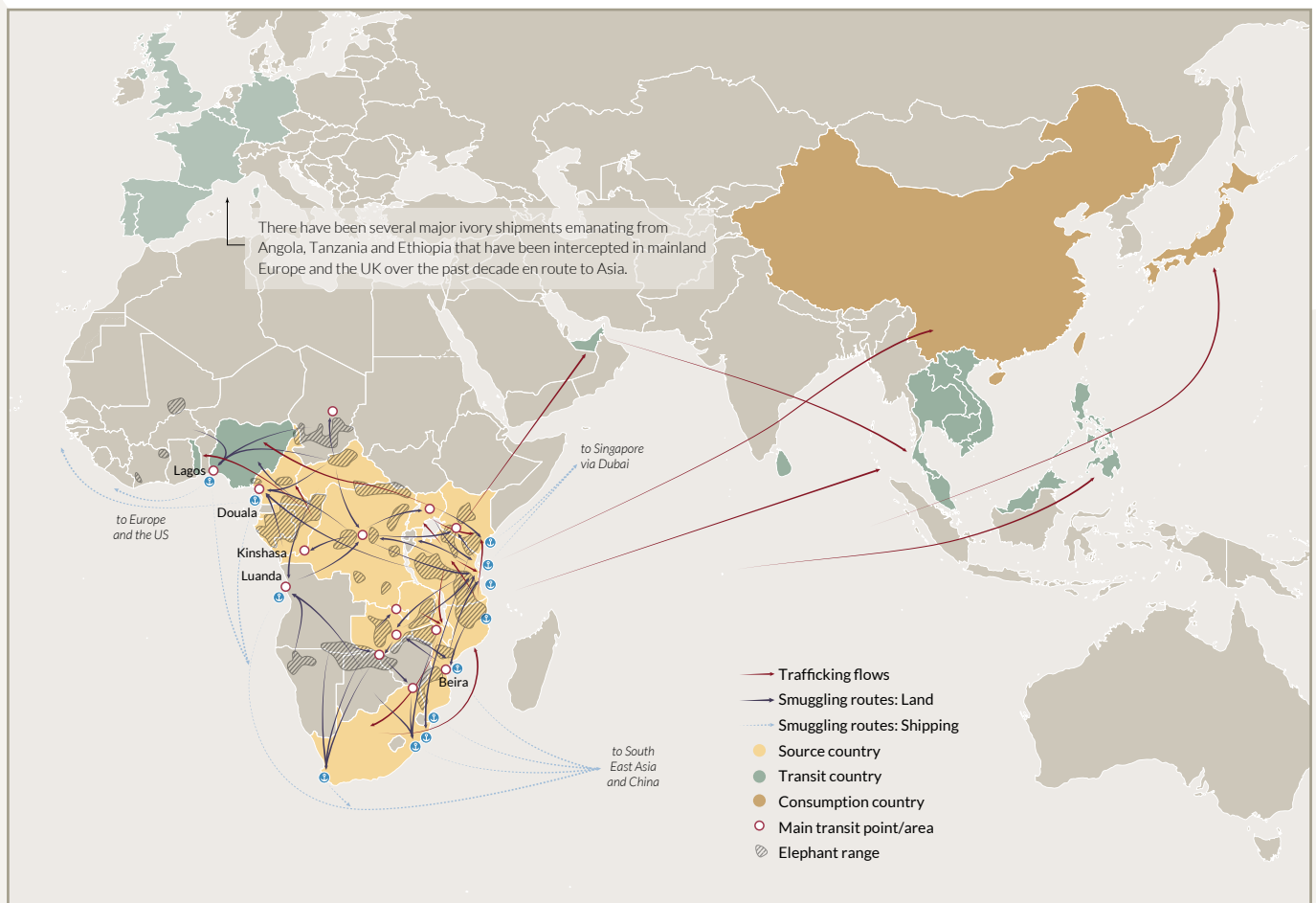
## Trends and drivers

### Species, origins and destinations

#### *Elephants (ivory)*

The African elephant is heavily targeted for its tusks. In East Africa (especially Tanzania and Kenya) and parts of Southern Africa (notably Botswana and Zimbabwe), elephant poaching surged in the first decade of the 2000s and in the 2010s. Tanzania alone lost 60% of its elephants (around 65 000 animals) between 2009 and 2014,<sup>103</sup> mainly due to ivory poaching. Poached ivory from ESA is smuggled primarily to East Asia, where consumer markets in China, Vietnam, Thailand and Japan have driven demand for ivory carvings and trinkets. However, China's 2018 ban on the commercial import and domestic sale of ivory, with narrow exceptions, marked a change in policy direction, restricting international and domestic trade.<sup>104</sup>

Routes often go from source countries to seaports such as Mombasa, Dar es Salaam, Maputo and Nampula, then by ship to Asian ports (notably Vietnam, Hong Kong, Philippines and Malaysia). The map below provides a detailed picture of ivory trafficking routes, transit countries and destination markets. Europe and the US have comparatively smaller illegal markets for ivory, although they have served as transit points, with ivory from Africa seized in Europe en route to Asia.



**FIGURE 5** Ivory trafficking routes, transit countries and destination markets.

SOURCE: CITES, EIA, UNODC, TRAFFIC, GI-TOC

## The Kromah network

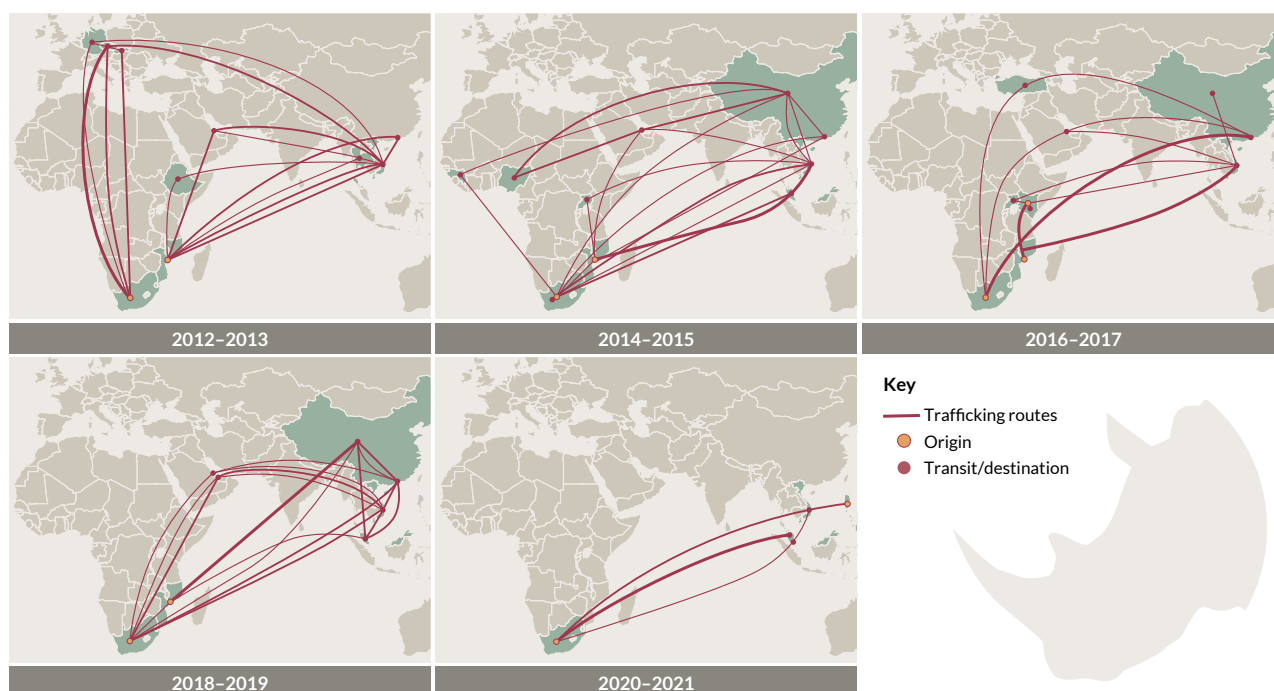
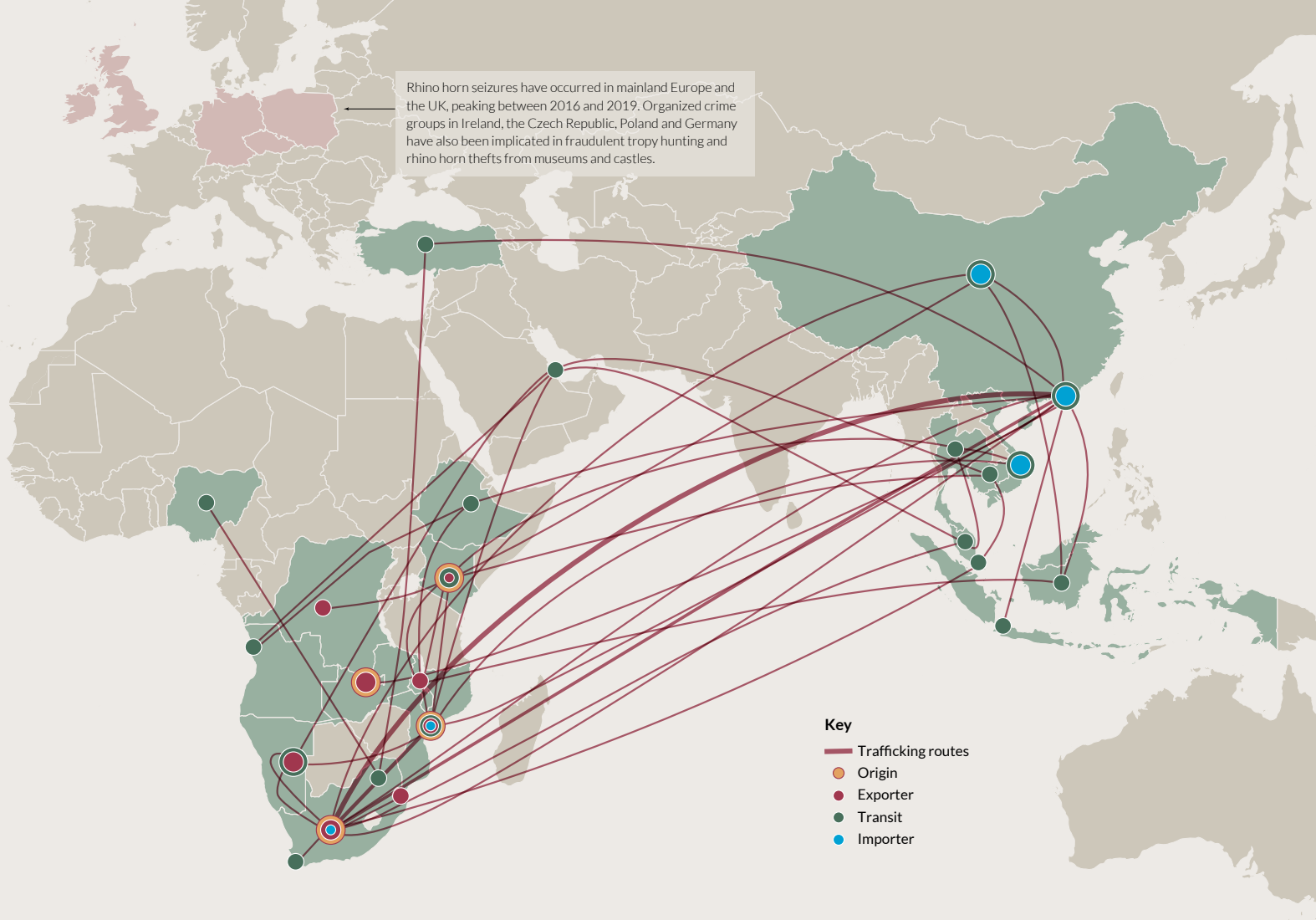
A transnational syndicate led by Liberian national Moazu Kromah (aka 'Ayoub') operated out of Kampala, Uganda, trafficking elephant ivory and rhino horn from East Africa to US and Asian buyers between 2012 and 2019. Kromah's network sourced wildlife products from Uganda, the DRC, Guinea, Senegal, Tanzania, Kenya and Mozambique, while coordinating shipments through Uganda. In 2019, Kromah was arrested in Uganda and extradited to the US, where he later pleaded guilty to smuggling at least 190 kilograms of rhino horn and 10 tonnes of ivory valued at US\$7.4 million. This case was groundbreaking. Non-governmental organizations played a pivotal role in supporting prosecutions and enhancing the capacity of law enforcement agencies to tackle wildlife trafficking, while US agents spent years building the case, highlighting deep cooperation across jurisdictions. It demonstrated both the reach of organized wildlife crime (using shell companies, corrupt officials and freight forwarders) and the potential for novel legal approaches (using US courts to prosecute an African trafficker for crimes committed partly in Africa and the US). Trade involving endangered or threatened species violates several US laws, such as the far-reaching Lacey Act,<sup>105</sup> which has been used to prosecute international wildlife traffickers, as well as international treaties implemented by certain US laws. The dismantling of this network also revealed links to Chinese and Vietnamese buyers and showed that collaboration can net major traffickers, even in a country with limited enforcement capacity of its own.<sup>106</sup> ■

### *Rhinoceroses (horns)*

Southern Africa – mainly South Africa, with its large white rhino population – is the source of most illicit rhino horn. Poaching in the Kruger National Park and private reserves in South Africa has been intense since around 2008, feeding a black market for horns used in East Asia. Late 2024 saw a dramatic spike in rhino poaching in the Hluhluwe-iMfolozi Park in South Africa's KwaZulu-Natal province, followed by a significant upsurge in the Kruger National Park.<sup>107</sup>

Vietnam and China are the dominant end-use markets for rhino horns (see Figure 6). Vietnam's economic boom created a wealthy class that viewed rhino horn as a luxury health tonic or status symbol, driving demand since the late 2000s.<sup>108</sup> Today, rhino horns are mainly sold as luxury items, whole or in the form of carvings, beads, bracelets or other trinkets. Over 90% of poached African rhino horn comes from South Africa's white rhinos, with smaller contributions from Namibia, Zimbabwe and Kenya. Horns are smuggled out through airports such as OR Tambo and Maputo, or overland to East African airports, notably Jomo Kenyatta International Airport in Nairobi and Entebbe International Airport in Uganda.<sup>109</sup> Trafficking networks often involve Asian nationals based in Africa. Authorities have estimated that 54% of global rhino horn seizures involve Chinese or Vietnamese nationals as couriers.<sup>110</sup>

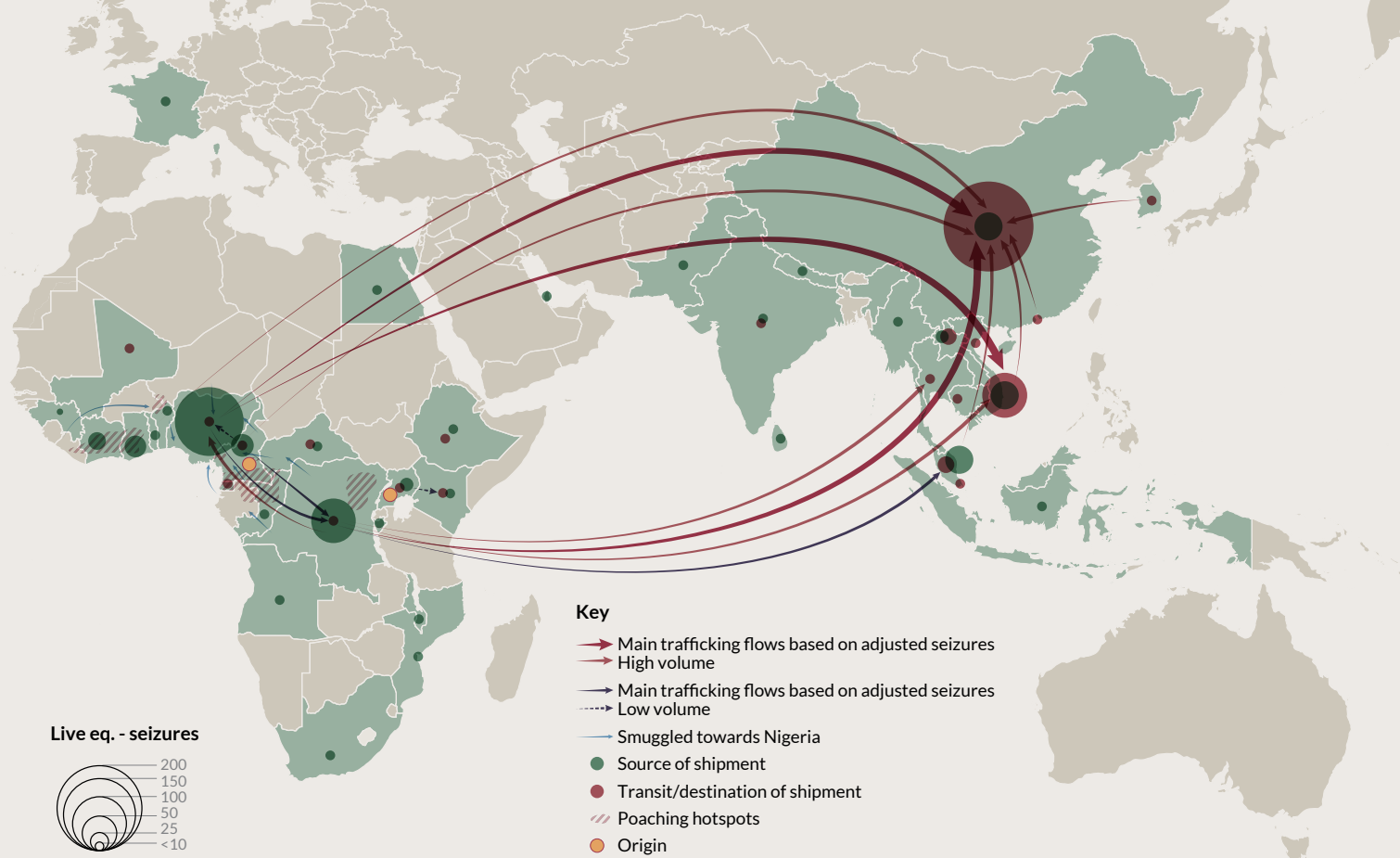
Vietnam also serves as a transit point for rhino horn destined for China. In the past, so-called 'pseudo-hunting scams' in South Africa involved Vietnamese syndicates in Europe hiring Czech and Polish hunters to shoot rhinos legally and export horns as trophies, which then entered the black market.<sup>111</sup> Middle Eastern transit has also occurred, with seizures in Qatar and the UAE involving rhino horn en route to Asia.<sup>112</sup>



**FIGURE 6** Rhino horn trafficking routes showing changes over time.

SOURCE: WJC, TRAFFIC, C4ADS





**FIGURE 7** Source and destination markets for pangolins.

SOURCE: UNODC, ESRI

### ***Pangolins (scales and meat)***

Pangolins are the most trafficked wild mammals on earth. Africa's pangolin species (especially the white-bellied and giant pangolin varieties found in West, Central, Southern and East Africa) are being poached to supply Asian markets after Asian pangolin populations were decimated.<sup>113</sup>

While West and Central African countries such as Nigeria, Cameroon, the DRC and the Central African Republic have been primary sources for large pangolin scale shipments,<sup>114</sup> East African nodes such as Uganda have also been implicated as collection and export points (see Figure 7). Some seizures in Uganda and Kenya have contained pangolin scales from Central Africa.<sup>115</sup> Southern African pangolins (e.g. Temminck's ground pangolin) are less commonly seized in large volumes, but some poaching exists in Zimbabwe and South Africa.<sup>116</sup>

Pangolin scales are overwhelmingly destined for China, where they are used in traditional medicine. Ground into powder, the scales are believed to promote blood circulation, stimulate lactation, reduce swelling and expel pus. Despite international trade bans, domestic use persists in China. In June 2020, China elevated the protection status of pangolins to the highest level and removed pangolin scales from the official list of approved ingredients in traditional medicine.<sup>117</sup>

Trafficking networks often consolidate scales from multiple African countries at a port in West or East Africa. For example, the largest recorded seizure – 14 tonnes of scales in Singapore in 2019 – had been shipped from Nigeria. Pangolin trafficking routes funnel towards Asian ports such as Guangzhou (China), Hong Kong and Haiphong (Vietnam), often through transit hubs such as Malaysia. There is also

intra-African trade for bushmeat (locally, pangolins are hunted for meat in Central and West Africa), but the international scale trade is more devastating. Europe has occasionally been a destination for pangolin products (including luxury leather), but not at the scale of Asia. Notably, Europe sometimes serves as a transit region for pangolin scales too – EU ports and airports have intercepted shipments en route to Asia, highlighting global reach.<sup>118</sup> Germany, for example, was involved in 39 pangolin seizure incidents, comprising an estimated 737 animals, between 2010 and 2018.<sup>119</sup> France and Belgium have also been identified as important transit hubs.<sup>120</sup>

## A pangolin super cartel

In the late 2010s, Nigeria began emerging as the most significant source of pangolin scale seizures globally. A series of huge interceptions followed – 12 tonnes in Vietnam (2019), 9 tonnes in Singapore (2019, mixed with ivory) and 10 tonnes in China (2020). All these seizures could be traced back to Nigeria and neighbouring countries. Investigations by Nigeria's customs service, supported by the Wildlife Justice Commission, uncovered a syndicate led by Vietnamese nationals based in Nigeria. In 2022, three Vietnamese suspects and a Guinean were arrested in Lagos. The suspects were described as 'high-ranking members of a major organized crime group involved in the trafficking of ivory and pangolin scales from Nigeria and rhino horn and lion bones from Mozambique and South Africa to Vietnam'.<sup>121</sup> This network exemplified how traffickers from an established trade (Vietnamese traders in ivory and rhino horn) diversified into pangolin scales. They exploited existing routes and methods, including by consolidating scales from multiple African countries at the Lagos port complex, bribing customs and using front companies to ship to Asia. The case also showed that East African products – some scales in these shipments are likely to have come from pangolins in East and Central Africa – were being funnelled through West Africa, representing a geographical broadening of African wildlife crime routes.<sup>122</sup> ■

### ***Big cats (bones, teeth, claws and skins)***

Several big cat species in ESA are trafficked, including leopards, lions and cheetahs. Leopard skins are sought for ceremonial clothing (within Africa and abroad) and fashion, while lion bones and other parts have emerged as a substitute for tiger products in Asian markets. South Africa has reported lion bone smuggling to South East Asia for use in traditional medicine and 'tiger bone wine' production.

Lions and leopards from South Africa (including bones from captive-bred lions) and poached wild lions in neighbouring countries including Mozambique, Zambia and Zimbabwe feed this market. Lion bones are primarily destined for Vietnam, Laos and China.<sup>123</sup> Leopard skins are sometimes used locally in Southern African traditional ceremonies, while others are illegally exported to Asia, the US and the EU.

The pet trade in cheetah cubs is a severe threat in the Horn of Africa. Each year, an estimated 300 cheetah cubs are trafficked out of Ethiopia, Somalia and northern Kenya, destined for lavish private collections in the Arabian Gulf.<sup>124</sup> Smuggling routes for cheetahs typically go by land to Somalia and by boat to Yemen, then overland into the Gulf states. Tragically, cub mortality is very high; fewer than 20% are estimated to have survived the journey in recent years. This trade has decimated cheetah populations in parts of East Africa.<sup>125</sup>

Although tigers are not native to Africa, South Africa, for example, has been implicated in shipments of live tigers and farmed tiger products to Asia. This activity exploits legal loopholes in the regulations intended to protect wild tigers and tiger products from commercial international trade, as the same laws do not apply to captive-bred animals.<sup>126</sup>

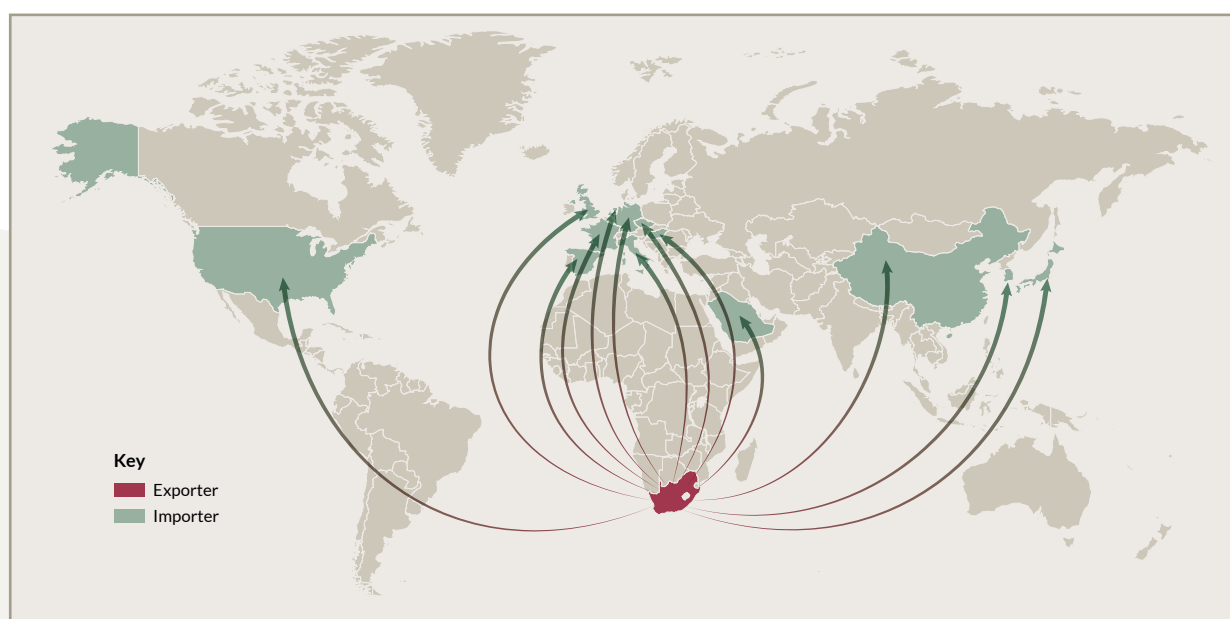
### Plants and reptiles

The illegal trade in plants from ESA to international markets is a significant concern, affecting numerous species and ecosystems. Rare succulents and cycads from South Africa and Namibia have been poached at alarming rates to supply specialist collectors in Europe, the US and Asia.<sup>127</sup> Over 1.6 million succulents, representing 650 species, were seized in South Africa between 2019 and 2024, mostly headed for markets in Asia, particularly South Korea, China and Europe. Significant destinations included the Czech Republic, Germany, the Netherlands, the UK and the US.<sup>128</sup>

South Africa's Karoo Biome, a global biodiversity hotspot, has experienced a surge in illegal succulent harvesting. Endemic desert plants hundreds of years old are dug up and shipped out, fetching high prices in horticultural circles. Similarly, orchids and cycads from the African wilds are smuggled into greenhouses in Europe and the US.<sup>129</sup>

Timber, such as aromatic African sandalwood (*Osyris lanceolata*) from East Africa<sup>130</sup> and fine-grained, richly coloured rosewood<sup>131</sup> from Madagascar, is trafficked along some of the same routes, and medicinal plants, such as African cherry (*Prunus africana*) bark<sup>132</sup> or hoodia cactus from Southern Africa, are illegally harvested for export to Europe and Asia. Indigenous San communities in Southern Africa traditionally used hoodia as an appetite suppressant during long hunting trips. Hoodia has garnered international attention for its purported weight loss attributes, leading to significant demand in nutraceutical markets across Europe and Asia. This surge in interest has resulted in substantial illegal harvesting and trade, threatening the species' survival.<sup>133</sup>

East Africa is a major source for the exotic pet trade in reptiles. Chameleons from Madagascar and Tanzania, geckos and tortoises from Tanzania, Kenya and Madagascar, and ball pythons from Sudan and Uganda are illegally exported to Europe and the US. They are often labelled as captive-bred when



**FIGURE 8** Markets for illicitly harvested succulents.

SOURCE: TRAFFIC

they are, in fact, wild-caught.<sup>134</sup> German customs have intercepted several illegal wildlife shipments, including reptiles, concealed in luggage or parcels. In one instance, law enforcement officials discovered 130 reptiles and amphibians, many protected or endangered species, being sold from a hotel room in Hamm during Europe's largest reptile fair.<sup>135</sup> In another example, police in Spain arrested 21 suspects and seized 355 reptiles smuggled from South Africa, Australia, Brazil and Mexico.<sup>136</sup>

Tortoises, including the endangered ploughshare tortoise from Madagascar and the leopard tortoise from Tanzania, have been seized in Asian markets and Europe, highlighting global demand.<sup>137</sup> Madagascar's diverse natural wealth presents many opportunities to criminals, enabled by systemic corruption and the country's porous land and sea borders. Tortoises are often wrapped in tape, sometimes with other objects, to disguise their shape when they go through scanners. They are generally shipped in suitcases as personal luggage or freight. Couriers are sometimes offered US\$500 to take a return flight to Bangkok with only hand luggage. Baggage check-in is facilitated by airport staff linked to the smugglers – there have been reports of bags bypassing security and being loaded directly onto aircraft.<sup>138</sup>

Madagascar's main trafficking routes are primarily by air from Antananarivo Ivato International Airport or by boat from Mahajanga in the north-west to the Comoros. Secondary routes include regional flights from smaller airports to the Comoros, Mayotte or Réunion.

### ***Intersection with Europe***

Europe plays a complex role in the illegal wildlife trade: it is a transit corridor and a destination market.<sup>139</sup> The EU's open borders and high trade volume make it attractive for traffickers to route shipments through. The bloc is a major transit hub for wildlife trafficking between Africa and Asia, with wildlife smugglers and other criminal networks, including networks in the EU, exploiting key airports in or close to Brussels, Frankfurt, Paris and London, and ports such as Rotterdam, Antwerp and Hamburg.<sup>140</sup>

Brussels airport leads in terms of ivory seizures in Europe – albeit mainly small quantities – while larger ivory shipments have transited through the UK and France.<sup>141</sup> Customs in EU nations have in the past also intercepted numerous rhino horn shipments; for example, horns seized in the Czech Republic and Austria have arrived on flights from South Africa and have often been transported by Vietnamese couriers. Some smuggling rings have operated within Europe.<sup>142</sup> For instance, Irish and Czech crime groups were implicated in acquiring rhino horns stolen from EU museums and castles (as well as some originating from pseudo-hunts) to sell onward to Asia.<sup>143</sup>

In 2022 alone, EU authorities seized 1 886 live animals, including parrots, birds of prey and turtles, originating from various countries around the world and destined for the pet trade. In 2021, 3 645 live animals were seized.<sup>144</sup>

## **Key trade routes and transit hubs**

This section explores the flows, routes and hotspots facilitating the illegal wildlife trade in ESA. Traffickers constantly adapt routes in response to regulatory crackdowns. The sub-sections below detail the major land, air and maritime pathways used in the illegal wildlife trade, highlighting key smuggling tactics, hubs and transit points that facilitate this underground economy.



## Land routes

Within Africa, traffickers move products from poaching sites to export points via roads and border crossings. For example, ivory from elephants poached in Tanzania has been transported by road to ports in Dar es Salaam and Zanzibar.<sup>145</sup> Overland routes often traverse borders: e.g. rhino horns from South Africa or Namibia may be smuggled through Mozambique or Zimbabwe by road, then onward to seaports or airports.<sup>146</sup>

In the Horn of Africa, cheetah cubs captured in Ethiopia, Kenya or Somalia are driven or carried to coastal points in Somalia or Somaliland and then loaded onto boats to cross the Gulf of Aden.<sup>147</sup> Central transport nodes such as Nairobi (Kenya) and Entebbe (Uganda) also serve as collection points where contraband from multiple countries is consolidated for export.<sup>148</sup> Smugglers adapt overland routes in response to enforcement pressure. For instance, crackdowns in Kenya<sup>149</sup> may shift trafficking to the Uganda–South Sudan–Sudan routes, or from Tanzania into the DRC and Angola before export.<sup>150</sup>

## Air routes

Air transit is a preferred method for high-value, low-bulk items (e.g. rhino horn, small ivory carvings and reptile hatchlings). Traffickers frequently route flights through a range of major hubs to obscure the origin. Analysis of seizures (2009–2017) shows ivory, rhino horn and pangolin scales typically flow from Africa to Asia via the Middle East and sometimes Europe.<sup>151</sup> Major airports such as Addis Ababa Bole, OR Tambo, Jomo Kenyatta and Entebbe are common points of departure. In early 2025, air routes connecting Beira in Mozambique and OR Tambo airport in Johannesburg were flagged as ‘high risk for rhino horn smuggling’.<sup>152</sup> Angola’s Luanda 4 de Fevereiro International Airport is also considered high risk, with the March 2025 arrest of a number of Vietnamese nationals found with consignments of ivory and rhino horn. Since 2021, Angola has grown into a ‘key trafficking hub for Vietnamese criminal networks’ moving rhino horn.<sup>153</sup>

At the same time, transit often occurs in Gulf hubs (Dubai and Doha) or European hubs (Frankfurt, Brussels and London) en route to Asia (Hong Kong, Hanoi, Bangkok and Beijing). Doha has emerged as a significant hub, with Qatari authorities reporting several seizures of rhino horns being smuggled from South Africa and Zimbabwe, elephant ivory from Uganda and ivory statues, piano keys and ivory-handled knives from the UK since 2022.<sup>154</sup>

Live reptiles and bird eggs are sometimes carried in personal luggage on multi-leg flights (including eggs hidden in clothing). Dozens of such seizures occur globally each year. Because enforcement at airports has tightened, smugglers continually switch routes and airlines. Recent cases show detours: ivory routed from East Africa through Istanbul or Moscow to Asia, or rhino horn couriers switching planes in Qatar or Nairobi.<sup>155</sup>

## Sea routes

Maritime shipping enables bulk smuggling of heavy wildlife products. East Africa’s seaports on the Indian Ocean are long-standing trafficking conduits. Mombasa (Kenya) and Dar es Salaam/Zanzibar (Tanzania) became infamous during the 2009–2014 elephant poaching crisis as exit points for ivory.<sup>156</sup> Concealment in sea cargo is sometimes sophisticated: in one case, 33 rhino horns from Southern

Africa were hidden with hundreds of ivory chopsticks and bracelets in a container labelled as plastic waste from Cape Town; the illicit cargo was intercepted in Hong Kong.<sup>157</sup> Traffickers often split large consignments across multiple containers to reduce risk.

Southern African ports such as Maputo, Pemba, Nampula and Nacala (all in Mozambique)<sup>158</sup> and Walvis Bay in Namibia have been implicated as transit points.<sup>159</sup> Maputo, for instance, is used by criminal networks as a storage and re-export hub – evidenced by Mozambique’s record 2015 seizure of 65 rhino horns and 1.1 tonnes of ivory in a single bust.<sup>160</sup> From these ports, routes across the Indian Ocean go to South and South East Asia (via trans-shipment in Colombo and Singapore) and East Asia (direct or via Malaysia or Vietnam). More minor maritime routes include inshore dhows moving ivory and other contraband along the East African coastline. Syndicates are increasingly shipping ivory and pangolin scales from Nigeria, Cameroon and Angola. Some of these illicit cargoes may have originated further south, as an alternate route to Asia to evade East African enforcement.<sup>161</sup>

### ***Trafficking routes via Europe***

Traffickers take advantage of Europe’s transport connectivity: a shipment might go from Nairobi to Dubai to London, then to Hong Kong, masking its African origin.<sup>162</sup> A 2022 report by the Wildlife Justice Commission warned that several horn seizures that year and in 2021 suggested a ‘potential return to the use of European countries as transit locations’.<sup>163</sup>

The UK intersects these flows. Seizures at Heathrow airport have ranged from live reptiles to ivory and traditional medicines. In recent years, concerns have been raised about poached raw rhino horns being processed and laundered as ‘antiques’. A 2021 study of the UK antique market for rhino horn found 1 247 sales between 2017 and 2019, which reflected a 101% increase in ‘antique’ horn carvings.<sup>164</sup>

## **Hotspots**

Key transit hubs include major African airports (OR Tambo, Jomo Kenyatta and Addis Ababa Bole), ports (Mombasa, Dar es Salaam and Maputo), Middle Eastern connection hubs (Dubai, Doha and Istanbul) and European hubs (Brussels, Frankfurt and London).

OR Tambo has seen numerous interceptions of rhino horn destined for Asia. Jomo Kenyatta International Airport’s status as another hotspot has prompted initiatives to counter smuggling there.<sup>165</sup>

Traffickers employ creative concealment methods to defeat surveillance at these hubs. Common tactics include hiding ivory or horn in false compartments of luggage or cargo, mixing wildlife products with legal goods (wood, plastic or seafood) and misdeclaring shipments (pangolin scales are sometimes designated as ‘fish maw’ or timber). For live animals, concealment ranges from small reptiles taped inside electronics or stuffed in socks to sedated birds in tubes. Traffickers also abuse postal and parcel services for smaller contraband such as reptile skins, ivory trinkets and plant cuttings since such packages face less scrutiny than travellers or containers.<sup>166</sup>

## A South African crime boss

In late October 2022, Clyde Mnisi – a nightclub owner and ‘businessman’ living in Mpumalanga near South Africa’s Kruger National Park – was inaugurated as the traditional leader of the Mnisi clan. He wore a leopard-skin robe and took his place on a wrought-iron throne painted gold. Barely five months later, Mnisi was gunned down in an apparent assassination.<sup>167</sup> Just days after his funeral, his widow was shot dead.<sup>168</sup> Then two of his brothers were killed, and his sister was shot dead at a McDonald’s drive-through.<sup>169</sup>

Implicated in loansharking and cash-in-transit heists, Mnisi was one of the ‘kingpins’ in a ‘massive trafficking network of poached rhino horn’.<sup>170</sup> Many years before his demise, Mnisi had been arrested in connection with rhino horn trafficking in September 2018, along with six other suspects, including a crime boss, Petros Sydney Mabuza (who was shot dead in a hit in 2021), and a notorious former police officer named ‘Big Joe’ Nyalunga. That police operation, codenamed Project Broadbill, seized assets worth millions, including properties, cars, trucks, stolen trailers, generators and electronic equipment and animal skins.

Five of the suspects were serving or former police officers. They included Phineas Lubisi, a police captain at Calcutta police station and formerly station commander of Skukuza police station in the Kruger National Park, and Aretha Mhlanga, a constable at Skukuza. Others were Claude Lubisi, a former Calcutta constable, Rachel Qwebana, a constable with the Acornhoek stock theft unit, and Nyalunga, a former police warrant officer based at White River police station.<sup>171</sup>

The syndicate is alleged to have exerted influence over a swathe of territory along the Kruger’s western boundary. It stretched from Belfast and Cork to the east of Sabi Sands Game Reserve, down to Calcutta, Mkhuhlu, the Shabalala tribal trust area and Hazyview, where Nyalunga and Mabuza had homes a few kilometres apart.

At the time of the arrests, a police spokesperson said the syndicate’s criminal operations, aided by corrupt police and staff in state and private reserves, were ‘executed with paramilitary discipline and included counter-intelligence operations to prevent detection’. Its reach extended from the Kruger National Park to Gauteng and KwaZulu-Natal.<sup>172</sup> ■

## Towards more effective international collaboration

The overall effectiveness of enforcement in the region and globally has been very mixed. Poaching rates for some species have declined in recent years. For instance, rhino poaching in South Africa peaked in 2015 and has since decreased each year, dropping from around 1 200 to 420 rhinos killed annually, partly due to intensified protection and dehorning but also because the overall population had declined so steeply already. In a decade, beginning in 2011, the world’s largest population of rhinos in the flagship Kruger National Park fell by between 66% and 70%, primarily due to poaching.<sup>173</sup>

Similarly, elephant poaching in East Africa has declined since the mid-2010s after the arrest of major players. However, traffickers often adapt rather than disappear – shifting operations to countries with weaker enforcement. The rise of West and Central Africa as trafficking hubs for ivory and pangolin in response to East African crackdowns shows the displacement of the problem. Corruption remains

a severe impediment: customs officers, politicians and even rangers have been caught abetting the trade, including by disregarding shipments and leaking enforcement plans. International agreements such as the Convention on Trade in Endangered Species of Wild Fauna and Flora (CITES), which came into effect in 1975 and governs international wildlife trade, lack teeth, relying heavily on political will and states for implementation.

Meanwhile, positive trends include better bilateral cooperation. The US, for example, has successfully extradited and prosecuted African traffickers in recent years.<sup>174</sup> The use of technology, including sniffer dogs, DNA forensics to trace ivory to origin populations and satellite tracking of shipments have all contributed.

The illegal wildlife trade connecting ESA to the world is a multifaceted challenge involving complex logistics, cultural demand, economic pressures and conservation emergencies.

Challenges remain daunting. Corruption, limited judicial outcomes and the vast profit incentive continue to undermine efforts. The COVID-19 pandemic initially disrupted trafficking logistics but also worsened local poverty, potentially pushing more people into poaching. Trafficking networks quickly rebounded.<sup>175</sup>

The illegal wildlife trade thrives on imbalances between source markets and consumer markets: economic imbalances, enforcement imbalances and information asymmetries. Narrowing those gaps is crucial. Key imperatives include making wildlife crime less attractive relative to other livelihoods, reducing the risks of zoonotic diseases, and ensuring traffickers face high risks and low rewards through law enforcement and justice mechanisms.<sup>176</sup> The survival of species like the elephant, rhino and pangolin – and the integrity of entire ecosystems – will depend on sustained international commitment and collaboration.





## ILLICIT EXTRACTIVES MARKETS

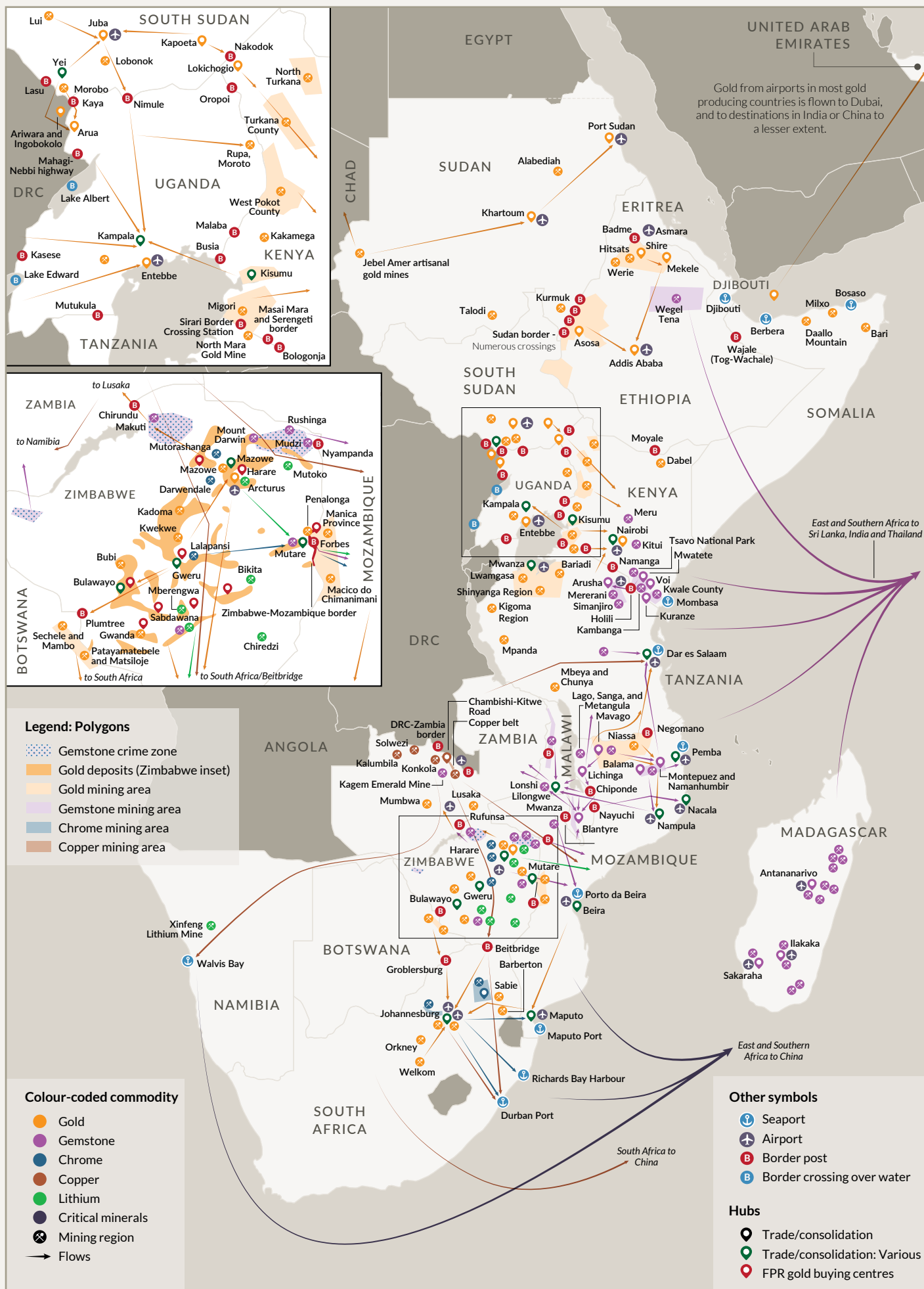
**C**riminal exploitation of the ESA extractives sector is widespread, from illegal artisanal and small-scale mining (ASM) to grand corruption. Smuggling routes connect remote mining sites to key regional nodes, and illegal activity is flourishing as political and business elites increasingly control mineral supply chains. Government actors, powerful private interests and foreign states are progressively capturing and consolidating control over mineral supply chains.

Gold rightly features heavily in discussions of criminality in the African extractives sector. Surging demand for gold is a major factor driving criminal capture of the sector. This demand exacerbates conflicts by providing supernormal profits to local elites who control illicit output in fiefdoms they often terrorize.

The majority of illicit African gold flows to Dubai, a major global trading centre, polluting the global supply of this precious metal and stoking the use of gold in money laundering. SWISSAID estimates that 66.5% (405 tonnes) of the gold exported from Africa to the UAE in 2022 was smuggled.<sup>177</sup> In March 2025, gold hit an all-time high of US\$98 per gram, meaning that 400 tonnes of gold would be valued at over US\$39 billion at today's gold prices.





Illicit activity stretches to other mined commodities, including critical minerals and coloured gemstones. Critical minerals are raw materials that are essential for modern technologies, economies and national security. Different countries and regions deem some minerals to be more critical than others, although there is significant overlap (see Figure 10).<sup>178</sup>





Owing to their geopolitical significance and the dominance of supply chains by a small number of states, critical mineral supply chain disruptions pose a high risk for many countries.<sup>179</sup> Currently, China dominates the processing and manufacturing of critical minerals, including graphite and lithium.<sup>180</sup> As countries seek to diversify away from China and global competition heats up, even small deposits are increasingly valuable, thereby incentivizing criminal actors to secure critical mineral assets and supply chains.



**FIGURE 9** Extractive commodities, mining areas, hubs and flows.

SOURCE: GI-TOC

Minerals	 UK	 China*	 EU	 US
Aluminum/bauxite		•	•	•
Antimony	•	•	•	•
Arsenic			•	
Barite			•	
Beryllium			•	
Bismuth	•		•	
Boron			•	
Cesium				•
Chromium				•
Cobalt	•	•	•	•
Coking coal			•**	
Copper		•	•	•
Feldspar			•	
Fluorspar		•	•	•
Gallium	•		•	
Germanium			•	
Gold		•		
Graphite	•	•	•	•
Hafnium			•	
Helium			•	
Indium	•			•
Iron ore		•		
Lithium	•	•	•	•
Magnesium	•		•	

Minerals	 UK	 China*	 EU	 US
Manganese			•	
Molybdenum		•		
Nickel		•	•	•
Niobium	•		•	
Palladium	•			
Platinum	•		•	
Phosphate rock			•	
Phosphorus		•	•	
Potash		•		
Rare earths	•	•	•	•
Rubidium				•
Samarium				•
Scandium			•	
Silicon	•		•	
Strontium			•	
Tantalum	•		•	
Tellurium	•			•
Tin	•	•		•
Titanium			•	
Tungsten	•	•	•	•
Uranium		•		
Vanadium	•		•	
Zinc				•***
Zirconium		•		•

**FIGURE 10** Critical mineral list of the UK, China, the EU and the US.

SOURCE: Adapted from Visual Capitalist, <https://www.visualcapitalist.com/the-critical-minerals-to-china-eu-and-u-s-national-security/>.

NOTES: \* China leads in mineral processing, controlling 100% of the world's refined supply of natural graphite, over 90% of manganese, 70% of cobalt, nearly 60% of lithium, and 40% of copper refining; \*\* The EU is a significant importer of coking coal used in steel production; \*\*\* Zinc is crucial for protecting steel through galvanization. The US imports 76% of its refined zinc.

## Conflict minerals

Links between minerals and conflict are proliferating to an alarming degree. While the recent resurgence of violence and mass displacement in mineral-rich eastern DRC has drawn global attention, conflicts linked to minerals have been playing out across the region more broadly.

The relationship between minerals and conflict varies significantly. For example, in South Sudan there is increasingly violent competition for gold mining areas.<sup>181</sup> Meanwhile, in Sudan, one of the two key players in a two-year-old civil war derives significant revenues from its long-standing illicit control of gold mines, bolstering its ability to procure weaponry and pay mercenaries.

Risks are also emerging in northern Ethiopia, notably in the Tigray region, where the Tigray Defense Forces and Tigray People's Liberation Front are involved in mining and trading gold in areas they control following the end of their war with the federal government.<sup>182</sup> Whether this is directly funding sporadic outbreaks of localized conflict or simply a means of enrichment for individuals within these groups is not yet clear. However, a substantial risk of conflict financing exists. An example of this risk is the fragmentation of the Tigray People's Liberation Front, a split that reportedly stemmed from a struggle over the control of the gold trade in Tigray.<sup>183</sup>

## The global impact of Africa's minerals

The transnational nature of gold supply chains also creates wide-reaching harms. Increasing geopolitical rivalry complicates mineral trading relationships, as wealthy nations scramble for access to and control over deposits of gold and critical minerals, as well as their supply chains.

Sudan is a primary example of where minerals, criminality and geopolitics collide. Entities affiliated with the Wagner Group – a Russian private military company – have reportedly been active in Sudan's gold sector since 2017. Sudan is one of Africa's largest gold producers. It has been estimated that more than 30 tonnes of gold were smuggled out of the country in 2022. The UN estimates that more than 50% of gold mined in Sudan is exported illegally.<sup>184</sup> Most of the gold exported from Sudan, both licit and illicit, is sent to Dubai.

In 2022, Wagner operatives were implicated in a scheme to smuggle gold from Sudan to Russia.<sup>185</sup> There are also allegations that the UAE is supplying arms to the Rapid Support Forces (RSF), a paramilitary group that is fighting Sudan's military in a war that broke out in April 2023.<sup>186</sup> The UAE denies this.<sup>187</sup>

Criminality undermines the security and licit profitability of the extractives sector, as well as its contributions to both national and sustainable development. In South Africa, *zama zamas* (a colloquial term for illegal miners) invade active mine shafts, in addition to abandoned ones, and make use of smuggled explosives in the extraction process.<sup>188</sup>

This is different from artisanal and small-scale gold mining, which comes with its own environmental, public health, economic and conflict hazards. The involvement of violent organized gangs from Lesotho and the use of illicit gold profits extends the criminal threat beyond South Africa's borders.<sup>189</sup>



In South Africa, illegal miners known as *zama zamas* are known to occupy abandoned mine shafts. © Shiraaz MohamED/AFP via Getty Images



## London Bullion

Illicit finance in the African gold sector has significant implications for the UK's influence in international markets and on the continent. London has long served as a global hub for physical gold trading. However, a sustained drop in vault gold holdings since their peak in 2021 threatens London's dominant position, which could lead to reduced trading volumes and associated revenues from clearing, insurance and storage. This trend coincides with a broader shift in the global gold market towards the East, specifically Dubai and Hong Kong.<sup>190</sup> In 2024, the Dubai Multi Commodities Centre, a commodities exchange and free-trade zone in the UAE, claimed to have surpassed London to become the world's second-largest gold hub. Central banks are also impacting global gold markets by increasing their holdings in order to reduce their reliance on Western vaults and de-dollarize.

Furthermore, in 2025, significant volumes of gold were flown from London to New York amid fears of changes to US trade policy, highlighting the direct impact of geopolitics on gold logistics. Such shifts challenge London's dominance in price discovery and may also reflect a broader realignment of global finance on a geopolitical level.

At the same time, demands on UK stakeholders to ensure that gold is sourced responsibly are increasing. The London Bullion Market Association (LBMA) is under mounting pressure to address human rights concerns and the presence of illegal gold in global supply chains. The LBMA is currently engaged in a legal battle, having been accused of wrongly certifying gold from an industrial mine in Tanzania as free from human rights abuses.<sup>191</sup> Although this case is not linked to illicit flows, it sets a precedent for the legal challenges businesses and industry bodies may face if they cannot secure their mineral supply chains. Given the significant illicit gold flows through the UAE, the question arises as to whether UK buyers can be confident that gold procured from that country has been responsibly sourced. Bullion trading and refining hubs in the East tend to offer lower regulatory barriers and geographical proximity to major buyers in Asia. ■

## Trends and drivers

The different characteristics of minerals shape supply chains, dictating how they are extracted, transported and processed. For example, platinum and gold have very different supply chains and face different criminal threats, even when mined in proximity in South Africa.

Platinum and other critical minerals are not as easily illegally mined and smuggled due to high logistical costs and the need for sophisticated extraction methods. For example, due to the complexity of processing and refining platinum group metals, illegal platinum mining is almost unheard of. Corruption and theft therefore pose greater criminal risks than smuggling.<sup>192</sup>

Industrial minerals, notably chrome, similarly require relatively sophisticated processing, but there is limited capacity for this regionally. Much of this mineral is therefore shipped to China in ore form. A substantial portion is illicitly mined in South Africa's Limpopo and North West provinces before entering global supply chains.<sup>193</sup>

In contrast, gold, due to its ease of extraction, portability and high value, is a prime target for smuggling. Moreover, it is globally fungible. Gold supply chains therefore tend to be widely dispersed and malleable. Coloured gemstones, while not as globally fungible, share similar dynamics to gold.

Within the region, gold and other mineral commodities are commonly smuggled across land borders, with weak regulation and corruption easing movement. Both formal and informal border crossings are exploited. Informal border crossings are more commonly used for smaller quantities. However, increasing criminal capture of the sector has resulted in greater professionalization of transport and the movement of minerals in greater quantities.

Financing also plays a major role. For example, gold mining sponsors and buyers in trade hubs often effectively purchase illicit gold output before it even leaves the ground. This has fed into greater volumes of minerals being supplied in single shipments and greater sophistication in the transport and hiding of minerals, alongside higher levels of corruption.

Gold and coloured gemstones are often exported by air when leaving the continent.<sup>194</sup> For example, in 2020, South Africa seized 73.5 kilograms of unwrought gold bullion that was found in the hand luggage of three Malagasy nationals, amid allegations the gold was being smuggled to Dubai.<sup>195</sup> The 2023 Al Jazeera exposé 'Gold Mafia' spotlighted the high levels of criminality in Zimbabwe's gold sector, divulging how high-level officials in national government and politically exposed persons in the private sector were facilitating gold smuggling on a large scale.<sup>196</sup>

While there is evidence that commercial airports and airlines are relied on heavily to move gold, there is also mounting evidence that private airstrips and planes are being used to transport this precious metal. A gold dealer in Nairobi reported that large dealers were using private jets and cargo flights to move consignments during the COVID-19 pandemic.<sup>197</sup> Private jets have also been used to smuggle gold out of Sudan.<sup>198</sup>

Seaports are also an important transit point in mineral supply chains, especially critical minerals and other minerals that are moved in bulk, including lithium and chrome. There is also growing concern about the smuggling of gold concentrate by sea.<sup>199</sup>

Meanwhile, special economic zones (SEZs) are a growing threat,<sup>200</sup> and their proliferation across the continent requires attention. Due to a lack of oversight and weak regulation, minerals can easily be discreetly exported out of SEZs, enabling smuggling on a massive scale. A 2024 case involving 15.78 kilograms of gold seized at the port of Dar es Salaam en route to Zanzibar arguably constitutes an example of this.<sup>201</sup> Zanzibar, known as a major node in human smuggling and drug trafficking,<sup>202</sup> hosts numerous SEZs and has its own SEZ legal regime separate to that of the Tanzanian mainland.<sup>203</sup>

There is also evidence that SEZs are linked to money laundering; an investigation found that two phantom gold refineries were channelling millions of dollars, apparently alongside gold bars and coins, through an Eswatini SEZ to Dubai.<sup>204</sup> In this case, it is unclear how much gold physically moved through the SEZ, but it nevertheless served as a conduit for channelling funds related to gold smuggling from other countries (notably Zimbabwe) to Dubai.<sup>205</sup> SEZs therefore provide cover for the smuggling of minerals from one jurisdiction to another, as well as facilitating money laundering.

## Copper theft

Two of the world's top 10 copper-producing countries are found in Africa, namely the DRC and Zambia.<sup>206</sup> Morocco and South Africa are also significant producers, while Namibia has been ramping up production in recent years.<sup>207</sup>

Within Southern Africa, the main exit points for copper exports are the ports of Walvis Bay in Namibia, Beira in Mozambique, Durban in South Africa and Dar es Salaam in Tanzania. Smaller amounts are exported through Angola's Lobito port.<sup>208</sup>

High copper prices have left trucks laden with cargo vulnerable to hijack and theft by organized criminal groups. Routes through South Africa have become so dangerous that many logistics companies transporting copper ore employ armed security escorts.<sup>209</sup> The number of trucks carrying valuable cargo (including copper products) hijacked in South Africa has increased dramatically over the last decade. The threat of hijacking and operational problems at Durban's port have made South Africa much less attractive than Dar es Salaam and other export points.<sup>210</sup>

Countries within the region also contend with major theft of copper cable. South Africa is particularly badly affected by this phenomenon. In 2021, several state-owned enterprises jointly announced that they were experiencing combined direct losses of about R7 billion (nearly US\$390 million) a year due to the theft of copper.<sup>211</sup> According to South Africa's National Infrastructure Plan 2050, the total cost of copper theft could exceed 1% of GDP annually, imposing an enormous burden on taxpayers.<sup>212</sup>

Copper syndicates in South Africa have become ruthlessly efficient, trading the metal on the domestic market, where it is reprocessed and sold to local buyers who resell the copper in neighbouring countries or move stolen copper to more lucrative international markets, using the same channels as legal exports.

A significant amount of this stolen copper leaves the country through seaports in containers that are either mislabelled or accompanied by false documentation. In some cases, scrap copper is labelled as raw copper. In other cases, it is mislabelled as non-metal goods, such as textiles, and then exported under the corresponding customs codes. Once reprocessed, stolen copper can also be laundered alongside legally acquired copper. This makes its origins difficult to determine.

Kenya is also severely affected by copper theft. In January 2022, nine senior Kenya Power officials were detained in connection with a nationwide blackout allegedly caused by theft and vandalism, negligence and sabotage.<sup>213</sup> Copper stolen in Kenya is likewise reprocessed for domestic and international sale, utilizing similar categories of local players along the illicit supply chain as in South Africa.

## Banning the trade in scrap metal

Kenya, Zambia, Uganda, Tanzania and South Africa have responded to copper and other non-ferrous metal theft by implementing bans on the scrap metal trade. However, the temporary nature of such bans may have caused more problems than they have solved.

Kenya's ban lasted from January to May 2022. It was conceived to allow the government time to develop guidelines to regulate the scrap metal trade. Although regulations have been introduced, it is questionable whether they are being followed, and the extent to which scrap dealers in Kenya have been able to circumvent them is uncertain.

While there has been no detailed assessment or evaluation of whether the ban had a material effect on vandalism and theft of government infrastructure, there are indications that it did not discourage the trade in scrap metal. Unscrupulous dealers continued to trade illegally and smuggle scrap metal out of the country using land borders. In addition, there were indications that illegally acquired scrap metal was stockpiled during the ban.<sup>214</sup>

In South Africa, the Department of Trade, Industry and Competition likewise imposed a temporary ban on the export of scrap metals, including copper. This ban took effect in December 2022 and lasted a year, during which time authorities took steps to force buyers and sellers to register and imposed reporting requirements on them.

As with Kenya, there has not been any significant assessment of whether the ban and the additional measures implemented by South Africa to curb copper theft have had the desired impact. However, insiders indicate that it has had very little impact on the illicit trade,<sup>215</sup> among them Evert Swanepoel, who heads the Copper Development Association Africa. Swanepoel notes that the ban hurt the legal copper industry even as looting to supply the illicit market continued unabated.<sup>216</sup> In its 2023 financial year, Transnet, a logistics parastatal, reported that 1 121 kilometres of copper cable had been stolen – roughly equivalent to the distance by road between Johannesburg and Harare.<sup>217</sup> ■

## Market distribution and routes

Understanding where mineral deposits occur is essential in identifying illicit markets. Geological mapping also assists in identifying where criminal threats in the minerals sector might emerge in the future and how supply chains might shift in response to pressure.

Gold deposits can be found – and are informally or illicitly mined – in nearly every country in ESA. Coloured gemstone deposits are more limited, with the notable producers being Kenya, Tanzania, Malawi, Zambia, Mozambique and Madagascar.<sup>218</sup> Critical mineral deposits occur in limited pockets. South Africa is a top producer of platinum<sup>219</sup> and Zimbabwe is one of only a few countries in the region with notable lithium deposits.<sup>220</sup>

## Hotspots

### Gold

Although gold supply chains quickly consolidate as they near regional export hubs, the sheer volume of gold deposits across ESA means that there are multiple trade and export hubs. Major gold export hubs include Juba (the capital of South Sudan), Entebbe, Nairobi, Harare and Johannesburg.

However, gold flows can shift quickly, so any city with an international airport has the potential to be an export hub. Most gold is smuggled to Dubai.<sup>221</sup> Other destinations for African gold include India, China and Switzerland.<sup>222</sup> Strong illicit gold links have also been identified between Kenya and India.<sup>223</sup>

Illicit gold flows have significant implications for UK gold markets. The UAE reported that US\$129 billion worth of gold flowed through Dubai in 2024, a 36% increase compared to 2023, making it the world's second-largest gold market.<sup>224</sup> According to the UK's National Crime Agency,

organized criminals in Britain are smuggling millions of pounds in drug money by air to Dubai and then laundering it by investing in the gold trade.<sup>225</sup>

At the same time, as noted above, the LBMA is under increasing pressure to address human rights concerns and the presence of illegal gold in global supply chains.<sup>226</sup> The LBMA is currently in a legal battle, accused of wrongly certifying gold mined at an industrial gold mine in Tanzania as free from human rights abuses.<sup>227</sup> While the case is not linked to illicit flows, it could be a precursor for the legal challenges businesses and industry bodies could face if they cannot secure mineral supply chains and ensure mining is carried out in a responsible manner that protects human rights and the environment. This is especially the case for sourcing gold from the UAE and other known gold laundering hubs.

## **Coloured gemstones**

All African countries that produce coloured gemstones face smuggling challenges, including Madagascar,<sup>228</sup> Kenya,<sup>229</sup> Mozambique and Malawi.<sup>230</sup> Most coloured gemstones from Africa are exported and smuggled to Thailand, Sri Lanka and India.<sup>231</sup>

In a major development, Malawi's government temporarily banned all mineral exports in February 2025. The government cited the need to audit existing contracts and update the regulatory system to ensure greater transparency. However, experts expect the ban to increase smuggling rates and reduce local gem prices.<sup>232</sup>

## **Critical minerals**

While less common, the smuggling of critical minerals does occur. Tin and tungsten are smuggled from the DRC into Uganda. Lithium is smuggled out of Zimbabwe through the Forbes border post into Mozambique and then through the port of Beira.<sup>233</sup> However, corruption, human rights abuses and the theft of consignments tend to be more significant threats in the critical minerals sector. China is the main export destination for many minerals; it dominates manufacturing and production supply chains.

### ***Northern Mozambique: A regional crime zone***

Within northern Mozambique, Pemba, Nampula and Nacala are key transit and trade hubs for minerals. Gold and coloured gemstones are known to be smuggled out of Pemba and Nampula airports. Nampula especially is noted as a convergence hub for dealing in many illicit markets, with extractive commodities prominent among them.<sup>234</sup> Additionally, graphite mining in Cabo Delgado, Mozambique's northernmost province, is threatened by illicit groups. Ports at Nacala and Pemba also provide opportunities to smuggle minerals, especially critical minerals, out of the country.

Gold and gemstones are mined at various sites in the Niassa Special Reserve, which also includes a dealing hub in Mavago and a lengthy and porous border with Tanzania. Commodities mined here flow in all directions, including east to Pemba (which has an international airport and large seaport), west to Lichinga and Malawi, and north to Tanzania.<sup>235</sup> Ruby mining is prolific in Cabo Delgado province, with much of it undertaken illicitly.

Cabo Delgado has since 2017 been blighted by an insurgency launched by Ansar al-Sunna, which in 2019 became an affiliate of the Islamic State group. Mozambique has relied heavily on Rwanda's military to contain this insurgency, scoring some successes, although the jihadist group has been increasingly active again since 2023.





Gold and coloured gemstones are known to be smuggled out of Nampula airport in northern Mozambique.

© Gianluigi Guercia/AFP via Getty Images

The degree to which gold and ruby mining and trade finances the ongoing insurgency is difficult to discern. Some people in the area believe insurgents are actively involved in mining and trade,<sup>236</sup> and ruby traders have sometimes been linked to Ansar al-Sunna,<sup>237</sup> but further investigation is needed to assess the extent of the illicit mineral trade captured by this group.

### ***Klerksdorp–Orkney–Stilfontein: A subregional crime zone***

Significant illegal mining of gold and other minerals and related disputes beset this mining area in South Africa's North West province. Officials estimate that the country lost US\$3 billion to the illegal gold trade in 2024.<sup>238</sup> In addition to illegal mining in abandoned shafts and in operational mines, gangs intimidate and extort local residents and compete against one another. These gangs mostly originate from Lesotho. They are well organized and have an extensive history in illegal mining and battles for control over resources.<sup>239</sup> 'Turf wars' often involve extreme violence,<sup>240</sup> sometimes perpetrated outside mining sites with civilians caught in the crossfire. The town of Orkney is a prominent hotspot within this zone.

South Africa's government stands accused of allowing extremely heavy-handed police tactics against illegal miners at one abandoned gold mine near Stilfontein. Police cut off supplies to these miners in August 2024, prompting many to emerge from underground and surrender; however, others were reportedly cut off from the main shaft because the police also allegedly dismantled a rope and pulley system. A court order in January 2025 led to the rescue of 240 miners who had been trapped, but 87 died underground, reportedly due to dehydration and starvation.<sup>241</sup>

### ***Darfur: A crime zone feeding conflict dynamics***

A boom in gold mining in Sudan's Darfur region has fed into a resurgence of armed conflict. The RSF paramilitary has long been heavily involved in extracting gold from these mines and has consolidated its control.<sup>242</sup> Gold flows from Darfur to the UAE reportedly finance weapon purchases by the RSF, helping it fight Sudan's army in the ongoing war.<sup>243</sup> Gold from Darfur flows mainly to Chad in the first instance, with traders and couriers often relying on motorcycles to navigate the rough terrain.<sup>244</sup> In January 2024, the RSF seized control of Nyala airport in South Darfur state, dislodging Sudan's

military. Land Cruisers have reportedly been used to move gold to Nyala, and the airport is likely to be an export point for gold headed to Dubai.<sup>245</sup>

### ***Kampala and Entebbe***

The Ugandan cities of Kampala and Entebbe play a key role in regional mineral supply chains. Gold is smuggled into Uganda from the DRC and South Sudan, and to a lesser extent from Kenya. Tin and tungsten are also smuggled into Uganda from the DRC and exported from the country. A secondary hotspot in Uganda is Arua, located at the intersecting borders of the DRC, South Sudan and Uganda, where gold flows converge. The lack of strong law enforcement and high levels of corruption enable this illicit trade, which in turn finances armed groups and perpetuates regional conflicts.

### ***Nairobi and Mombasa***

Nairobi is a hub for the illicit gold trade, including gold sourced from South Sudan, and Kenyan traders are reported to continue to play a significant role in the DRC's artisanal gold sector.<sup>246</sup> There has also been a proliferation of scams within Kenya's gold market. Mombasa's port and the Kenyan capital are reportedly key points in regional mercury supply chains.<sup>247</sup>

### ***Antananarivo***

Madagascar's status as a prominent coloured gemstone producer and high levels of associated smuggling over decades have made Antananarivo a major dealing centre. In recent years there has also been a gold boom, accompanied by high levels of gold smuggling,<sup>248</sup> consolidating the Madagascan capital's status as an important hub.

## **Transit points**

Given the proliferation of airports, seaports and land borders across the region, selecting a few key nodes is challenging. However, from available reporting and GI-TOC research, two key transit points stand out.

### ***Robert Gabriel Mugabe International Airport***

Zimbabwe's largest airport is a major conduit of gold trafficked out of the country. Official complicity and collusion between the state and private sector actors propel much of the smuggling through this airport. In addition to the 'Gold Mafia' exposé,<sup>249</sup> there have been numerous high-profile cases linked to the airport, recently extending to the president of the Zimbabwe Miners' Federation, who was arrested for allegedly attempting to carry 6 kilograms of gold bars en route to Dubai.<sup>250</sup>

### ***OR Tambo International Airport***

South Africa's main airport is both an entry point and exit point for smuggled gold, although Dubai is the primary end destination. The city's refineries are a major pull factor for those smuggling gold from other ESA countries, notably Zimbabwe, but also Mozambique and Madagascar.



## HUMAN SMUGGLING AND TRAFFICKING

**T**he first half of the 2020s has seen the drivers of mass, irregular migration intensify significantly across much of ESA. Substantial new armed conflicts have erupted, initially in Ethiopia and, more recently, in Sudan, where the ongoing civil war has displaced millions of people.

An intensification of the El Niño weather phenomenon drove a severe drought across much of the Horn of Africa between 2020 and 2023.<sup>251</sup> This was followed in 2024 by extreme weather events that triggered catastrophic flooding; hundreds were killed and more than 380 000 people displaced in Kenya in May,<sup>252</sup> before a million people were affected by flooding in South Sudan later in the year.<sup>253</sup> These examples are far from isolated. In the most fragile states, such events propel a doom loop whereby climate change, the loss of livelihoods, displacement, the fragmentation of political authority, predatory behaviour and armed conflict reinforce one another.

A significant proportion of migrants embark on irregular migration journeys, their movements often facilitated by smugglers. These routes, while offering a means of movement, expose migrants to human trafficking, exploitation, assault and torture. Falling victim to traffickers brings the risk of modern slavery, especially for those seeking to reach the Arabian peninsula.<sup>254</sup>

The line between human smuggling and human trafficking in the region is often difficult to discern.<sup>255</sup> Although smuggling and trafficking are distinct crimes, smuggling networks often transition into trafficking enterprises, particularly when migrants cannot pay for their journeys or otherwise become dependent on criminal actors. Criminal networks have increasingly exploited migrants for profit through forced labour, sexual exploitation and debt bondage.

Human smuggling and trafficking networks also intersect with other forms of organized crime, such as drug trafficking, arms trafficking and other illicit trades. The same routes, logistical infrastructure and corrupt networks that facilitate human movement are also leveraged by other criminal economies, reinforcing a wider transnational criminal ecosystem.

## Trends and drivers

Western Europe is a destination of choice among migrants on the northern smuggling routes across the Mediterranean, and those who travel east into the Middle East and through Türkiye.<sup>256</sup> For some of those travelling south through the African continent, South Africa is an alternative stepping stone to Europe and North America (see Figure 11).<sup>257</sup>

Smuggled people risk becoming trafficked if those providing the smuggling service exploit them for favours or payment above what was initially agreed. Human traffickers have capitalized on the aspirations of prospective migrants, enticing them into migrating through online advertisements for fake jobs.<sup>258</sup> Ugandans, in particular, have been targeted by Middle Eastern trafficking syndicates who lure them with false job adverts. Once they arrive, many are sold into servitude.<sup>259</sup>

Sex trafficking is particularly prevalent among at-risk children who are expected to find work and contribute to household incomes.<sup>260</sup> In other cases, people often become victims during transit when they are most vulnerable and reliant on criminal networks for their security.

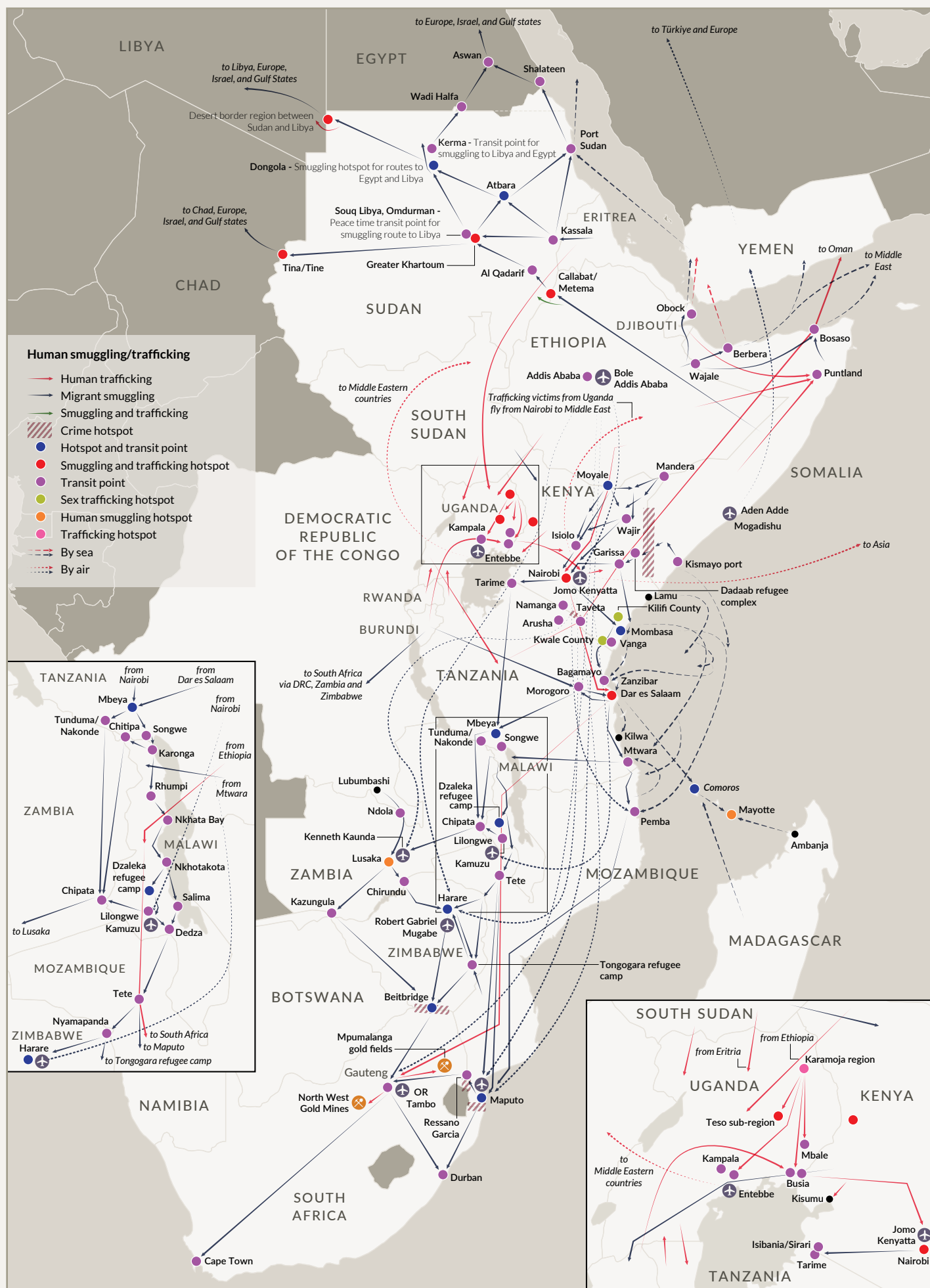
## Market distribution

Human smuggling and associated trafficking do not follow a singular typology across the region. They are facilitated by loose networks of well-run syndicates spanning multiple borders, or by criminal entrepreneurs and smugglers operating in certain key transit hubs who specialize in moving migrants from one area to another. Some smuggling networks consist of loose alliances of freelancers, specialists and criminal entrepreneurs who work together when opportunities arise.

Local brokers are often employed in transit countries for their inside knowledge of migration control structures.<sup>261</sup> Bribery or co-optation of officials makes smuggling through formal border posts possible.<sup>262</sup> High-level government officials are also allegedly directly involved in smuggling and trafficking syndicates in some jurisdictions, including in South Africa.<sup>263</sup>

Often, local smuggling gangs that operate along a specific border area are commissioned to move people and contraband through informal border crossings. These groups often subject migrants to violence, including sexual assault, due to the smuggled persons being highly unlikely to report such crimes to local authorities.<sup>264</sup>

More organized and hierarchical smuggling networks, with managers in charge of operations, exist in key nodes and major capitals. These managers mostly work independently or with 'chief smugglers'. Smuggling networks use local structures under their control and personnel who perform specific functions, including transport and accommodation provision, in nodes and hotspots along the migration route.<sup>265</sup>



**FIGURE 11** Human smuggling and trafficking routes, and hotspots.

SOURCE: GI-TOC



## Migrant smuggling routes

### The southern route

The southern route starts in the Horn of Africa and runs through Kenya, Tanzania, Malawi, Zambia, Mozambique and Zimbabwe, before terminating in South Africa (see Figure 11). Ethiopian and Somali migrants account for the vast majority of East African migrants along this corridor.<sup>266</sup>

Migrants from these countries and from the DRC, Rwanda, Burundi and Sudan join the route at various points. Although South Africa is the terminus for this route, destinations for migrants vary along the way. East African migrants opt largely for Kenya (an estimated 76% of those tracked),<sup>267</sup> where Nairobi is both a major destination and transit node.<sup>268</sup> A smaller but sizeable contingent (about 21% of those tracked) aim to reach South Africa.<sup>269</sup> However, most migrants in South Africa – an estimated 84% – are from other SADC countries,<sup>270</sup> and therefore embark on their journeys towards the end of the southern route.

South Africa has been a magnet for migrant labour ever since the diamond and gold rushes of the 19th century. It remained a key destination throughout the 20th century, thanks to its relatively advanced economy and the mining industry's demand for cheap labour.<sup>271</sup> The end of apartheid in the early 1990s accelerated migration trends, as the opening of borders, political freedoms and higher wages became further pull factors.<sup>272</sup> An estimated 9% of South Africa's labour force consisted of migrant labour in 2022.<sup>273</sup>

Its progressive asylum and refugee policy has also boosted South Africa's popularity among African migrants. Employment opportunities are largely centred on the informal economy and agriculture.<sup>274</sup> The risk of death is much lower than for most other routes – especially the northern route across the Sahara and through the Mediterranean – although detention and abuse along the way are reportedly common.<sup>275</sup>

Reports compiled by the International Organization for Migration (IOM) from transit countries such as Tanzania indicate that as many as 99% of migrants on the southern route are men.<sup>276</sup> A 2022/23 Mixed Migration Centre survey of migrants who reached South Africa found 68% of respondents were men and 32% women. Many women travel more discreetly (sometimes flying part of the way) or in smaller groups for safety, whereas large overland groups are often exclusively made up of young men.<sup>277</sup>

Approximately 85% of migrants from the Horn of Africa on the southern route are Ethiopian, while Somalis make up about 15%. Ethiopia's sizeable youth population, repeated droughts and the 2020–2022 conflict in Tigray between federal and local forces have driven tens of thousands to migrate southwards. Somali flows south have declined somewhat relative to the eastern route to the Gulf.<sup>278</sup>

People of other nationalities who use the route in smaller numbers include Eritreans, as well as citizens of the Great Lakes countries, especially the DRC, who generally travel through East Africa to reach South Africa. Within Southern Africa, many Zimbabweans, Mozambicans, Malawians, Basotho and Congolese also migrate to South Africa for work in licit and illicit economies, even if the southern route usually refers to the inflow from the Horn of Africa.<sup>279</sup>

Smuggling networks offer an often unavoidable service to migrants heading south, helping them to navigate cultural and linguistic barriers encountered in different geographic areas and arranging visa

applications and travel documents. Virtually all migrants from outside the SADC region use smugglers. Some even use smugglers to navigate difficult routes within their own countries en route to border regions.<sup>280</sup> Sections of the southern route, particularly along the eastern coast between Tanzania and Mozambique, involve a sea route facilitated by dhows involved in drug trafficking.<sup>281</sup> Even within the SADC region – where migration barriers between countries are far fewer – there is substantial use of smugglers.<sup>282</sup>

## The northern route

This route takes migrants from African countries through North Africa and the Middle East and across the Mediterranean to mainland Europe and the UK. Migrants from the Horn of Africa and Sudan embark on this route through transit countries including Ethiopia, Djibouti, Eritrea, Sudan, Chad, Libya and Egypt.<sup>283</sup>

Libya, as the major springboard for travel across the Mediterranean, has a well-documented exploitative system of detention where migrants captured on the northern route are imprisoned and often made to pay an extortion fee for their release. Additionally, many are tortured, sexually abused or forced into labour, exemplifying a dynamic in which smuggling transitions into trafficking.<sup>284</sup>

The conflict that broke out in Sudan – a key transit country – in April 2023 has bifurcated routes and made erstwhile smuggling hotspots like Khartoum impossible to access. Yet smuggling has continued through the country via other transit points, testifying to the resilience and adaptability of human smuggling networks. In fact, where conflict and armed groups have made regular migration over state borders more complicated, smugglers have stepped in to meet the demand.<sup>285</sup> Migrants from conflict-affected regions have become reliant on these illicit networks to overcome limited mobility and restrictive visa policies in neighbouring countries.<sup>286</sup>



Egypt is a main transit country for migrants from Africa, including conflict-ridden Sudan, attempting to reach mainland Europe and the UK. © Mohamed Elshahed/Anadolu via Getty Images

There are signs, however, that the transit of migrants through Sudan is rebounding. In the first half of 2025, there was a noticeable rise in field reports of Horn of Africa migrants crossing from northern Sudan into southern Libya. This may be linked to the Sudanese government's recapture of Khartoum and southern areas of the country in early 2024, which is likely to have eased northbound movement.

However, debriefings with Eritrean migrants in Libya suggest that smuggling routes have developed between areas of control held by the Sudanese Armed Forces and RSF. These routes allegedly transport Eritreans from their home country west across Sudan and into Chad, before heading north towards the Libyan coast.

Libya has seen an uptick in the number of migrants from the Horn of Africa embarking from its shores in 2025. Eritrean migrants now make up the second-largest group arriving in Italy, alongside increases in the numbers of Ethiopian and Sudanese migrants.<sup>287</sup>

Eritrea has been a significant source of migrants reaching the UK and mainland Europe in recent years. Young Eritreans are fleeing the country in search of safety and opportunity, driven by its authoritarian regime, political repression, human rights abuses and open-ended military conscription.<sup>288</sup>

Reaching Europe from East Africa involves a perilous multi-stage journey by land and sea. Abuse and human trafficking are constant threats throughout. Many Eritreans and Sudanese are robbed, held for ransom or forced into labour by smugglers and militias in lawless areas.

Irregular migration to the UK, especially by small boat across the English Channel, has surged in recent years. Eritreans and Sudanese now make up a growing proportion of this movement. Before 2018, only a few hundred Channel crossings were recorded annually, but the numbers exploded from 2020 onwards. In 2024, 36 816 migrants were recorded arriving in the UK by small boat, compared to 8 466 in 2020. Eritrean and Sudanese migrants ranked fifth and sixth highest overall, following nationals of Vietnam, Iran, Syria and Afghanistan. In the first three months of 2025, Eritrean migrants accounted for the largest number of small boat arrivals.<sup>289</sup>

## **The eastern route**

Migrants from Ethiopia and Somalia use smuggling services into Puntland, Somaliland and Djibouti. Smuggling boats then take these migrants across the Red Sea and Gulf of Aden to Yemen and beyond. This route is fraught with risk not only due to the perilous sea voyage, but also because of the risk of being trafficked in Yemen and of falling into forced labour in the Middle East's more developed countries.

Here, the lines between smuggling and trafficking often blur, as upon arrival in the Gulf states, smugglers often hand migrants over to labour traffickers. Fraudulent university qualifications are reportedly used by migrants from Somalia to attain travel documents. This is observed in attempts to reach Europe via Türkiye through direct flights from Mogadishu.<sup>290</sup>

## **The Indian Ocean route**

Some migrants from Ethiopia and Somalia who travel the initial phases of the southern route take an ocean voyage to the island of Mayotte, historically a major destination given its status as French territory. Smugglers along this route frequently use the same networks involved in the illicit trade in wildlife products, arms and drugs, further linking human smuggling to broader transnational criminal markets.

Mayotte used to attract irregular migrants from the Comoros, Madagascar, Rwanda, the DRC and the Republic of Congo. However, repeated legislative initiatives in France – culminating in a constitutional reform terminating the automatic bestowal of citizenship to children born to migrants on Mayotte – are feeding into a decline in Mayotte's popularity.<sup>291</sup> The voyage to Mayotte is incredibly dangerous and as many as 50 000 people are believed to have died along it between 1995 and 2012,<sup>292</sup> at the height of its popularity.

## Hotspots

### Crime zones

Crime zones are located mostly along borders. They include multiple crossing points within a wider geographic area characterized by limited border control and official complicity. In some cases, seasonal climate patterns – notably the drying up of river beds that run along borders – make increased movement possible.

Kenya's borders with Ethiopia and Somalia, and South Africa's border with Zimbabwe, are prominent examples of crime hotspots. These borders all cover extended geographic areas characterized by high volumes of smuggling into the key destinations of Kenya and South Africa.

High levels of criminality along the border between Kenya and Somalia are exacerbated by weak security and institutional weaknesses, despite the Kenyan military's long-standing deployment in southern Somalia as part of an African Union force pitted against al-Shabaab. This border area has a long-standing and resilient criminal economy, which has thrived amid insecurity.<sup>293</sup> There is also a well-established criminal economy straddling the Kenya–Ethiopia border, although most migrant smuggling is funnelled through the largest border post at Moyale.<sup>294</sup>

Considerable numbers of migrants pass through the border between Zimbabwe and South Africa. It represents the final crossing along the southern route and thus a key choke point where many illicit trades converge. Smuggling occurs along a substantial part of the border, although Beitbridge is a major convergence point. Migrants are smuggled both through the border post, often with official complicity,<sup>295</sup> and along informal points along the Limpopo River, where movement is eased during the dry season. Local gangs, known as *guma-gumas*, act as brokers in facilitating smuggling along these informal crossings, both of people and various commodities.<sup>296</sup> They play both a facilitatory and at times predatory role; reports of migrants being raped, assaulted and even murdered are common.<sup>297</sup>

The border between South Africa and Mozambique provides additional entry points, albeit to a lesser degree. However, this border is a major crime zone where migrant smuggling is just one of many illicit markets. Frustrations among local communities, allegedly arising from foreign criminal operations along the border, have given rise to both vigilantism and opportunistic crime, often violent in nature and directed at Mozambican buses, trucks and other vehicles.<sup>298</sup>

Capital cities and large towns often act as hubs, allowing migrants to access smuggling routes. These centres also enable brokers and smuggling networks to hand over and receive groups of migrants. Key infrastructure, such as airports and the highways that serve them, are major features. Nairobi,<sup>299</sup> Lilongwe, Dar es Salaam and Maputo<sup>300</sup> are all examples of such hubs.

## Transit points

The cities cited above commonly play a dual role as hotspots and transit points. For example, Nairobi functions both as a hotspot and a vital transit point connecting to both the eastern and southern routes and attracting migrants from all over East and Central Africa.<sup>301</sup>

Migrant smuggling is important for the local economy in some transit points such as the Ethiopian border town of Moyale, where people smuggling is reported to account for 60% of the town's economy.<sup>302</sup> Moyale is the border post of choice for migrant smugglers due to lax controls and its connection to a highway that runs onwards through the Kenyan counties of Marsabit and Isiolo.<sup>303</sup> The town of Isiolo is a vital consolidation hub along the corridor for human smuggling networks. Criminal actors maintain infrastructure in such towns, including lodgings, where migrants stay before being moved onwards.<sup>304</sup>

The Beitbridge border post and the towns of Beitbridge (Zimbabwe) and Musina (South Africa) are main transit points for many migrants travelling along the southern route. These hotspots are located within the broader crime zone of the South Africa–Zimbabwe border, which is described above.

Hub and broker convergence occur at points along smuggling routes. Notably, this includes the intersection of drug and human smuggling using private dhows along sections of the Tanzanian and Mozambican coasts. The likelihood is that brokers provide services and vessels to distinct networks, rather than one network overseeing the trafficking of both people and drugs.

The Kenya–Somalia border is one node where both people and various commodities are smuggled, and where multiple networks operate. This is hub convergence, with a high presence of broker convergence, where actors in the area provide their services to smuggle different commodities rather than controlling the market.

In conflict zones, human smuggling corridors are also used to transport illicit arms, further fuelling regional instability. This is notable in Sudan and other parts of the Sahel.

Smuggling networks in Libya, Sudan and Somalia are directly linked to ransom economies, where migrants are kidnapped and extorted by organized groups. This also occurs in Southern Africa, where Ethiopian and Bangladeshi migrants have experienced extortion by smugglers who have refused to release or transport them further without additional payment.





# CRIMINAL MARKET CONVERGENCE

**A**s the maps and market analysis make clear, notably different illicit markets often operate in the same hubs. For example, the supply chains and destination markets for smuggled gold and cocaine, or illegally mined gemstones and rhino horn, may be quite different, but they converge temporarily in certain locations.

The cases that we have mapped and analyzed for this report highlight three main types of convergence:

- **Hub convergence** – When multiple illicit commodities trafficked by different networks pass through a critical transport or geographic hub (such as an airport, port or border crossing), typically with the support of a corrupt facilitator or broker. We see hub convergence at key transport hubs and ports, often in countries or cities with good transport infrastructure where significant licit trade is occurring (for example, the main ports in countries such as Kenya, Tanzania and South Africa, and in European cities such as London, Rotterdam and Frankfurt). This is the most common form of convergence across the illicit economies chosen for this study.
- **Network convergence** – When the same organized criminal networks trade in multiple commodities, spanning more than one illicit market at once. We see criminal convergence, for example, in street gangs in South Africa and Kenya, in the bulk traders of heroin and methamphetamine in northern Mozambique, in the armed bands of illegal miners from Lesotho and in wildlife traffickers with linkages to Vietnam and China.
- **Broker convergence** – When criminal networks, possibly trading in multiple commodities, rely on the same local brokers or facilitators to trade or move illicit goods through a particular geographic hub, often a major city known for its confluence of illicit markets. This may include, for example, corrupt facilitators such as customs officials, police officers or cargo agents.

Understanding how these different types of convergence occur is an important step in developing policies to counter cross-cutting organized crime issues.

## Hub convergence

An illicit hub may be a favourable location for multiple illicit markets due to geographic factors, physical infrastructure – deepwater ports and airports, as well as the major highways that serve such facilities – or administrative infrastructure. Administrative infrastructure includes financial services

and professional facilitators who can assist criminal actors in laundering money and disguising illicit business as legitimate. Hubs might also feature other services, such as gemstone and gold processing or certification services, further attracting organized criminal groups.

Nairobi is a major example of hub convergence. The illicit gold trade, drug trade and people smuggling networks all operate through and thrive in the Kenyan capital, but do not necessarily involve the same actors. Migrants are drawn to the city partly due to it being a major transit hub along the southern route, and partly due to its status as East Africa's largest economic hub. The latter also makes it a regional hub for the illicit gold trade, further attracting criminal networks.

## Network convergence

Observation of criminal market dynamics in ESA shows many examples of criminal networks diversifying into several criminal markets, linking otherwise independent illicit economies together. For example, the trade in methamphetamine precursors (incoming from China) and the illicit abalone trade<sup>305</sup> (outgoing to China) have long been linked in South Africa's Western Cape, which is home to substantial stocks of abalone.<sup>306</sup>

Organized crime groups may emerge within one market, and as they grow in scale and sophistication adapt to bring in other commodities. Some groups involved in illegal mining in South Africa's Mpumalanga province, for example, shifted to poaching to supplement revenue streams, often with the first illicit activity initially funding the new venture.<sup>307</sup> Given the mining syndicate's access to arms, the shift to poaching was not difficult.<sup>308</sup>

Uganda's Kromah cartel, which smuggled heroin, ivory and rhino horn, and Malawi's Lin network, with its interests in gemstones, pangolin scales and ivory, are also good examples.<sup>309</sup>

The GI-TOC's previous research into the convergence of wildlife trafficking with other forms of organized crime found that criminal convergence seldom happens at the poaching level of the wildlife supply chain.<sup>310</sup> Most poachers are not hardened criminals, but are more opportunistically involved in the wildlife trade. By contrast, further along the supply chain, the wildlife traffickers who move the illicit products internationally are often part of more specialized organized crime groups that resort to violence and control other forms of illicit trade.

## Broker convergence

Criminal networks may use the same brokers or influential individuals (including either state or non-state actors) to move commodities through border points where one well-connected individual may be able to intervene to ensure avoidance of customs checks. Such brokers often operate on a freelance basis for smuggling networks, which may be involved in transporting an array of illegal commodities. Other brokers are officials who take bribes to allow illicit goods through customs unchecked, or forestall investigations into organized smuggling networks.

OR Tambo International Airport and the Beitbridge border crossing between South Africa and Zimbabwe are examples of hubs where the role of brokers is prolific. The border post at Beitbridge has brokers – both officials and non-state actors – operating as independent service providers to syndicates moving various forms of contraband. Specialized smugglers based around the border area smuggle people, drugs, cigarettes and copper across the border, while also preying on migrants, often robbing them and raping women.<sup>311</sup>



Customs officials at the Beitbridge border crossing between South Africa and Zimbabwe are known to take bribes to facilitate smuggling. © Phill Magakoe/AFP via Getty Images

Customs officials at Beitbridge and Musina are known to take bribes to facilitate smuggling of illegal wildlife products, drugs and gold, among other contraband.<sup>312</sup> Officials from the South African Revenue Service,<sup>313</sup> border management<sup>314</sup> and the military<sup>315</sup> have been arrested for facilitating the smuggling of goods and people into the country, including through customs fraud.<sup>316</sup>

## Convergence within a criminal ecosystem

Naturally, the three major types of convergence – hub, network and broker – overlap in many instances. Different types of convergence most often do not occur in isolation but are interoperable parts of a broader criminal ecosystem. Where a hub has a role as a transit point for multiple commodities, it is logical that the criminal groups on the ground will involve themselves in multiple markets. The same is true for brokers. Hub convergence, therefore, often facilitates broker and network convergence.

Understanding this convergence can be a useful first step in setting actionable policies to tackle regional criminal markets more successfully. Interventions that target illicit hubs where many criminal markets converge – or target criminal networks involved in many illicit markets, or expose the brokers who facilitate illicit flows – therefore uncover more than one crime type simultaneously. In a world where resources for policymakers, law enforcement and development interventions are scarce, such interventions are highly desirable.

Organized crime is concentrated in certain subregions and cities in ESA, as well as around strategic transport nodes. However, such hubs are also found in conflict zones, or other areas where criminal networks operate free from state control. This is where the three major drivers cited in the introduction to this report – state fragility and corruption, the nexus between conflict and crime, and transcontinental trafficking corridors – come together.

## Busia: Western Kenya as a convergence zone

Kenya has 12 operating land entry points, nine maritime border points and nine air entry points. Busia, some 400 kilometres west of Nairobi on the Ugandan border, is one of the busiest transit hubs to parts of East and Central Africa. It handles on average 500 trucks and 3 000 people each day. The establishment of a one-stop border post in 2018 reduced turnaround time for human and vehicular traffic at the crossing.<sup>317</sup>

Like other busy border points elsewhere, Busia is a hub for transnational organized crime in the region. It is among three border points in western Kenya where the government in January 2025 sought to deploy operational bases to curb cross-border crimes and illegal entries.<sup>318</sup> A report by the state research agency on borderland crimes flags this border point as a crime hotspot.<sup>319</sup>

The crimes cited include human trafficking and smuggling, commodity smuggling,<sup>320</sup> arms trafficking, drug trafficking, cross-border robbery, forgery of travel documents, and the illicit trade in charcoal, timber and gold. Reports have also flagged the border point as a conduit for the smuggling of ethanol used in the manufacture of illicit and counterfeit alcoholic drinks in Kenya.<sup>321</sup> Based on media reports, drug trafficking accounts for the largest share of the cross-border crimes converging in Busia.<sup>322</sup>

Local groups and foreign criminal cartels have either set up operational bases in Busia or shuttle goods between Nairobi and Kampala. In September 2023, the then interior ministry cabinet secretary, Kithure Kindiki, declared war on criminal gangs in Busia.<sup>323</sup>

The town's vulnerabilities stem from alleged corruption and indifference at the border crossing; cross-border ethnic alliances, which provide cover for fugitives; and the cosmopolitan nature of the municipality, which allows foreign actors to operate inconspicuously. Authorities are taking steps to deal with these risks, among them establishing one-stop border posts elsewhere to decongest the Busia border point, and enhancing collaboration between the Kenyan and Ugandan border agencies.

## Markets

Law enforcement interventions on the southern route and naval patrols in the Indian Ocean have forced heroin and cocaine traffickers from West Africa to find alternative routes to East African coastal markets. Busia finds itself on a route that runs overland from West Africa to East Africa towards Mombasa. Arrests and seizures have been reported in the Busia area.<sup>324</sup>

Kenya is a source, transit and destination market for human trafficking involving forced labour and sexual exploitation.<sup>325</sup> Busia, a key hub along the eastern corridor, is a base used by Kenyan and Ugandan smugglers and traffickers who collaborate to move the human 'cargo' to Nairobi and onward to the Middle East.

The multitudes of unlicensed money exchangers operating in Busia are indicative of the ease with which currency can be moved across the border and the attendant risk of cross-border money laundering. The money exchangers provide a favourable commission-free exchange rate compared to banks and licensed money dealers.

Platoons of illegal brokers, who double as currency changers and document falsifiers, facilitate commodity smuggling and illegal border crossings. Their bribes range from US\$1.50 to US\$15 to move people across without documentation. They also arrange for the passage of unscreened, undeclared goods, with bribes ranging from US\$400 to US\$20 000, depending on the type and value of the commodity.

For years, Busia was a transit point for firearms destined for conflicts in South Sudan and the DRC; some of these weapons were displaced to criminals in the area.<sup>326</sup> ■



## Illicit market convergence: Main regions

The regions below are centres of organized criminal convergence. These provide a big-picture view of criminal activity across the region. The individual markets – drugs, human trafficking and smuggling, extractives and wildlife – are addressed above.

### Somalia – northern coast and southern borderlands

The ongoing conflict in Somalia and extreme levels of state fragility and humanitarian crisis have long meant that organized crime runs rampant through the country. Al-Shabaab continues to control significant parts of southern Somalia, imposing illegal taxation on trade passing through its territory. Al-Shabaab operatives also extort businesses across Somalia, including areas beyond its territorial control, notably in the capital, Mogadishu. Migrant smuggling networks and large volumes of illicit trade transit the Somalia-Kenya border, including illicit weapons and everyday goods such as sugar, much of which is illicitly taxed by al-Shabaab before being smuggled across the (officially closed) border.<sup>327</sup>

Along Somalia's northern coast, maritime arms smuggling networks and migrant smuggling groups move people across the Gulf of Aden to Yemen and the Middle East, while unregulated fishing is rife.<sup>328</sup> This area was the epicentre of Somali piracy in the early 2000s, and many of these networks have since diversified into other illicit trades and remain active (as shown by a resurgence in piracy attacks in early 2024).<sup>329</sup>



Operatives belonging to the Somali terrorist group al-Shabaab extort business across the capital of Mogadishu and beyond. © Ed Ram/Getty Images



## Mombasa and Kenya's coast

Mombasa, Kenya's largest Indian Ocean port, is a critical hub for transnational crime in East Africa, serving as a significant entry and exit point for illicit commodities. Drug trafficking through Mombasa has grown significantly; large shipments of heroin from south-western Asia are offloaded in or near Mombasa for local distribution and trans-shipment to international markets. For example, Kenyan authorities have seized heroin consignments running into the hundreds of kilograms on vessels in the Indian Ocean, pointing to Mombasa's role in the heroin route.<sup>330</sup>

Mombasa and other coastal Kenyan towns (notably Malindi and Lamu) are nodes in human smuggling networks moving migrants from the Horn of Africa. Kenya's coastal hubs are also beset by local organized crime. For example, the Mombasa Republican Council and other groups have engaged in racketeering and sometimes violent clashes, exploiting the grievances of local communities.<sup>331</sup>

## Nairobi: Crime capital

Media reports and research place Kenya's capital at the centre of drug trafficking, the illegal wildlife trade, human smuggling and trafficking, the fake gold trade, money laundering and tax evasion, among other criminal activities.<sup>332</sup> State and non-state criminal actors exploit the city's favourable geography, developed transport infrastructure and advanced financial services.

High levels of corruption and poor governance have blunted law enforcement as well as judicial independence, making the city even more attractive for criminal entrepreneurs.<sup>333</sup>

Mafia-style groups, including al-Shabaab, maintain cells in Nairobi to coordinate their regional activities. Gangs, cartels and syndicates control some segments of the city.

Known as 'Little Mogadishu', the suburb of Eastleigh is reportedly the epicentre for smuggling, money laundering, tax evasion and arms trafficking in Nairobi. Much contraband from war-torn Somalia ends up here. It is not clear whether al-Shabaab militants invest their revenue in Eastleigh: the link between the terror group and the booming market is anecdotal. In March 2025, agents from Kenya's Directorate of Criminal Investigations arrested 18 suspects in Eastleigh on suspicion of tax evasion.<sup>334</sup> The arrests came four months after the government deployed a police unit to combat a new wave of extortion and gang violence in Eastleigh allegedly perpetrated by Ethiopians and Somalis.<sup>335</sup>

A significant number of drug seizures and arrests of suspects over the past year indicates Jomo Kenyatta airport's growing influence as a regional drug trafficking hub. A possible explanation is that traffickers of heroin, cocaine, cannabis and amphetamines have identified the airport as an alternative point for moving drugs following increased surveillance by multinational naval operations along the traditional southern maritime drug route. In February 2025, anti-narcotic detectives at the airport seized illegal amphetamines destined for Australia.<sup>336</sup> In August 2024, a Sierra Leonean national en route to India was arrested at the airport for possession of a kilogram of cocaine.<sup>337</sup> ■

## Dar es Salaam and Tanzanian routes

Dar es Salaam, the principal port of Tanzania, mirrors Mombasa's role in many ways. It is a transit hub for heroin coming across the Indian Ocean; Tanzanian authorities have intercepted sizeable heroin shipments.<sup>338</sup> Traffickers also utilize the wider Tanzanian coast and the Zanzibar archipelago to land small skiffs carrying drugs and evade law enforcement. Dar es Salaam is also implicated in wildlife trafficking – during the height of the elephant poaching crisis, Tanzania was identified as the source of nearly a third of all ivory seized globally, much of it exported through Dar es Salaam's port.<sup>339</sup>

Illicit logging products (notably endangered hardwood timber) and gemstones (Tanzania's tanzanite stone) have likewise been smuggled out through Dar es Salaam.<sup>340</sup> Beyond the port, Tanzania's borders with Mozambique, Malawi and Kenya make it a corridor for migrant smuggling towards Southern Africa. Towns such as Arusha (near Tanzania's borders with Kenya and Uganda) serve as collection points for illicit wildlife (ivory and pangolin scales from Central Africa) and arms trafficked from conflict zones further north. Tanzania's geography – a long coastline and central location bridging both East Africa and Southern Africa – makes it a pivotal hub for various illicit trades connecting the two regions.<sup>341</sup>

## Northern Mozambique: multiple converging markets

A region rich in natural resources, northern Mozambique is also a strategic transit zone for drugs flowing along both the southern and lusophone trafficking routes.<sup>342</sup> Although insurgent activity in Cabo Delgado shifted many illicit flows further south,<sup>343</sup> the northern cities of Pemba and Nacala remain important nodes for inflows of containerized shipments of drugs and for outflows of wildlife products, prominently timber, through their respective ports.<sup>344</sup> Drug shipments are also brought to shore frequently in smaller vessels along convenient stretches of coastline in both northern and central Mozambique.<sup>345</sup>

Nampula is a major hub for all illicit trade in the region, but is primarily a hub for drug trafficking (mostly for flows coming inland from Nacala and Pemba) and the gemstone trade.<sup>346</sup> Nampula's transport and banking infrastructure, as well as its real-estate market, underline its utility for both the physical transport of illicit commodities and associated laundering of proceeds.<sup>347</sup>

State officials, both local and national, benefit financially from the illicit trade in drugs and extractives. Most pertinently this includes elements of Mozambique's political elite who deter interventions against drug trafficking in exchange for tribute.<sup>348</sup> At lower levels of the state apparatus, law enforcement officials are often directly involved in smuggling or play a facilitatory role by looking the other way when instructed by higher-ranking officials involved in trafficking.<sup>349</sup> At mining sites, especially those in and around Montepuez in Cabo Delgado, police are known to extort illegal miners.<sup>350</sup>

In and around the Niassa Special Reserve, broker convergence is observed between the wildlife trade (mostly timber and ivory) and gemstone trafficking. Here, groups involved in one market (e.g. gemstones) will maintain control of their core market, but assist networks involved in the wildlife trade. This takes the form of protection during poaching operations or help in smuggling ivory and timber along the same routes as gemstones to western Mozambique and across the border to Malawi.

The wildlife traders then traffic the consignments further abroad by mixing animal parts with certified gems.<sup>351</sup> The networks trading in each commodity maintain control of their respective markets, but brokers lower down the value chain operate together in facilitating the collective trafficking of the goods before they reach their separate final destinations.

More generally, the various illicit markets operate largely independently within the broader criminal economy of northern Mozambique, but they coalesce around key nodes such as Nampula, Pemba and Nacala, highlighting notable hub convergence in the region. ■

## **Great Lakes border zone (Uganda, Rwanda, DRC)**

The intersection of East Africa with Central Africa's conflict region creates another crime hotspot. Uganda is a major transit hub for contraband originating in the DRC. Entebbe and Kampala in Uganda are notorious as conduits for smuggled gold and minerals from eastern DRC's war-torn Kivu provinces.<sup>352</sup> Smuggling networks, often involving Congolese rebel groups and Ugandan intermediaries, move gold through Uganda to international markets, bypassing official scrutiny.<sup>353</sup> Kampala's sizeable market and transportation links also make it a destination for counterfeit medicines and illicit cigarettes.<sup>354</sup> Rwanda has also been implicated as a route for the DRC's minerals, especially gold, coltan and tin, which are laundered through Rwandan exports.<sup>355</sup> The tri-border area of Uganda, Rwanda and the DRC, including the towns of Goma (DRC) and Kasese (Uganda), is a hub where conflict resources and illicit goods are funnelled out of Central Africa into the East African trade stream.<sup>356</sup>

## **Johannesburg, Pretoria and Gauteng province, South Africa**

The Gauteng urban region of South Africa (encompassing Johannesburg, Pretoria and surrounding towns) is arguably the most significant organized crime hub in Southern Africa.<sup>357</sup> As the region's economic heart, with excellent transport links (notably airports and highways) and financial infrastructure, Johannesburg attracts many criminal enterprises.<sup>358</sup> It is a crucial distribution centre for drugs (heroin arriving from East Africa and cocaine direct from Latin America or via West Africa) destined for local consumption or re-export.

South African law enforcement notes that domestic and foreign drug trafficking syndicates converge in Johannesburg – for instance, Nigerian networks base themselves there to manage Southern African operations and South Asian cartel operatives have been detected collaborating with local crime bosses.

Johannesburg is also a central hub for human smuggling and trafficking rings: victims from poorer African countries (including Malawi, Mozambique and Lesotho) are brought to the city's informal brothels and labour markets, while the city's international airport serves as a transit point for traffickers moving people to Europe or the Middle East.

Financial crimes are concentrated in this hub too – South Africa's banking sector, the most advanced in Africa, enables large-scale money laundering. Organized fraud schemes (credit-card cloning and advance-fee scams) often have operational bases in Johannesburg or Pretoria. Johannesburg has high rates of carjackings by syndicates who then smuggle stolen vehicles across the border to Mozambique or Zimbabwe.<sup>359</sup> Local gang culture (prison-origin gangs and street gangs in townships such as Soweto)

intersects with transnational crime (drug cartels and money launderers), making it uniquely pivotal in Southern Africa's illicit economy.<sup>360</sup>

## **Cape Town, South Africa**

Cape Town is a hub for the narcotics trade, a market associated with gang activity. The city's Cape Flats area is infamous for gangsterism; decades-old gangs control street territory and fight violent turf wars over retail drug markets, including for methamphetamine, heroin and cocaine.<sup>361</sup> Cape Town's port and airport also make it a transit point: cocaine shipments from Latin America and West Africa have been seized entering Cape Town and Saldanha Bay to its north, which is emerging as a significant hub. Western Cape gangs have historically worked with Latin American cartels and Chinese gangs. As noted above, abalone is traded with Chinese criminal groups in exchange for drug precursors.<sup>362</sup> The geography of Cape Town, with its busy harbour and status as a global tourist destination, provides cover and opportunity for these syndicates.

## **Northern KwaZulu-Natal, South Africa**

Northern KwaZulu-Natal's strategic location, weak border controls and existing criminal networks make it a prime hub for various forms of organized crime. The link to Mozambique further facilitates cross-border smuggling and human trafficking. Stolen vehicles from South Africa are smuggled into Mozambique through the region. Home to private game reserves and parks such as Hluhluwe-iMfolozi, it is a significant hotspot for rhino poaching and other forms of wildlife crime.<sup>363</sup> Northern KwaZulu-Natal is also a major transit route for heroin moving from Mozambique to Durban, where gangs repackage this drug in distinctive capsule form. These capsules have been found in Uganda and Malawi.<sup>364</sup>



## CONCLUSION

**L**ogistically and geographically, ESA offers a patchwork of entry points, hubs and trade corridors that serve as prized infrastructure for local, regional and transnational criminal networks. Unguarded coastlines, complex land borders, busy and under-resourced ports, and conflict zones all make the region highly exploitable by organized criminal interests.

Illicit flows are concentrated around strategic transport nodes such as major seaports, airports and border crossings in large cities that possess robust transportation networks, as well as in small towns and rural areas where the state's presence is diminished or absent. These hubs and nodes, whether the port of Dar es Salaam, the Baidoa corridor connecting Somalia to Kenya, or the ganglands of Cape Town, fit into a geography of crime and exploitation by criminal networks.

Organized crime has also penetrated state structures across ESA, corroding governance and fuelling insecurity. Mozambique, Somalia, Kenya and South Africa are examples of how criminal networks exploit weak institutions and thrive on corruption. In each of these countries, criminal actors have burrowed into the fabric of the state – from local police on the take to politicians colluding with traffickers – or formed a parallel system of governance in areas neglected by the state.

This report has shown that instability is amplified in parts of the region where criminal markets intersect with conflict and extremism. In some cases, war and insurgency have enabled illicit economies to metastasize; meanwhile, illicit economies finance conflict actors, perpetuating a vicious cycle. Sudan's civil war is the latest chapter in a story of rival predatory networks fighting to control formal and illicit economies and manipulating state institutions for personal gain.<sup>365</sup> Somalia's chronic conflict has turned swathes of the country into ungoverned spaces exploited by arms traffickers – weapons leak out of conflict zones and into the hands of criminal networks and extremist militants.<sup>366</sup> In northern Mozambique's Cabo Delgado province, an Islamist insurgency is linked to the illicit trade in gemstones, timber and other resources, illustrating how conflict opens opportunities for organized crime, while criminal profits from smuggling or extortion help fuel further violence.<sup>367</sup> Islamic State facilitators and organizers in South Africa have allegedly raised funds through kidnapping-for-ransom and extortion schemes.<sup>368</sup>

In Kenya, criminal organizations and extremist elements have leveraged local grievances and corruption to entrench themselves – politically connected gangs in Nairobi's low-income settlements and Mombasa have run protection rackets with impunity, blurring the line between organized crime and insurgent violence. Politicians have been known to create or finance organized criminal gangs and ethnic militias to propel themselves to power.



Endemic corruption has opened doors for transnational criminal networks to operate across ESA. These syndicates, particularly groups from China, Russia, Europe (including the UK) and Latin America, have actively penetrated Africa's illicit markets, partnering with local facilitators to traffic drugs, wildlife and precious minerals. For instance, Asian drug cartels and poaching networks work with African intermediaries to smuggle heroin, methamphetamine, ivory and abalone.

ESA is now an integral gateway to the global illicit economy, serving as a transit and sourcing zone for contraband destined for overseas markets. On Africa's Atlantic side, South Africa is emerging as a significant conduit for cocaine flows: ports in the Western Cape, such as Saldanha Bay,<sup>369</sup> are being exploited by traffickers moving Latin American cocaine towards Europe and other regions. In one incident, nearly a tonne of cocaine was found in a fishing vessel, with nationals from Bulgaria and Myanmar involved, revealing how a relatively small, under-policed harbour is being used as a gateway for international drug shipments.<sup>370</sup>

Entrenched organized crime poses an existential threat to democratic governance and regional stability, hollowing out state institutions and subverting democracy from within. As criminal networks penetrate politics, they weaken accountability and skew policies to serve illicit interests, undermining citizens' faith in democratic processes. The proceeds of crime fund patronage networks and even political campaigns, meaning illicit money can capture the state. The net result is an erosion of the social contract: governments lose legitimacy when they cannot protect communities from violence or when officials are seen to be in league with criminals. In short, organized crime has become more than just a law-and-order issue – it is a fundamental governance and security challenge that threatens ESA's stability and future.

## Recommendations

- **Establish a mechanism to monitor illicit markets:** Effective responses to organized crime are hindered by fragmented expertise, siloed data and limited coordination. Trial a detection and surveillance system – analogous to a public health surveillance mechanism – that continuously monitors the evolution of illicit markets and criminal networks in priority ESA countries. Funded by the private sector and international partners, a mechanism in the form of an observatory or analysis centre would track and analyze relevant trends in drug trafficking, wildlife poaching, human trafficking, resource smuggling, extortion, arms dealing and other forms of organized crime, providing early-warning alerts and evidence-based analysis to inform policy decisions across the region. Governments and regional bodies in ESA would be encouraged to make informed decisions on criminal trends and coordinate proactive responses by institutionalizing regular data collection. This would not only inform programming but also provide subtle, neutral assistance to partner governments, donors and civil society organizations – thereby amplifying impact across Africa without imposing political agendas.
- **Expose and disrupt key criminal actors and facilitators:** Prioritize the identification of prominent organized crime figures and their corrupt facilitators through coordinated investigations and intelligence sharing nationally, regionally and internationally. Such efforts should also target the nexus of crime and corruption at critical nodes like major seaports and new trafficking hubs. For instance, law enforcement and watchdog agencies should focus on rooting out collusion at ports and harbours – from Mombasa and Durban to emerging hotspots such as Saldanha Bay and coastal Madagascar. A concerted effort to expose the brokers who facilitate illicit trade will erode the impunity of these kingpins and enablers. International and regional bodies can assist by

maintaining sanctions lists and watchlists of known traffickers, publishing reports that name and shame key figures, and encouraging asset freezes and travel bans on corrupt figures linked to organized crime.

- **Expand capacity for container-based interdiction at strategically important African ports:** Support and funding could focus on targeted container screening at ports such as Durban, Beira and Mombasa, where cocaine and heroin flows to areas such as mainland Europe, the UK and Australia have been detected. Technical support, vetting programmes and forensic support should be prioritized. In return for the provision of funding, technical expertise, training and infrastructure enhancements, host states should grant donors an oversight role at key ports of entry. By focusing on intelligence-driven search-and-seizure operations targeting goods destined for specific destinations, donors can respect national sovereignty while safeguarding their own markets.
- **Increase diplomatic pressure on SEZs and financial havens:** Address the role of permissive jurisdictions and free-trade zones – particularly Mauritius and Dubai – that are being used to funnel illicit financial flows and enable organized crime. SEZs often provide secrecy or lax regulation (through offshore corporate registries, free ports or lenient customs controls) that transnational criminals exploit to launder money and move contraband. Regional governments and international partners should push for greater transparency and accountability in these zones. This includes conducting rigorous audits of trade records, enforcing anti-money laundering standards and closing loopholes that allow trade-based money laundering or smuggling under the cover of legal commerce. In particular, collaborative engagement with authorities in hubs like Dubai is needed to clamp down on the laundering of illicit African commodities. Large quantities of illegally mined gold from Southern Africa are known to be smuggled and laundered through Dubai's market. Dubai is also a hub for money laundering and cryptocurrency transactions. And there is evidence that UK drug dealers are laundering money through Dubai by converting the multi-million-pound proceeds of drug trades into gold there. Gaining the cooperation of national authorities to improve oversight in these offshore safe havens is crucial to constricting the financial lifelines of organized crime networks. The EU could condition trade preferences under the EU-Mauritius Economic Partnership Agreement or investment frameworks with the UAE on improved financial transparency, countering terrorism financing, anti-money laundering enforcement and customs cooperation. Mauritius has previously been on the EU's tax haven black list, and the UAE has also come under scrutiny. The EU can re-list jurisdictions that fail to cooperate on tax transparency or are found to be facilitating illicit financial flows. The UK is a significant player in global finance and gold markets, a founding member of the Financial Action Task Force (FATF) and has wide influence in bodies such as the Organisation for Economic Co-operation and Development (OECD), the United Nations Office on Drugs and Crime (UNODC) and the Egmont Group, and could push for FATF reviews of jurisdictions for compliance with anti-money laundering/countering financing of terrorism standards. It is important to note that there are significant political, legal and jurisdictional constraints and these would require political and diplomatic pressure over time.
- **Focus on emerging hubs:** Madagascar stands out as a strategic but largely overlooked point in transnational trafficking, especially as a repackaging and distribution hub. It is a source of extractive commodities (gemstones, gold and graphite in particular), wildlife products and people smuggled to overseas destinations. It is also increasingly important in global drug trafficking, since four major trafficking routes converge temporarily there. Madagascar's proximity to the East African mainland, its position in the Indian Ocean and its limited port surveillance capacity make it particularly vulnerable. South African ports such as Durban and Saldanha Bay are also emerging as vital cogs in the drug trade.

- **Focus on strategic trade corridors and overland routes:** The EU and the UK could bolster the development of select trade corridors and overland routes in ESA, coupled with increased capacity, skills, data and traceability systems to curb smuggling of illicit commodities while enhancing trade.
- **Improve private sector transparency:** Beneficial ownership is often obscured behind a web of front companies, trusts and proxies. Transparency around corporate ownership reduces opportunities to launder illicit funds, but in many countries in ESA records are often inaccessible, incomplete, inaccurate and unavailable in digitized form. Efforts to strengthen financial reporting, supply chain transparency and data availability are of vital importance. Encourage and support the implementation of beneficial ownership standards as part of a broader campaign for greater transparency in this area internationally.
- **Invest in data analytics and technology transfer:** Enhancing the real-time detection of suspicious trade and financial patterns requires substantial investment in advanced analytics and the transfer of regulatory technologies to partner countries. Donor governments, working with leading private-sector and not-for-profit innovators, could pilot machine-learning-driven trade-data platforms that automatically flag anomalies, irregular invoicing of commodities, unusual shipment routing and repetitive transactions between high-risk entities.
- **Facilitate information-sharing across the ESA banking sector:** The rapid movement of money, cross-institutional layering of funds, involvement of opaque shelf companies and trusts, and the role of enablers such as lawyers and real-estate agents, require speedy information sharing between law enforcement agencies and banks, as well as between competitor banks, in order to assess risk and respond swiftly and appropriately. However, information exchange between banks regarding high-risk customers and entities is rare due to a lack of legal frameworks, privacy laws and commercial interests. Donor governments with experience in facilitating the sharing of information between banks, as well as with institutional knowledge of the banking sector, can play a significant role in convening support for the adoption of new legal approaches, advanced AI and machine-learning systems and shared analytics platforms.



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# **GLOBAL INITIATIVE**

AGAINST TRANSNATIONAL  
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