

Narcotics flows through eastern Africa: the changing role of Tanzania and Mozambique

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Question

What evidence is available on narcotics (particularly heroin and methamphetamine) flows into and out of east Africa, especially the roles played by Tanzania and Mozambique. And to what extent can we evidence links, including routings and methodologies, between the east African and UK/Europe drugs trade?

What changes have been seen in the east African narcotics markets (with particular interest in heroin and methamphetamine from Afghanistan) over the past 5 to 10 years? And what is the likely impact of an increase/decrease in supply from Afghanistan?

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1. Summary

In the last few decades, the southern route's use for drug trafficking gained prominence as increased law enforcement and unrest in the Middle East made the traditional 'Balkan route' less viable. This southern route transports drugs, mainly heroin, from its production in Afghanistan to Pakistan or Iran, to eastern Africa – including Tanzania and Mozambique- and consequently to South Africa, after which it is moved to Europe (Aucoin, 2018; Otto & Jernberg, 2020). Notable targets of trafficking via the southern route have been the United Kingdom, Belgium, and the Netherlands (UNDOC, 2015).

It is difficult to know for certain the quantities of drugs being trafficked through eastern Africa, but the literature puts it at up to 40 tonnes, with 5 of those staying behind, while the rest is transported overseas (Haysom et al., 2018a, 2018b). Due to various political and economic shifts, methamphetamines produced in Afghanistan recently also began to be trafficked alongside heroin shipments through the southern route, with recent estimates putting it at 50% of drugs being trafficked (Eligh, 2021). Most of the literature agrees that, in recent years, drug trafficking routes in eastern Africa have shifted due to political changes, but there is no evidence to suggest that the amount being trafficked have decreased (Bird et al., 2021; Jacobsen & Høy-Carrasco, 2018).

Drugs arrive to the coasts of Mozambique and Tanzania via dhows, which are motorized wooden boats, from Pakistan or Iran. The dhows anchor a few kilometres from the shore and are met by a fleet of small boats that transport the drugs back to the beach. Sometimes the drugs arrive in containerships alongside other cargo. The drugs are packaged and warehoused in Mozambique and Tanzania. Most of the drugs are further transported along the southern route to South Africa, usually via roads, but occasionally by sea or air, usually concealed with other goods or hidden inside the parts of the transportation vehicles. Once in South Africa, the drugs are then transported to Europe (Hanlon, 2018; Haysom et al., 2018b; Nelson, 2020). There is very little information on this last leg of the journey. However, the one paper found that discusses this cites that the drugs are hidden in shipments of bulk export products destined for Europe, both via air and via sea (Haysom et al., 2018b; Jacobsen & Høy-Carrasco, 2018).

The movement of drugs through eastern Africa is facilitated by several factors. While it used to rely on concealment behind legitimate trade networks and facilitation by high-level corruption, it is now moving towards the trend of flexibility, small players, and adoption of technology (Hanlon, 2018; Haysom et al., 2018a). A case in point is the rise in the use of the gig economy by international criminals, where they send encrypted texts via apps to facilitate pickups and deliveries. This has the advantage of isolating network members from each other (Hanlon, 2018). Relatedly, petty corruption, as opposed to 'elite corruption', is playing a bigger role, with police and customs officials accepting small bribes to allow unhindered passage (Haysom, 2020, p. 2; Nelson, 2020; Stanyard et al., 2022).

In both Mozambique and Tanzania, the drug trade was sanctioned by the ruling parties. It was privy to a few big players who had a quid pro quo agreement with the government, including investing in local infrastructure and funding election campaigning (Haysom, 2020; Haysom et al., 2018a; Stanyard et al., 2022). In Mozambique, part of the pact between the drug traffickers and the political elite was to keep Mozambique as a transit state as opposed to a consumer state, so stopping heroin from seeping into local consumption (Haysom et al., 2018a).

However, recent changes to the political landscape created ripples of change in the drug trafficking market. Firstly, Tanzania elected a president that announced a crackdown on drugs in the country. Secondly, the big drug players in the Mozambiquan market lost their political favour with the election of a new government. Thirdly, and most importantly, there was a rise of armed insurgency in northern Mozambique, which meant heightened military presence on the Tanzanian border with Mozambique (Haysom, 2020; Haysom et al., 2018a; Stanyard et al., 2022).

These three factors resulted in several shifts. Firstly, the amount of drugs transported to Tanzania via sea routes decreased, while those arriving to Mozambique increased (Walker & Restrepo, 2022). Secondly, drugs arriving to Mozambique have been landing at points further south along the coast to avoid the insurgents (Haysom, 2020). Contrary to expectations, there is no evidence to suggest that the insurgents are making a move into the drug market (Stanyard et al., 2022). Thirdly, there has been a rise in more modular, smaller, remotely controlled foreign groups involved in the transit heroin trade on the southern route, taking up part of the market that used to be controlled by big local players (Haysom, 2020; Walker & Restrepo, 2022). The extent to which this impacted drugs reaching South Africa and consequently Europe is unclear; despite increased seizures at the borders, these developments have not been perceived as major issues that hinder the drug supply (Stanyard et al., 2022).

The Taliban's return to power in Afghanistan may create even further change. It is unclear in the literature at the moment whether this will mean an increase or decrease in the supply of drugs coming from the country (GITOC, 2021a). Both will have an impact on drug trafficking in eastern Africa, the first by further increasing the 'decentralisation' of the drug trade and the latter by consolidating the market in the hand of a few wealthy traffickers (GITOC, 2021a). There is, however, a well-documented increase in the production of methamphetamines in Afghanistan and it is unclear how much of it will end up reaching Europe (EU4MD, 2021; UNDOC, 2021). According to EU4MD (2021) the presence of this Afghan-manufactured methamphetamine in South Africa and Mozambique along routes that are used to transport heroin to Europe may be a cause for concern and there may be a need to enhance monitoring of the phenomenon.

Generally, the body of literature on narcotics flows in Tanzania and Mozambique is detailed and rich, but it is limited to a few key grey literature sources. Most of the literature reviewed comes from the work of the Global Initiative Against Transnational Organised Crime (GITOC). The papers are comprehensive and thorough and rely on well-evidenced claims from interviews with different players in and around the illicit economies as well as media and police reports. There are some gaps in the body of research; most notably, the literature clearly identifies that drugs that flow from eastern Africa end up in South Africa, and from there they get moved to Europe. However, it is unclear how the drugs are smuggled out of South Africa to reach European markets. It is also unclear how developments in Afghanistan will impact the drug market along the southern route, but that could be because it is too early to tell.

2. Background

Afghanistan is the world's number one producer of heroin. Most heroin produced in Afghanistan ends up in consumer markets in Europe and has historically been transported primarily via two overland routes. The first is the northern route, stretching from Afghanistan to Central Asia and to Russia and the second is the western route known as the Balkan Route, which passes through

Pakistan and Iran, into Turkey, eastern Europe and onwards to western Europe (Otto & Jernberg, 2020).

In the last few decades, but especially in recent years, a maritime route has gained prominence, known as the southern route (Otto & Jernberg, 2020). Heroin trafficking through the southern route grew consistently since its origins in the 1980s, but increased most significantly from 2009 (Aucoin, 2018). While most drugs that reach Europe still come from the Balkan route, the southern route is rising in prominence. This route flows from Afghanistan to Pakistan and Iran, through the Indian Ocean to eastern Africa, where various countries are used as transit states, affecting them in varying ways. The heroin then makes its way to South Africa, and on to various consumer markets, including Europe (Otto & Jernberg, 2020).

The increase in the use of the southern route is in part due to increased law enforcement on the land-based Balkan route and to wars and unrest in the Middle East (Aucoin, 2018; Otto & Jernberg, 2020). This caused traffickers to use sea routes instead as they are harder to police and allow illicit activities to remain undetected, pushing drug flows to eastern Africa (Otto & Jernberg, 2020). While the majority of heroin that reaches eastern Africa is in transit to Europe and elsewhere, some remains behind, either due to leakage from transit shipments or due to a portion of shipments being specifically destined for these eastern Africa States (Haysom et al., 2018a; Otto & Jernberg, 2020).

Once heroin reaches the eastern and southern African coast, it eventually makes its way to Europe, usually via South Africa. South Africa is the largest consumer market for heroin in east and southern Africa, as well as a key transit point onward to Europe and the United States (Stanyard et al., 2022). Notable end markets of trafficking via the southern route have been the United Kingdom, Belgium, and the Netherlands, but there is good reason to believe that part of the heroin trafficked to Belgium and the Netherlands is also destined for the United Kingdom (UNDOC, 2015).

Some of the heroin is increasingly being consumed in the African states themselves (Eligh, 2020); the 2017 World drug report noted that Africa is currently experiencing the sharpest increase in heroin use globally (Haysom et al., 2018a). However, the amount that remains in these countries is minimal in comparison to the amount that's being trafficked. This indicates that most of the heroin is moved forward to Europe and other destinations, which are far more profitable than African markets (Haysom et al., 2018a).

More recently, due to several changes in political dynamics that will be discussed in Section 7, methamphetamines are also being trafficked along the southern routes (Eligh, 2021). According to Eligh (2021), emerging evidence suggests that Afghan meth shipments are being 'piggybacked' with heroin along the pre-existing trafficking routes. Eligh (2021) alludes to the methamphetamines moving from eastern Africa to South Africa. However, it is unclear to what extent these go on to reach the European markets.

3. Quantity and types of drugs being trafficked

It is difficult to know for certain the quantities of drugs being trafficked through eastern Africa. However, through data on supply, trafficking, and demand as well as media reports and interviews, it is possible to discern from the literature a rough estimate. According to UNDOC

(2013), between 1990 and 2009 the reported amount of heroin seized in eastern Africa was only one ton. However, between 2010 and 2013, there was a notable increase in the amount of heroin seized in Tanzania and Mozambique. This may be due to an increase in law enforcement efficiency, which means larger shares of heroin transmitted are captured. However, this could also indicate that the flow has increased due to increased disruption on the Balkan route or due to growth in local demand (UNDOC, 2013).

Estimates suggested that the heroin flowing in eastern Africa amount to 22 to 40 tonnes per year (Haysom et al., 2018a). However, these figures are likely to be undervalued as estimates by Haysom et al. (2018b) find that 10 to 40 tonnes of heroin a year enter Mozambique alone through dhows. According to the authors, only about 5 tonnes remain in the region, while the rest is trafficked to the more lucrative international markets. According to Aucoin (2018) two types of heroin are trafficked through East Africa: 'brown sugar' – also known as 'heroin number 3' (a paste that can be smoked) and 'white sugar', or 'heroin number 4' (a refined salt for injecting). There has been a notable shift in seizures of the latter in recent years, which, suggests a growth in local East African processing of refined heroin (Aucoin, 2018).

Recent estimates show an increase in the amount of heroin trafficked in Mozambique but a decrease in the amount of heroin trafficked in Tanzania (GITOC, 2021b; Haysom et al., 2018a; Stanyard et al., 2022). However, there is no indication that the total amount of heroin being trafficked have decreased. Political and economic factors shifted the routes that go to Tanzania south to Mozambique. These shifts will be discussed in the Section 7.

As mentioned, methamphetamines produced in Afghanistan have recently also begun to be trafficked alongside heroin shipments in the southern route. According to Stanyard et al (2022), currently shipments to northern Mozambique typically contain 50% heroin and 50% methamphetamines. Recent seizures point to a large market, but exact estimates of the volumes of trafficked methamphetamine are not available in the literature. While there are some rumours that some of the methamphetamine is actually produced in Mozambique, these claims are not completely substantiated (Eligh, 2021).

4. Political economy of drug trafficking

Mozambique

A small network of Mozambican families of Asian origin and with close ties to the ruling party controlled the transit heroin trade in the country for almost three decades. The top of this network, allegedly, is Mohamed Bachir Suleman (known as MBS), who is accused by the US government of being an international drugs trafficker (Hanlon, 2018). Three family groups allegedly work under MBS and facilitate the drug trafficking. These are the Rassul, Moti, and Ayoob families. These families are tied to several business ventures, such as hotels, industrial complexes, pharmaceuticals, and supermarkets. They are also in the business of importing and exporting several types of products (Haysom et al., 2018b).

According to the Haysom et al. (2018b), there are no formally acknowledged set of rules between drug traffickers and top government officials. Instead, there are long standing, implicitly agreed on regulations that are mutually beneficial. Haysom et al. (2018b) write that one quid pro quo of the party's protection of the trade may be that heroin does not leak out into the local drug market.

Mozambique's role should primarily be that of a transit state, not a consumer state. Another facet of the elite pact may be for the drug money to go into financing local investment. As such, the property boom in the north, and many luxury residential and commercial properties in Maputo may be a result of the drug trade. According to Haysom et al. (2018b) this arrangement was able to prevail and be sustained because there were few Mozambican heroin users on the streets, and millions invested in local assets. As such, this was seen as a victimless crime, especially since heroin users are considered to be found only in the wealthy Global North.

Recently, however, the criminal market in Mozambique has shown signs of destabilisation. The drug trade continues under President Nyusi, who took over in January 2015, but there was seemingly less protection for the major players (Hanlon, 2018; Haysom et al., 2018b). Party links to the drug trade shifted to lower and more decentralised levels. The changes in Mozambique's ruling party happened at the same time as other global changes in the structures of legal and illegal commerce, which resulted in heroin shipments increasing. This included crackdowns in Tanzania and Kenya, which have shifted a significant part of the East African heroin traffic south to northern Mozambique (Hanlon, 2018; Haysom et al., 2018b). This increase has resulted in entirely new heroin trade channels running in parallel to the old ones. This shift has been referred to as movement from organised crime to 'disorganized' crime (Hanlon, 2018). This decentralization will be discussed in more details in Sections 6 and 7.

In 2017, the north of Mozambique, the epicentre of the drug trade in the country, witnesses the rise of insurgent groups that claim ties to the Islamic State (Stanyard et al., 2022). While there has been some claims that these insurgency groups in Cabo Delgado were making a move into the drug market (GITOC, 2021b; Jacobsen & Høy-Carrasco, 2018), the rumours are not substantiated (Stanyard et al., 2022). One of the reasons behind these claims were a result of a seizure of 28 kilograms of heroin in Mocímboa da Praia in early October 2021. The drugs were found in a complex owned by a local businessman, a location known to be used by the insurgents during their occupation of the town. Mozambican and regional authorities have pointed to the seizure as proof that the insurgents are involved in drug trafficking (Stanyard et al., 2022).

However, the timing of the seizure, the movement of trade to the south, and the declining volumes of drugs shipments into the north of the country do not support the claim that they belong to the insurgent groups. The alternative explanation is that the heroin had, in fact, been stored by someone else before the insurgents captured Mocímboa da Praia, who then abandoned it in an urgent escape. This alternative explanation fits with other evidence that heroin was still being trafficked through Mocímboa da Praia until it was captured by the insurgents in August 2020 (Stanyard et al., 2022). Indeed, Walker & Restrepo (2022) discussed extensive research done in 2021 including interviews with law enforcement officers, local sources connected to the drugs trafficking routes, local drug couriers, and local journalists, which found no evidence linking the insurgent groups with the dhow-based drugs supply route.

Tanzania

According to Haysom et al. (2018b), Tanzanian intelligence found that heroin was entering the country through dhows around 2006. Evidence suggests that heroin smuggling in Tanzania started in Zanzibar, then moved to the mainland (Haysom et al., 2018b).

The heroin networks operating in Zanzibar are composed of elite local businessmen and public officials. There are about seven to ten big dealers in Zanzibar who are hidden and have power in government or the police, but generally keep a low profile (Haysom, 2020; Haysom et al., 2018b). Similarly in Dar es Salaam, the drug trade seemed to be controlled by several powerful figures; in the recent crackdown, kingpins named by the government include politicians, businessmen, musicians, and a famous preacher (Haysom et al., 2018b).

According to Haysom et al. (2018b), there are several pieces of evidence to suggest that drug traffickers were receiving substantial political protection in Tanzania between (at least) 2000 and 2015. One indication is that despite knowledge of drug smuggling since 2006, there were no effective measures to curb the trade. Indeed, anti-drug interventions were ineffective in numerous respects and Tanzania was unable to make seizures at sea. Additionally, the authors claim that several people who have worked at the Dar es Salaam port said that senior members of the political elite placed key figures there to facilitate the smuggling. Finally, there are claims in the literature that campaign financing of the ruling party, which heavily relied on donors, came at least in part from illicit funds (Haysom et al., 2018b).

Unlike in Mozambique, the local consumption trade in Tanzania was not constrained by political agreements between traffickers and ruling elites (Haysom, 2020). Indeed, in recent years, a significant mainland local heroin trade and addiction crisis have developed and spread across the country (Haysom et al., 2018b). Additionally, Tanzanian nationals seem to control or coordinate a large amount of the local heroin market in the region. Tanzanian networks, which transport small and medium-sized shipments, have a presence in Kenya and Mozambique, and a strong presence in South Africa, where they control the heroin consumption market (Haysom et al., 2018b).

President Magufuli, who came to power in 2015, made the drug trade a central concern of his administration (Haysom, 2020). In early 2017, Magufuli announced a major attack on the drug trade using measures such as releasing a list of people to be questioned, some of which were high-profile political figures, and cracking down on corruption in several ports around the country. This had an impact on illicit trade, resulting in drug traffickers avoiding using Dar es Salaam's port (Haysom et al., 2018b). However, there was concern that Magufuli's approach was too centralised and too dismissive of institution building to be sustainable. In other words, 'It will go when he does' (Haysom et al., 2018b).¹

Evidence suggest that the law-enforcement efforts did lead to some decrease in the drugs arriving to Tanzania via the sea, although the country may still have played a role in packaging and shipping (Jacobsen & Høy-Carrasco, 2018). More importantly, rather than reducing the drug trade, these measures only served to displace it elsewhere due to the integration of the regional economy in eastern Africa. Police action in Dar es Salaam and other ports in Tanzania meant that many operators in the drug trade have merely been driven out of the country into Mozambique (Haysom et al., 2018b). According to the authors, sources in South Africa claimed that the heightened port checks in Tanzania only created a three-week lag in local consumer markets as dealers switched routes in favour of greater reliance on road and rail (Haysom et al.,

¹ President Magufuli died in March 2021 and was succeeded by president Samia Suluhu Hassan. It is unclear to what extent the crackdown on drug trafficking changed as a result, but the new president seems to be taking similar steps and the displacement of the drug trade to Mozambique did not change.

2018b). The insurgency in north Mozambique further exacerbated this trend, as heightened border enforcement in Tanzania and Mozambique pushed the drug trade to the south. This will be discussed in detail Section 7.

5. Routes of drug trafficking

Similar to any other type of commodity, heroin has a supply chain with several stops between the producer and consumer where the commodity must be warehoused and repacked (Hanlon, 2018). As mentioned, heroin is produced in Afghanistan, passes through Pakistan (and Iran), and is moved to eastern Africa. It is warehoused and repacked in several locations in eastern Africa and then goes by road to Johannesburg, South Africa. From there, it is sent to Europe (Hanlon, 2018). Figure 1 summarises the routes taken to import and export heroin.

Figure 1: Map of main landing points and transport links along the southern route

Source: Haysom, 2020: 7 This figure has been removed for copyright reasons. The figure can be viewed at <https://enact-africa.s3.amazonaws.com/site/uploads/2020-03-05-heroin-coast-02.pdf>

Mozambique

Heroin is picked up from the Makran coast of Iran and Pakistan and transported to traditional trading destinations on the coast of northern Mozambique. Usually this is done through motorized wooden boats, called dhows, which have concealed compartments that can carry 100-1000 kg of heroin. The dhows anchor 20-100 km offshore and are met by a group of small boats that take the heroin to various spots along the coast (Hanlon, 2018). According to Hanlon (2018), the dhows arrive at least weekly, except during the three-month monsoon season.

After moving the heroin from dhows onto small fishing boats, the small boats then land in the coast of Cabo Delgado, specifically in the area north of the coastal town of Pemba as well as among the Quirimbas Islands. The fishing boats land their deliveries on the beaches and avoid attracting attention as they are a few among numerous other small vessels operating the area (Bird et al., 2021; Hanlon, 2018). Once on land, the heroin is taken by road to either Nacala or Nampula for consolidation, packaging, and onward shipment. Both of these towns are hubs of trade. Nacala is the country's biggest and most modern port; Nampula is the third largest city in Mozambique and considered the 'capital' of the north (Haysom et al., 2018b).

The other maritime transport method is for heroin to be hidden in containers imported directly through Pemba Port and Nacala Port (Hanlon, 2018). There are no estimates of how much heroin is imported by way of Nacala and Pemba ports (Haysom et al., 2018b). Nacala is said to be the deepest port in eastern Africa, and it is a major container port with a rail link to northern Mozambique (Hanlon, 2018). The port is used for importing several transit goods among which is heroin (Hanlon, 2018). According to Haysom et al. (2018), the transit trade is controlled by a small number of families of South Asian origin (discussed in Section 4 and linked to MBS), who have such informal political and economic influence in Nacala that they 'own the town'. Evidence gathered by Haysom et al. (2018) also indicate that there is little inspection of arriving cargo into the port and officials specifically avoid scanning containers imported by the political elite, by MBS, or by those linked to MBS. Customs and port officials are installed by the ruling political party, usually senior, trusted members of the party or agents from Mozambique's state security service.

Pemba is a relatively small port and has long been a focus of illegal traffic. Management of ports was privatized in Mozambique, but Pemba was one of the one ports which remained partially under the control of the state and it was clear that high officials did not want outsiders in the port (Hanlon, 2018). According to Nelson (2020), the entry of heroin and cocaine through Pemba port is linked to one specific trader, who owns numerous businesses that rely on imported goods and allegedly maintains the networks needed to ensure that the containers are not properly searched. After they arrive, specific customs officers move the drugs out of the port into a company warehouse. From there, some of it is transported by road to Nampula then to South Africa. A portion of the drugs exists via the airport with drug mules, and some is sold locally. There are reports of increased drug trafficking due to a trade agreement signed between Mozambique and Brazil, which increased containerised goods and, consequently, cocaine movement (Nelson, 2020).

Some heroin comes overland by road from Tanzania and Kenya (Hanlon, 2018; Haysom et al., 2018b). As of 2018, there has only been one major seizure on this route of 600 kg of heroin, which was headed to South Africa. According to Hanlon (2018), traffic on this route is small and the roads are bad and there is limited other traffic, making heroin smugglers more noticeable. To pass through the territory, these shipments rely on bribery and general lack of law enforcement. Traffickers who do use this route may indirectly benefit from the unofficial prohibition on publicising hard-drug seizures (which will be discussed in section 6) and the degree to which drug enforcement is neglected in Mozambique (Haysom et al., 2018b).

Drugs are sent by road to the south of Mozambique and then to South Africa using the N1, which is the only road from the north to the south of the country. According to Hanlon (2018), the importers use different initial patterns. The MBS organised crime network moves the drugs to warehouses in Nacala port or to other warehouses belonging to the south Asian trading families, such as warehouses in Nampula, which are all tightly guarded. The newer decentralised networks are said to prefer inland locations and are following more Latin American models, with locations with little traffic and where access can be guarded, for example by surrounding hills. There are many police check points on the roads and requests for bribes are common.

The growing regional consumer market for heroin gets some of its supply from 'leakage' from the transit trade. This is done through in-kind payments to various people along the routes, such as drivers, fishermen, and policeman. Some of it leaks through small-scale theft from bulk shipments (Haysom et al., 2018b). However, there is also some evidence that bigger players in the heroin market import their own supplies from air mules travelling from Pakistan or buy in bulk from transit traders. Generally, however, this secondary trade is more disorganized and run by a fluctuating set of players trading in smaller volumes. As mentioned, many of these small-scale dealers are Tanzanian and they have most likely brought products across the porous northern border zone between the two countries (Haysom et al., 2018b).

Tanzania

According to Nelson (2020), a survey found that the heroin available in Tanzania uses packaging that is distinctive from that found in Zanzibar, confirming that this market has its own supply and is distinct from the other local markets on the mainland. Heroin arrives in Zanzibar in several ways. Similar to Mozambique, small boats are used to collect heroin that arrived from Pakistan and Iran from dhows, which they meet offshore (Nelson, 2020). Drugs may also be concealed

within containerised goods shipped from Pakistan to the main port in Zanzibar City. This is facilitated by large-scale traffickers establishing import-export business that brings multiple commodities in containers from Asia. This allows the heroin to be hidden in among the goods (Nelson, 2020).

Corrupt payments are made to allow the containers to be driven straight out of the port without inspection. The consignments are then driven into warehouses belonging to the importers (Nelson, 2020). According to Nelson (2020), in some cases, these warehouses have sophisticated security, including static cameras and visual surveillance. Senior customs officers in Zanzibar are appointed by the government from the mainland to the port and airport, with key local officials in the port maintaining continuity (Nelson, 2020). These officers allegedly also enable the corrupt payments that are needed to preserve the systems that allow goods to move without inspection.

According to Nelson (2020), some heroin shipments are also brought by mules travelling from Pakistan. While some of these mules are sent and coordinated by major traffickers, other are small-scale traffickers who finance their own travels and drug smuggling activities. Securing supply lines of heroin naturally relies on traffickers establishing strong links to supply networks in Pakistan (Nelson, 2020).

While some heroin remains in Zanzibar to serve the local market, most of these drugs are moved further. Significant quantities are smuggled by small boats to Bagamoyo, just north of Dar es Salaam, where the supply is consolidated and then moved on (Nelson, 2020). According to Nelson (2020), a significant, quantity of heroin and cocaine is moved internationally through airports by drug mules. The mules carry drugs to Europe and Asia, typically on airlines that travel via the United Arab Emirates. They also sometimes travel to South Africa, and onwards to the US or Europe (Nelson, 2020).

Haysom (2020) look at Bagamoyo as a case study of coastal towns in Tanzania in the midst of the drug trade. Heroin that comes into Zanzibar is transported to the mainland via Bagamoyo and surrounding villages, where it is consolidated and transported onwards by road. Most of the seizures in Lunga Lunga and Hori Hori along the Kenya-Tanzania border are comprised of heroin sourced in Bagamoyo.

The official port is only able to handle a fraction of the 200 ships that arrive daily to the town. Screening checks are done manually, and containers inside boats will typically only be counted rather than inspected. The rest of the boats landing in Bagamoyo use unsecured natural harbours or informal ports. Unlike the official port that operates from 8am to 5pm, these informal ports are open all night, serving vessels arriving from Zanzibar that bear drugs, among other commodities. These boats, as they don't use the official harbour, are not inspected by customs officials (Haysom, 2020).

Bagamoyo warehouses have also been used to store drugs and chemicals used in the manufacture of heroin. In May 2017, Tanzanian authorities found five tons of chemicals used to manufacture heroin in backyard storage in Bagamoyo as well as in Dar es Salaam and in Moshi. Another aspect of Bagamoyo's ties to the drug trade is an abandoned beach house which allegedly used to belong to a European trafficker. This trafficker received shipments in Bagamoyo and distributed the goods through the use of his private airstrip. He deserted

Bagamoyo after President Magufuli ascended to power, when, presumably, he lost political protection (Haysom, 2020).

As mentioned, besides the drugs that come from Zanzibar, Tanzania has its own heroin supplier, distinctive from the islands'. Tanzania's border region with Kenya is a hive of smuggling activity. Dar es Salaam has played a crucial role as an epicentre of both the transit and the local retail heroin trade. Likewise, the port of Tanga is home to at least one heroin kingpin and is close to landing sites in both Tanzania and Kenya. Arusha is also a hub for the heroin market; it derives its importance in the coastal criminal economy in part from its proximity to Nairobi and Mombasa, key Kenyan hubs, and also from its position on the road corridor south from Kenya (Haysom et al., 2018b)

Road transport corridors are also used to traffic drugs across the south and centre of Tanzania, through Mbeya, to Zambia and eventually onwards to South Africa (Haysom et al., 2018b). While the exact routes that move the drugs from the interior southwards are not known, Haysom et al. (2018b) suspect that some of them pass through Zimbabwe. According to Aucoin (2018), while the Lunga-Lunga border point between Kenya and Tanzania has been described as a mainland route for heroin that is transported into Tanzania and the southern African region as a whole, this was not frequently reported on in the media.

Getting to Europe from eastern and southern Africa

There are very few papers in the literature that touch on how drugs reach Europe from South Africa. According to Hanlon (2018) and Haysom et al. (2018), heroin used to be sent directly to ports, such as Durban in South Africa, where it was put into containers. This has changed recently, however, and Johannesburg has become the warehousing and transshipment point. According to the author, containers are carried by rail to the ports and shipped without further customs inspection to City Deep Container Terminal in Johannesburg. It is notoriously corrupt, so containers with heroin pass unnoticed. Corruption is also prevalent in the O.R. Tambo international airport in Johannesburg, so it is easy for the heroin to go through unhindered.

According to Hanlon (2018) and Haysom et al. (2018), it is unclear whether most heroin that reaches Europe is shipped there by sea containers or by air. South Africa is mainly interested in reducing local use, so most checks aim to stop heroin entering the country. As such, there are few checks on exports. Indeed, as of 2018, there have only been two reported export seizures, one on each route. In 2009, 150 kg of heroin was intercepted in a shipment of tourist souvenirs at Heathrow airport, London, on a flight from South Africa; the trail was traced back to Durban and then Mozambique. And in June 2017 police seized 963 kg of heroin in pallets of cases of wine destined for export by sea. The seizure was intended for shipment to Belgium (Hanlon, 2018).

According to Jacobsen & Høy-Carrasco (2018), heroin leaves South Africa to Europe typically concealed within shipments of bulk export products such as wine and oranges. Smugglers use various other methods to hide their consignment. An example of this is the 'rip on, rip off' technique where drugs are placed in containers without the knowledge of the owner, using forged seals. Anecdotally, there are reports of drug parcels with Global Positioning System (GPS) transponders having been dropped along the East Africa Coast and carried by ocean currents as far as South Africa. This works to subvert any deterrent efforts to stop transshipments at sea (Jacobsen & Høy-Carrasco, 2018).

According to Haysom et al. (2018) heroin is shipped in containers of non-perishable solid goods – cases of wine, stone, tiles, etc. because they are easier to escape scanning and easier to leave for longer in European port. The authors contend that the Port of Cape Town is not known for corruption. However, this gives traffickers an advantage as they are able to use containers carrying export that do not normally attract attention, such as wine and fruit. Containers declaring such goods will be assigned a relatively low risk rating by customs authorities in the receiving countries, making them less likely to be searched

There doesn't seem to be any evidence in the literature of drugs going directly to Europe from eastern Africa, except via South Africa. The exception to this is Nelson (2020), who makes mention of a significant quantity of drugs that are moved by drug mules traveling internationally by air.

6. Methods of drug trafficking

Gig economy and technology

As mentioned, drug trade in Mozambique headed by the MBS model was built on the basis of apparently legitimate trade operating through their official trading companies and using their own warehouses, hotels, and staff, all under political impunity (Hanlon, 2018; Haysom et al., 2018b). However, more recently, the methods of transferring drugs became looser and more flexible, using drivers, fishers and others for individual pick-ups and deliveries (Hanlon, 2018).

According to Hanlon (2018), people are contracted and paid for specific jobs often assigned by mobile phone using encrypted messaging services. For example, a driver or a boat owner may receive a message telling them to go to a particular point to collect a heroin parcel. Sometimes those employed are already involved in the illegal trade of other goods such as timber, ivory, fuel, liquor, and cigarettes. Hanlon (2018) sees this as a part of a wider trend of international criminal networks adopting technology, social media, and the gig economy. This is because this method has the advantage of keeping network members isolated from each other and can be coordinated without knowing many other network members. The Mozambique's heroin transit traffic is, as a result, part of a much larger global shift.

According to Hanlon (2018), the wide availability of good mobile telephone coverage in north-east Mozambique since 2015 made the use of gig economy and technology a way to expand the heroin trade. The author discusses incidences, whereby the expansion of mobile telephone signals became better along the main roads, which resulted in drivers transporting heroin being given a telephone number of a police official or a connected party figure to phone if they were stopped by checkpoints along the way. According to Hanlon (2018), this may still be used for MBS-linked shipments, but due to widespread corruption, this is also likely used by freelance drivers working for the new networks. These drivers are simply given money to bribe the police and other officials; their fee for the job is any money they do not spend in bribes.

The use of the gig economy and new technological development is likely accelerating the proliferation of newer 'decentralised' smugglers, that will be discussed in Section 7.

Concealment and smuggling

Through various interviews and media reports, the literature discusses some of the methods of concealment and smuggling that allows the drugs to move through the routes. While the transit heroin trade is a bulk trade, the shipments are sometimes broken down into a number of smaller consignments to avoid detection (Haysom et al., 2018b). These are hidden among other commodities to enable smuggling. According to Aucoin's (2018) media analysis, for example, some of the most popular commodities among which drugs were found packaged were sugar, wooden furniture, cashew nuts, flour and fresh produce, such as fruit and vegetables in Kenya, Uganda, and Tanzania. According to Hanlon (2018), heroin that comes from Pakistan to Mozambique is sometimes hidden in rice containers sent to Nacala and Pemba or in motorcycle fuel tanks.

Heroin is sometimes also hidden in transportation vehicles. According to Hanlon (2018), smugglers usually use a light pickup or a 4x4 vehicle, such as a Toyota Hilux, which might carry between 20 kg and 100 kg with some that are especially prepared and can carry up to 200 kg. The drugs are usually hidden under the plates of the flat bed, behind door panels, and in the fuel tank. These pickups vehicles are driven from Mozambique to South Africa. Additionally, according to Haysom (2020), traffickers in Mozambique use new cars and fill the spare-tyre space with drugs. They hire the drivers to transport heroin from landing sites on the coast to Nampula, from Nampula to Maputo, and from Maputo to South Africa, the final destination. Another method is through filling trucks that were carrying cargo from South Africa to Mozambique with illegal cargo, including heroin, on the return trip (Handlon, 2018).

Some evidence in the literature touches on the profile of people that engage in heroin smuggling activities. For example, some air routes to international destinations usually use mules that are often young women, sometimes with babies, who might be recruited believing that they will be travelling for a work opportunity (Nelson, 2020). Indeed, according to Nelson (2020), there are reports that some journeys to well-screened airports may have as many as 10 mules on a flight, so if a few get stopped the rest will get through because the airport's holding facilities for drug mules will be full.

Finally, according to Aucoin (2018), the incidences of heroin trafficking reported by the media are usually carried out by locals and internationals who are working together. This, the author concludes, suggests that heroin trafficking is more commonly carried out by a mix of local and foreign actors at the point of entry and distribution than is the case with other drug types, which tend to be dominated by either wholly local or wholly foreign groups – depending on the drug type.

Petty corruption and lack of capacity

Besides implicit ties between the government and established drug traffickers in eastern Africa that was discussed in Section 4, the literature also examines the prevalence of petty corruption, how its tied to high-level corruption, and how it facilitates the drug trade. Additionally, there is some discussion on lack of funding for monitoring facilities and how that is also tied to the prevalence of corruption.

For example, there is evidence that suggests that government officials disguise the presence of heroin in the country. According to Haysom et al. (2018b) national and provincial statistics are

disrupted by actors in centralised statistical units; heroin is taken out of the system by police or customs officials and is mis-declared as another type of drug. According to the authors, this serves two purposes; at the national level, the incentive for this is to hide the trafficking that the ruling party is benefitting from, while at the provincial and district level the incentive is direct financial benefits from corruption.

Additionally, according to Haysom et al. (2018b), heroin is an important source of income for police and customs officers. When they find drugs, they negotiate with the dealers and receive either an amount of money or some quantities of drugs to sell in the local market. Several other papers in the literature mention corruption as a key method to enable the drug trade in both Mozambique and Tanzania, including bribing customs officers to look the other way or paying off the police to allow the drugs to pass (Haysom, 2020; Nelson, 2020; Stanyard et al., 2022).

According to Henson (2018), despite some efforts to curb corruption through taking measures such as suspensions, the view seems to be that a lack of funding meant there was a lack of facilities like scanners which made it impossible to implement border controls. As a result, most illegal products are seized on the other side of the borders in South Africa. Additionally, for the longest time in Tanzania, the navy and coast guard were small and underfunded and, as a result, unable to prevent the dhow-based heroin trade (Haysom et al., 2018b). Haysom et al. (2018a) concludes that building capacity among law-enforcement agencies where there is deeply systemic corruption is futile and potentially counterproductive.

7. Recent developments

Crackdown in Tanzania and insurgency in Mozambique

There have been several recent events that have resulted in shifts in previous drug routes. Firstly, the aforementioned crackdown by the Tanzanian government has increased law enforcement capabilities that meant that some of the drug trade was shifted. While some assess that the maritime drug flows into Tanzania were down to zero because of police efforts, this view was contested. Drugs still seem to be containerised in Tanzania where port security is lax, especially in Zanzibar. However, the drugs were now likely landing in Mozambique and coming into Tanzania in small boats or across land to feed the old trafficking routes (Jacobsen & Høy-Carrasco, 2018).

The insurgency in Mozambique created another shift. The increased military presence on the coast of Tanzania meant that old trafficking routes were now more monitored. This resulted in two changes. Firstly, the Mozambique route became more important as drug trafficking from Tanzania moved southwards. However, because of the presence of the insurgency, this also means that old Mozambican routes in the north of the country are now more dangerous and more costly. Both of these dynamics resulted in an increase in drug trade in Mozambique and a shift of routes towards the south of the country (Walker & Restrepo, 2022).

Figure 2: Map of the Mozambican coast

Source Haysom 2020. This figure has been removed for copyright reasons. The figure can be viewed at <https://enact-africa.s3.amazonaws.com/site/uploads/2020-03-05-heroin-coast-02.pdf>

For example, for the networks that have their logistical base at Nacala port, it has become hard to bring in heroin on the northern Mozambican coast. As such, they have moved their heroin landing sites further south to several other routes, including Angoche (Figure 2). Angoche and similar remote, sea front towns, can serve as so-called *bandari bubu*, i.e., makeshift port or remote unmonitored harbour, highly porous to illicit trade, that can be easily deconstructed and moved (Haysom, 2020). Due to the poor road network, Angoche is relatively isolated and not subject to regular patrols. Traffickers in Mozambique hire drivers to transport heroin from Angoche and other landing sites on the coast to Nampula, from Nampula to Maputo, and from Maputo to South Africa. Interviews suggest that aside from Angoche, there are other potential sites for drug deliveries in Nampula province, each capable of serving as a *bandari bubu*: Memba, Mogincual, Ilha de Moçambique and Moma (Haysom, 2020). According to the authors, the bulk of the people involved in the illicit trade at *bandari bubu* are not serious organised criminals, but rather fishermen and transporters offering their services to licit and illicit traders alike.

According to the authors, the rise of Angoche and similar *bandari bubu* along the coast of eastern Africa as well as the 'decentralisation' of the drug trade to smaller players raises concerns as to whether it is ever possible to seal such sites to illicit trade. Despite major seaports and airports also becoming important entry points, the nature of the *bandari bubu* is the main driver of eastern and southern Africa's role in the heroin trade (Haysom, 2020).

Despite some of the former trafficking hotspots in northern Mozambique coming back into government control, findings from the literature suggest that this has not meant the return of drug trafficking to the old routes. Traffickers and drug shipments from dhows that moved south to avoid the insurgents have remained there for the time being (Stanyard et al., 2022).

According to Stanyard et al (2022), these localized shifts have not translated into largescale disruption of the overall drug trafficking flows via Mozambique into South Africa. Interviews with members of drug trafficking networks in Cape Town supported this finding, as the disruption due to conflict in northern Mozambique was not perceived as an issue that is hindering drug supply from Mozambique to South Africa. However, the authors reported evidence that smuggling drugs over the Mozambican land border had become more difficult in recent months, as evidenced by several major seizures of heroin and methamphetamines reported by law enforcement along the border. Drug trafficking networks are reportedly looking for alternative routes, for example shifting smaller quantities via post, and sea and air routes.

Rise of new players and the move towards decentralisation

The crackdown on drugs in Tanzania and the increased surveillance in Zanzibar in response to the insurgents has caused a market shift to Mozambique. This, coupled with the loss of political power of the big player, caused the rise of more modular, smaller, remotely controlled foreign groups involved in the transit heroin trade on the southern route, especially in northern Mozambique. This diversification of actors happened as small-scale 'entrepreneurs' have entered the market buying small quantities over time and carving out roles locally (Haysom, 2020; Walker & Restrepo, 2022).

According to Hanlon (2018), the new decentralised networks appear to be controlled from outside Mozambique, with relatively junior controllers and special warehouses inside Mozambique. The network is controlled from the United Arab Emirates with local controllers and

fixers or facilitators below them, particularly Muslim Kiswahili speakers or young Pakistani men. Both the old-style networks and the new decentralized players are moving heroin through Mozambique, but it is unclear which system is dominant (Hanlon, 2018). According to Hanlon (2018), increasingly as part of this decentralised trade, European buyers are able to make the drug purchase directly from Dubai dealers and request a specific brand. This request is consequently sent to Johannesburg or Mozambique via text message, after which the order will be packaged and shipped according to the instructions.

More recently, according to the Stanyard (2020), there are significant changes in drug supply from Mozambique to South Africa taking place linked to market shifts in Mozambique. In previous years Tanzanian and Nigerian groups have controlled the bulk of import and wholesale distribution of the heroin market in South Africa. Now, their dominance is being rivalled by Pakistani networks that import drugs via Mozambique. These groups have been able to grow in the market through offering drugs at lower price and higher quality than their Nigerian and Tanzanian rivals. These networks have been using remote crossing-points at the Mozambique border to transport drugs to major South African cities.

Developments in Afghanistan and the rise of methamphetamines

As mentioned, both the heroin and methamphetamine that flow through eastern Africa come primarily from Afghanistan. With Taliban in control of Afghanistan, there is speculation on whether they will deliver on their promise to curb opium production in the country or whether production will increase due to the contraction of the Afghani economy (GITOC, 2021a). According to GITOC (2021a), there is evidence to suggest that the Taliban derives more revenue through taxing meth production and transit than through taxing heroin production and transit.

The meth found in eastern Africa in recent years has been available in the urban drug market of South Africa since 2019. According to Eligh (2021) and GITOC (2021a), key figures in the south Asian community in northern Mozambique are alleged to be responsible for coordinating the importation, storage and onward distribution of this new flow of meth. As mentioned, evidence suggests that the regular shipments of heroin transported to eastern Africa in dhows have been accompanied also by large volumes of Afghan-produced meth. These combined shipments of heroin and meth appear to be distributed along the same traditional heroin trafficking routes that supply the drugs into the interior of Africa. This is a new development, as meth was not seen as a major drug trafficked through the southern route (GITOC 2021a). However, whether or not this proliferation of meth is tied to Taliban gaining control is unclear; the literature does not draw a direct link between these two events.

According to GITOC (2021a), if Taliban does keep its promise of ending drug production, this will have a knock-on effect in drug markets around the world. In eastern and southern Africa, this would cause shortages and increases in prices which would both impact the people who use drugs and the overall shape of market. As mentioned, with the increasing law enforcement control in Tanzania, there has been a 'decentralisation' in drug trade in Mozambique, with an increasing number of small-time, lower-level traffickers. An increase in heroin and meth prices will likely squeeze these small-scale players out of the market and leave trafficking routes in the hand of 'old fashioned' wealthy elite traffickers.

On the other hand, if the drug production increases in the wake of the collapsing Afghan economy, the opposite will take place. The trend of the 'decentralization' and the diversification of

the north Mozambique drug trade will continue as more small-scale traffickers become able to finance small drug shipments and gain advantage in the expanding market (GITOC, 2021a).

It is unclear in the literature at the moment whether there has been an overall increase or decrease in the production of drugs in Afghanistan. However, the emergence and rise of methamphetamine production is relatively well documented in various sources (EU4MD, 2021; UNDOC, 2021). According to EU4MD (2021), European methamphetamine market is comparatively small and methamphetamine is manufactured in Europe, meaning an increase in demand will likely be met by European production. As a result, it is unclear how much of a threat Afghan-origin methamphetamine could present for Europe. However, Afghan-manufactured methamphetamine is available in countries located on drug trafficking routes to Europe, including South Africa and Mozambique, which may be a cause for concern and there may be a need to enhance monitoring of the phenomenon.

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