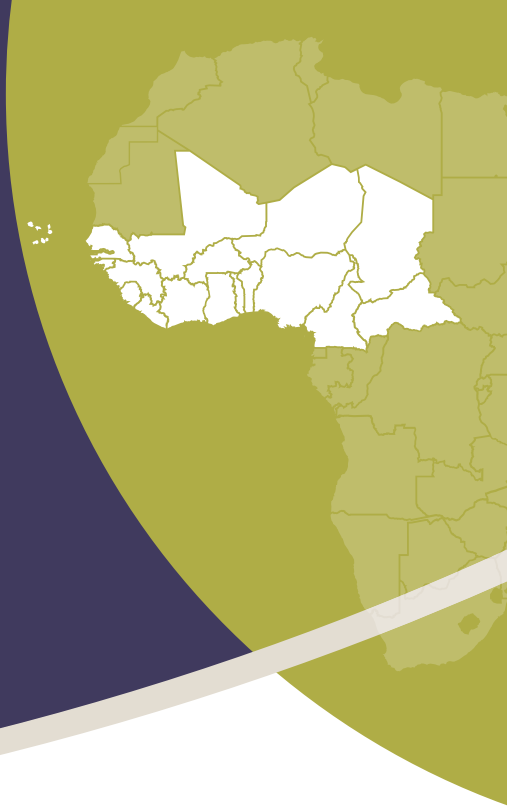
RISK BULLETIN

OBSERVATORY OF ILLICIT ECONOMIES IN WEST AFRICA



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Summary highlights

Conflict, coups and containers: why the Sahel cocaine routes were disrupted.

Northbound trans-Sahelian trafficking routes underpin a substantial minority of cocaine exports from West Africa to Europe. While available evidence indicates that these routes experienced a resurgence between 2019 and 2023, recent research reveals that this trend is likely to have been disrupted by political upheaval and armed conflicts since mid-2023. Trafficking volumes through northern Niger are reported to have fallen sharply, though trafficking routes through northern Mali remain largely resilient and have restructured operations. Indications of significant cocaine trafficking in southern Mali should largely not be read as north-bound flows. Instead, they reflect West Africa's growing role as a recontainerization hub, with routes between coastal points of import and export shaped by the export potential of subregional maritime ports.

The shadow constellation: how Starlink devices are shaping conflict and crime in the Sahel.

Starlink satellite internet technology is a growing influence in conflict dynamics in the Sahel. Violent extremist groups, including Islamic State West Africa Province (ISWAP) and Jama'at Nasr al-Islam wal Muslimin (JNIM), are exploiting the portable, high-speed connectivity to enhance their operations, coordinate in real-time and evade detection in areas with poor telecommunications infrastructure. Although Niger and Chad legalized Starlink in March 2025 to improve regulation, smuggling networks are likely to continue to traffic devices from Nigeria and Libya along established corridors, charging inflated prices for both equipment and subscriptions, and permitting armed groups and criminal networks to access this technology. While the technology brings connectivity benefits to remote regions, this capacity to empower criminal networks complicates security responses in the conflict-ridden Sahel.

Canary Islands migrant smugglers ramp up to meet surging demand.

More migrants to the European Union arrive in the Canary Islands from West and North Africa than by any other route, and many of them have been displaced from northbound trans-Sahelian alternatives. Regional conflict dynamics are contributing to its surging

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popularity. Smuggling networks in Senegal and Mauritania have responded by becoming more professional and efficient, and they cater to an increasingly eclectic range of clients. Conflict dynamics and economic stresses suggest that movement on the route — the world's deadliest for migrants — looks set to rise further.

ABOUT THIS ISSUE

The 12th issue of the Risk Bulletin of Illicit Economies in West Africa examines how conflict dynamics in the Central Sahel are reshaping — and in turn being shaped by — criminal economies and modernity's megatrends, including digital innovation. From satellite internet to trans-Sahelian trafficking routes, these stories point to the adaptation of criminal networks to globalized trends and technologies, while illustrating how illicit networks change in response to state fragility, militarization and changing market opportunities.

In Niger, the increasing use of smuggled Starlink devices by armed groups, traffickers and civilians reflects both the absence of state-controlled telecommunications infrastructure in peripheral regions and the growing integration of global technologies into illicit economies. The widespread availability of these portable satellite internet systems — many trafficked from neighbouring countries — is transforming the way information is shared and operations are coordinated across borders, including by armed groups and criminal networks. This risks reinforcing regional criminal networks in areas where the state is largely absent.

Bisecting similar geographies, the upwards trend in the trans-Sahelian cocaine trade is likely to have been disrupted by the resurgence of conflict in northern Mali, and Niger's 2023 coup. As routes adapt to insecurity, some traffickers in Niger are turning away from the drug trade and towards the lucrative gold sector.

Conflict dynamics in northern Mali have also influenced irregular migration patterns, contributing to displacement away from the Central Mediterranean route, towards maritime smuggling routes from Senegal and Mauritania towards the Canary Islands. The Canary Islands route — the deadliest irregular migration route in the world — is becoming increasingly tied into Sahelian conflict dynamics, and beginning to reshape the profile of those on the move. Smuggling networks have become increasingly professionalized to cater to swelling demand, keeping prices steady and enhancing the efficiency of operations.

Together, these articles show how illicit economies in West Africa are becoming more regionalized and increasingly shaped by global forces — whether in the form of conflict-driven reorganization, the repurposing of commercial technologies or the enduring draw of international markets. The Global Initiative Against Transnational Organized Crime continues to provide analysis that captures these evolving dynamics, tracing the links between local vulnerabilities, regional reconfigurations and global criminal opportunity.

Conflict, coups and containers: why the Sahel cocaine routes were disrupted.

Situated at the crossroads of routes linking West and North Africa, the countries of the Sahel have long been bisected by cocaine and cannabis resin trafficking routes, mainly to Europe.[1] Both drug markets are deeply entrenched in the region's political and security dynamics, meaning they shape — and are shaped by — regional conflict and instability.[2] While cannabis resin is more prominent in terms of volume, this bulletin focuses on cocaine.

Between 2019 and 2023, available evidence indicates that northbound trans-Sahelian cocaine trafficking underwent a resurgence. Consumption of cocaine powder and crack increased in parts of the Sahel,[3] many stakeholders close to the trade reported growing flows,[4] and wider regional developments (discussed below) created enabling conditions for resurgence.

In addition, although an unreliable indicator of trafficking volumes, cocaine seizures, concentrated in Niger, Burkina Faso and Mali, soared from an average of 13 kilograms a year between 2015 and 2020 to 1 466 kilograms in 2022.[5] This suggestion of a sustained growth in trans-Sahelian trafficking raised security concerns, given the well-documented links with between the cocaine trade and some non-state armed groups — notably elements of the Cadre stratégique permanent (CSP, the Strategic Framework for the Defence of the People of Azawad, now disbanded) — operating in the region.[6]

However, dramatic changes in the Sahelian conflict and political landscape since 2023, and in Libya in February 2025, appear to have disrupted cocaine trafficking through northern Niger and to a lesser extent northern Mali. Meanwhile, reports of significant trafficking in southern Mali, often seen as an indicator of northbound flows,[7] are probably linked to coastal trafficking routes.

Conflict and coups drive traffickers to change direction

Two developments in 2023 were key in reshaping northbound cocaine trafficking flows towards Europe. First, the July coup in Niger, which disrupted long-standing links between trafficking networks and state-embedded actors and sponsors. And second, the August outbreak of conflict in northern Mali between rebel armed groups and the extremist group Jama'at Nasr al-Islam wal Muslimin (JNIM) on the one hand, and the Malian armed forces supported by Russia's Wagner Group on the other.

By the end of 2023, northern Mali was experiencing levels of violence not seen in the area since 2013,[9] and many trafficking routes shifted to avoid areas affected by armed conflict and changes in territorial control. In some cases, this entailed an adjustment within the broader trafficking corridor; for example, Tabankort had been a main logistical and storage hub for cocaine and cannabis resin transiting northern Mali, but these activities reportedly shifted to In-Afarak, which remains

WHAT DROVE THE 2019–2023 COCAINE TRAFFICKING RESURGENCE?

- Increased cocaine trafficking through West Africa as a whole driven by rising production in Latin America, higher consumption in Europe, and growing law enforcement pressure on direct maritime trafficking routes;
- the July 2019 closure of the French Barkhane forward base in Madama, northern Niger, and subsequent decreased international surveillance;[8]
- the relative stability of the Kidal region in northern Mali, which enabled traffickers to operate there with a degree of predictability;
- the consolidation of power in the hands of the Libyan Arab Armed Forces (LAAF) across the Fezzan and southern Cyrenaica, creating a more stable environment for trafficking; and
- the alleged involvement of senior LAAF figures in protecting the drugs trade.

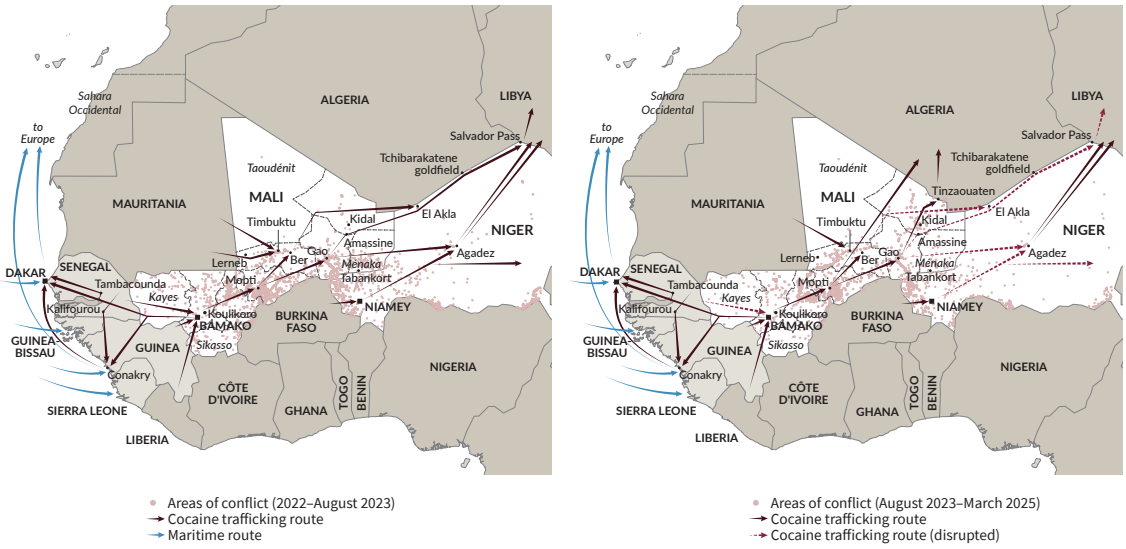

FIGURE 1 **Cocaine trafficking routes before and after the 2023 resurgence of conflict in northern Mali and the military coup in Niger.**

Source: Data from the GI-TOC and ACLED

under the control of the Azawad Liberation Front, a coalition of separatist armed groups formed in December 2024.[10] In other cases, routes were displaced further, towards overland routes via southern Algeria, southern Mali, Mauritania or coastal countries, or onto air and maritime routes.[11]

Displacement has been particularly sustained away from the east of Mali's Kidal region — where the CSP lost control of key trafficking nodes and the ability to protect drug convoys. The sharp spike in armed violence raised the risk of attacks on convoys, decreasing Niger-bound flows and resulting in a significant loss of business for several intermediaries operating there.[12]

Niger's July 2023 coup also disrupted a long-standing protection system that enabled many traffickers to operate with a high degree of impunity,[13] and the net result was a sharp drop in trafficking of cocaine and cannabis resin through northern Niger. A trafficker involved in transporting drugs through the Mauritanian desert and northern Mali reported that networks in Niger have been unable to recover due to a lack of trust in the new authorities.[14] Several high-level traffickers with close ties to the former regime have adopted a lower profile and scaled down operations.[15]

Although the protection infrastructure is likely to be reconstituted over time, the disruption to the trade has been significant and some high-level players linked to the previous regime have turned to alternative income streams. For example, immediately after the coup, the trafficking activities of Ghoumour Itouwa Bidika, long alleged to be a player in the transport of cocaine and cannabis resin through northern Niger,[16] reportedly diminished. More recently, sources close to Bidika claimed that he had transitioned to the informal gold market in southern Algeria.[17] This is in contrast to Mali's cocaine and cannabis resin markets, where major players have, according to available evidence, largely remained stable.[18]

Increased state patrols along key trafficking corridors[19] and escalating instability fomented by Nigerien and Chadian bandit groups, which have frequently attacked and seized drug convoys, have also contributed to lower flows through northern Niger since 2023.[20] Overall, from mid-2023, traffickers in Niger reported a sustained decrease in drug convoys, particularly those connecting northern Mali to the Salvador Pass, a key drug-trafficking node on the Niger-Libya border en route to European consumption markets.[21]

On the other side of the pass, in Qatrun in southern Libya, clashes erupted in February 2025 between the

LAAF and Chadian mercenaries linked to the disbanded 128 Brigade of the LAAF.[22] These mercenaries were reportedly connected to a trafficker and had allegedly been involved in protecting northbound drug shipments.[23]

At the time of writing, the fighting had driven the mercenaries and the trafficker out of Qatrun and into northern Niger. It had also halted most trafficking in southern Libya, instability and lack of clarity about further LAAF actions in the region rendering operations too risky. Coupled with events in northern Niger, this development underscores the volatility and growing risk for traffickers operating in nominally 'stable' parts of the Sahel and North Africa.

Shifting dynamics in southern Mali

Since late 2022, cocaine flows through southern Mali and Senegal have reportedly been increasing.[24] However, this should not be interpreted as evidence of increased northbound trans-Sahelian flows.[25] Part of the increase is probably attributable to displacement from northern Mali since 2023, as outlined above, onto routes through the western Kayes region towards Mauritania or Senegal.[26] Perhaps more importantly, flows transiting southern Mali are often linked to transit between coastal entry and exit points, rather than northbound consignments.[27]

The prevailing direction of trafficking across the Senegal-Mali border has reportedly reversed since late 2022 and is now predominantly into Senegal, towards coastal export points and ultimately headed for Europe.[28] Alongside the growing difficulties facing northbound routes, traffickers' growing use of West Africa to containerize cocaine may also have played a role in this reversal.

Since 2019, a growing volume of cocaine consignments arriving in West Africa have been trafficked from Brazil, Suriname or Guyana on pleasure craft, fishing vessels and bulk cargo ships, rather than in containers. In the Gulf of Guinea, these vessels offload (directly or through sea drop-offs) onto vessels from West Africa, where the cocaine is landed, stored, repackaged and redistributed before being exported, largely towards Europe. Although intelligence gaps remain regarding the West Africa to Europe leg of the journey, a significant proportion of Europe-bound consignments are believed to be containerized.

Stakeholders in Senegal report that cocaine trafficked through the south-east, including from Mali, is often disembarked in Sierra Leone or Guinea on its way to Dakar.[29] The Senegalese port has higher throughput and better links to Europe than ports in neighbouring states, offering better opportunities for concealment in licit cargo. Although there have been no material seizures of cocaine consignments in Dakar port in recent years, scanning and screening capacities are concentrated on imports, as is the case with maritime ports globally, meaning that outbound flows are less likely to be seized.

Routes through Mali are longer than other options linking points of entry (Sierra Leone and Guinea) and exit (Dakar), notably further west around Kalifourou in Senegal, also a prominent trafficking route. So why bring cocaine into Mali at all? Traffickers' efforts to diversify routes, challenging disruption, is probably part of the answer. But this longer journey also reflects the long-standing importance of Bamako as a base for several key traffickers.

Analysis of drug markets elsewhere suggests that consignments are often moved from points of entry to areas close to the home base of senior players, where they are stored until conditions are right for their redistribution — because a purchaser has been confirmed, or logistics have been put in place — even where this entails longer routings.[30] Some reports also indicate that although many actors in Mali's cocaine trade remain unchanged, some networks previously operating in the north have increasingly favoured routes through the south and neighbouring states, mostly Senegal, Guinea, Guinea-Bissau and Mauritania, and by sea.[31] This could have further strengthened the importance of Bamako as a logistics hub in subregional cocaine routings.

Conclusion

Trafficking networks across the Sahel have repeatedly demonstrated their ability to adapt to shifting security and conflict dynamics, changing routes and allegiances to protect trafficking volumes.[32] Some elements of recent disruption are likely to prove only temporary — in Niger, for example, the effects of the 2023 coup will probably fade over time, as networks adapt to the new political landscape and forge new relationships in order to revive their operations. However, the volatile conflict dynamics between state actors and their auxiliaries, coupled with the growing constellation of non-state armed groups (insurgents, violent extremists

and criminals) in the northern areas of Mali and Niger, means that many regions will remain under the patchwork control of a number of different actors. Traffickers looking to bisect these regions will continue to face a high risk of losing their cargo to attacks, as no single actor can guarantee protection. This is likely to continue to suppress trans-Sahelian cocaine trafficking in the medium-term, with maritime routes, or overland routes crossing the coastal states, providing a more reliable option.

Notes

1 Mark Micallef et al, After the storm: Organized crime across the Sahel-Sahara following upheaval in Libya and Mali, GI-TOC, November 2019.
2 International Crisis Group, Drug trafficking, violence and politics in northern Mali, 13 December 2018.
3 This included, for example, Agadez in northern Niger: Interviews with crack and heroin users and dealers, and medical professionals, in Agadez, November and December 2020; interview with Agadez Regional Council officials, December 2020. Interviews conducted for the GI-TOC's hotspot mapping initiative supported this finding in a number of other areas of the Sahel, including in Bamako.
4 Alexandre Bish, Soldiers of fortune: The future of Chadian fighters after the Libyan ceasefire, GI-TOC, December 2021; interview with a customs official, Kidira, 2022; interview with an OCRTIS agent operating in Kidira and Tamabacounda, 2022; interviews in Chad, Zinder, Niamey, Ouagadougou and Agadez, interview with an OCRTIS researcher in Sebha, Libya, and with an Italian law enforcement source with extensive contacts in southern Libya and Niger, August 2021–2022.
5 United Nations Office on Drugs and Crime, Drug trafficking in the Sahel, 2024.
6 Ibid.
7 Mali faces an explosion in drug trafficking: more than 1 466 kg of cocaine seized in 2023, Maliweb.net, 27 June 2024.
8 This was reported to particularly affect trafficking dynamics around the Salvador Pass and routes circumventing the Toummo crossing. See Alexandre Bish, Soldiers of fortune: The future of Chadian fighters after the Libyan ceasefire, GI-TOC, December 2021.
9 Ladd Serwat, Regional overview: Africa 2023, Armed Conflict Location and Event Data, November 2023.
10 Remote interview with a member of CM-FPR 2, an armed group affiliated with FAMa in the Gao region, August 2024.
11 Although the use of flights is not new, traffickers are reportedly also favouring air routes connecting Sahelian capitals such as Bamako and Niamey to Europe, with France being a key destination country; Guinea-Bissau police seize over 2 tons of cocaine on plane from Venezuela, Reuters, 9 September 2024.
12 Interview with a Malian researcher, August 2024. This had a more significant impact on hashish trafficking, as cocaine also enters Niger from elsewhere, including Benin.
13 United Nations Security Council, Final report of the Panel of Experts Established pursuant to Security Council resolution 2374 (2017) on Mali and renewed pursuant to resolution 2484 (2019), 2020; Letter dated 3 August 2022 from the Panel of Experts established pursuant to Resolution 2374 (2017) on Mali addressed to the President of the Security Council, 2022; International Crisis Group, Managing trafficking in northern Niger, 6 January 2020; L Raineri and F Strazzari, Drug smuggling and the stability of fragile states: The diverging trajectories of Mali and Niger, Journal of Intervention and Statebuilding, 16, 2, 2022.
14 Interview with a drug trafficker from the department of Arlit, August 2024, by phone.
15 Interview with a member of the Agadez regional security council, August 2024.
16 Bidika was a key player in the transport of drug shipments on behalf of Cherif Ould Abidine, a former national deputy and president of the Nigerien Party for Democracy and Socialism regional office in Agadez until his death in 2016. In 2021, Bidika was arrested after the seizure of 17 tonnes of cannabis resin. After just over a year in prison in Niamey, his charges were dropped due to procedural error. Bidika's involvement in drug trafficking in Niger, and his arrest, has been documented by the Mali Panel of Experts, see: United Nations Security Council, Final report of the Panel of Experts established pursuant to Security Council resolution 2374 (2017) on Mali and renewed to resolution 2484 (2019), S/2020/785/Rev.1, 6 August 2020; Letter dated 6 August 2021 from the Panel of Experts on Mali established pursuant to Resolution 2374 (2017) addressed to the President of the Security Council, 2021.
17 Ongoing monitoring and interviews, January–February 2025.
18 Interviews (law enforcement, community members, close observers of the cocaine trade), Niger, northern Mali, July and August 2024 and February 2025.
19 This included Operation Garkuwa, launched in 2022, which intensified patrols in key trafficking corridors, particularly in the departments of Arlit and Iferouan. These patrols targeted the roads linking Arlit to Assamaka and the gold sites of Tchibarakaten, as well as roads linking Iferouan to Tchibarakaten.
20 See section on banditry in Alice Fereday, Niger: Regional migration and goldmining consolidate as smuggling to Libya stagnates, GI-TOC, July 2023.
21 Interview with a drug transporter from the department of Iferouane, August 2024, by phone. Interviews (law enforcement, community members, close observers of the cocaine trade), Niger, northern Mali, July and August 2024 and February 2025.
22 More specifically Saleh Anakazi's fighters, primarily from the Shuhada Waw (Martyrs of Waw).
23 Interview with a local researcher, February 2025, by phone.
24 Interview with an official from the Guinean government's anti-narcotics bureau, Conakry, March 2024; interview with a water and forestry officer, Tambacounda, June 2024; interviews with Malian law enforcement officers working in southern Mali, February 2025; Anta Seck, Senegal: Record seizure of more than a ton of cocaine in Tambacounda, TV5Monde, 17 April 2024; Senegalese Customs, Fight against illicit trafficking, 18 June 2024; Mali faces an explosion in drug trafficking: more than 1,466 kg of cocaine seized in 2023, Maliweb.net, 27 June 2024; OCRTIS said most seizures had been in the south. Malian customs reported a significant increase in cocaine flows since 2022 in the Kayes, Koulikoro and Sikasso regions; interviews with law enforcement, community members and close observers of the cocaine trade, Bamako, July and August 2024.
25 This is a common interpretation in the media. See, for example: *Afrique – La drogue en Afrique : des pays de transit aux marchés émergents pour les narcos*, Agenzia Fides, 29 June 2024.

26 Remote interview with a local researcher in Gao, August 2024. Flows along the long-standing corridor linking Bamako to Libya via Gao and northern Niger have reportedly decreased, with some loads being trafficked through south-eastern Mali to Senegal or Mauritania on their way to Morocco. By early 2025, some loads had returned to the corridor, but instability and inter-group rivalries still present obstacles.

27 Overland links between coastal entry and exit points are a common driver of trans-Sahelian cocaine movements beyond Mali. For example, in May 2022, 115 kilograms of cocaine were intercepted in Burkina Faso in a Ghana-bound vehicle that passed through Sierra Leone, Guinea and Mali.

28 Interview with an OCTRIS representative, Dakar, November 2024; the October 2022 seizure of 300 kilograms of cocaine in Kidira (Tambacounda region) concealed in a refrigerated truck bearing a Malian plate number, allegedly coming from Bamako, was Senegal's biggest land seizure of cocaine at the time.

29 Interview with a Senegalese water and forestry officer, Tambacounda, May 2024; interview with a Senegalese customs official, Dakar, December 2024; interview with an OCTRIS representative, Dakar, November 2024; discussion with journalist in Tambacounda, May 2024.

30 See analysis of cocaine flows in Madagascar in Lucia Bird et al, Changing tides: The evolving illicit drug trade in the western Indian Ocean, GI-TOC, May 2021.

31 Interviews with law enforcement, community members and close observers of the cocaine trade, Bamako, July and August 2024; and northern Niger and northern Mali, February and March 2025.

32 Peter Tinti, Drug trafficking in northern Mali: a tenuous criminal equilibrium, ENACT, September 2020.

The shadow constellation: how Starlink devices are shaping conflict and crime in the Sahel.

Violent extremist groups in the Sahel, including Jama'at Nasr al-Islam wal Muslimin (JNIM) and Islamic State West Africa Province (ISWAP), are exploiting Starlink to enhance their operational capabilities. Criminal actors are not only trafficking Starlink devices but using them to evade law enforcement and sustain illicit economies. Their ability to do so is underpinned by an illicit supply chain that allows them to obtain Starlink devices and bypass nascent regulations on their use.

Starlink, a constellation of low Earth orbit satellites, launched its first 60 satellites in 2019. By March 2025, it had more than 7 100 in orbit.[1] It has been celebrated as a solution to help bridge the global digital divide. This could be particularly valuable in parts of rural Africa where factors such as conflict, limited private investment and tenuous state control continue to constrain internet connectivity.

Starlink kits consist of small, portable components: a dish, a power supply, cables, a base and a Wi-Fi router. They allow users to connect to satellite internet, eliminating the need for local telecommunication infrastructure. However, the technology also offers new opportunities to armed groups and criminal networks, exacerbating security challenges.

Technological innovation has always faced early exploitation by criminal interests or violent actors, and Starlink is no exception. Non-state conflict actors and criminal networks operating in areas where regular mobile networks are unavailable or unreliable are increasingly using Starlink to evade detection. The technology facilitates real-time coordination and can be used to disseminate public messaging.[2] Government forces report that the growing use of Starlink for secure communications makes it harder to intercept the plans of armed groups.[3]

The growing availability of Starlink is reshaping the landscape of conflict and crime in the Sahel. Deeper knowledge of traffickers' methods and routes will aid understanding of the implications of increased connectivity for conflict dynamics.

The legalization of Starlink

The central Sahel remains the global epicentre of terrorism, accounting for 51% of global deaths caused by terrorism in 2024. After its 2023 coup, Niger experienced a 94% increase in extremist violence in 2024 — the most dramatic surge worldwide. Although the violence was concentrated in the north of the country, there are signs that it is spreading.[4] There is reason to believe that Starlink technology is playing an important role in these groups' operations.

In March 2025, Niger and Chad legalized Starlink in an effort to better regulate the technology by requiring devices to be registered.[5] Mali is considering a similar move.[6] For some consumers, legalization may diminish the need for smuggling. But illicit supply routes are likely to continue underpinning supply to armed groups and criminal networks wanting to evade regulatory oversight.

Legalization of Starlink represented a milestone in Niger's efforts to improve digital connectivity. Download speeds of up to 200 megabits per second (Mbps) at a monthly cost of FCFA24 000–FCFA25 000 (about €37) have significantly improved connectivity.[7] By comparison, Niger Telecoms, the state-owned telecommunications provider, offers a 2 Mbps broadband plan for FCFA55 157 (€84).[8]

The official rationale for granting the licence focused on connectivity. However, security concerns within the military government also influenced the decision. With Starlink kits being smuggled into Niger from Nigeria, where the service was already operational,[9] a security officer in Zinder said: 'The [licensing] of Starlink will also help us better regulate the use of this technology, which until now has been entering the country in an uncontrolled manner.'[10]

Starlink's application for legalization in Niger had been pending since 2021. While permission to operate was nominally granted in 2024, discussions over technicalities delayed the launch and fuelled the expansion of the illicit market.[11] Many Nigeriens subscribed to Starlink through Nigeria before its legalization.[12]

How smugglers traffic Starlink kits

Factors that make Starlink kits easy to traffic include their portability, border officials' lack of understanding about what they are, and widespread corruption. A trafficker in Maradi explained: 'It's easy to move the kits. You just pay the drivers and the police a little money and they let you pass without any problems. Everyone knows how it works.'[13] After legalization, customs officers continued to seize Starlink kits as no official instructions had been issued to allow their legal entry. A customs officer in Zinder said: 'We haven't been told anything about these devices being authorized. For now, we treat them like any other smuggled goods and seize them when we find them.'[14]

A customs officer in Aderbissinat, a town in central Niger on the road south from Agadez, said that smugglers exploit law enforcement's limited familiarity with Starlink technology: 'By the time we understood their true nature, hundreds had already been smuggled through.'[15] To evade detection, kits are frequently broken up into components, concealed, or intermingled with legitimate goods such as agricultural products. A customs officer in Diffa said: 'By the time we intercept one kit, 10 others have already crossed.'[16]

Smuggling networks are also adaptable. A police officer who had been based in the south-eastern town of Mainé-Soroa noted: 'Like any other trafficking network, increased patrols on one route will result in a relocation to another.'[17] These activities are typically conducted after hours, utilizing bypass roads, unpaved pistes and motorbikes rather than cars. In the words of a trafficker from Agadez: 'We bend like the wind — routes change but the goods flow.'[18]

Traffickers charge FCFA260 000–FCFA400 000 (€396–€609) to smuggle each kit. The fee includes bribes to law enforcement officials, which typically amount to FCFA20 000–FCFA30 000 (€30–€45). The trafficking networks also profit from subscription fees, charging end-users FCFA50 000–FCFA75 000 (€75–€120) a month, more than twice the actual cost in Niger.[19] Traffickers retain control over customer accounts, using intermediaries to collect payments from clients, many of whom do not have bank accounts. Traffickers therefore exploit Niger's low banking penetration to retain a sustained flow of illicit income.[20]

Starlink devices are trafficked on Niger's established southern, eastern and northern smuggling corridors, which connect key hubs such as Agadez, Maradi and Zinder to armed groups and criminal networks across the Sahel. Kits are imported from Nigeria through the southern cities of Maradi and Zinder towards major urban hubs, including the capital, Niamey, and Agadez. There is also a southwards flow of kits from Libya.[21]

From Agadez, kits are transported to Arlit in northern Niger or Tinzaouaten on northern Mali's Algerian border, an area controlled by armed and violent extremist groups including JNIM and ISWAP. From Niamey, kits are distributed through established smuggling networks to Mali's Ménaka and Gao regions, where they are sold.[22]

The southern corridor feeds Starlink kits into Niger from northern Nigerian cities including Kano and Maiduguri. Maradi and Zinder are pivotal storage and distribution hubs on this corridor. Kits are often stored in warehouses or residential compounds before being sent to their destinations, which include the bandit enclaves of Tillabéri, violent extremist strongholds in Tahoua, or through Niamey to other regions under armed group influence, including Ménaka (IS Sahel) and Gao (Katibat Macina, a jihadist group aligned with JNIM).[23]

The eastern corridor stretches from Zinder or Maiduguri through the border city of Diffa to Chad. The nomadic traders and boatmen who ferry Starlink kits across the porous Chad border form a pivotal lifeline supplying Starlink kits and other commodities to armed groups in the Lake Chad basin, including Chadian militias and ISWAP.[24]

The northern corridor originates in south-western Libya, where Tuareg and Tebu networks dominate smuggling operations. Starlink devices are ferried across Libya's southern border into Niger, passing through desert outposts such as Djado and Dirkou before reaching Agadez. This long-standing smuggling hub is an important staging ground where caches are consolidated and dispersed.[25]

How extremists and criminals use Starlink

Starlink enhances the capabilities of criminal networks. Indeed, traffickers are enabled by the same Starlink kits that they smuggle. A trafficker in the Agadez region explained the appeal: 'Starlink has simplified communication. It is much more practical and affordable than Thuraya satellite phones. Previously, it was difficult to contact someone in town with Thuraya, but now it's easy to call or message anyone through WhatsApp.'[26] A

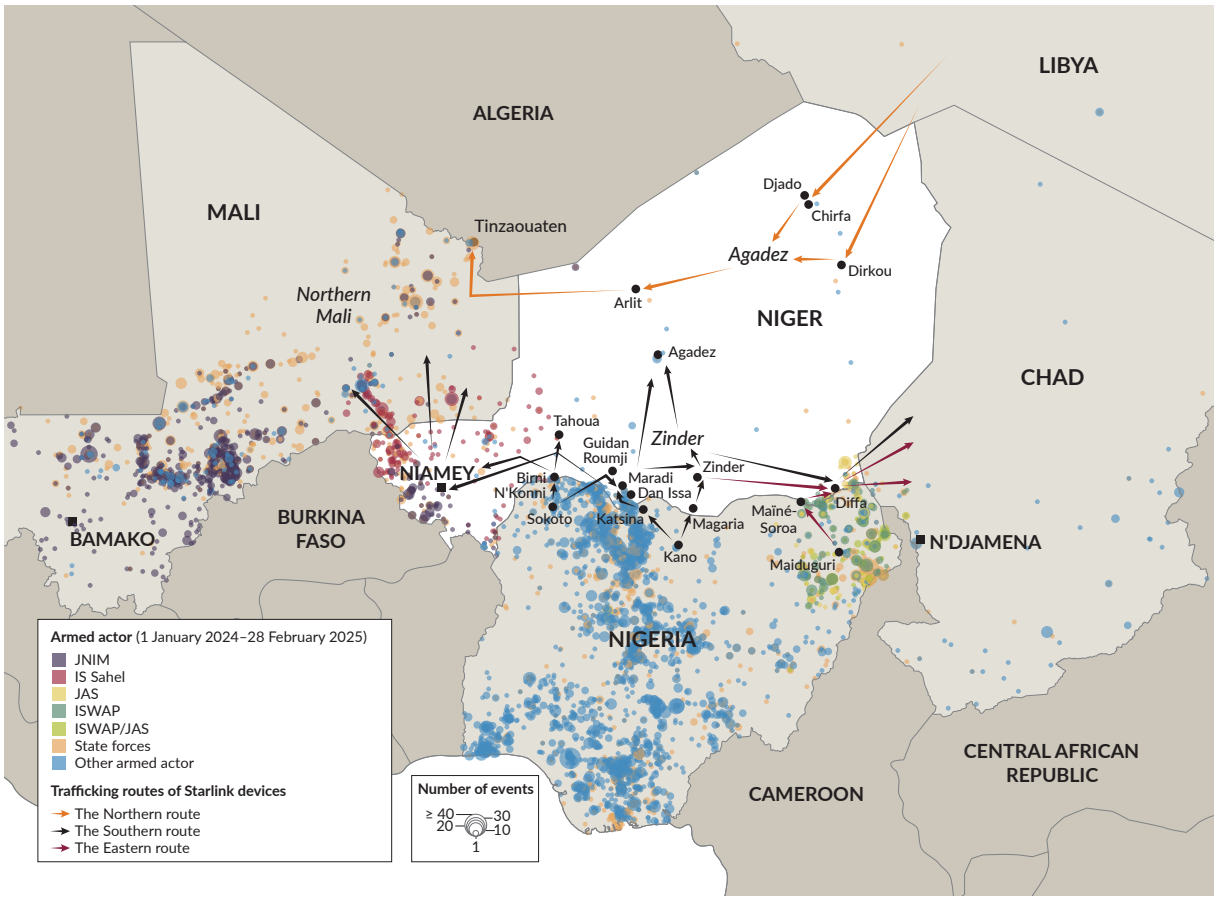

FIGURE 1 Trafficking routes for Starlink devices.

Source: Interviews with Starlink dealers, Maradi, Zinder and Agadez, February 2025

gendarme in Agadez observed that Starlink was helping traffickers evade detection: 'They know the desert better than we do, and with Starlink they're always connected. It's like they're playing a game where they can see all the moves and we're left guessing.'[27]

Starlink is also having a significant impact on conflict dynamics. Since 2023, northern Mali has experienced a resurgence of violent conflict pitting the Malian army, supported by Russian Wagner Group (now coming under the control of Russia's Africa Corps) auxiliaries, against the Cadre stratégique permanent (the Strategic Framework for the Defence of the People of Azawad, now disbanded), driving a surge in civilian casualties. Part of the Cadre stratégique permanent became the Front de Libération de l'Azawad (FLA), a coalition of separatist rebel groups. The FLA has used Starlink extensively, as have the Malian armed forces (FAMa).[28] According to an FLA leader in the Tinzaouaten area, the coalition relies on Starlink to coordinate operations, share intelligence and communicate its narrative. In the three-day battle at Tinzaouaten in late July 2024, during intense clashes with FAMa and Wagner mercenaries, the FLA used Starlink to maintain secure communication across its dispersed units and disseminate updates on social media, amplifying external messaging efforts.[29]

This phenomenon is not limited to separatist groups. Videos frequently circulating on social networks depict violent extremist groups using Starlink kits. For example, in June 2024, JNIM released a video claiming responsibility for an operation in Fitili, Gao, against Abdul Aziz Maza, a commander of IS Sahel. The footage prominently displayed a Starlink kit among the items recovered by JNIM.[30] Similarly, Nigerien security forces report that Starlink devices have been confiscated during operations against JNIM and IS Sahel in regions such as Tillabéri and Tahoua.[31]

This use of Starlink by armed groups and violent extremists extends further than the central Sahel. ISWAP, predominantly active in Nigeria, northern Cameroon and the Diffa region of Niger, has been a long-standing user of satellite technology for connectivity. Previously, it relied on Thuraya plug-and-play Wi-Fi routers.[32] According to a source close to the

Multinational Joint Task Force, established in 2014 to combat ISWAP and other violent extremist groups in the Lake Chad Basin, numerous Starlink devices were seized during operations against ISWAP in 2024 and 2025.[33]

Many of the armed groups operating across the Sahel and West Africa are believed to rely on Starlink devices. A leader of the Union des Nigériens pour la Vigilance et le Patriotisme (Union of Nigeriens for Vigilance and Patriotism — UNVP), a support group for the Conseil National pour la Sauvegarde de la Patrie (National Council for the Safeguard of the Homeland), made up of residents and former rebels from the Agadez region, noted: 'These days, every suspicious vehicle seems to carry one of these Starlink devices. The armed groups near Emi Lulu, the militias Haftar [Khalifa Haftar, commander of the Libyan Arab Armed Forces] pushed out who are now hiding along the Niger border — they all rely on these devices to stay connected and coordinate their movements.'[34]

A Starlink device being used by Azawad separatists in the desert in Mali.

Photo: Screengrab from Telegram

A murky outlook

The proliferation of Starlink devices in Niger and the wider Sahel highlights how digital innovation is reshaping conflict and criminal dynamics in regions historically underserved by technology and with poor connectivity. While Starlink plays an important role in boosting connectivity for licit trade in remote regions, it has also become a tool used by armed groups and criminal networks, enabling better real-time communication during operations and posing further obstacles to responses.

Legalization of Starlink kits across the Sahel may help to mitigate some aspects of their use by illicit actors, but trafficking appears likely to continue. Legalization of Starlink may bring its own complications, since the company will be bound by national laws on the technology's use and may have to comply with state demands to restrict connectivity. Measures such as denying Starlink connectivity to certain areas (known as ring-fencing) may temporarily inhibit armed group connectivity but will come at the price of engendering civilian resentment and denying large areas the benefits of new connectivity.

Geopolitical factors and the close relationship between Starlink's part-owner, Elon Musk, and US President Donald Trump may also shape Starlink's rollout. In Ukraine, shifts in the US position away from Kyiv have been reflected by worsening Starlink connectivity and a ban on the use of devices in offensive action against Russia, with significant implications for conflict dynamics.[35] The growing reliance of armed groups on Starlink devices could give the US unexpected leverage in Sahelian conflict dynamics, although this may decrease if private sector rivals introduce competing products.

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Canary Islands migrant smugglers ramp up to meet surging demand.

In the first quarter of 2025, the maritime smuggling route from West and North Africa to the Canary Islands remained the most active — and deadliest — way for migrants to enter the European Union.[1] After trending dramatically upwards since 2020, the number of migrants using the Canary Islands route (also known as the Atlantic route or north-west African route) escalated sharply in 2023 (40 330) and 2024 (46 843) to roughly double the annual arrival figures in 2020 and 2021.[2]

Displacement of Malians and other West Africans away from northbound trans-Sahelian routes explains part of this increase. Reflecting this, between 2023 and 2024 the Central Mediterranean route saw a 59% reduction in migrant numbers.[3] Resurgence of conflict in northern Mali, tightening migration policy in Tunisia and human rights abuses in Libya have encouraged thousands of migrants — many advised by their smugglers — to head for the coasts of Mauritania and Senegal and hire smugglers to reach the Canary Islands by boat. *Passeurs* (a word used widely in West Africa to refer to a variety of intermediaries in the smuggling chain) in Mali have been quick to advertise this alternative routing.

While economic drivers once underpinned most movement on the Atlantic route, it is increasingly tied to regional conflict dynamics. Moroccan and Senegalese migrants once significantly outstripped other nationalities, but in 2024 and 2025 the largest group of migrants on the route (about 40%) were Malians.[4] A growing number of them are from conflict-affected regions, with the Atlantic route also well positioned to underpin likely secondary movement of displaced Malians from refugee camps in Mauritania.

Smuggling networks in Senegal and Mauritania have become increasingly organized to meet sustained — and escalating — demand. With intermediaries across neighbouring coastal states and in Mali, networks have increased the efficiency of departure logistics and cater to an increasingly wide range of clients — well evidenced indicators of growing professionalization and human smuggling as a vector in migration.[5]

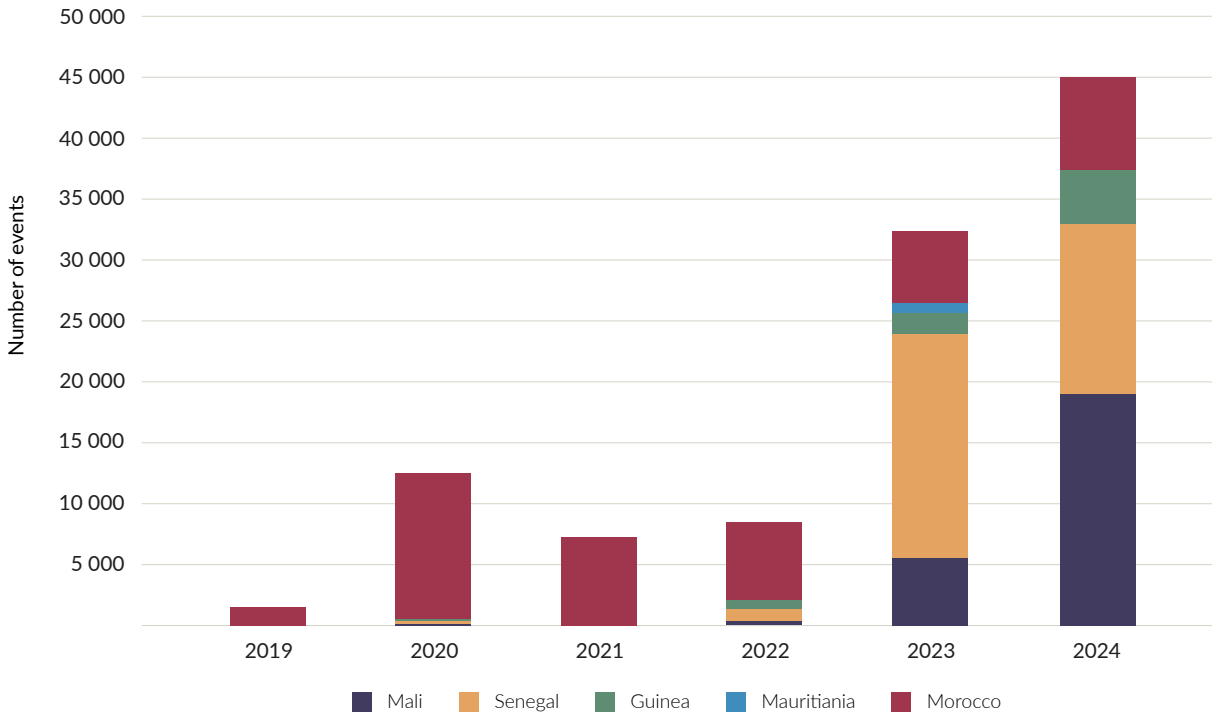

FIGURE 1 **Numbers of arrivals in the Canary Islands by nationality, 2019–2024.**

Source: Frontex, Migratory map

With the conflict landscape showing no sign of improvement, movement on the Canary Islands route looks set to increase further. Because it remains the deadliest migration route in the world, this has severe humanitarian implications.[6]

Factors behind the shift towards the Canary Islands route

Political and security developments in North Africa and northern Mali have reshaped smuggling routes since late 2023.[7] In September, after negotiations with the European Union, a toughening of Tunisia's migration policy led to mass expulsions and an 80% decrease in the number of migrants and refugees transiting the country.[8] In Libya, reports of abuse, kidnappings for ransom and sales of detainees to traffickers have spread southwards, increasing awareness of the risks of transit.[9]

In addition, two security upheavals in northern Mali have altered the security equilibrium that allowed migrants and refugees to travel through key hubs such as Timbuktu. First, the outbreak of hostilities between the Cadre stratégique permanent (the Strategic Framework for the Defence of the People of Azawad, now disbanded) and the Forces Armées Maliennes (Malian Armed Forces — FAMa), operating with the support of Russia's Wagner Group (now rebranded Africa Corps) since mid-2023. Second, violent extremist groups — including the al-Qaeda-affiliated Jama'at Nasr al-Islam wal Muslimin (JNIM) and Islamic State Sahel Province have stepped up their activities, notably by imposing blockades on large northern towns, and on the city of Timbuktu between August and December 2023.[10]

In the last quarter of 2023, *passeurs* started rerouting clients away from routes bisecting northern Mali towards Algeria and onto routes bisecting Kayes region in south-western Mali towards Senegal and Mauritania.[11] While the scale of the rerouting is difficult to assess, monitoring of key smuggling nodes provides insights. Individuals working with migrants and refugees in Timbuktu, a key node on northbound routes, estimate that flows between 2023 and 2024 decreased by more than 30%. In contrast, flows through Gogui — a key smuggling node in Kayes region, bordering Mauritania — were estimated to have increased by roughly the same proportion. This was largely attributed to growing movements of migrants and refugees from neighbouring states and a smaller increase in Malian nationals.[12] Smugglers in Kayes also reported that their business boomed in 2024: one smuggler interviewed in February 2025 said he helps more than 40 migrants and refugees daily, compared with 15 in 2022.[13]

This rerouting is organized and communicated to migrants and refugees by *passeurs*, shaping journeys by Malians and nationals of other neighbouring states in distinct ways.

For most West African migrants and refugees — largely Guineans, Ivorians, Gambians and Burkinabè — seeking to travel north through Mali, Bamako is often the place where they connect with a smuggler to continue their journey. In the capital, many are told that travelling north has become too dangerous. Key threats identified by *passeurs* include FAMa and Wagner (now Africa Corps) patrols, and the risk of drones and air strikes on smuggling convoys. Instead, *passeurs* recommend travelling west, connecting migrants and refugees with Kayes region *passeurs* who organize their trip towards Senegal or Mauritania.[14] Recruiters working for Senegalese and Mauritanian networks plying the Atlantic route also have intermediaries in neighbouring coastal states, enabling some West African migrants and refugees to travel towards disembarkation points on routes that avoid Mali entirely.

Most Malian nationals travelling on the Canary Islands route continue to be from Kayes and Sikasso regions, which have longstanding traditions of migration on this route.[15] Deteriorating economic and security conditions[16] have contributed to the growing displacement since late 2023.[17] Notably, most Malians interviewed on the route gave economic reasons as the primary driver for movement. However, this is usually the case, with security concerns typically cited only later.

JNIM is increasingly operating in western and southern Mali, doubling its attacks between 2022 and 2023 then stabilizing at that level in 2024.[18] There is also escalating displacement from conflict across central and northern Mali, where civilian casualties — particularly at the hands of FAMa and Wagner — totalled almost 1 500 between January 2024 and March 2025 (compared with 350 at the hands of JNIM).[19] Most flee towards refugee camps at the Mauritanian border, where more than 260 000 Malians had arrived as of September 2024.[20] For now, most remain in the camps; many are in poor physical condition, lack resources to continue their journeys, and require permits to move between regions of Mauritania.

However, international organizations working on migration in Senegal and Mauritania report that a growing number of Malian refugees displaced by conflict are moving on the Canary Islands route.[21] Some estimates suggest that 10–15% of asylum seekers in refugee camps in Mauritania reach the coast and embark on maritime journeys towards the Canary Islands.[22] There are concerns that the influx of displaced Malians in Mauritania could drive a further increase in movements on the Canary Islands route and that pressure from migratory inflows could intensify economic stresses in Mauritania, triggering growing secondary movements on the route.[23]

Contributing to this escalating emigration from southern Mali, some residents of northern and central Mali, who would typically have emigrated northwards on traditional smuggling routes from Timbuktu or Gao towards Algeria, are also increasingly deciding to use the western route through Kayes region.

The professionalization of the migrant smuggling industry in Senegal and Mauritania

There are signs of smuggling networks becoming increasingly professional and efficient at pivotal disembarkation nodes to cater to increased demand on the Canary Islands route. Although disembarkation points are dispersed across several countries, most migrants displaced from trans-Sahelian routes head for Mauritania and to a lesser extent Senegal, and dynamics at these nodes demonstrate clear signs of professionalization.

For example, the journey through embarkation points has become much quicker. This was particularly highlighted for M'Bour, a key departure point about 70 kilometres south of Dakar. Migrants and refugees often arrive and depart on the same day, while previously they often spent days or weeks in the city before setting sail.[24]

The logistics of departure are well coordinated. At the scheduled time, small fishing boats arrive at the beach, each transporting 10–15 individuals at a time to a larger boat at sea. This is in contrast to the early 2020s, when most migrants and refugees embarked on the larger boats directly.[25] Captains of these smaller vessels are well remunerated, reportedly earning FCFA300 000–FCFA500 000 (about €460–€760) at the end of each operation. The amount probably reflects the significant risk of interception. Each migrant or refugee must show a boarding pass to get on the fishing boat. This system was implemented in 2023 when the growing number of clients necessitated better systems

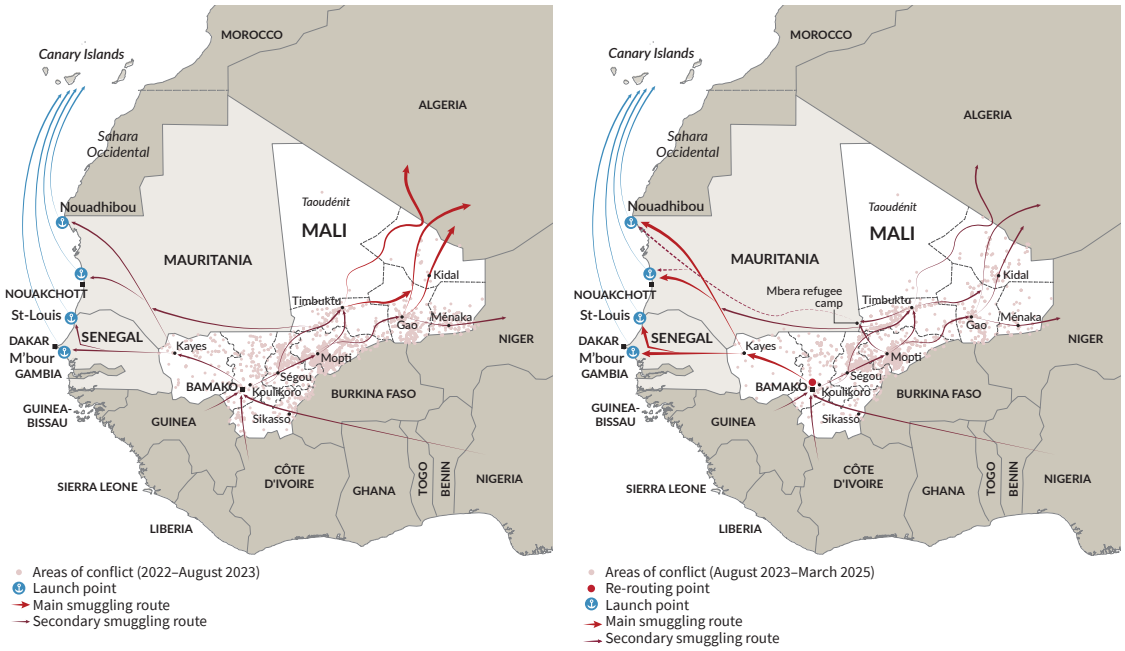

FIGURE 2 **Conflict incidents in the Sahel and changes in migratory routes, 2019–2024.**

Source: Data from the GI-TOC and ACLED

Departure point	2021 price (EUR)	2025 price (EUR)
Mauritania	1 300–1 500	1 200–1 800
Senegal (Senegalese)	450–750	350–750
Senegal (Foreigners)	Up to 1 500	900–1 000

FIGURE 3 **Prices for the sea crossing, 2021 and 2025.**
Source: GI-TOC

to avoid non-payment. Other members of the smuggling network track police movements on land and coastguard positions at sea, relaying updates to the captain of the large pirogue waiting offshore.

Second, the profile of migrants and refugees departing from Senegal and Mauritania has changed, becoming more diverse and increasingly distinct from the ethno-linguistic profile of their smugglers. This growing contrast between the profiles of migrants and their smugglers often points towards growing organization of the smuggling industry.[26]

Stakeholders in M'Bour estimated that in 2023 and 2024, more than 80% of individuals embarking on the Canary Islands route were not Senegalese, with more than half of these Malians.[27] Previously, most of those travelling were Senegalese.[28] Within Mali, most recruiters are still Malians who connect clients travelling towards M'Bour with *passeurs* in the city, typically Senegalese nationals, often of the Lebou ethnic group.[29]

From 2024, a growing number of Asian nationals, most prominently from Pakistan, have also embarked on the Canary Islands route from Mauritania (and to a lesser degree Senegal). Growing restrictions on other favoured routes — including the Balkan route, from which migrants and refugees are rerouted to fly via the UAE to Senegal — have contributed to this trend.[30] Similarly, increasing restrictions on routings from Senegal and Mauritania — via Spain and Turkey to Nicaragua, and onwards overland to the United States — have also contributed to growing travel on the Canary Islands route, as many Asian nationals found themselves in Mauritania and Senegal unable to follow their original journey plan.[31]

Prices and payment modalities offer further insights into the smuggling ecosystem. Prices for Senegalese nationals embarking from M'Bour have remained relatively steady: €350–€760 in February 2025 compared with €450–€760 in 2022.[32] Similarly, prices for West Africans (non-Senegalese nationals), though much higher (€900–€1 000) have remained generally stable since 2022.[33] In Nouakchott, Mauritania, prices were €1 200–€1 800 in March 2025,[34] compared with €1 300–€1 525 in 2022.[35] The relative stability of prices suggests that smuggling networks have been able to respond to higher demand by increasing supply.

A volatile outlook

Monitoring dynamics on the Canary Islands route will be key as JNIM continues to expand operations into southern Mali and secondary movements from Mauritania increase. Growing economic stresses in Sahelian and coastal states — including a forecast economic downturn in Senegal[36] — are likely to add to the drivers of movement on this route. Monitoring should include analysis of smuggling network professionalization — a vector for movement and a key factor in shaping risks for those on the move.

Responses by West African states will also affect the smuggling ecosystem. In the short term, measures taken by Mauritania in March 2025 — including expelling migrants and refugees into Mali and Senegal at an unprecedented scale and dismantling a number of networks[37] — may temporarily displace routings via Senegal, which could experience a resulting upsurge in departures during summer. This has implications for the safety and security of those on the move, forced to embark upon a longer — and therefore more dangerous — maritime journey from embarkation points in Senegal.

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