

# ApiraSol

## E-CIGARETTES IN INDONESIA 2024/2025 – Q2

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SUPPLY CHAIN INTELLIGENCE  
APRIL 2026



# Overview

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**1**

**INTRODUCTION &  
METHODOLOGY**

# Introduction

**ApiraSol has been investigating the routes, brands, and entities involved in the trade of illicit e-cigarettes across various countries worldwide for several years.**

In this particular research conducted in 2025, ApiraSol focused on the global illicit e-cigarette trade, drawing from trade data as well as open sources such as enforcement news, press releases from customs agencies, academic research papers, and online intelligence reports. The period covered for trade data spans January 2024 to December 2024, while enforcement-related news generally covers the years 2024 to 2025.

## The Illicit E-Cigarette Trade: A Growing Global Challenge

The illicit e-cigarette trade is becoming a significant force reshaping the global nicotine market, fueled by rapid growth and mounting regulatory complexity. According to Euromonitor International, the illicit e-cigarette market was valued at **USD 47 billion in 2024**, representing over **70% of global spending** and roughly **three-quarters of total volume—equivalent to 605 billion cigarettes**. Furthermore, Euromonitor reported that illicit e-cigarette products exceed **80% penetration in North America, Latin America, the Middle East and Africa, and Asia Pacific**,

while Western Europe, though lower, continues to face persistent illicit trade despite increasing legislative pressures.

## Regulatory Frameworks Driving Illicit Trade

Stringent bans and fragmented regulations often unintentionally fuel underground trade. Bans do not necessarily eliminate demand for e-cigarettes; where consumer interest persists despite such measures, gaps in legal supply may arise, creating opportunities for illicit suppliers to fill unmet demand. Even in countries with robust regulatory frameworks, unintended consequences may arise—strict compliance requirements and high taxation can make legal products more expensive and less accessible, while the convenience of illicit channels, including online and delivery-based sources, may further draw consumers toward cheaper, non-compliant alternatives. These conditions typically incentivize smuggling and the use of transshipment hubs in regions with weaker oversight, allowing illicit goods to infiltrate regulated markets.

Complex regulations also often create loopholes that illicit networks exploit, such as mislabeling products or routing shipments through multiple jurisdictions to obscure origins. While strong regulations aim to protect public health, without equally strong

enforcement, these often end up driving demand for illicit products rather than curbing it.

## China's Regulatory Gaps and Insufficient Enforcements

China produces the vast majority of e-cigarettes globally, making its regulatory framework critical to controlling illicit trade. The **Administrative Measures for Electronic Cigarettes** (effective May 1, 2022) require that all e-cigarette products comply with mandatory national standards and that producers, exporters, and retailers obtain licenses from the State Tobacco Monopoly Administration (STMA). Similarly, the **Administrative Rules for E-Cigarettes Import-Export Trade** (issued October 2022) stipulate that only licensed exporters can ship products abroad, and exported goods must either meet the destination country's regulations or adhere to China's national standards.

In practice, however, exports are not sufficiently controlled. Loopholes in licensing, weak oversight of small-scale producers, and limited monitoring of export compliance allow unlicensed operators to bypass official channels.

Compounding these issues is weak enforcement in many destination countries. These challenges are amplified by the growing use of digital platforms such as social media, messaging apps, and

informal online channels, which make detection and enforcement even harder.

Without stronger controls and enforcement mechanisms in China, and investment in monitoring capabilities in destination countries, illicit trade will continue to thrive despite regulatory efforts.

On December 18, 2025, China's General Office of the State Council issued a policy document titled "Opinions on Combating Tobacco-Related Illegal Activities Across the Entire Chain", which sets out a comprehensive enforcement strategy against illicit tobacco and nicotine products. The Opinions explicitly bring electronic cigarettes and other nicotine-containing products under strengthened regulatory scrutiny, calling for full-chain enforcement against the illegal production, wholesale, transportation, sale, and "export re-flow" of e-cigarettes and related products. This includes tightening oversight of e-cigarette manufacturing and supply chains, cracking down on unauthorized operations, and treating unlawful export and smuggling back into China as enforcement priorities alongside traditional tobacco smuggling.

The text of the Opinions does not designate exports to overseas destination markets as independent enforcement targets; rather, references to other countries and cross-border cooperation are tied specifically to preventing illegal e-cigarette exports from re-entering China's domestic market. This confirms that the

primary focus is safeguarding China's domestic regulatory objectives, public health, and market order, with international cooperation positioned mainly as a means to curb the re-flow of illicit products back into China. The effectiveness of China in stepping up its enforcement efforts to control the illicit trade of tobacco and nicotine products remains to be seen.

**Amid the alarming surge of illicit market activity and mounting regulatory complexity, ApiraSol's 2025 investigation into the global e-cigarette trade will map illicit trade flows, analyze seizure patterns across countries and regions, and uncover the mechanisms enabling this shadow economy.**

## Methodology

This report has been prepared using various data sources, including (but not limited to):

- Publicly available customs trade data for the period January 2024 - December 2024. For those countries covered in this report that don't make their customs data publicly available, data has been obtained from the mirrored data of other countries.
- Statistical data for the period January 2024 - June 2025.
- News articles relating to enforcement and seizures.

## Terminology and Definitions

**Statistical Data** - Numerical information representing measurable aspects of economic, demographic, social, or environmental phenomena, as produced by national statistical offices, government agencies, or intergovernmental organizations.

**Trade Data** - Information on the movement of goods and services between countries, typically reported by customs authorities and presented in terms of import and export volumes, values, origin, and destination.

**Enforcement News** - Reports and updates issued by law enforcement, customs, or regulatory agencies on activities such as investigations, product seizures, arrests, policy actions, and other official measures.

In the trade data, Origin and Destination Countries refer to the following:

**Origin Countries** - Shipment Origin Countries declared in publicly available trade data between January 2024 - June 2025.

**Destination Countries** - Shipment Destination Countries declared in publicly available trade data between January 2024 - June 2025.

**2**

**E-CIGARETTE  
TRADE - ASIA**

# E-Cigarette Trade - Asia

This report examines the trade of e-cigarettes in **Indonesia**.

The e-cigarette landscape across Asia is marked by a diverse and rapidly evolving regulatory environment. Countries like **India, Singapore, Taiwan, Thailand, Vietnam**, and **Hong Kong** have implemented strict bans on the import, sale, and use of e-cigarettes, citing public health concerns and youth protection. Others, such as **Australia, Malaysia, Indonesia** and the **Philippines**, have opted for regulated frameworks, allowing e-cigarettes under specific conditions—often with licensing, age restrictions, and product standards. Meanwhile, **China** and **South Korea** treat e-cigarettes as tobacco products, subjecting them to taxation, licensing, and safety regulations.

In many countries, there is a significant discrepancy between the value of e-cigarettes declared as exported from China and the value reported as imported by the destination country—**often with China’s export figures being much higher**. This statistical gap may indicate the **presence of illicit trade**, where products enter markets without being officially recorded or taxed.

However, in cases like **Singapore** and **Hong Kong**, the opposite trend is observed: declared imports from China exceed China’s reported exports. This suggests these locations may serve as transshipment hubs, where e-cigarettes—both legal and illicit—

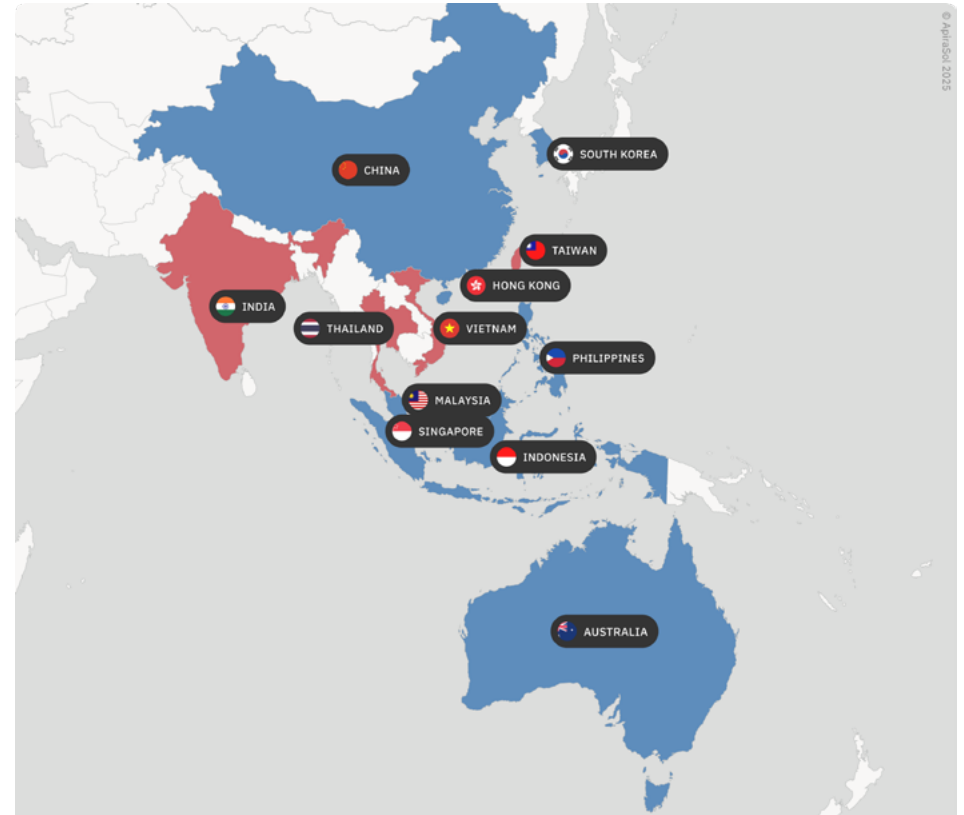
are imported, stored, and re-exported to other countries in the region.

Illicit e-cigarette trade continues to rise across Asia despite regulatory measures. Euromonitor estimates illicit incidence to be at least 60% in Indonesia and Malaysia, and around 80% in South Korea and the Philippines—underscoring the scale and persistence of the problem across the region. Enforcement reports consistently identify China as the main source, with large volumes of unregistered, untaxed, flavored, and high-nicotine devices produced in southern China and smuggled into most neighboring countries.

While most seizures trace directly back to **China**, some cases involve other routes—such as products intercepted in **Indonesia, Singapore, Malaysia**, and **Thailand** coming through Southeast Asian countries, and shipments in **India** linked to Middle Eastern suppliers. These are few compared to the overwhelming volume of China-origin products dominating the market.

Authorities—including customs, health ministries, and anti-smuggling units—have intensified crackdowns, seizing millions of illegal devices and launching awareness campaigns. Yet enforcement gaps and strong consumer demand fuel a thriving underground market, increasingly tied to organized crime. Australia

illustrates how these dynamics can escalate: since 2023, authorities have reported multiple bombing incidents and violent attacks connected to criminal groups involved in illicit tobacco and vaping products. This trend suggests that the illicit e-cigarette trade is not only a regulatory concern but may also pose broader public safety risks as it intersects with organized crime and, in some cases, adulterated or drug laced products.



# 3

## E-CIGARETTE TRADE - INDONESIA

# Summary

Indonesia's 2024 e-cigarette trade data reveals persistent and notable statistical gaps between declared exports and partner-reported flows—both in relation to bilateral trading partners and global figures. Indonesia's declared e-cigarette exports to the world, at \$270.3 million, point to a substantial positive trade balance, yet direct bilateral data with major partners, such as China, still show significant mismatches; for example, China's reported exports to Indonesia (\$166.8 million) far exceed what Indonesia records as imports from China (\$92.9 million).

These discrepancies can be attributed to multiple factors:

- **Regulatory Environment:** Indonesia allows regulated import, export, and sale of e-cigarettes, while neighboring countries such as Thailand and Singapore enforce outright bans. This difference motivates cross-border smuggling and incentivizes trafficking syndicates to exploit regulatory gaps and porous borders.
- **Re-routing:** Products often arrive via intermediary countries, obscuring true provenance and complicating harmonization of mirrored statistics.
- **Misdeclaration and evasion:** Varying customs reporting standards and misdeclaration of e-cigarette products across HS codes can distort official records.
- **Incomplete or Delayed Reporting:** Some shipments lack com-

plete data—such as shipment weight or transport mode—hampering transparency and granular reconciliation.

- **Customs Data Limitations:** Differences in classification standards, documentation practices, and valuation methods between Indonesia and its trading partners exacerbate discrepancies, making reconciliation of bilateral trade figures challenging.
- **Prevalence of Smuggling and Illicit Trade:** Smuggling, undeclared shipments, and home-based or clandestine manufacturing further widen the gap between reported and actual trade flows.

Despite these statistical inconsistencies, Indonesia's role as a supplier of e-cigarettes is clearly on the rise. Growing export values, a diverse range of shipment destinations, and the emergence of Indonesian manufacturers as notable players in global markets all point to Indonesia's increasing significance within e-cigarette supply chains. This trajectory is further supported by expanding production capacity and adaptability to evolving regulatory requirements, positioning Indonesia as both a critical exporter and a crucial link in regional and global trade networks.

The statistical challenges continue to complicate accurate market sizing and enforcement targeting. They highlight the ongoing need for enhanced data integrity, inter-agency coordination, and

modernization of trade monitoring systems as Indonesia's market presence and international influence within the e-cigarette sector accelerate.

## Regulatory Overview

Indonesia has implemented a robust regulatory framework for e-cigarettes under Law No. 17 of 2023 on Health and its implementing regulation, Government Regulation No. 28 of 2024. These laws classify e-cigarettes as addictive substances, placing them under the same or stricter controls as traditional tobacco products. The Food and Drug Supervisory Agency (BPOM) is tasked with overseeing compliance, including mandatory testing of all e-cigarette variants for nicotine content and prohibited additives in accredited laboratories.

Sales and distribution are tightly regulated. E-cigarettes cannot be sold via self-service machines, near school zones (within 200 meters), or online without verified age checks. The minimum legal age for purchase is 21, up from the previous 18. Packaging must include graphic health warnings and comply with plain packaging rules, while advertising and promotional activities are restricted across all media platforms.

Excise taxes apply to nicotine-containing products, and pack size limits are enforced: closed-system cartridges must not exceed 2 mL per cartridge, and refillable liquids are limited to 10 or 20 mL

containers. Solid e-cigarettes must be sold in packs of 20 sticks. BPOM's expanded authority under Regulation No. 19 of 2025 allows it to recommend product withdrawals and enforce administrative sanctions for violations.

## Statistical Data (Global Perspective)

Indonesia's declared exports of e-cigarettes to the World in 2024 totaled \$270,287,000, with the United States, the Netherlands, China, the United Kingdom, and the United Arab Emirates emerging as the top destination countries. This trade value highlights Indonesia's growing role as an exporter and an increasingly important supplier within the global e-cigarette market, suggesting robust manufacturing capacity, expanding international reach, and a strengthening position in cross-border supply chains and industry dynamics.

### Total Value 2024:

Total Exports from Indonesia 2024: \$270,287,000

## Statistical Data (China as Origin)

China's reported exports of e-cigarettes to Indonesia in 2024 amounted to \$166,834,000, while Indonesia registered \$92,915,000 in imports from China highlighting a considerable **statistical discrepancy of \$73,919,000**. This gap points to notable differences in customs reporting, possible transshipment or

misdeclaration of products, and other logistical factors that can obscure the true scale of bilateral trade flows between the two countries. Such discrepancies underscore ongoing challenges in achieving transparency and consistency in international trade data for the e-cigarette sector.

**Total Value 2024:**

- Total Exports from China 2024: \$166,834,000
- Total Imports from China 2024: \$92,915,000
- **Statistical Gap: \$73,919,000**

## EXPORTS OF E-CIGARETTES FROM INDONESIA TO WORLD - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)
24041210	E-cigarette liquid or gel	INDONESIA	WORLD	256,459
24041290	Products intended for inhalation without combustion, containing nicotine, other than e-cigarette . . .	INDONESIA	WORLD	11,303
24041910	Products intended for inhalation without combustion, containing tobacco substitutes	INDONESIA	WORLD	827
24041920	Products intended for inhalation without combustion, containing nicotine substitutes	INDONESIA	WORLD	1031
85434000	Electronic cigarettes and similar personal electric vaporising devices	INDONESIA	WORLD	667
<b>Total:</b>				<b>270,287</b>

## EXPORTS OF E-CIGARETTES FROM INDONESIA TO TOP 5 DESTINATION COUNTRIES - STATISTICAL DATA (ITC DATABASE)

HS Code	TOP 5 DESTINATION COUNTRIES				
	UNITED STATES	NETHERLANDS	CHINA	UNITED KINGDOM	UNITED ARAB EMIRATES
240412	247,995	9,316	8,167	1,655	5
240419	0	0	558	0	398
854340	168	0	0	345	0
<b>Value in 2024 (Unit : US Dollar thousand)</b>	<b>248,163</b>	<b>9,316</b>	<b>8,725</b>	<b>2,009</b>	<b>403</b>

## EXPORTS OF E-CIGARETTES FROM CHINA TO INDONESIA - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)	Value in 2025-Q1 -Q2 (Unit : US Dollar thousand)
24041200	Other products containing nicotine, intended for inhalation without combustion	CHINA	INDONESIA	81,340	328
24041990	Other products containing nicotine substitutes, intended for inhalation without combustion	CHINA	INDONESIA	348	0
24041910	Other products containing tobacco substitutes, intended for inhalation without combustion	CHINA	INDONESIA	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	INDONESIA	85,146	0
<b>Total:</b>				<b>166,834</b>	<b>328</b>

## IMPORTS OF E-CIGARETTES TO INDONESIA FROM CHINA - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)	Value in 2025-Q1 -Q2 (Unit : US Dollar thousand)
24041210	E-cigarette liquid or gel	CHINA	INDONESIA	22,025	14,587
24041290	Products intended for inhalation without combustion, containing nicotine, other than e-cigarette . . .	CHINA	INDONESIA	7,387	2,056
24041920	Products intended for inhalation without combustion, containing nicotine substitutes	CHINA	INDONESIA	101	222
24041910	Products intended for inhalation without combustion, containing tobacco substitutes	CHINA	INDONESIA	0	0
85434000	Electronic cigarettes and similar personal electric vaporising devices	CHINA	INDONESIA	63,402	37,845
<b>Total:</b>				<b>92,915</b>	<b>54,710</b>



Exports from Indonesia (Global Perspective)

**270,287,000**

Total 2024 Value (USD)

Exports from China to Indonesia

**166,834,000**

Total 2024 Value (USD)  
1H 2025 Value (USD): 328,000

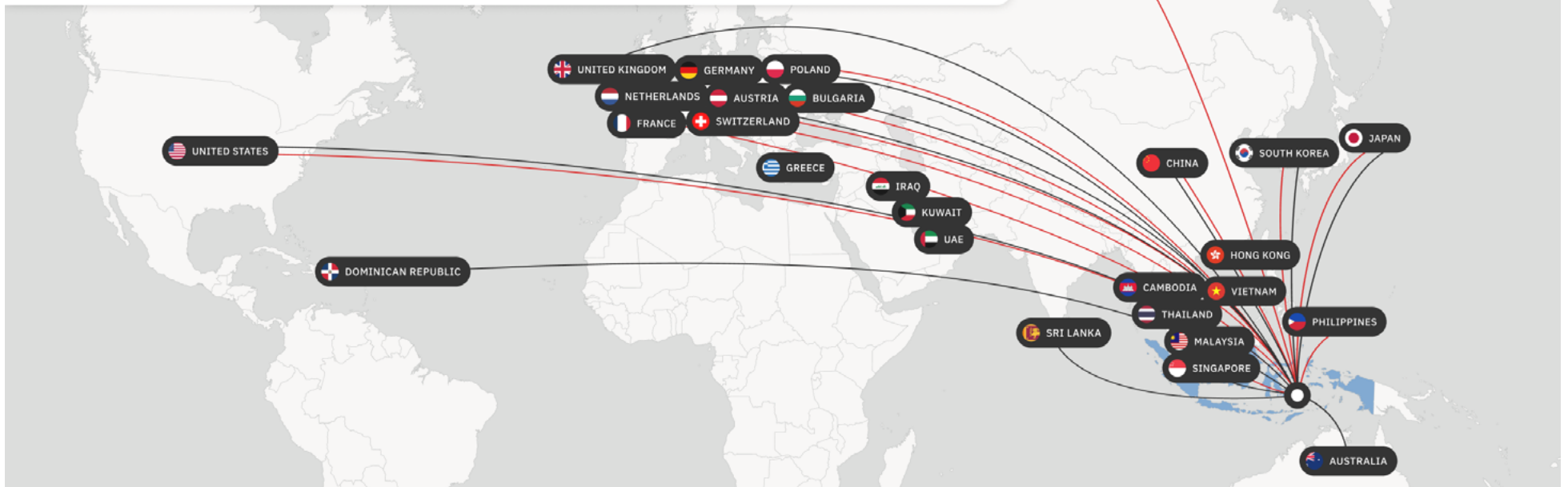
Imports to Indonesia from China

**92,915,000**

Total 2024 Value (USD)  
1H 2025 Value (USD): 54,710,000

**Statistical Data Gap \***  
**73,919,000**

\* Difference between the Exports and the Declared Imports (USD) — From Indonesia — To Indonesia



# INDONESIA

## TRADE DATA

The 2024 trade data shows over 4,000 e-cigarette shipments from China to Indonesia, totaling \$94.4 million and covering a wide variety of brands such as **Wangsheng, Wuyang, and others**. Shipments move through numerous exporters and importers, entering Indonesia via major ports like Tanjung Priok and Soekarno Hatta Airport. This pattern reflects Indonesia's expanding market demand for diverse e-cigarette products from China, supported by a broad and competitive supply chain. Persistent gaps in transport mode documentation highlight logistical and regulatory challenges that warrant further attention for improved oversight.

<b>Shipments:</b>	<b>4,036 Trade Shipments</b>
Period:	January - December 2024
Origin Countries:	China
Origin Ports:	Shekou: 54 %, Shenzhen: 20 %, Guangzhou: 4 %, Other ports: 22 %
Destination Countries:	<b>Indonesia</b>
Destination Ports:	Tanjung Priok: 55 %, Cengkareng Soekarno Hatta U: 33 %, Tanjung Perak: 7 %, Batu Ampar: 2 %, Other ports: 3 %
Products:	<b>Disposable pod devices, atomizer devices, disposable e-cigarettes, electronic cigarettes, cartridges, e-liquid, etc.</b>
E-Cigarette Brands:	<b>Wangsheng, Wuyang, and others</b>
Mode of Transport:	<b>Unknown: 99 %, Sea: 1 %</b>

## INDONESIA

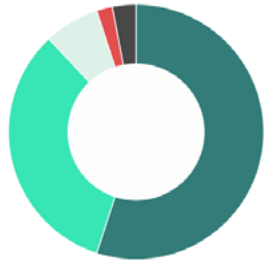
Value declared:	<b>94,416,721.99 USD</b> (95 % of shipments)
Weight declared:	1,197,436.74 KG (73 % of shipments)
Number of exporters:	131
Number of importers:	106
Top Exporters:	[REDACTED]
Top Importers:	[REDACTED]
HS Codes declared in shipments:	<p><b>854340:</b> Electronic cigarettes and similar personal electric vaporising devices (2,227 shipments)</p> <p><b>240412:</b> Other products containing nicotine, intended for inhalation without combustion (1,790 shipments)</p> <p><b>240419:</b> Other products intended for inhalation without combustion (19 shipments)</p>



Shipments (Period FY 2024)

**4,036**      **94,416,721.99**  
Quantity      Value (USD)

All included shipments and brands are recognized by regulatory authorities and involve only companies operating in compliance with legal requirements.



Destination Ports

- Tanjung Priok (55 %)
- Cengkareng Soekarno Hatta U (33 %)
- Tanjung Perak (7 %)
- Batu Ampar (2 %)
- Other ports (3 %)



Origin Ports from China

- Shekou (54 %)
- Shenzhen (20 %)
- Guangzhou (4 %)
- Other ports (22 %)

Mode of Transportation

Unknown: 99 %, Sea: 1 %

E-Cigarette Products

Disposable pod devices, atomizer devices, disposable e-cigarettes, electronic cigarettes, cartridges, e-liquid, etc.

Legal Brands at Time of Shipment

Legal brands at the time of shipment include various international brands such as WU XIANG, etc.

Top Importers

Top importers include various companies such as PT. ...

Top Exporters

Top exporters include various companies such as PT. ...

The online articles report on **seizures of illegal e-cigarette products in Indonesia**.

Indonesian police have uncovered home-based factories and clandestine labs producing illegal e-cigarette liquids, some laced with narcotics. Seizures have occurred in Jakarta, Batam, and Yogyakarta, with smuggled goods arriving from China, Malaysia, and Thailand via airports, hotels, and boats. Authorities have also disrupted international networks distributing drug-laced e-cigarettes.

These enforcement actions reflect an escalating trend of attempts to manufacture and traffic narcotic-infused e-cigarette products, often using sophisticated supply chains and deceptive packaging. Investigations have exposed both local actors and foreign nationals operating within Indonesia, with cases involving luxury apartments, shipping containers, and digital sales channels. In addition to product seizures, several illegal sellers—including foreign nationals—have been arrested and deported, and thousands of confiscated e-cigarette products have been destroyed in coordinated operations involving customs and police. This pattern points to a persistent challenge: Indonesia is both a key destination and a transit hub for illicit e-cigarette products, driving renewed calls for stringent regulatory controls, enhanced border vigilance, and stronger inter-agency cooperation to mitigate public health and security risks.

- **Locations of Seizures:** Seizures in Jakarta, Batam, Medan, Yogyakarta, Tangerang, and Tanjungbalai; targets included apartments, home labs, ports, and vessels.
- **Products & Methods:** Illegal e-cigarettes and liquids, often laced with narcotics, smuggled or homemade. International supply links included Iran, China, Malaysia, and Singapore.
- **Brands Seized:** [REDACTED] —alongside various foreign cigarette brands.
- **Scale & Enforcement:** Authorities (police, customs, BNN) conducted large-scale raids, destroyed thousands of units, and arrested syndicate members. Seizure values reached into the billions of rupiah.
- **Trend:** Organized crime networks exploit e-cigarette products for drug trafficking, driving frequent major busts and tougher enforcement actions.



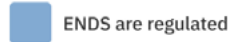
## INDONESIA ILLCIT TRADE OVERVIEW

Indonesian police have uncovered home-based factories and clandestine labs producing illegal e-cigarette liquids, some laced with narcotics. Seizures have occurred in Jakarta, Batam, and Yogyakarta, with smuggled goods arriving from China, Malaysia, and Thailand via airports, hotels, and boats. Authorities have also disrupted international networks distributing drug-laced e-cigarettes.

### Legend



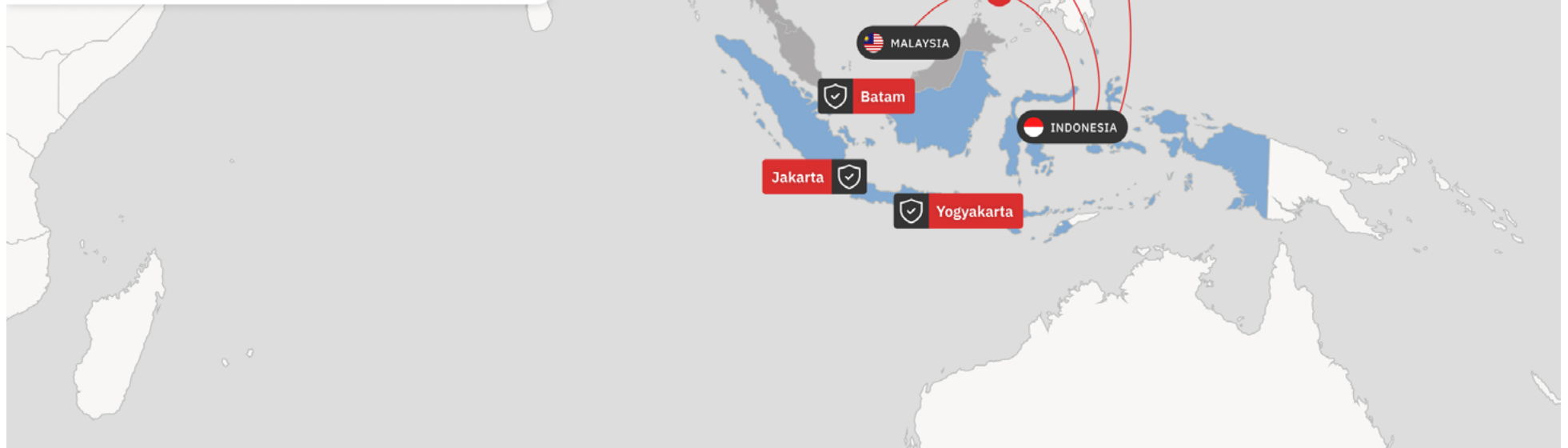
Seizure



ENDS are regulated



Illicit Shipment



Indonesian police raided a e-cigarette factory in Medan, arrested two suspects, and seized nearly 3,000 narcotics-laced cartridges along with materials to produce 57,000 more.



**Legend**

-  **Raid**
-  **Seizure**
-  **Arrest**
-  **ENDS are regulated**

**Source**

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- [Polda Sumut Bongkar Pabrik Liquid Vape Narkoba di Apartemen Mewah Medan Omzet Capai Rp15 Miliar per Hari](#)
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- [BNN Berantas Ribuan Vape Mengandung Zat Adiktif](#)
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## Contact us

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