

almares

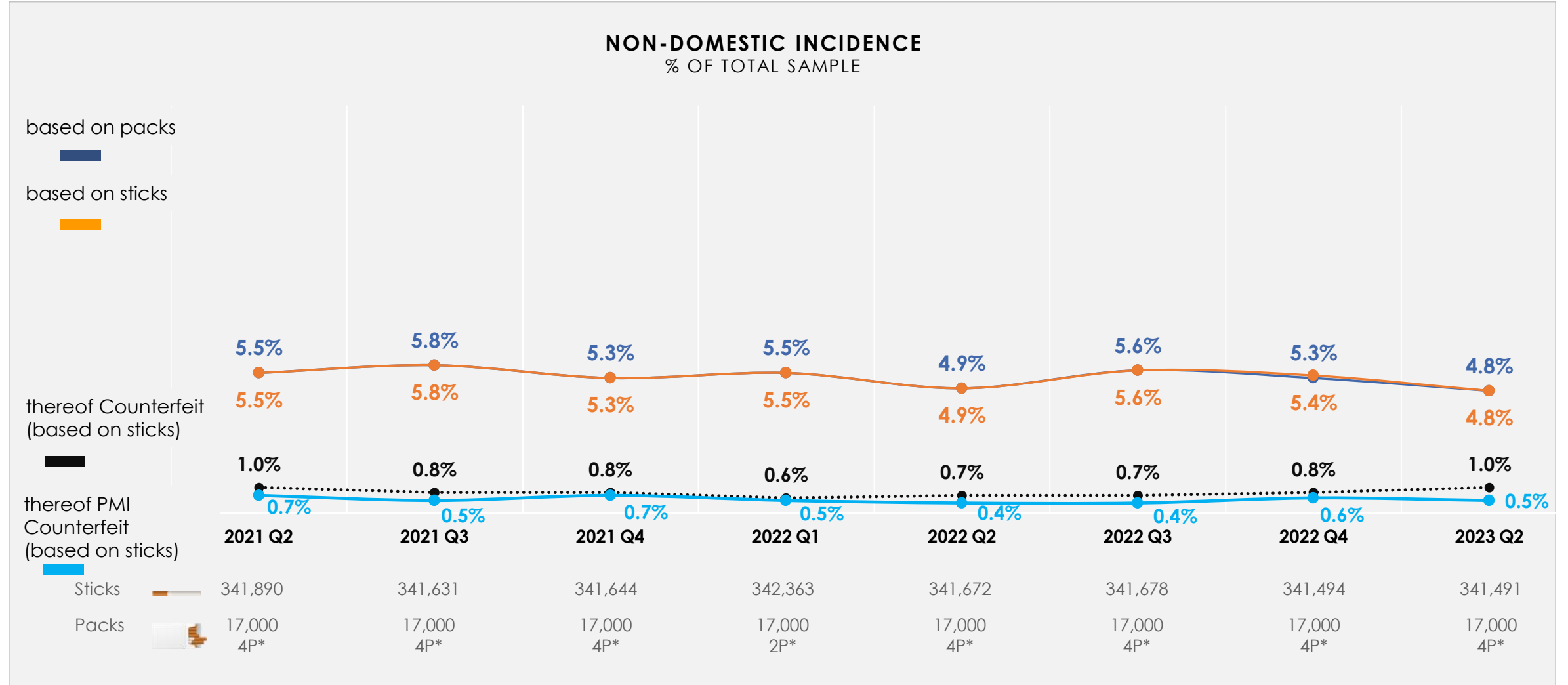
# EMPTY PACK SURVEY

## POLAND Q2 2023

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**AUGUST 2023**

# EXECUTIVE SUMMARY: NON-DOMESTIC TREND



# EXECUTIVE SUMMARY: KEY MESSAGES

## Industry overview

- Non-domestic incidence decreased to **4.8%** (vs 5.4% in Q4 2022, 5.6% in Q3 2022).
- Counterfeit incidence increased at **1.0%** (0.8%, 0.7%).
- Main non-domestic brands found were (excl. counterfeit):
  - **MINSK (GRODNO TOBACCO FACTORY)** with **0.7%** of all packs collected (0.7%, 1.1%).
  - **NZ (GRODNO TOBACCO FACTORY)** with **0.6%** (0.6%, 0.6%).
  - **MARLBORO (PMI)** with **0.3%** (0.3%, 0.4%).
- Main non-domestic market variants found were (excl. counterfeit):
  - **BELARUS** with **1.9%** of all packs collected (1.9%, 2.2%).
  - **DUTY FREE** with **0.7%** (0.9%, 0.7%).
  - **GERMANY** with **0.2%** (0.2%, 0.2%).
- Highest non-domestic in largest cities was found in: **BIAŁYSTOK** at **18.1%** (12.0%, 17.1%), **WARSZAWA** at **5.0%** (7.1%, 7.3%), and **LODZ** at **4.7%** (7.1%, 7.1%).

# OBJECTIVES, PROVISIONS, LIMITATIONS

## OBJECTIVES

Provide an indication on the incidence of non-domestic or illicit cigarettes consumed in POLAND.

- Tax-paid and non-tax paid cigarettes from other countries
- Counterfeit cigarettes
- Gain information related to non-domestic or counterfeit cigarettes by: Manufacturer, City, Brand family, Market variant

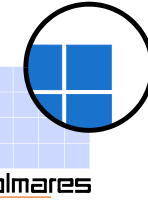
## PROVISIONS

- Participating companies: British American Tobacco (BAT), Imperial Tobacco (ITL), Japan Tobacco International (JTI), and Philip Morris International (PMI)
- Participating companies provided financial support for this study. ALMARES Institute conducted the empty pack collection independently. The market variant of all collected packs and the authenticity of the collected packs bearing their packs trademarks were examined by the participating companies.
- ALMARES Institute assumed limited responsibility for the report findings and conclusion. The objectives and limitations of the report are set out on this page. Should any party choose to rely on the report, they do so at their own risk.
- Non-domestic includes legal transportation

## LIMITATIONS

- Homes and workplaces are not covered
- No information on counterfeit incidence of non-participating companies
- The survey is designed to focus on trends rather than incidence at a single point in time

# RESEARCH APPROACH



## METHOD

Random collection from streets & public bins. Any brand, any market variant.

## TIMINGS

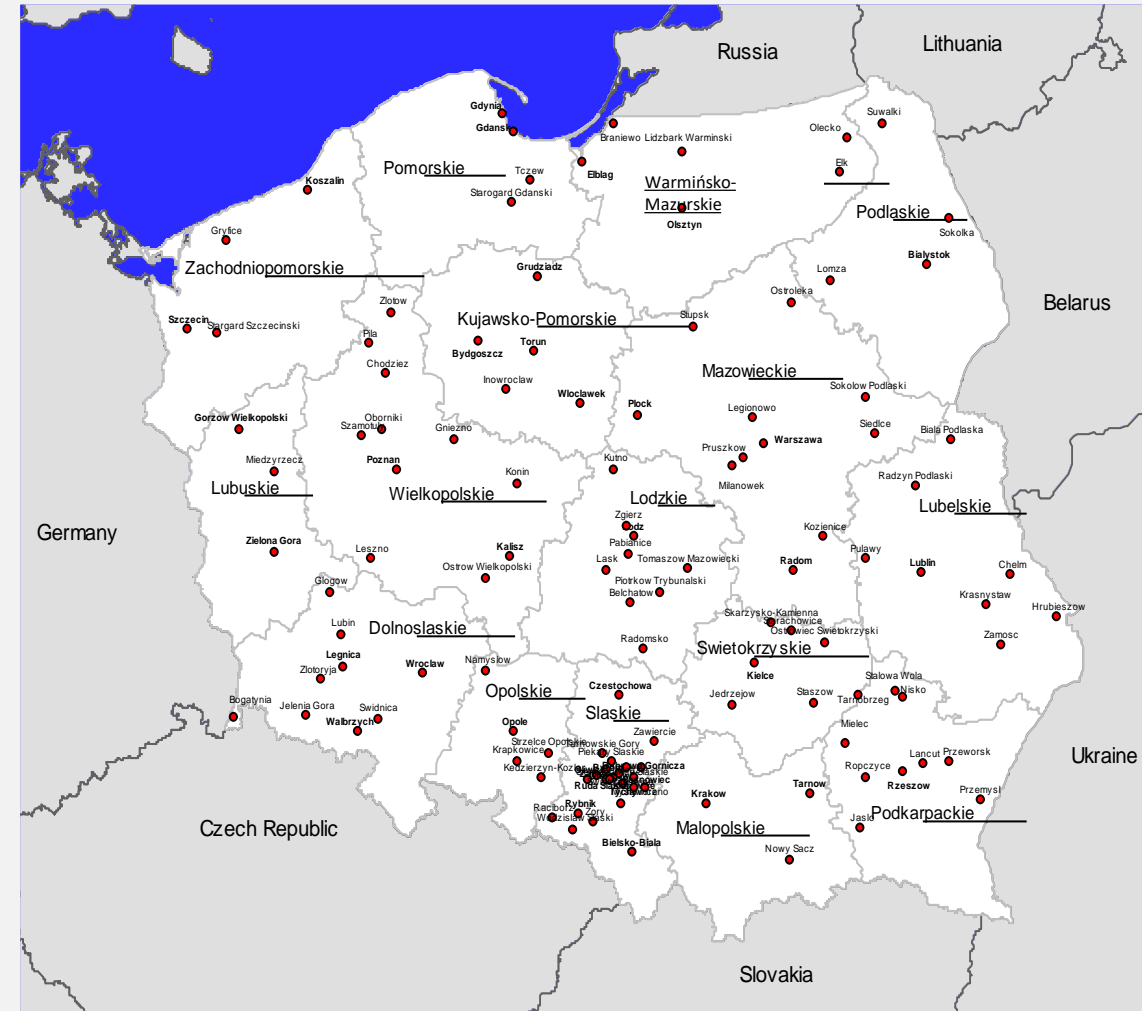
Fieldwork:  
3rd April – 9th May 2023

## REPORTING

The results are calculated based on number of sticks equivalent to the number of packs collected and weighted proportional to city population and smoking incidence.

## GEOGRAPHY

- 70 cities (40 largest cities and 30 smaller towns)
- Final data is weighted proportional to city population



## RESEARCH APPROACH

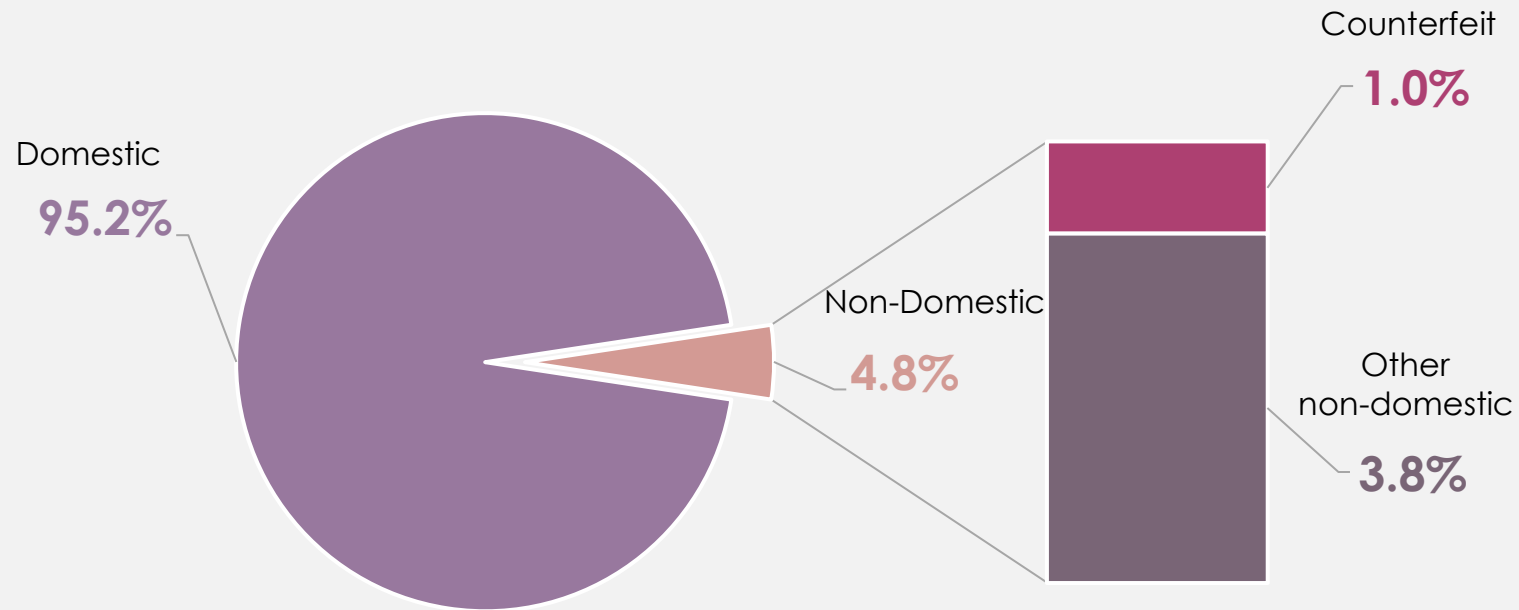
Voivodship	City	Actual Packs Collected	Weighted Packs Base
<b>Dolnoslaskie (borders: Czech Republic)</b>	Wroclaw	700	834
	Walbrzych	150	156
	Legnica	150	135
	Bogatynia	150	24
	Zlotoryja	150	21
<b>Kujawsko-Pomorskie</b>	Bydgoszcz	400	516
	Torun	225	292
	Wloclawek	150	165
	Grudziadz	150	140
<b>Lodzkie</b>	Lodz	825	1124
	Radomsko	150	75
	Lask	150	28
<b>Lubelskie (borders: Belarus, Ukraine)</b>	Lublin	400	560
	Krasnystaw	150	32
	Hrubieszow	150	30
	Radzyn Podlaski	150	26
<b>Lubuskie (borders: Germany)</b>	Gorzow Wielkopolski	150	174
	Zielona Gora	150	166
	Miedzyrzecz	150	26
<b>Malopolskie (borders: Slovakia)</b>	Krakow	825	940
	Tarnow	150	139
<b>Mazowieckie</b>	Warszawa	1850	2725
	Radom	250	345
	Plock	150	194
	Sokolow Podlaski	150	30
	Kozienice	150	29
	Milanowek	150	26
<b>Opolskie (borders: Czech Republic)</b>	Opole	150	158
	Strzelce Opolskie	150	24
	Krapkowice	150	22
	Namyslow	150	21
<b>Podkarpackie (borders: Slovakia, Ukraine)</b>	Rzeszow	200	227
	Jaslo	150	45
	Lancut	150	22
	Przeworsk	150	20
	Ropczyce	150	19
	Nisko	150	19

<b>Podlaskie (borders: Lithuania, Belarus)</b>	Bialystok	325	481
	Sokolka	150	31
<b>Pomorskie (borders: Russia)</b>	Gdansk	500	663
	Gdynia	275	356
<b>Slaskie (borders: Czech Republic, Slovakia)</b>	Katowice	350	477
	Czestochowa	275	364
	Sosnowiec	250	331
	Gliwice	225	291
	Zabrze	200	280
	Bielsko Biala	200	272
	Bytom	200	272
	Ruda Slaska	150	222
	Rybnik	150	220
	Tychy	150	202
<b>Swietokrzyskie</b>	Dabrowa Gornicza	150	194
	Chorzow	150	174
	Kielce	225	247
<b>Warminsko-Mazurskie (borders: Russia)</b>	Jedrzejow	150	20
	Staszow	150	19
	Olsztyn	200	285
<b>Wielkopolskie</b>	Elblag	150	200
	Braniewo	150	28
	Olecko	150	27
	Lidzbark Warminski	150	27
	Poznan	600	767
<b>Zachodniopomorskie (borders: Germany)</b>	Kalisz	150	146
	Chodziej	150	27
	Szamotuly	150	27
	Zlotow	150	26
	Oborniki	150	26
	Szczecin	450	586
	Koszalin	150	157
	Gryfice	150	24
	<b>Total Sample</b>	<b>17000</b>	<b>17000</b>

# NON-DOMESTIC: CATEGORIES

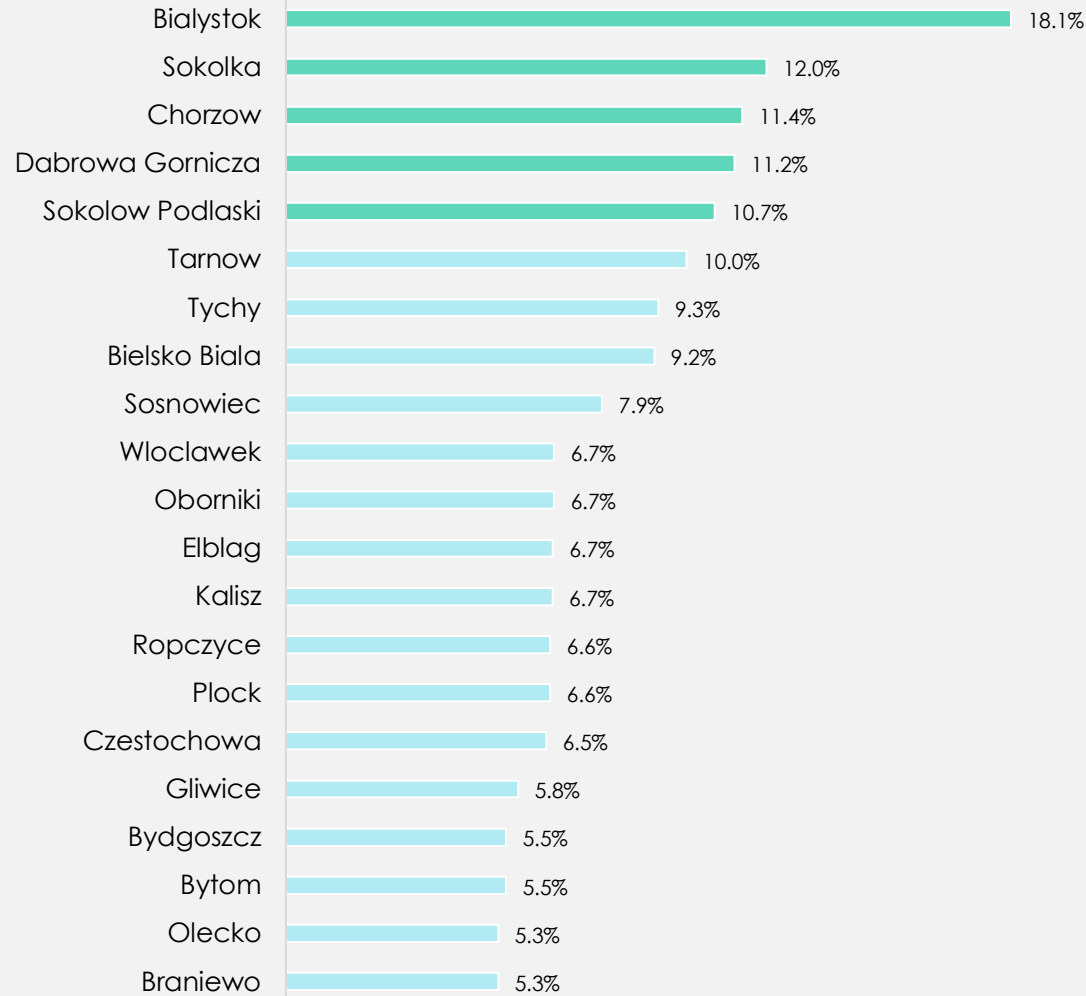
**NON-DOMESTIC INCIDENCE CATEGORIES**  
% OF TOTAL SAMPLE

— N= 341,491 sticks (weighted)

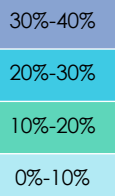
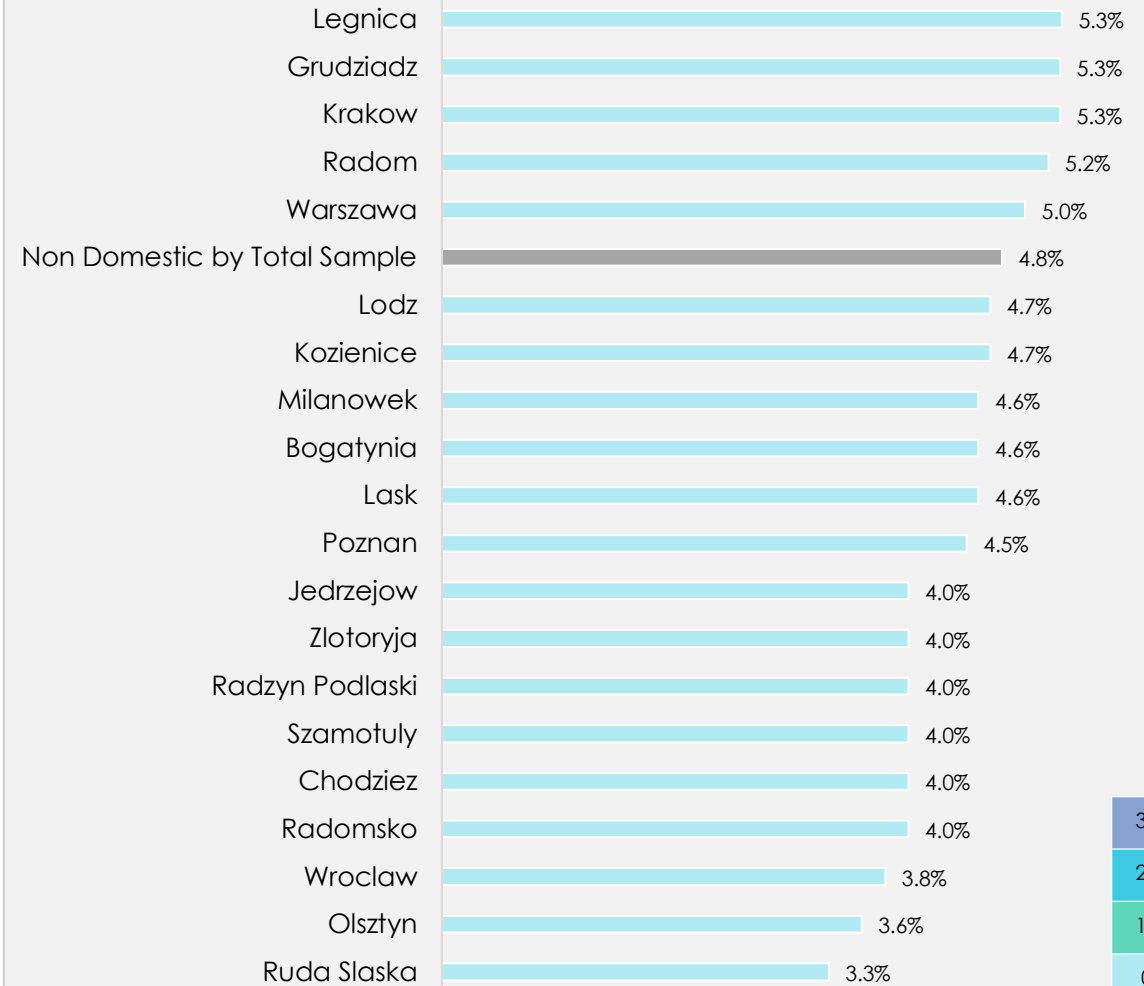


# NON-DOMESTIC: BY MARKET & CITY

**% OF CITY SAMPLE**  
Based on number of sticks



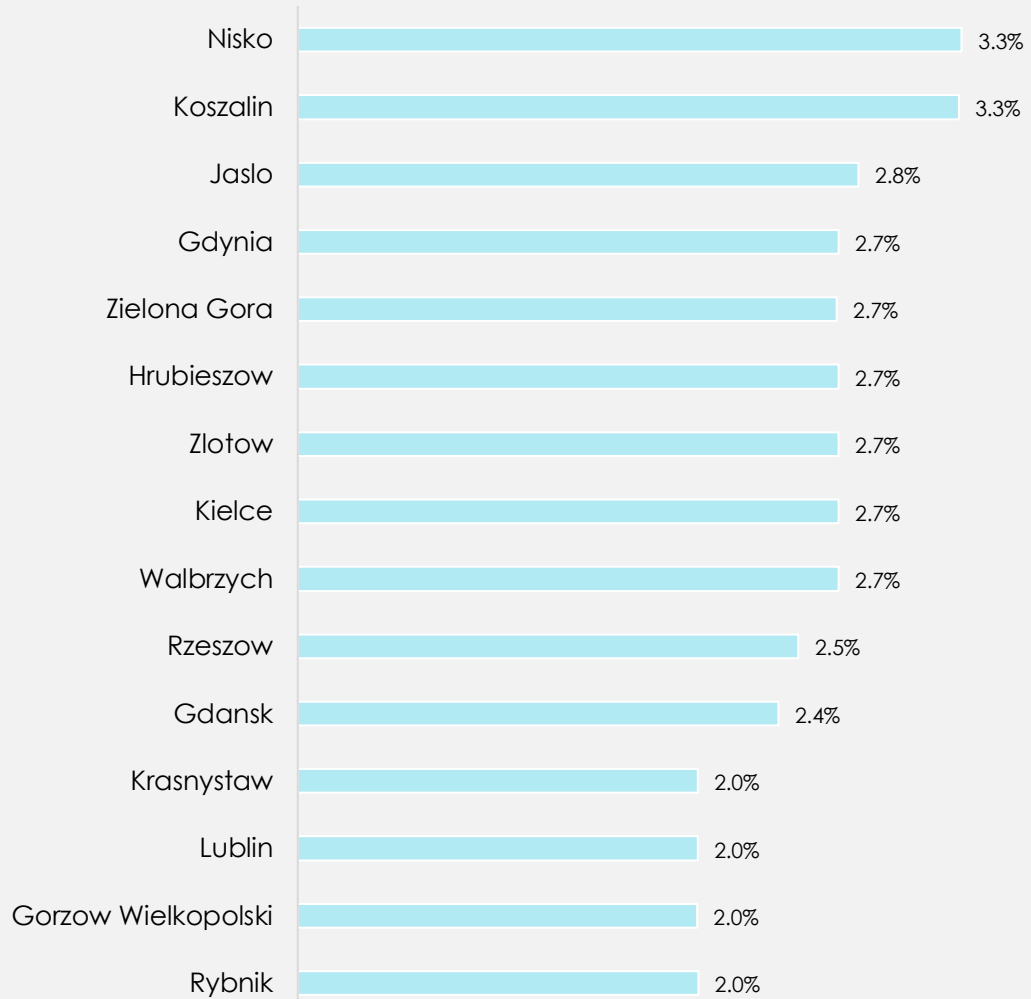
**% OF CITY SAMPLE**  
Based on number of sticks



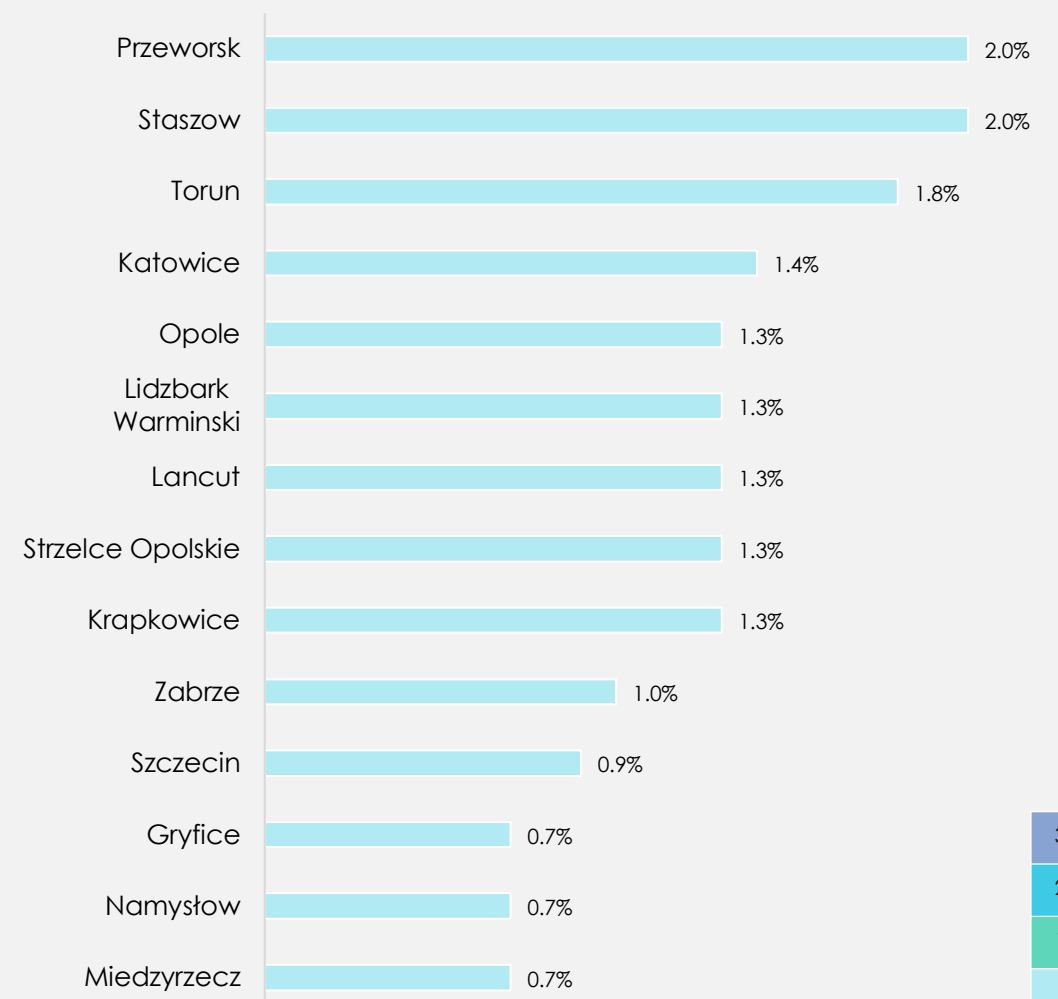


# NON-DOMESTIC: BY MARKET & CITY

**% OF CITY SAMPLE**  
Based on number of sticks



**% OF CITY SAMPLE**  
Based on number of sticks



# NON-DOMESTIC: BY BRAND FAMILY & CITY

% OF TOTAL SAMPLE Based on weighted sticks

— N= 341,491 sticks (weighted)

## NON-DOMESTIC

	COUNTERFEIT	MINSK (GRODNO TF)	NZ (GRODNO TF)	MARLBORO (PMI)	OTHERS	TOTAL	Q4 2022	Q3 2022
WARSZAWA	0.2%	0.1%	0.1%	0.0%	0.4%	<b>0.8%</b>	1.1%	1.2%
BIALYSTOK	0.0%	0.3%	0.1%	0.0%	0.1%	<b>0.5%</b>	0.3%	0.5%
ŁÓDŹ	0.1%	0.1%	0.1%	0.0%	0.1%	<b>0.3%</b>	0.5%	0.5%
KRAKOW	0.1%	0.0%	-	0.0%	0.2%	<b>0.3%</b>	0.3%	0.3%
POZNAŃ	0.0%	0.0%	0.0%	0.0%	0.1%	<b>0.2%</b>	0.2%	0.3%
WROCŁAW	0.1%	0.0%	0.0%	0.0%	0.1%	<b>0.2%</b>	0.3%	0.2%
BYDGOSZCZ	0.0%	0.0%	0.0%	0.0%	0.1%	<b>0.2%</b>	0.1%	0.2%
SOSNOWIEC	0.0%	0.0%	0.0%	0.0%	0.1%	<b>0.2%</b>	0.1%	0.2%
OTHERS	0.6%	0.2%	0.3%	0.1%	1.0%	<b>2.2%</b>	2.5%	2.3%
<b>TOTAL</b>	<b>1.0%</b>	<b>0.7%</b>	<b>0.6%</b>	<b>0.3%</b>	<b>2.2%</b>	<b>4.8%</b>	<b>5.4%</b>	<b>5.6%</b>
Q4 2022	0.8%	0.7%	0.6%	0.3%	2.9%	<b>5.4%</b>		
Q3 2022	0.7%	1.1%	0.6%	0.4%	2.8%	<b>5.6%</b>		

# NON-DOMESTIC: INCIDENCE TREND

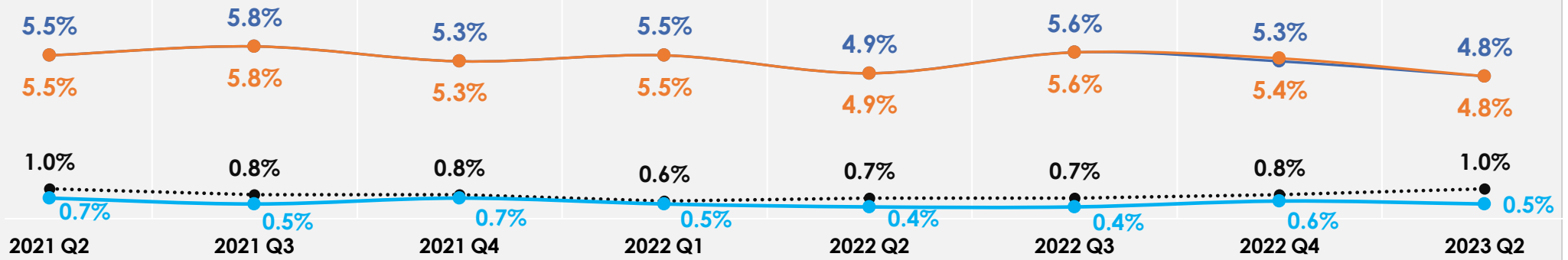
**NON-DOMESTIC INCIDENCE**  
% OF TOTAL SAMPLE

based on packs

based on sticks

thereof Counterfeit  
(based on sticks)

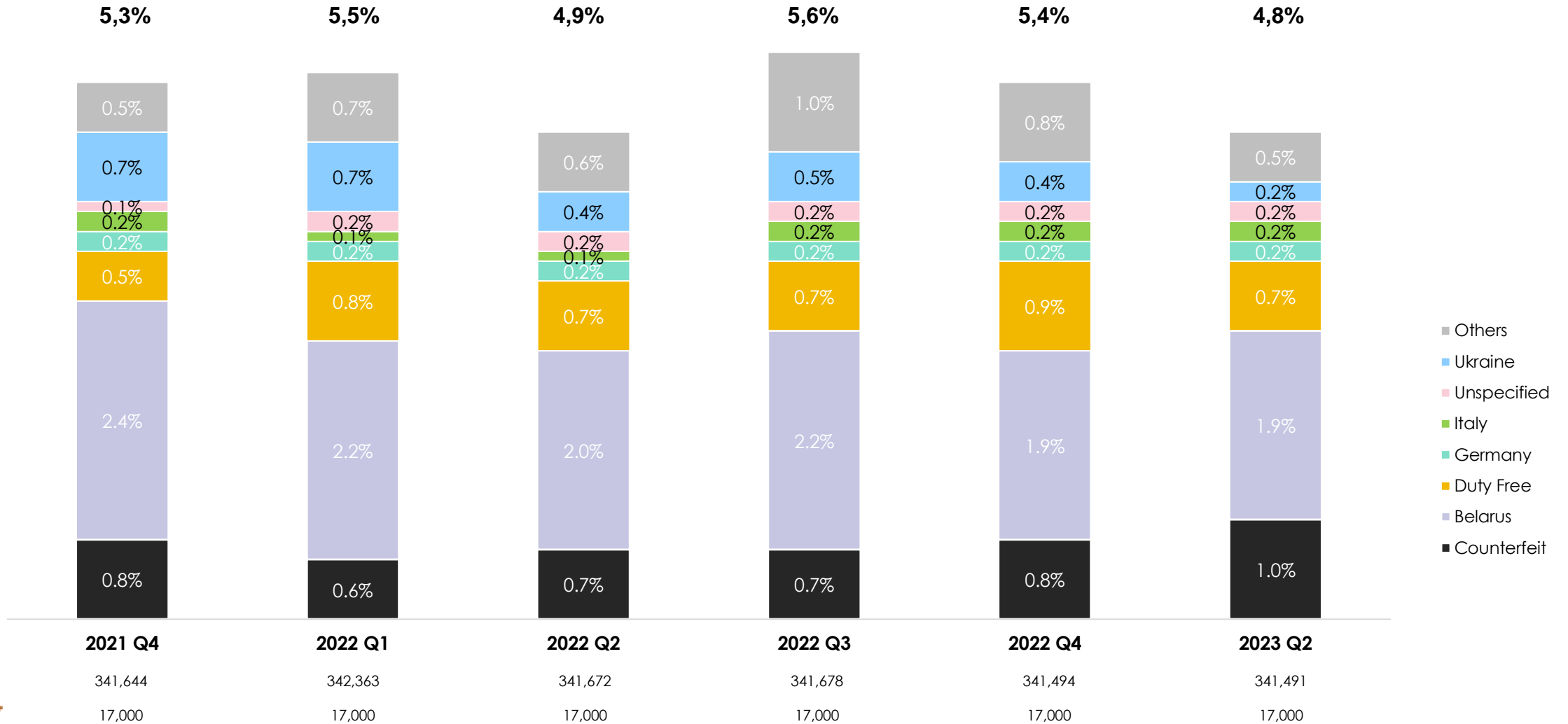
thereof PMI  
Counterfeit  
(based on sticks)



Sticks	341,890	341,631	341,644	342,363	341,672	341,678	341,494	341,491
Packs	17,000 4P*	17,000 4P*	17,000 4P*	17,000 2P*	17,000 4P*	17,000 4P*	17,000 4P*	17,000 4P*

# NON-DOMESTIC: MARKET VARIANT TREND

**% OF TOTAL SAMPLE**  
Based on weighted sticks



# NON-DOMESTIC: VOIVODSHIP TREND

SAMPLE			NON-DOMESTIC INCIDENCE						
VOIVODSHIP	PACKS	STICKS	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q2 2023
Podlaskie	475	10268	21.0%	15.5%	17.5%	15.3%	17.0%	12.1%	17.7%
Malopolskie	975	21702	4.2%	6.8%	6.4%	4.2%	4.4%	5.6%	5.9%
Slaskie	2450	66406	4.3%	5.3%	4.3%	4.5%	5.1%	5.1%	5.7%
Mazowieckie	2700	67263	8.7%	7.0%	8.5%	8.0%	7.8%	8.5%	5.2%
Wielkopolskie	1350	20449	4.2%	4.7%	2.8%	1.5%	6.9%	4.0%	4.8%
Warminsko-Mazurskie	800	11396	5.2%	3.7%	5.0%	2.9%	5.8%	3.9%	4.7%
Lodzkie	1125	24620	6.5%	8.1%	7.3%	5.4%	6.8%	6.9%	4.7%
Kujawsko-Pomorskie	925	22403	4.6%	3.4%	3.3%	3.6%	3.7%	3.5%	4.7%
Dolnoslaskie	1300	23494	4.1%	3.4%	5.5%	4.6%	4.3%	4.4%	3.9%
Swietokrzyskie	525	5731	2.1%	2.7%	3.6%	3.3%	2.6%	1.3%	2.7%
Podkarpackie	950	7066	5.4%	6.5%	5.9%	6.2%	7.5%	5.5%	2.7%
Pomorskie	775	20454	4.0%	2.9%	2.8%	2.1%	2.7%	2.5%	2.5%
Lubuskie	450	7326	4.6%	2.1%	1.8%	1.6%	0.9%	2.3%	2.2%
Lubelskie	850	12976	5.3%	2.2%	1.8%	4.1%	4.1%	3.2%	2.1%
Zachodniopomorskie	750	15400	3.9%	2.1%	2.8%	2.1%	3.2%	2.5%	1.4%
Opolskie	600	4537	4.5%	0.7%	2.5%	0.9%	1.7%	1.7%	1.3%
<b>TOTAL SAMPLE</b>	<b>17,000</b>	<b>341,491</b>	<b>5.8%</b>	<b>5.3%</b>	<b>5.5%</b>	<b>4.9%</b>	<b>5.6%</b>	<b>5.4%</b>	<b>4.8%</b>

# AGENCY CONTACTS



## KEY POINT OF CONTACT

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## RESEARCH SUPPORT

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## RESEARCH SUPPORT

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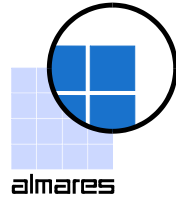
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**ALMARES INSTITUTE FOR  
CONSULTING AND MARKET  
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**THANK YOU**