

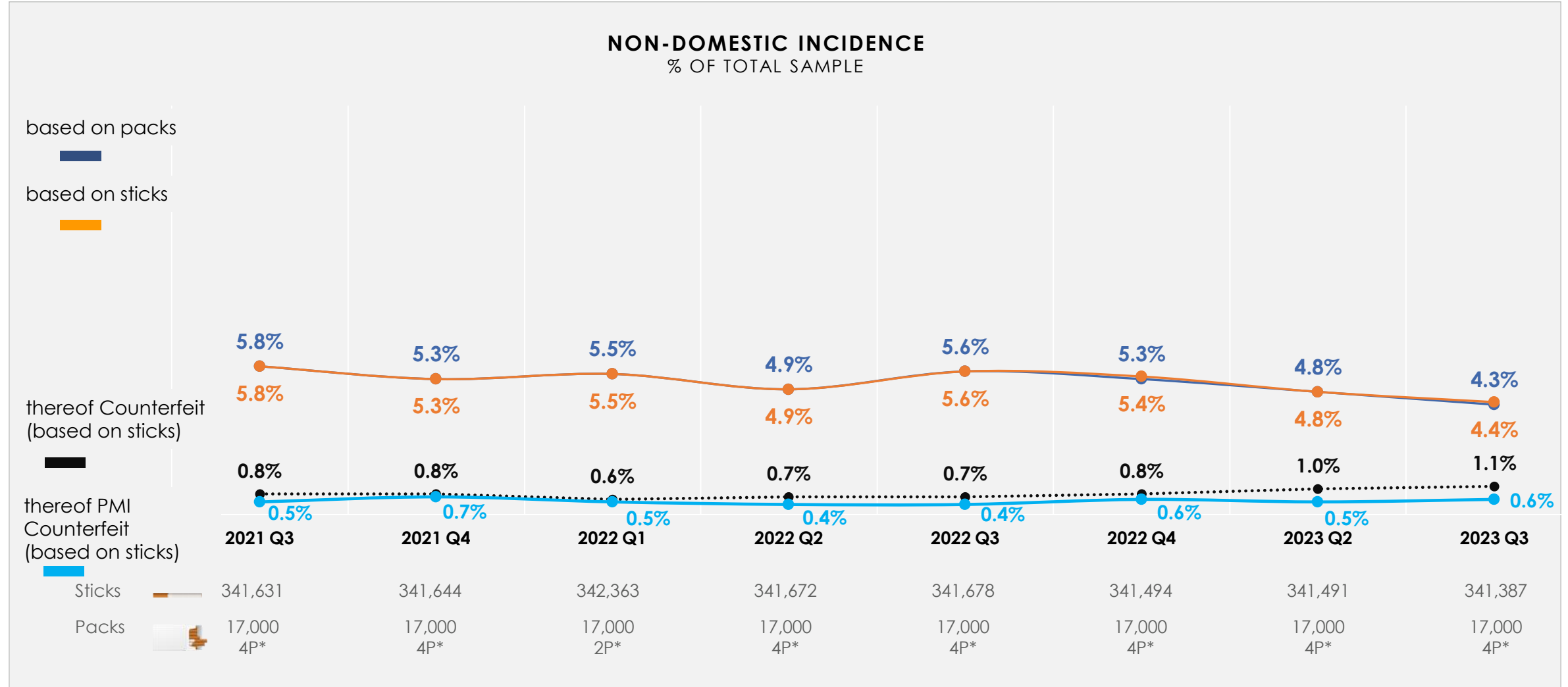
almares

EMPTY PACK SURVEY

POLAND Q3 2023

NOVEMBER 2023

EXECUTIVE SUMMARY: NON-DOMESTIC TREND



EXECUTIVE SUMMARY: KEY MESSAGES

Industry overview

- Non-domestic incidence decreased to **4.4%** (vs 4.8% in Q2 2023, 5.4% in Q4 2022).
- Counterfeit incidence increased to **1.1%** (1.0%, 0.8%).
- Main non-domestic brands found were (excl. counterfeit):
 - **NZ (GRODNO TOBACCO FACTORY)** with **0.6%** of all packs collected (0.6%, 0.6%).
 - **MINSK (GRODNO TOBACCO FACTORY)** with **0.6%** (0.7%, 0.7%).
 - **MARLBORO (PMI)** with **0.2%** (0.3%, 0.3%).
- Main non-domestic market variants found were (excl. counterfeit):
 - **BELARUS** with **1.7%** of all packs collected (1.9%, 1.9%).
 - **DUTY FREE** with **0.4%** (0.7%, 0.9%).
 - **UKRAINE** with **0.2%** (0.2%, 0.4%).
- Highest non-domestic incidence in largest cities was found in: **ŁÓDŹ** at **6.7%** (4.7%, 7.1%), **WROCŁAW** at **5.6%** (3.8%, 5.2%), and **WARSZAWA** at **4.3%** (5.0%, 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

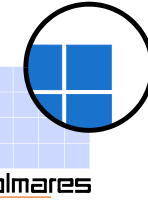
PROVISIONS

- 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

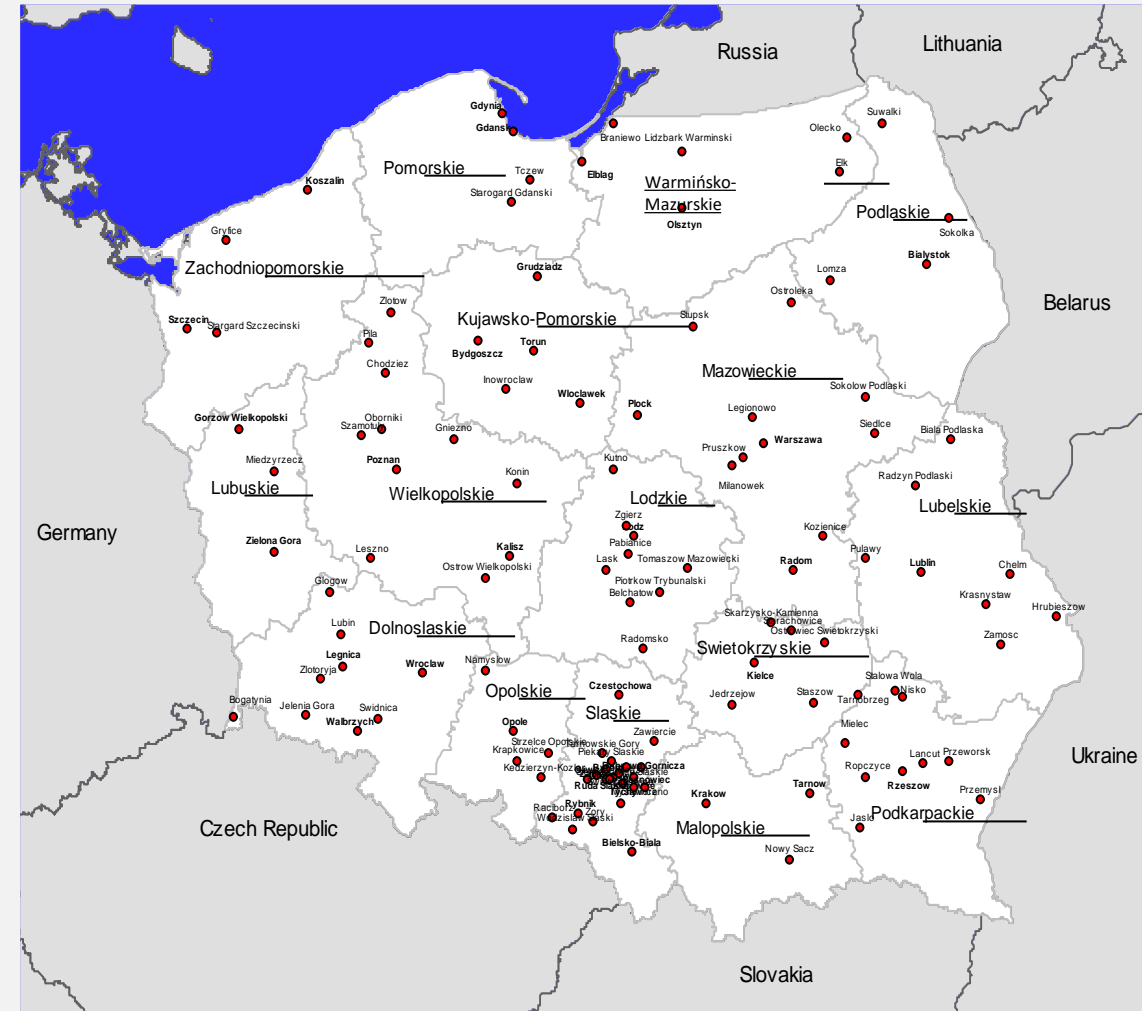
Fieldwork:
25th July – 9th August 2023

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

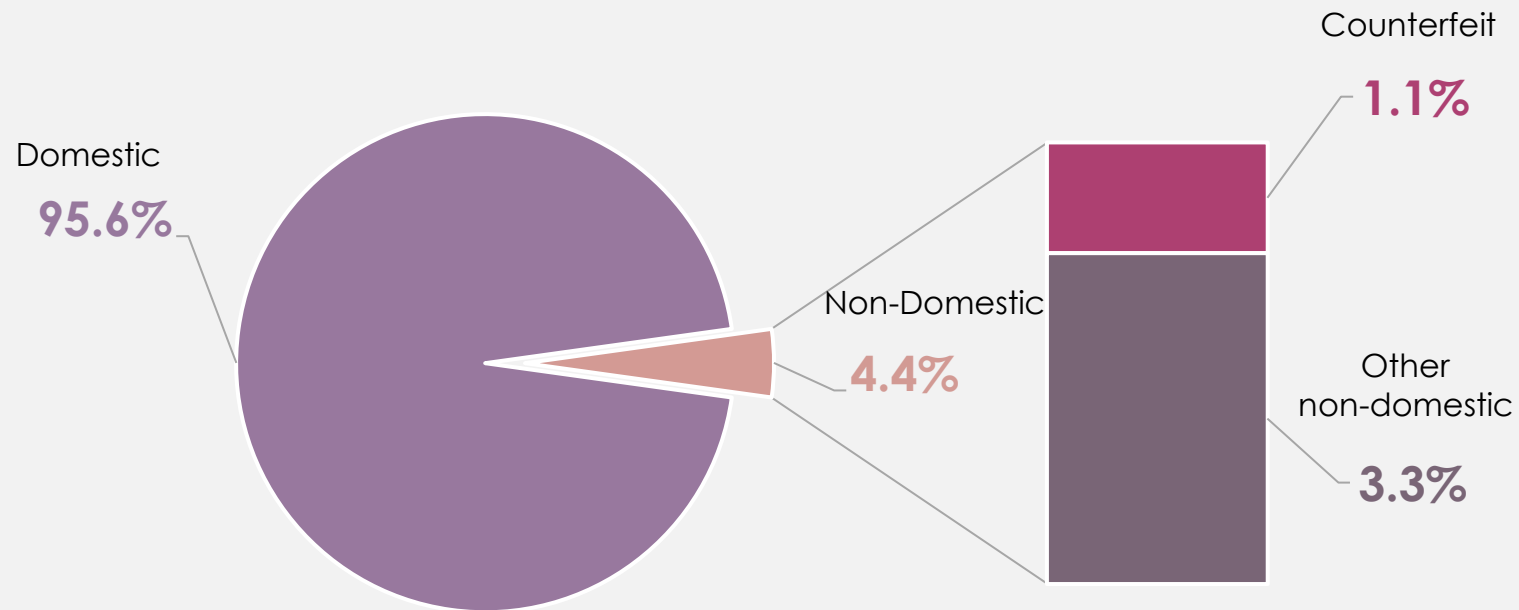
Voivodship	City	Actual Packs Collected	Weighted Packs Base
Dolnoslaskie (borders: Czech Republic)	Wroclaw	700	834
	Walbrzych	150	156
	Legnica	150	135
	Bogatynia	150	24
	Zlotoryja	150	21
Kujawsko-Pomorskie	Bydgoszcz	400	516
	Torun	225	292
	Wloclawek	150	165
	Grudziadz	150	140
Lodzkie	Lodz	825	1124
	Radomsko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

Podlaskie (borders: Lithuania, Belarus)	Bialystok	325	481
	Sokolka	150	31
Pomorskie (borders: Russia)	Gdansk	500	663
	Gdynia	275	356
Slaskie (borders: Czech Republic, Slovakia)	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
	Dabrowa Gornicza	150	194
Chorzow	150	174	
Swietokrzyskie	Kielce	225	247
	Jedrzejow	150	20
	Staszow	150	19
Warminsko-Mazurskie (borders: Russia)	Olsztyn	200	285
	Elblag	150	200
	Braniewo	150	28
	Olecko	150	27
	Lidzbark Warminski	150	27
Wielkopolskie	Poznan	600	767
	Kalisz	150	146
	Chodziej	150	27
	Szamotuly	150	27
	Zlotow	150	26
	Oborniki	150	26
Zachodniopomorskie (borders: Germany)	Szczecin	450	586
	Koszalin	150	157
	Gryfice	150	24
	Total Sample	17000	17000

NON-DOMESTIC: CATEGORIES

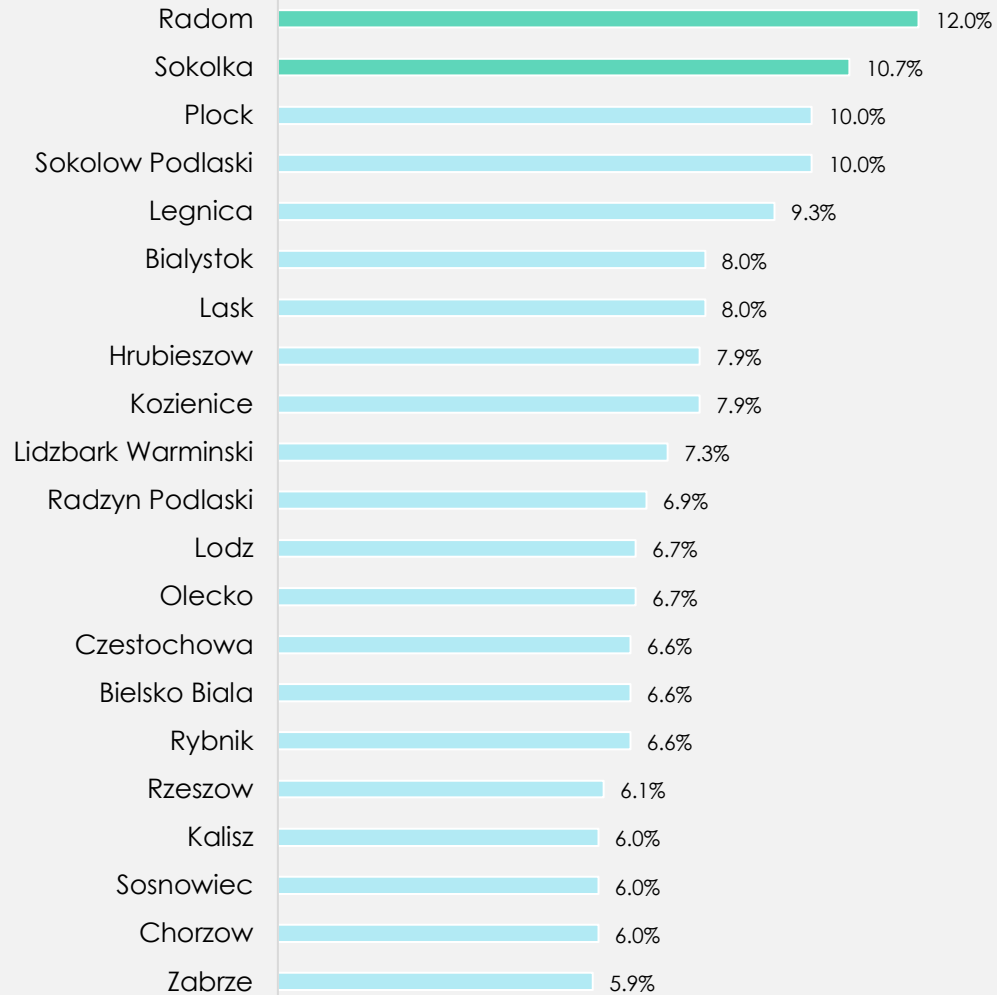
NON-DOMESTIC INCIDENCE CATEGORIES
% OF TOTAL SAMPLE

— N= 341,387 sticks (weighted)

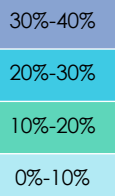
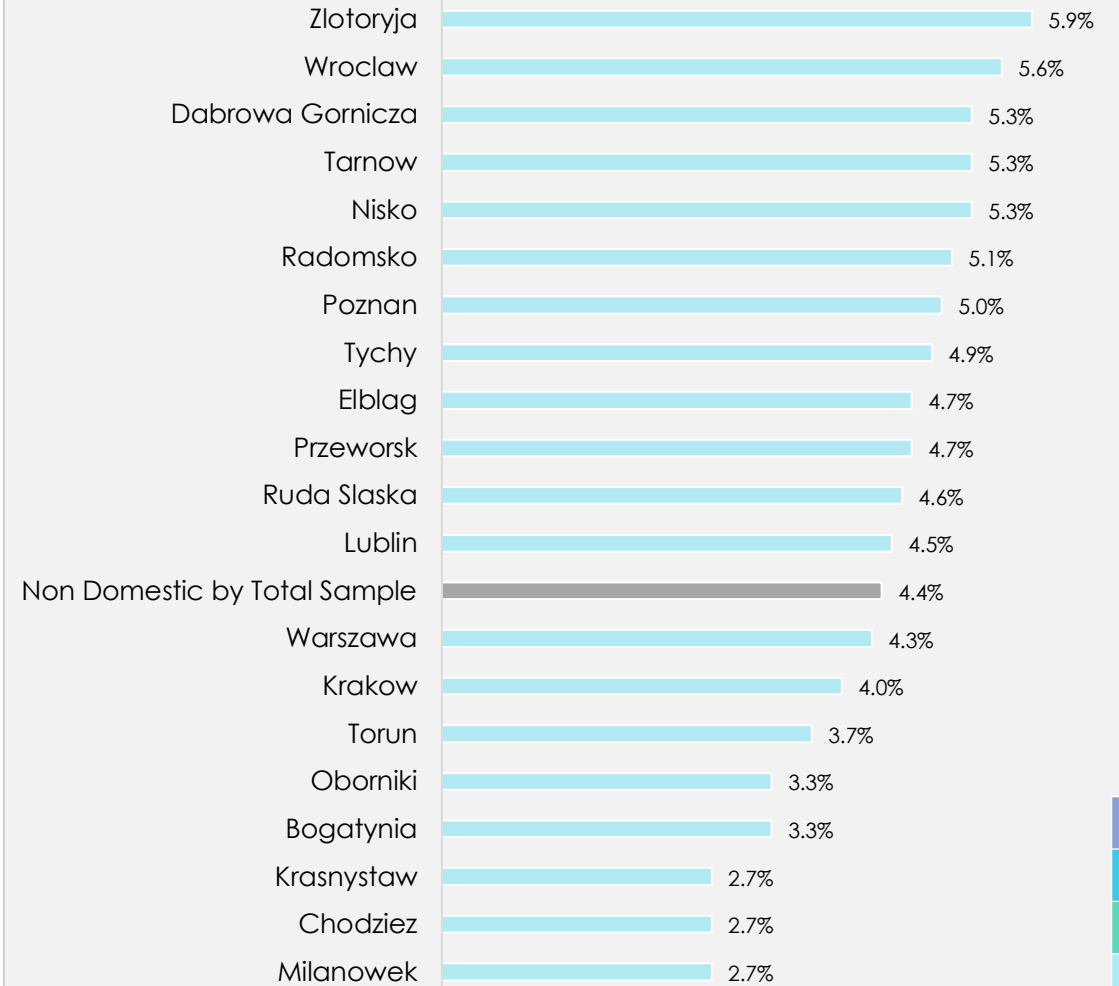


NON-DOMESTIC: BY MARKET & CITY

% OF CITY SAMPLE
Based on number of sticks

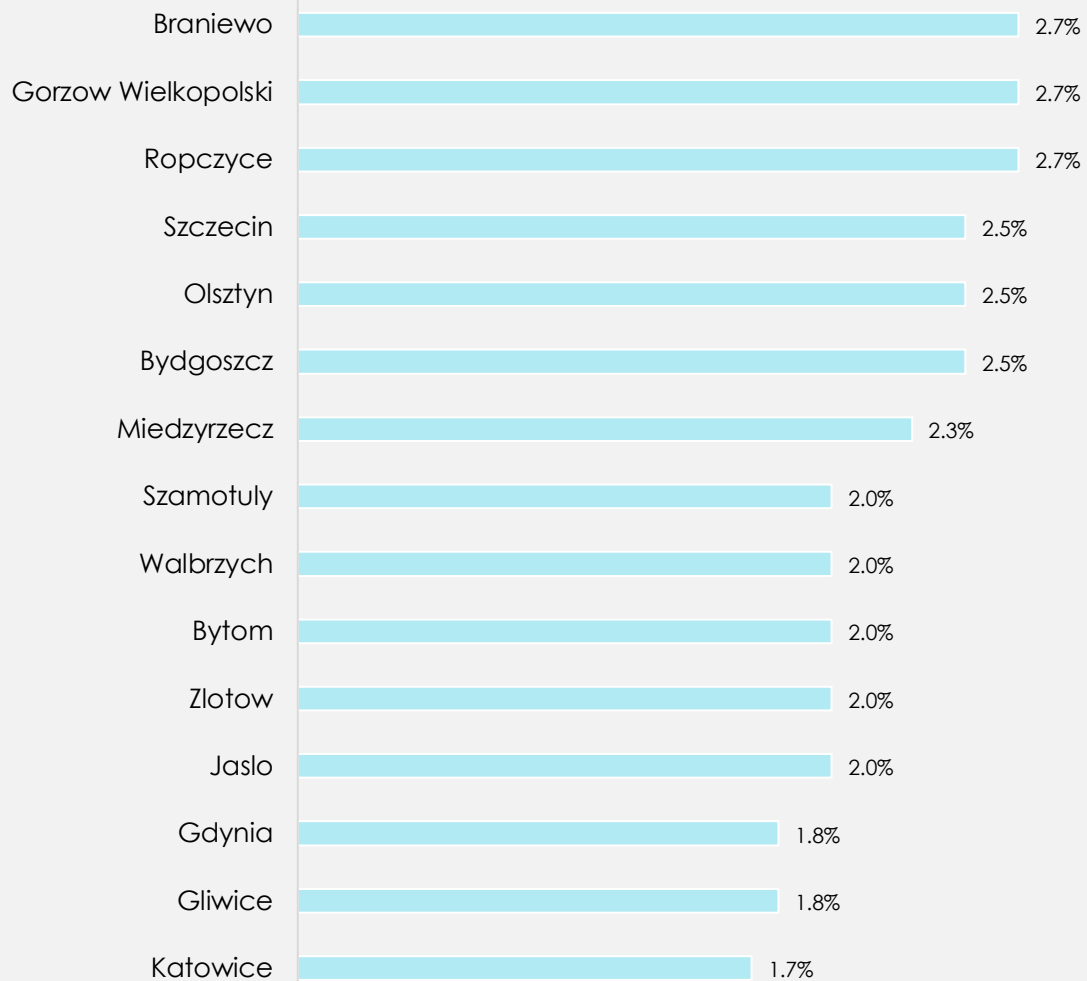


% OF CITY SAMPLE
Based on number of sticks

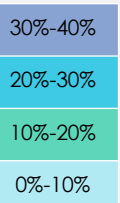
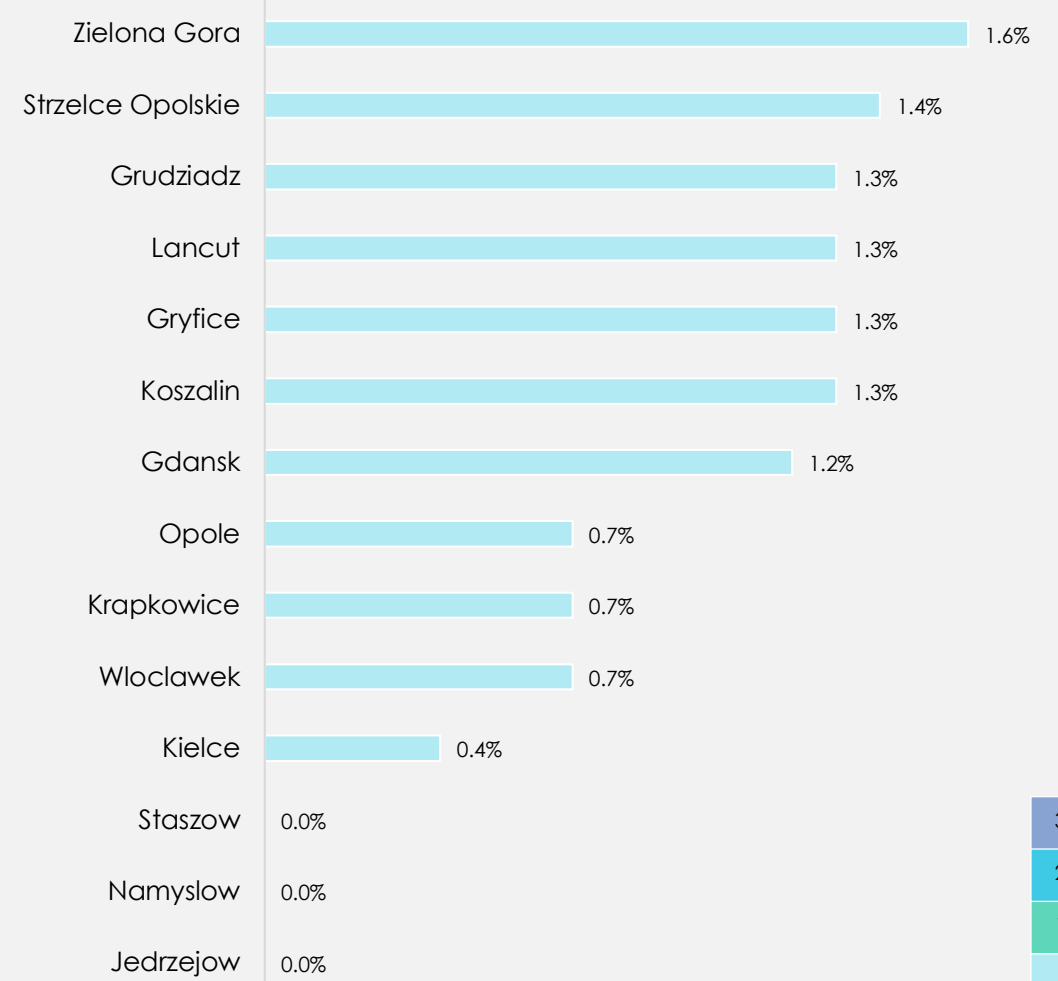


NON-DOMESTIC: BY MARKET & CITY

% OF CITY SAMPLE
Based on number of sticks



% OF CITY SAMPLE
Based on number of sticks





NON-DOMESTIC: BY BRAND FAMILY & CITY

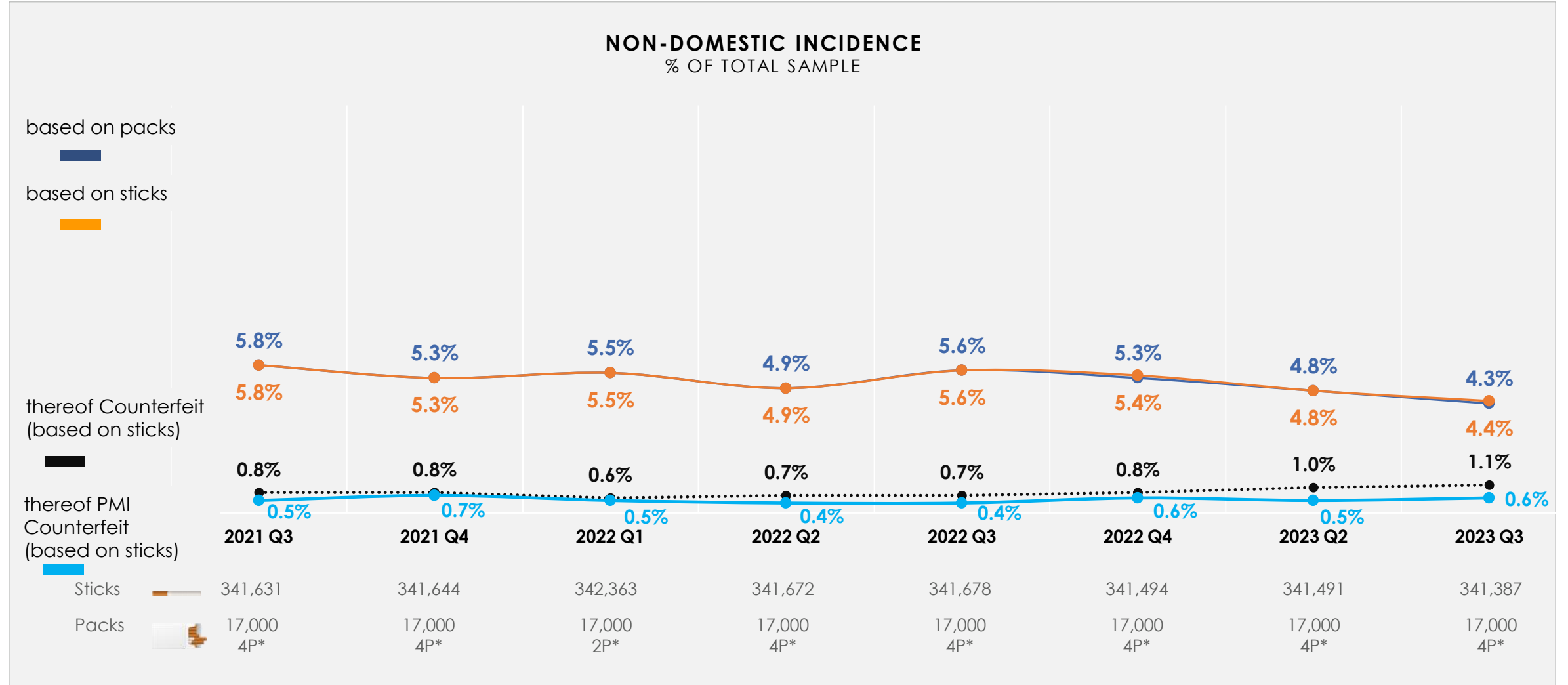
% OF TOTAL SAMPLE Based on weighted sticks

N= 341,387 sticks (weighted)

NON-DOMESTIC

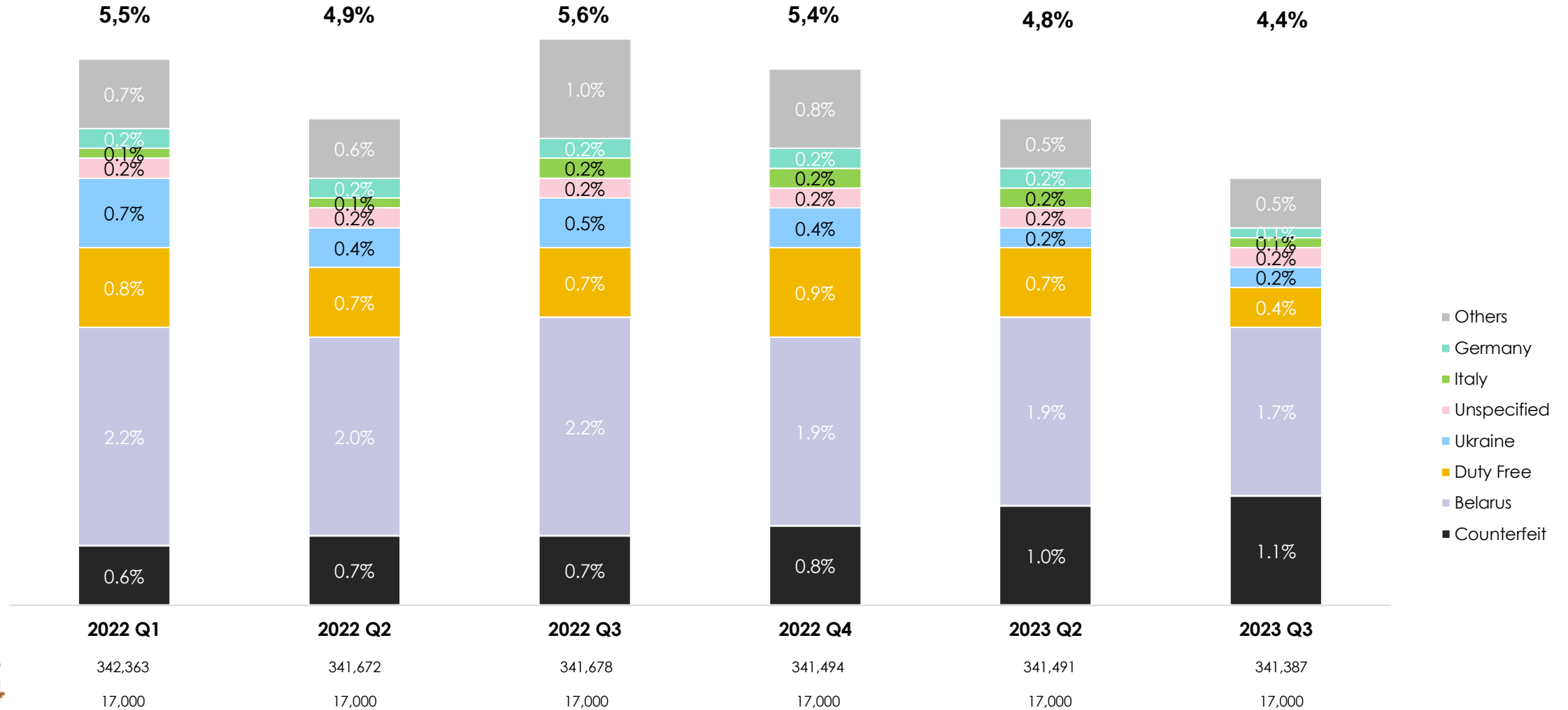
	COUNTERFEIT	NZ (GRODNO TF)	MINSK (GRODNO TF)	MARLBORO (PMI)	OTHERS	TOTAL	Q2 2023	Q4 2022
WARSZAWA	0.1%	0.1%	0.1%	0.0%	0.4%	0.7%	0.8%	1.1%
ŁÓDŹ	0.0%	0.1%	0.1%	0.0%	0.1%	0.4%	0.3%	0.5%
WROCŁAW	0.1%	-	0.0%	0.0%	0.1%	0.3%	0.2%	0.3%
RADOM	0.0%	0.1%	0.0%	0.0%	0.1%	0.2%	0.2%	0.1%
BIALYSTOK	0.0%	0.0%	0.1%	-	0.1%	0.2%	0.5%	0.3%
POZNAŃ	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.2%	0.2%
KRAKOW	0.1%	0.0%	0.0%	0.0%	0.1%	0.2%	0.3%	0.3%
OTHERS	0.7%	0.3%	0.2%	0.1%	1.0%	2.1%	2.5%	2.6%
TOTAL	1.1%	0.6%	0.6%	0.2%	1.9%	4.4%	4.8%	5.4%
Q2 2023	1.0%	0.6%	0.7%	0.3%	2.2%	4.8%		
Q4 2022	0.8%	0.6%	0.7%	0.3%	2.9%	5.4%		

NON-DOMESTIC: INCIDENCE TREND



NON-DOMESTIC: MARKET VARIANT TREND

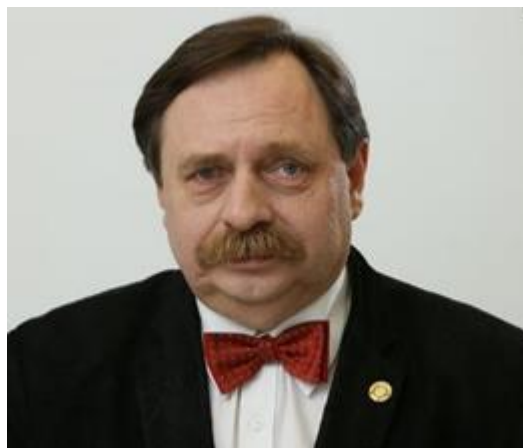
% OF TOTAL SAMPLE
Based on weighted sticks



NON-DOMESTIC: VOIVODSHIP TREND

SAMPLE			NON-DOMESTIC INCIDENCE						
VOIVODSHIP	PACKS	STICKS	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q2 2023	Q3 2023
Podlaskie	512	10247	15.5%	17.5%	15.3%	17.0%	12.1%	17.7%	8.2%
Lodzkie	1228	24684	8.1%	7.3%	5.4%	6.8%	6.9%	4.7%	6.6%
Dolnoslaskie	1169	23434	3.4%	5.5%	4.6%	4.3%	4.4%	3.9%	5.5%
Mazowieckie	3348	67206	7.0%	8.5%	8.0%	7.8%	8.5%	5.2%	5.5%
Podkarpackie	352	7080	6.5%	5.9%	6.2%	7.5%	5.5%	2.7%	5.0%
Wielkopolskie	1019	20482	4.7%	2.8%	1.5%	6.9%	4.0%	4.8%	4.9%
Lubelskie	649	12990	2.2%	1.8%	4.1%	4.1%	3.2%	2.1%	4.7%
Slaskie	3300	66379	5.3%	4.3%	4.5%	5.1%	5.1%	5.7%	4.6%
Malopolskie	1079	21646	6.8%	6.4%	4.2%	4.4%	5.6%	5.9%	4.2%
Warminsko-Mazurskie	567	11358	3.7%	5.0%	2.9%	5.8%	3.9%	4.7%	3.7%
Kujawsko-Pomorskie	1114	22396	3.4%	3.3%	3.6%	3.7%	3.5%	4.7%	2.4%
Zachodniopomorskie	767	15445	2.1%	2.8%	2.1%	3.2%	2.5%	1.4%	2.2%
Lubuskie	366	7342	2.1%	1.8%	1.6%	0.9%	2.3%	2.2%	2.2%
Pomorskie	1019	20446	2.9%	2.8%	2.1%	2.7%	2.5%	2.5%	1.4%
Opolskie	226	4528	0.7%	2.5%	0.9%	1.7%	1.7%	1.3%	0.7%
Swietokrzyskie	286	5723	2.7%	3.6%	3.3%	2.6%	1.3%	2.7%	0.4%
TOTAL SAMPLE	17,000	341,387	5.3%	5.5%	4.9%	5.6%	5.4%	4.8%	4.4%

AGENCY CONTACTS



KEY POINT OF CONTACT

Andrzej Ludek

President & CEO

Andrzej.Ludek@almares.com.pl

Tel: +48 22 621 82 18 ext. 106



RESEARCH SUPPORT

Zbigniew Korona

Data Processing Department Manager

Zbigniew.Korona@almares.com.pl



RESEARCH SUPPORT

Marcin Rudzinski

Director of Field Operations

Marcin.Rudzinski@almares.com.pl

Tel: +48 22 621 82 18 ext. 102



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THANK YOU