



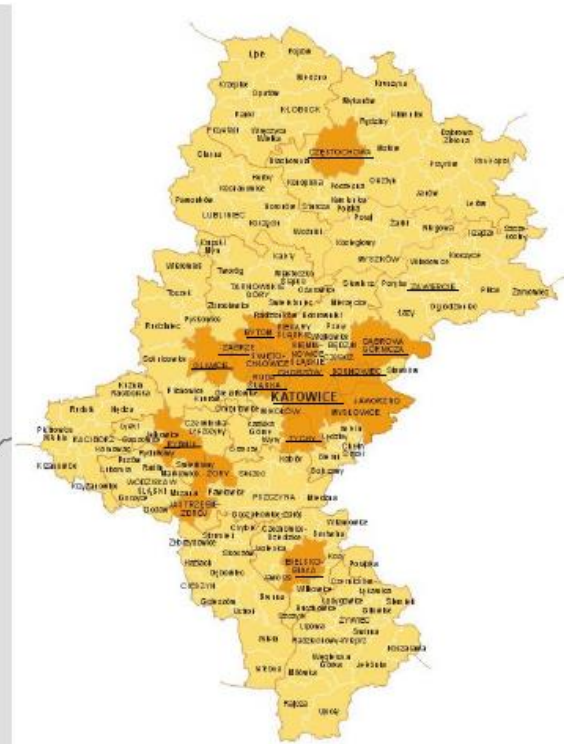
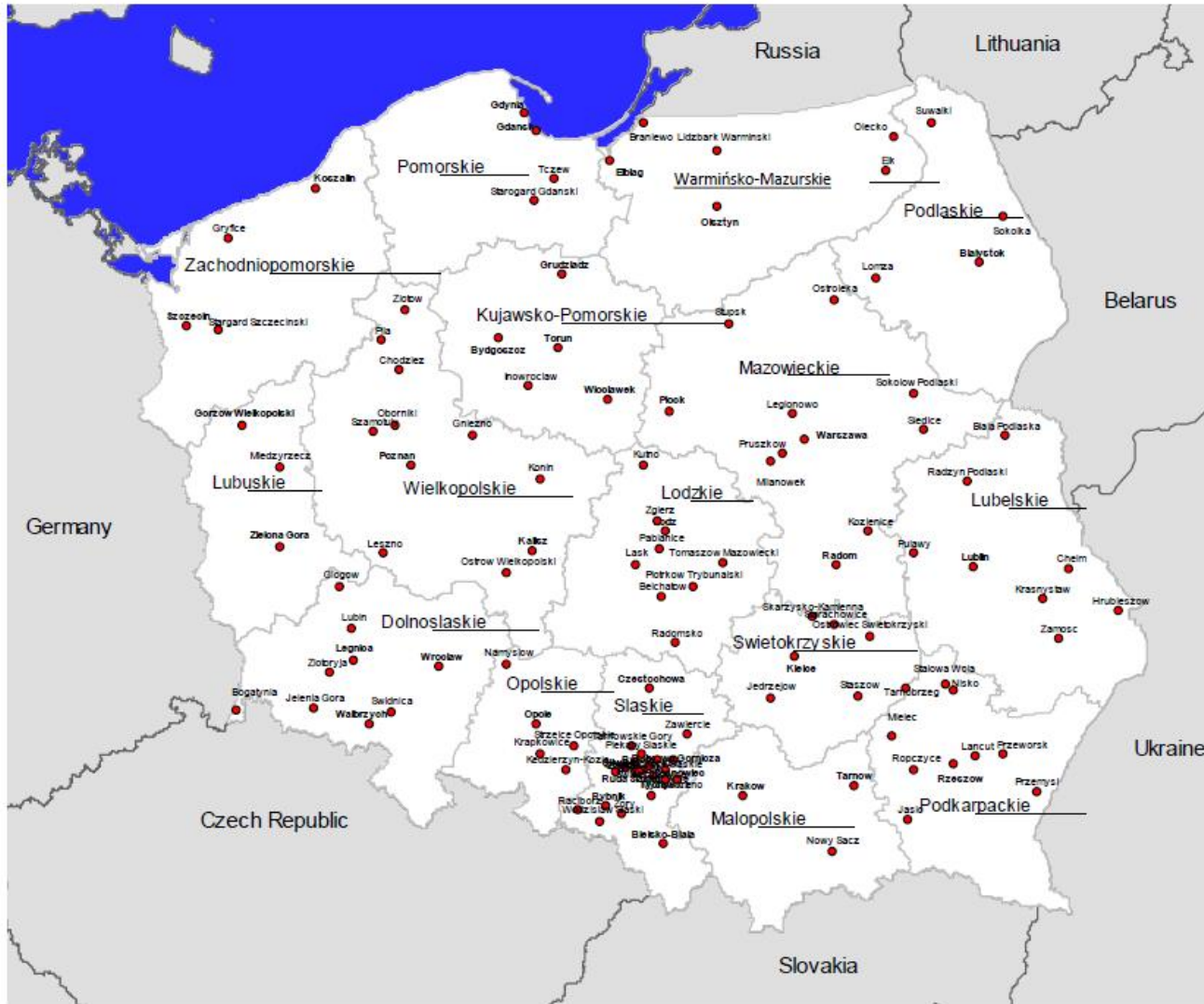
Poland Market Survey Report

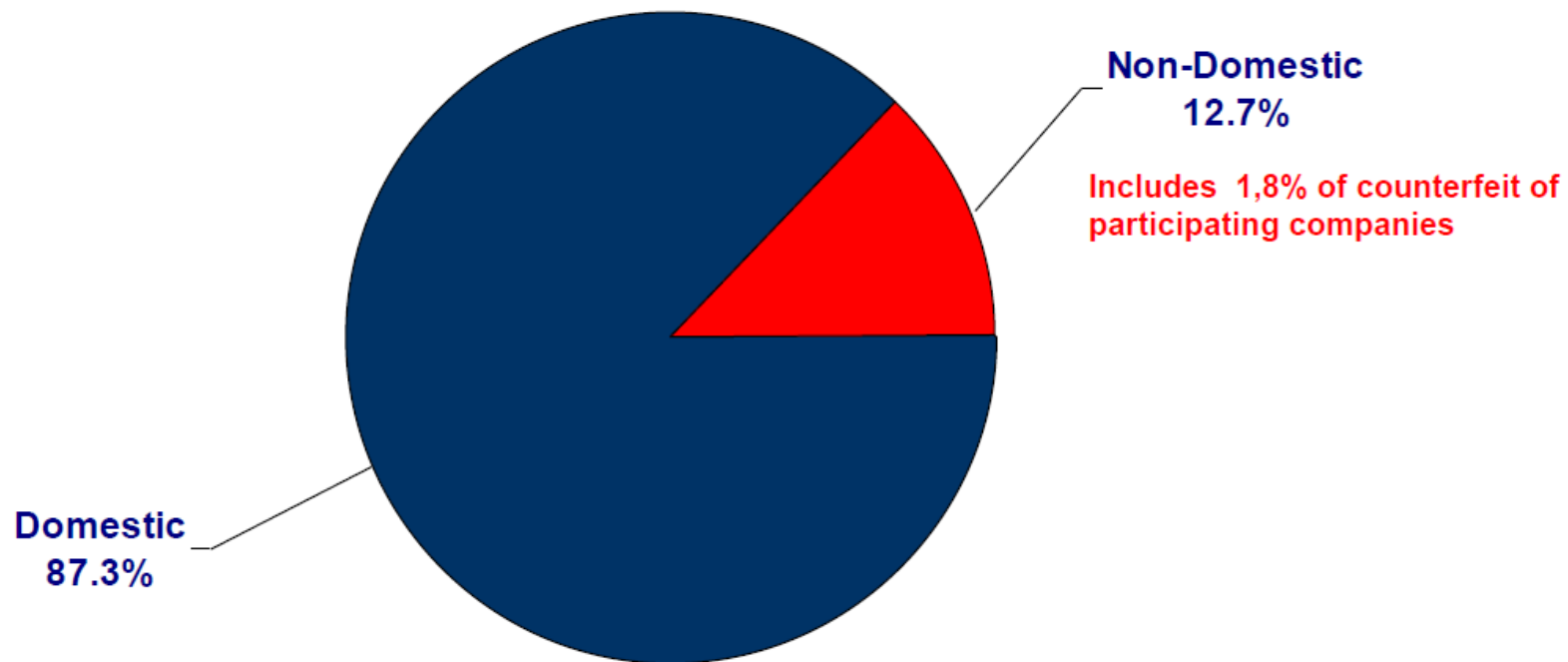
Empty Discarded Pack Collection October / November 2017

Conducted on behalf: British American Tobacco
Imperial Tobacco Group
Japan Tobacco International
Philip Morris International

Prepared by: ALMARES Institute for Consulting and Market Research
ul. Swietokrzyska 31/33a
00-049 Warszawa, Poland

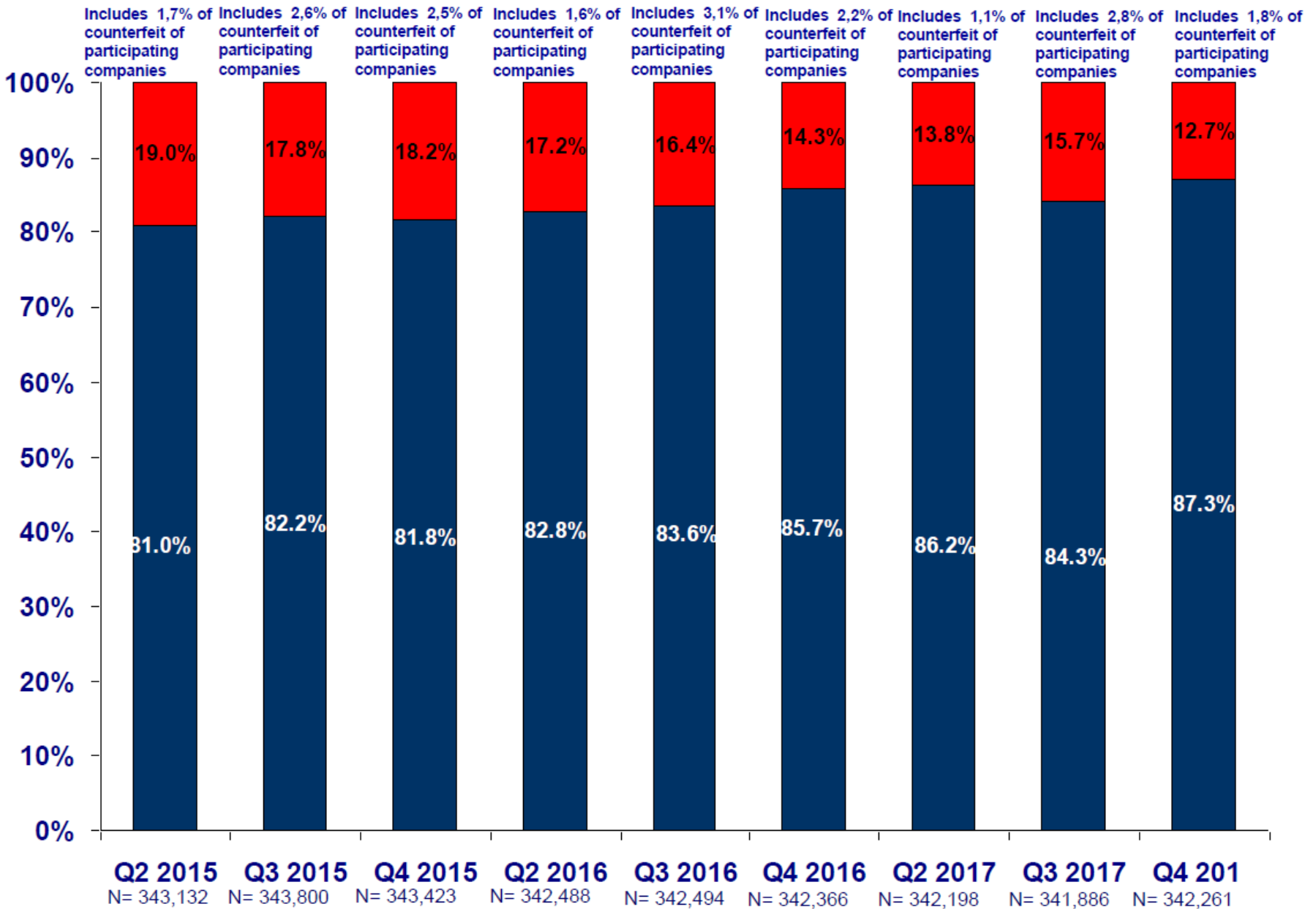
- **Empty Discarded Pack (EDP) collection**
 - ✓ Random collection from streets and public bins
 - ✓ Any brand and market variant
 - ✓ Total 70 cities (40 largest cities and 30 smaller towns)
 - ✓ Target main sample: 17,000 packs
 - ✓ City sample quotas proportional to population
 - ✓ Fieldwork conducted – 31.10 – 21.11.2017
- **Limitations**
 - ✓ Homes and workplaces are not covered
 - ✓ No information on counterfeit incidence of non-participating companies' products
- **Caution**
 - ✓ The survey is designed to focus on trends rather than incidence at a single point in time





Q.4. 2017 N= 342,261 weighted sticks

All Packs Collected – Non-domestic Packs Incidence – Evolution

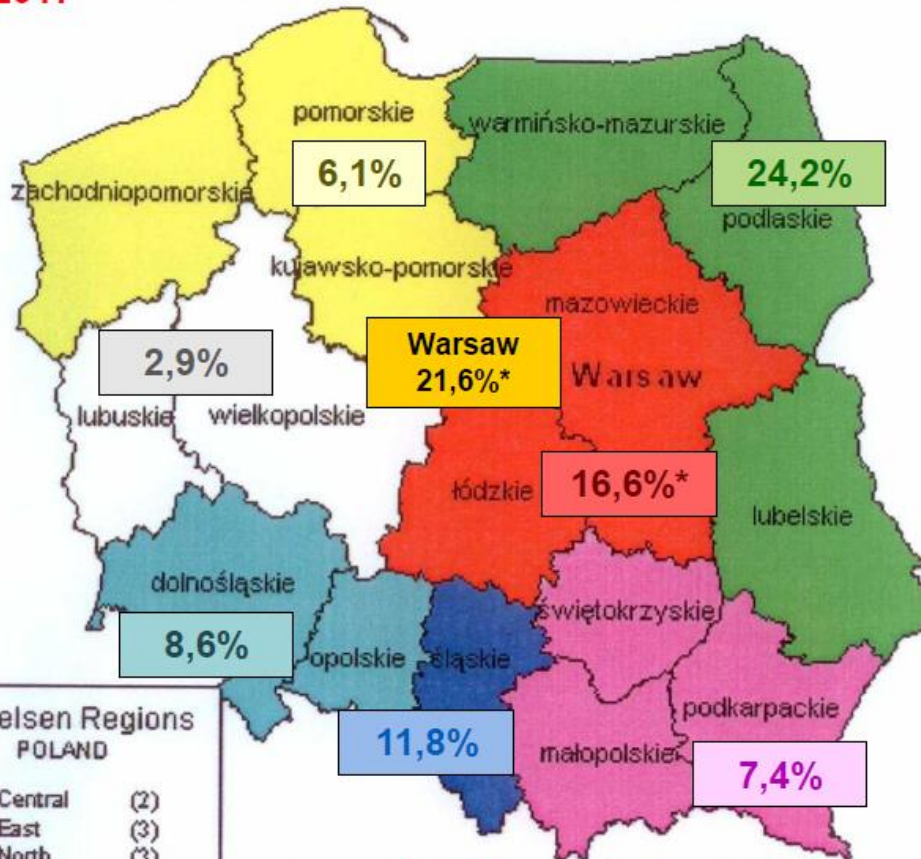


Figures are given in weighted sticks.

■ Domestic Packs ■ Non-domestic Packs

Q.4. 2017

Poland national incidence of non-domestic packs: 12.7%



ACNielsen Regions
POLAND

- Central (2)
- East (3)
- North (3)
- South (1)
- South-East (3)
- South-West (2)
- West (2)

Q.2. 2017		Q.3. 2017	
Warsaw	19.9%	Warsaw	25.6%
Central	19.8%	Central	23.9%
East	33.5%	East	33.2%
North	5.4%	North	5.2%
South	9.5%	South	14.7%
South-East	13.1%	South-East	11.1%
South-West	9.6%	South-West	6.5%
West	2.7%	West	3.1%

Q.2. 2015		Q.3. 2015	
Warsaw	32.7%	Warsaw	28.0%
Central	19.6%	Central	21.5%
East	49.1%	East	35.2%
North	5.9%	North	7.0%
South	14.1%	South	17.6%
South-East	17.3%	South-East	20.4%
South-West	3.9%	South-West	6.0%
West	10.2%	West	2.8%

Q.4. 2015		Q.2. 2016	
Warsaw	27.8%	Warsaw	26.8%
Central	23.9%	Central	21.2%
East	43.3%	East	44.3%
North	7.0%	North	6.6%
South	16.1%	South	16.3%
South-East	16.0%	South-East	11.3%
South-West	7.4%	South-West	6.1%
West	2.4%	West	1.9%

Q.3. 2016		Q.4. 2016	
Warsaw	25.4%	Warsaw	21.9%
Central	21.8%	Central	17.4%
East	41.3%	East	33.6%
North	5.5%	North	6.0%
South	12.7%	South	10.6%
South-East	15.2%	South-East	18.3%
South-West	7.5%	South-West	4.5%
West	2.7%	West	3.0%

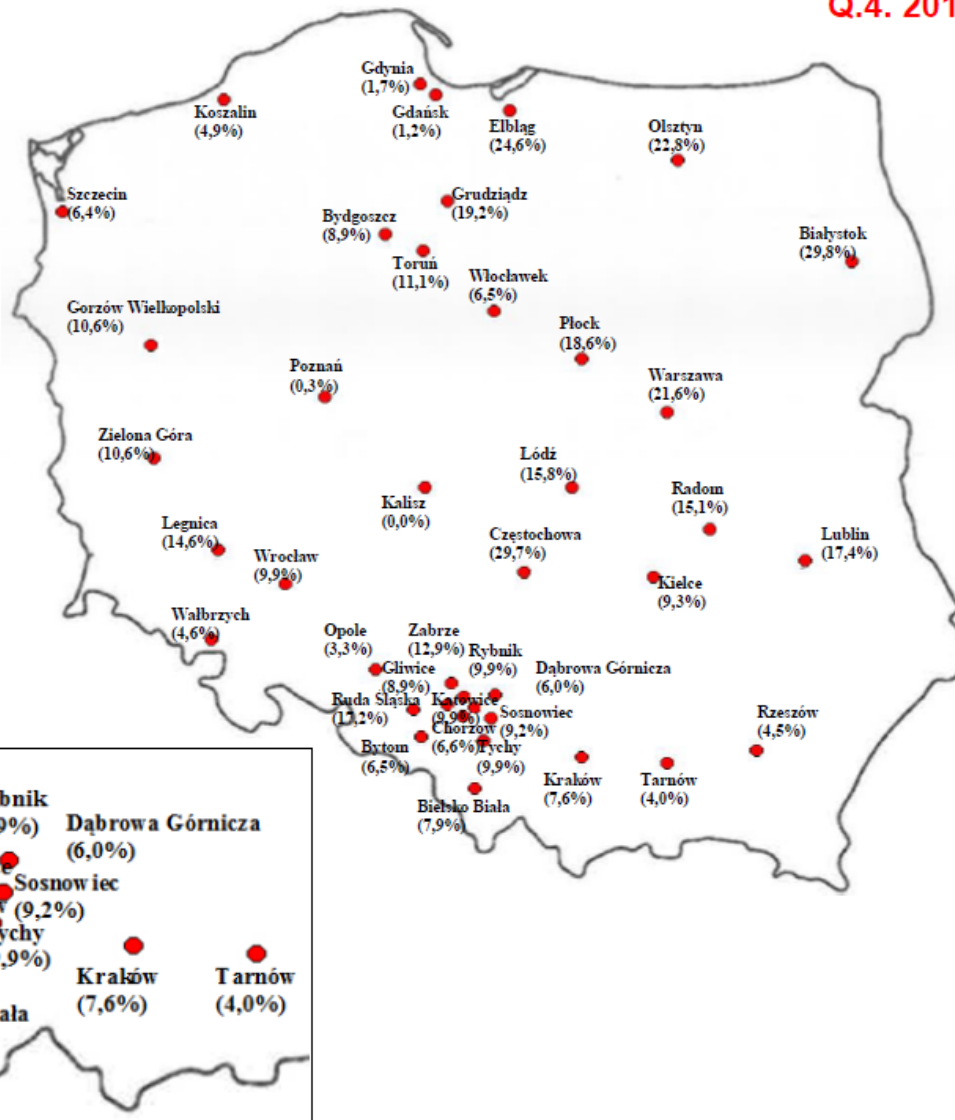
All data: calculated in cigarettes (single) – weighted by localization populations and smoking incidence

Largest 40 cities

Poland national incidence of non-domestic packs: 12.7%

Q.4. 2017

N = 342,261 weighted sticks

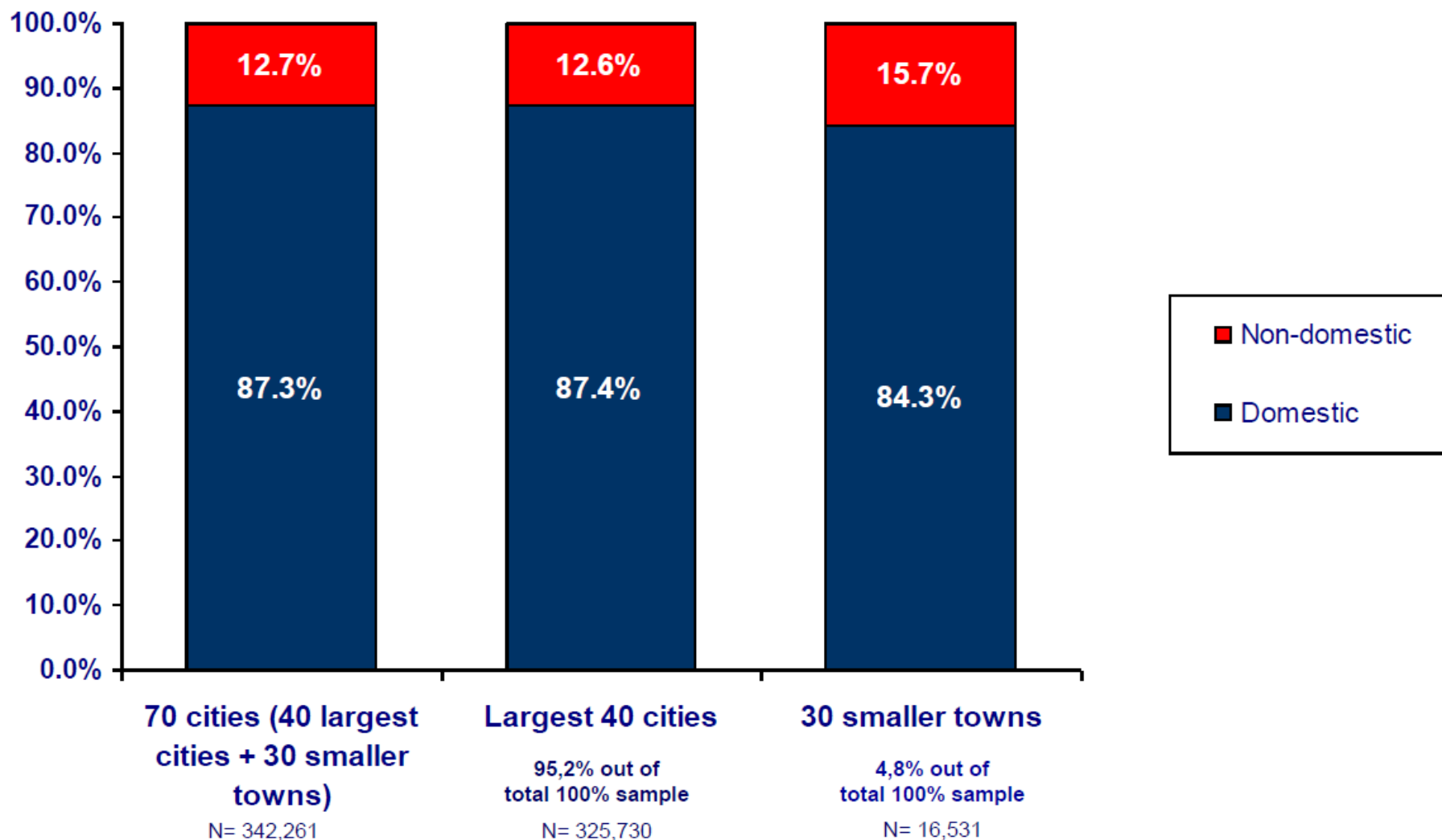


Small Towns

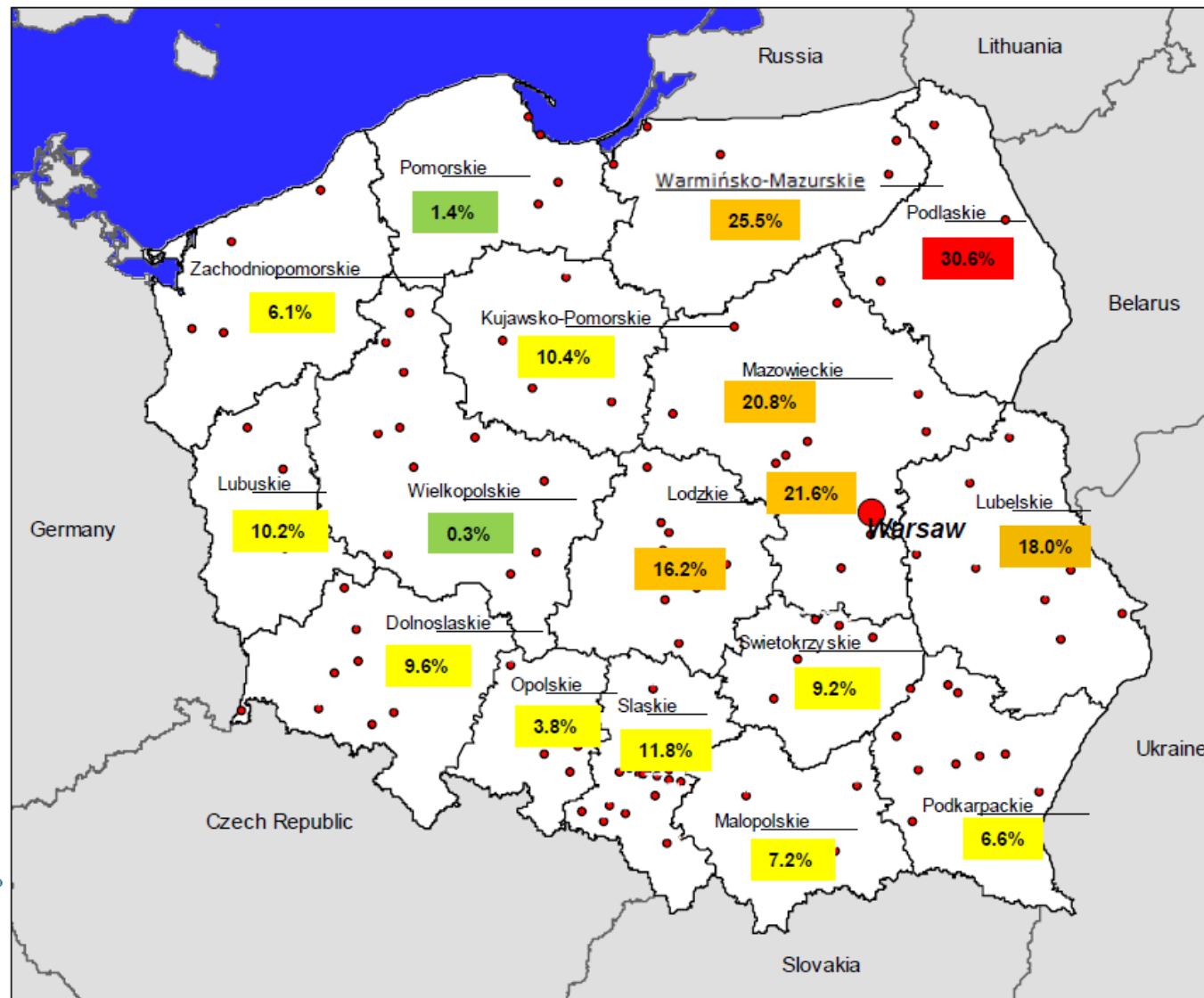
REGION	CITY	INCIDENCE
East	Sokółka	42,0%
	Braniewo	47,9%
	Lidzbark Warmiński	51,1%
	Krasnystaw	26,6%
	Hrubieszów	24,8%
	Olecko	12,0%
	Radzyń Podlaski	12,0%
South-East	Nisko	18,6%
	Jasło	12,0%
	Ropczyce	6,0%
	Przeworsk	3,3%
	Łańcut	10,0%
	Jędrzejów	8,0%
Central	Staszów	9,6%
	Radomsko	20,0%
	Łask	21,9%
	Milanówek	30,0%
	Kozienice	20,6%
West	Sokołów Podlaski	21,2%
	Międzyrzecz	4,6%
	Złotów	0,0%
	Oborniki	0,7%
	Szamotuły	1,3%
South-West	Chodzież	0,0%
	Złotoryja	3,9%
	Strzelce Opolskie	7,6%
	Krapkowice	5,3%
	Bogatynia	6,0%
North	Namysłów	2,0%
	Gryfice	6,0%

Incidence of Non-domestic Packs Comparison of Results in Large Cities Vs. Results in Smaller Towns

Q.4. 2017 N= 342,261 weighted sticks



All data: calculated in cigarettes (single) – weighted by localization populations and smoking incidence



(*): Mazowieckie including Warsaw

Q.4. 2017 N= 342,261 weighted sticks

Q.4. 2017 N= 342,261 weighted sticks

	Q2 2015	Q3 2015	Q4 2015	Q2 2016	Q3 2016	Q4 2016	Q2 2017	Q3 2017	Q4 2017
WARSAW	32.7%	28.0%	27.8%	26.8%	25.4%	21.9%	19.9%	25.6%	21.6%
<u>Voivodships</u>									
PODLASKIE	43.3%	38.1%	36.8%	36.3%	34.9%	35.0%	34.3%	33.7%	30.6%
WARMIŃSKO-MAZURSKIE	70.3%	40.1%	63.6%	58.3%	54.4%	27.3%	28.2%	35.2%	25.5%
MAZOWIECKIE	30.4%	28.1%	27.6%	25.7%	25.2%	20.5%	21.0%	24.4%	20.8%
LUBELSKIE	35.2%	28.7%	30.8%	38.5%	35.0%	38.0%	37.7%	31.1%	18.0%
LODZKIE	19.1%	18.0%	22.4%	21.2%	20.5%	18.9%	16.6%	26.3%	16.2%
SLASKIE	14.1%	17.6%	16.1%	16.3%	12.7%	10.6%	9.5%	14.7%	11.8%
KUJAWSKO-POMORSKIE	11.6%	15.7%	12.4%	7.5%	9.8%	8.8%	7.8%	8.6%	10.4%
LUBUSKIE	8.3%	5.1%	6.9%	7.3%	9.1%	9.0%	9.6%	11.0%	10.2%
DOLNOSLASKIE	3.7%	6.0%	7.5%	6.0%	7.8%	4.0%	10.4%	6.1%	9.6%
SWIETOKRZYSKIE	9.2%	7.4%	6.0%	11.8%	12.9%	10.5%	12.7%	8.2%	9.2%
MALOPOLSKIE	15.6%	19.3%	12.8%	4.7%	11.4%	17.5%	12.6%	6.4%	7.2%
PODKARPACKIE	29.2%	34.1%	33.8%	30.9%	28.6%	27.0%	15.0%	27.6%	6.6%
ZACHODNIOPOMORSKIE	5.3%	3.0%	7.9%	10.9%	4.8%	8.8%	5.5%	5.4%	6.1%
OPOLSKIE	4.6%	5.8%	6.9%	6.7%	6.1%	7.0%	5.4%	8.7%	3.8%
POMORSKIE	0.1%	0.6%	0.4%	2.4%	1.3%	0.9%	2.7%	1.4%	1.4%
WIELKOPOLSKIE	10.8%	1.9%	0.8%	0.0%	0.4%	0.9%	0.2%	0.2%	0.3%
Total Poland	19.0%	17.8%	18.2%	17.2%	16.4%	14.3%	13.8%	15.7%	12.7%

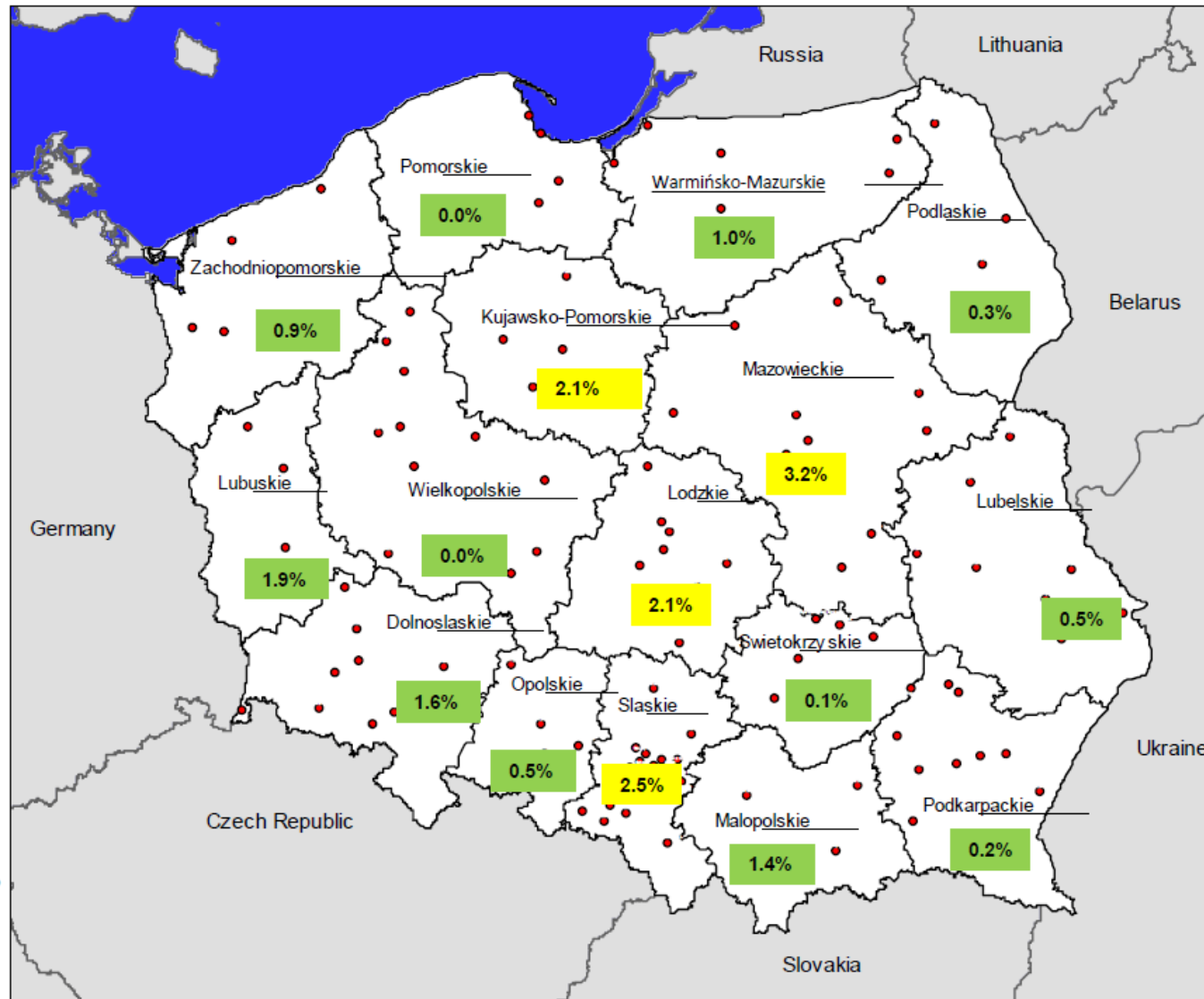
(*): Mazowieckie including Warsaw

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non-domestic incidence 12,7% includes
1.8% of counterfeit

ALMARES

CF Incidence by Voivodship



(*): Mazowieckie including Warsaw

Q.4. 2017 N= 342,261 weighted sticks

All data: calculated in cigarettes (single) – weighted by localization populations and smoking incidence