

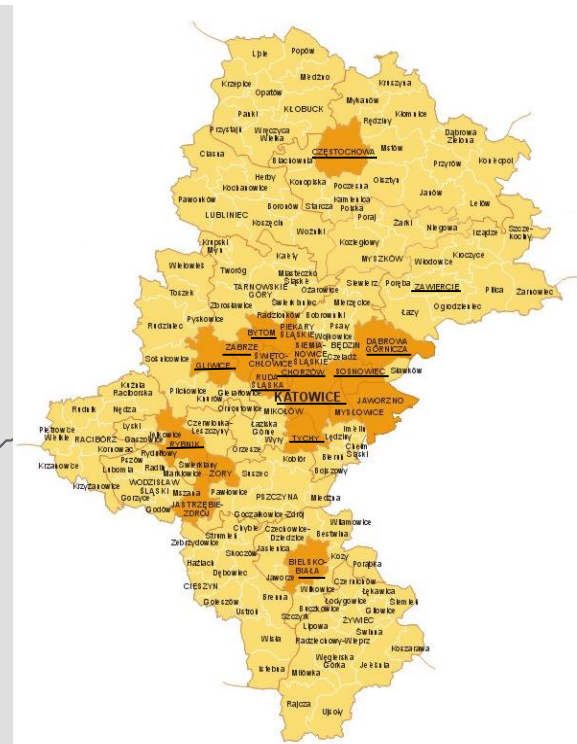
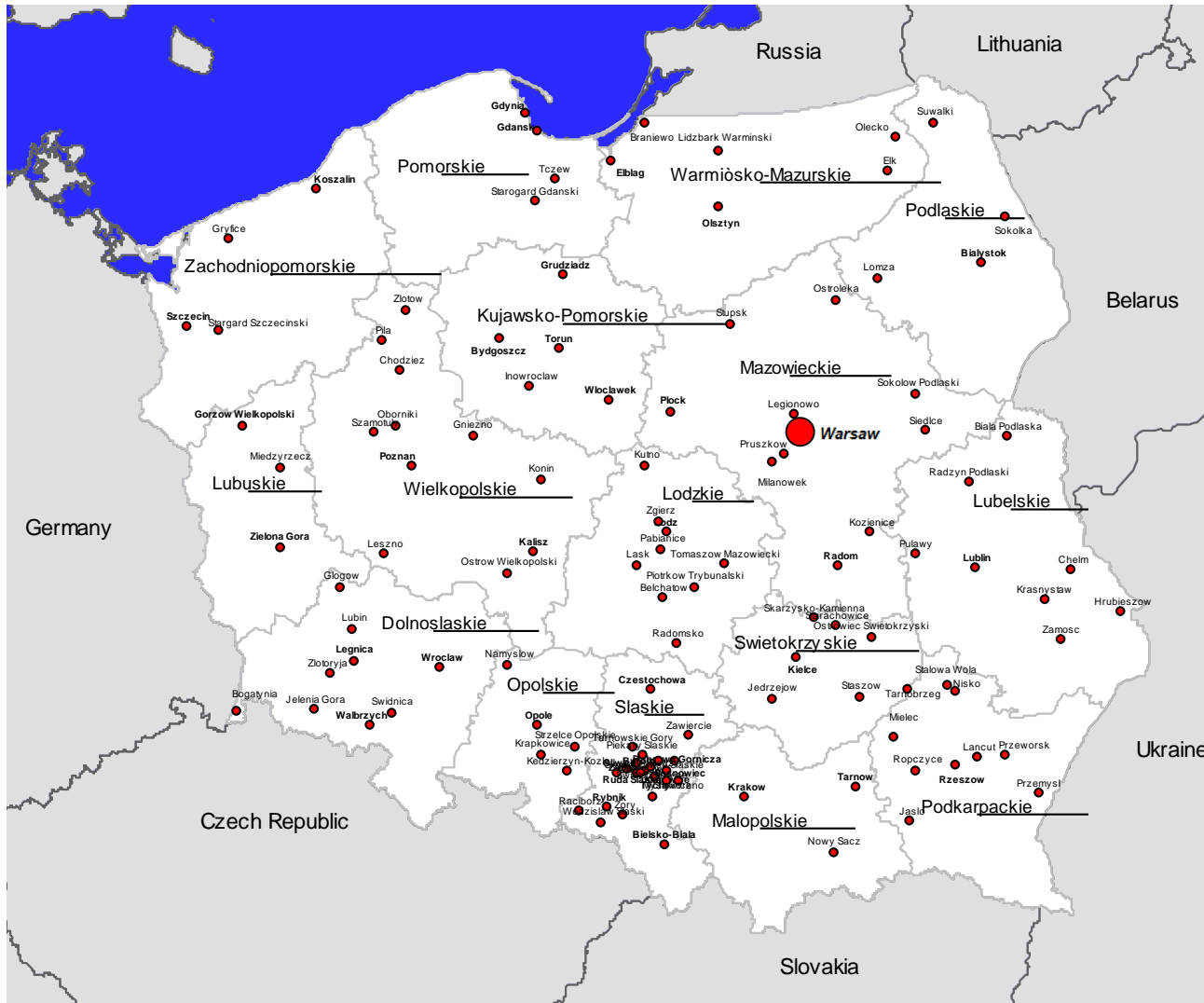
Poland Market Survey Report

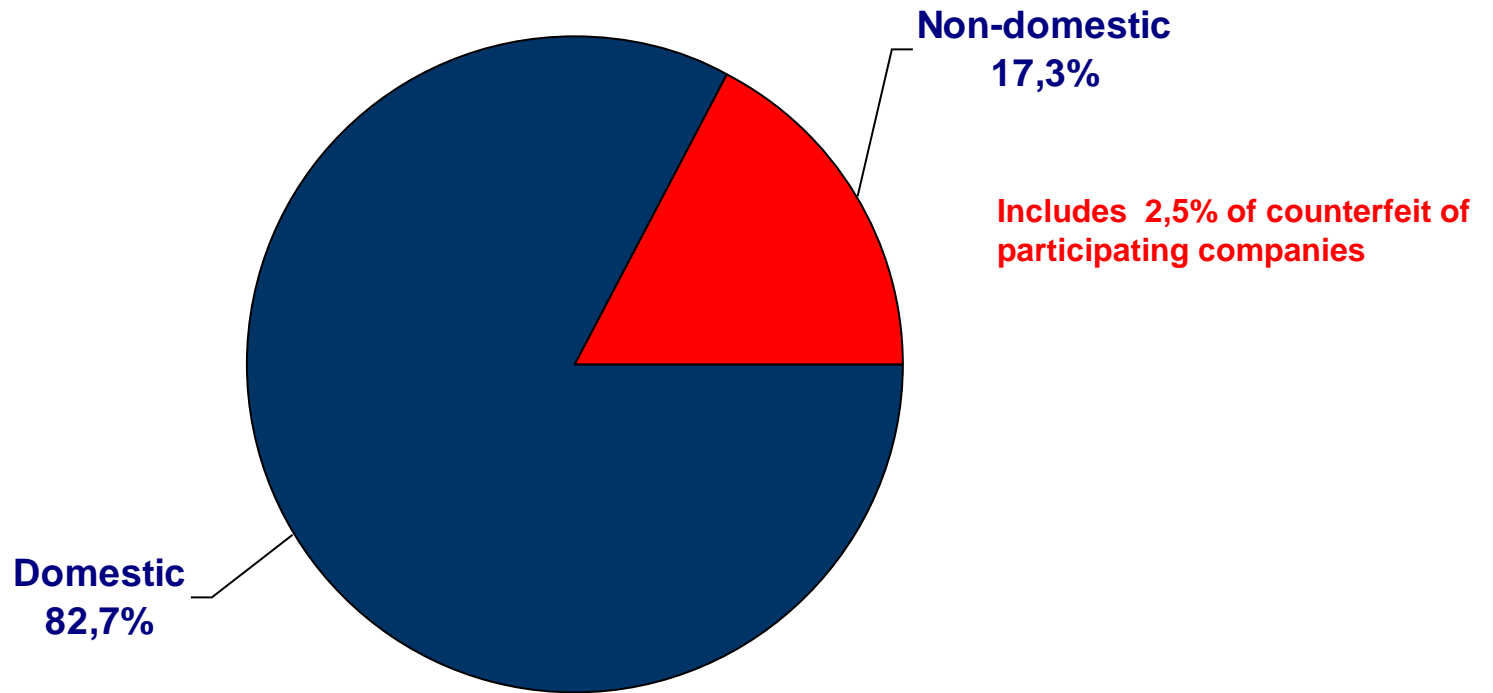
Empty Discarded Pack Collection October / November 2014

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

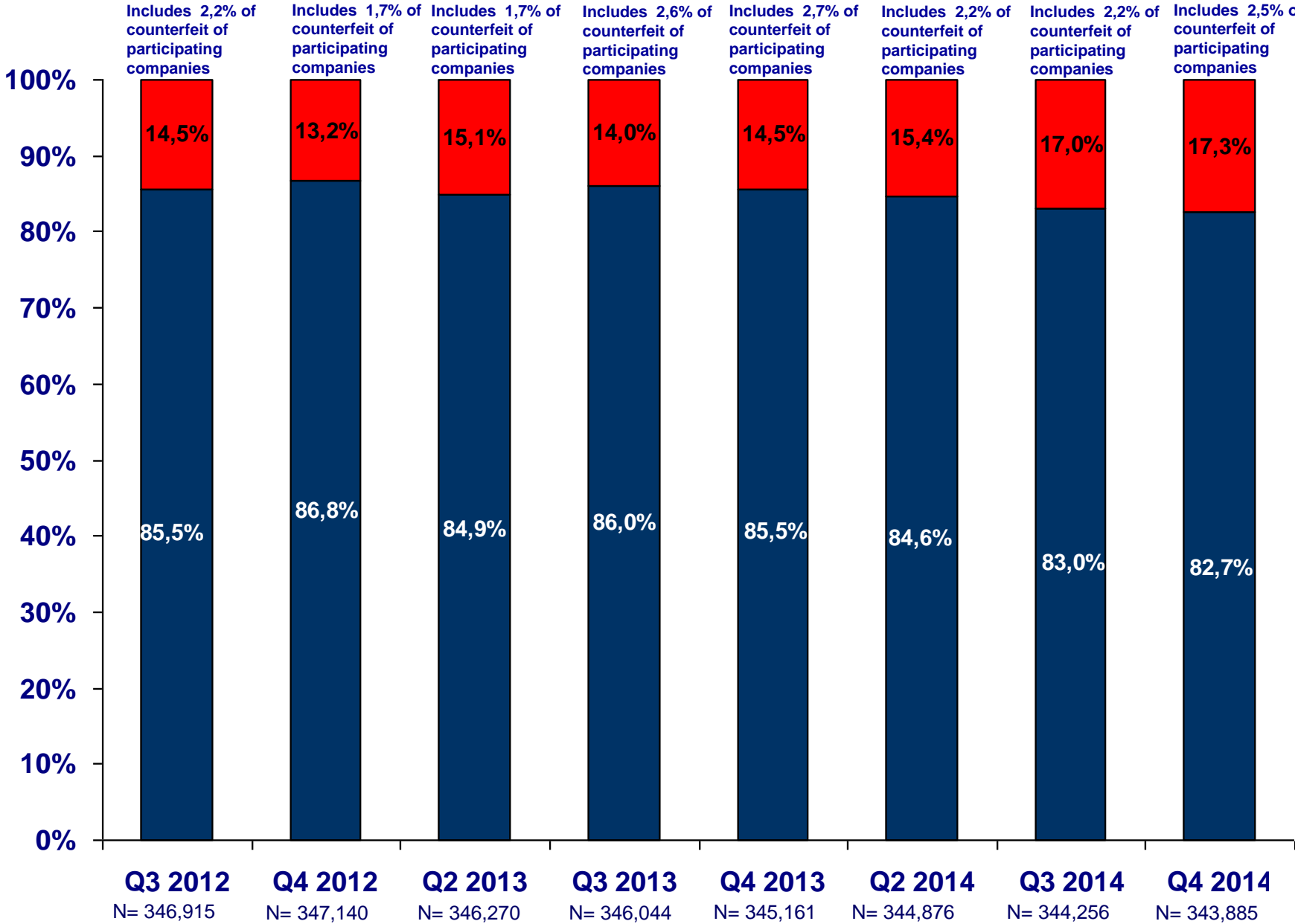
- **Empty Discarded Pack (EDP) collection**
 - ✓ Random collection from streets and public bins
 - ✓ Any brand and market variant
 - ✓ Total 70 cities (40 largest cities and 30 smaller towns)
 - ✓ Target main sample: 17,000 packs
 - ✓ City sample quotas proportional to population
 - ✓ Fieldwork conducted – 17.10 – 14.11.2014
- **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. 2014 N= 343,885 weighted sticks

All Packs Collected – Non-domestic Packs Incidence – Evolution

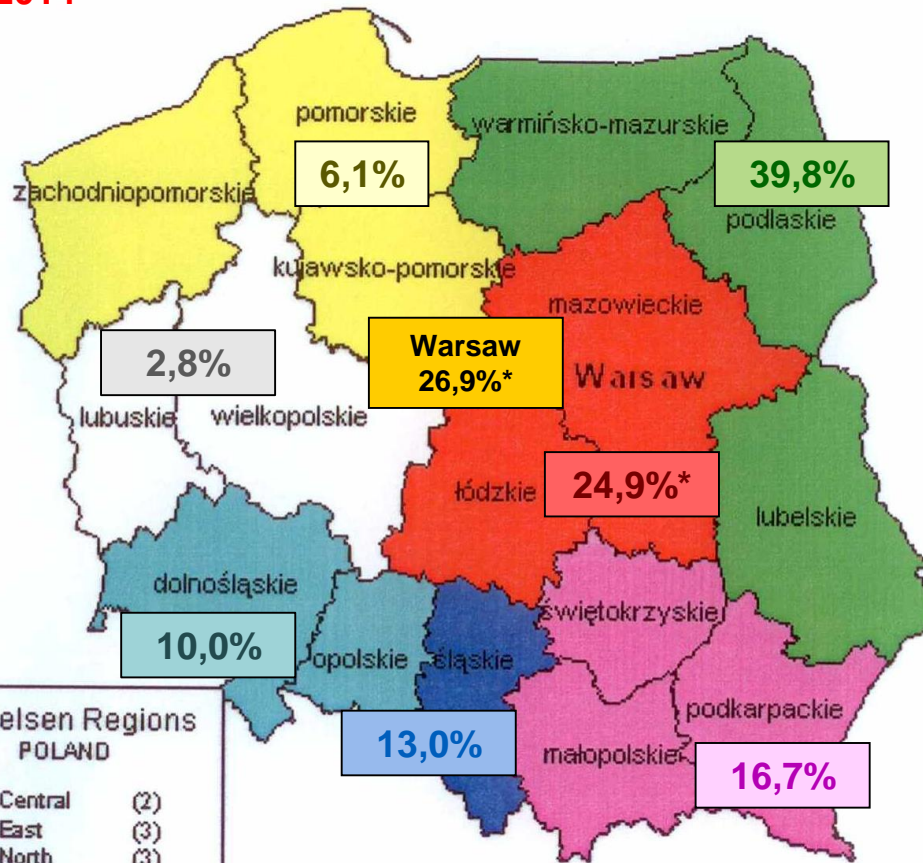


Figures are given in weighted sticks.

■ Domestic Packs ■ Non-domestic Packs

Q.4. 2014

Poland national incidence of non-domestic packs: 17.3%



ACNielsen Regions
POLAND

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

Q.3. 2014	
Warsaw	21.9%
Central	26.3%
East	46.7%
North	7.7%
South	13.0%
South-East	12.7%
South-West	6.2%
West	3.9%

Q.3. 2012	
Warsaw	24.7%
Central	23.5%
East	31.7%
North	4.3%
South	12.0%
South-East	13.1%
South-West	5.2%
West	2.3%

Q.4. 2012	
Warsaw	20.6%
Central	24.6%
East	27.4%
North	4.9%
South	9.9%
South-East	14.5%
South-West	3.9%
West	0.9%

Q.2. 2013	
Warsaw	24.2%
Central	21.6%
East	45.4%
North	4.4%
South	10.2%
South-East	10.1%
South-West	7.8%
West	2.4%

Q.3. 2013	
Warsaw	20.3%
Central	19.9%
East	36.5%
North	8.0%
South	10.1%
South-East	12.1%
South-West	5.2%
West	2.3%

Q.4. 2013	
Warsaw	21.3%
Central	21.8%
East	28.1%
North	7.4%
South	11.7%
South-East	18.7%
South-West	5.3%
West	2.6%

Q.2. 2014	
Warsaw	21.6%
Central	22.1%
East	43.9%
North	6.4%
South	9.4%
South-East	15.3%
South-West	6.3%
West	1.2%

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

Poland national incidence of non-domestic packs: 17.3%

Q.4. 2014 N= 343,885 weighted sticks

Largest 40 cities

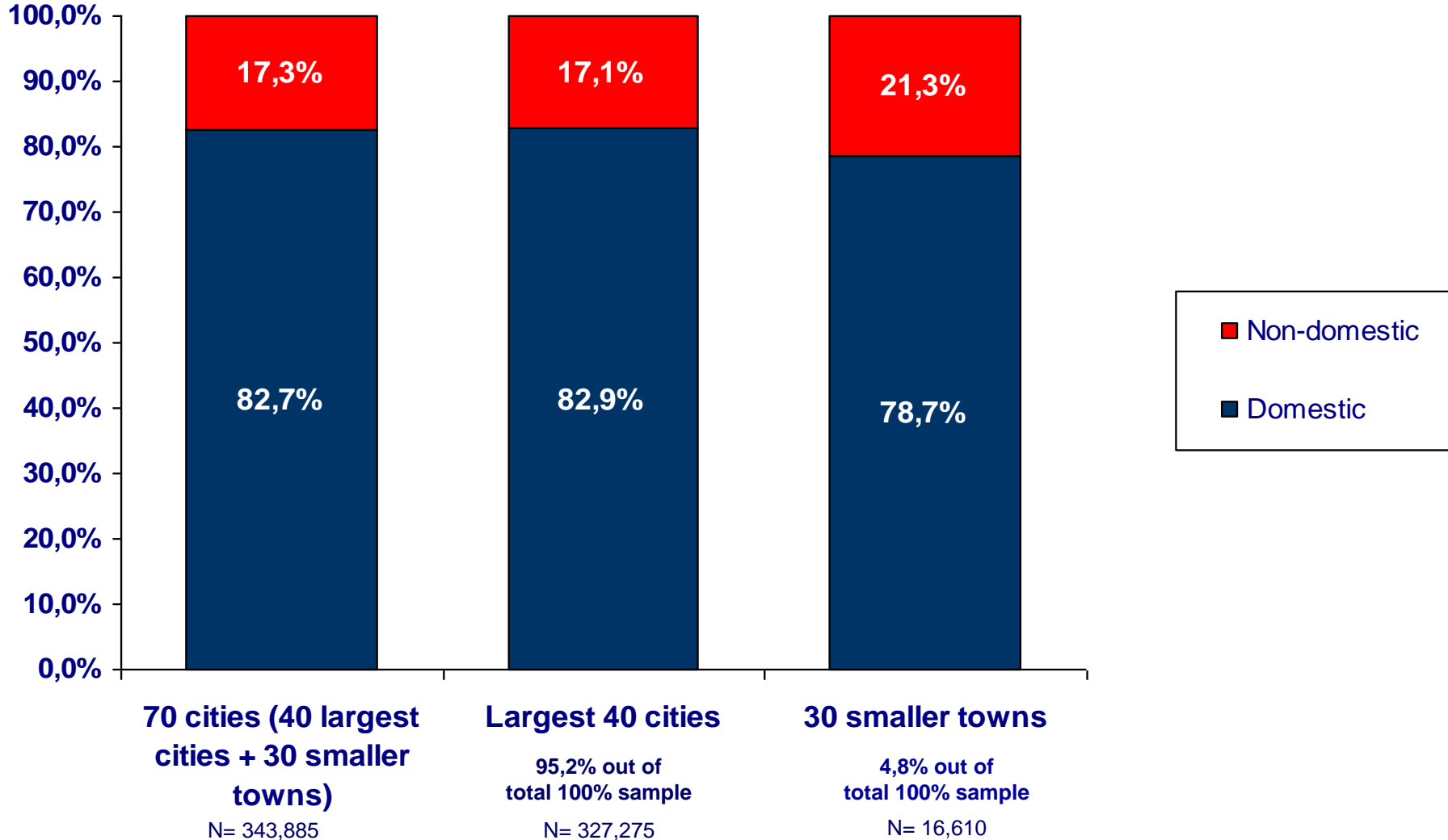


Small Towns

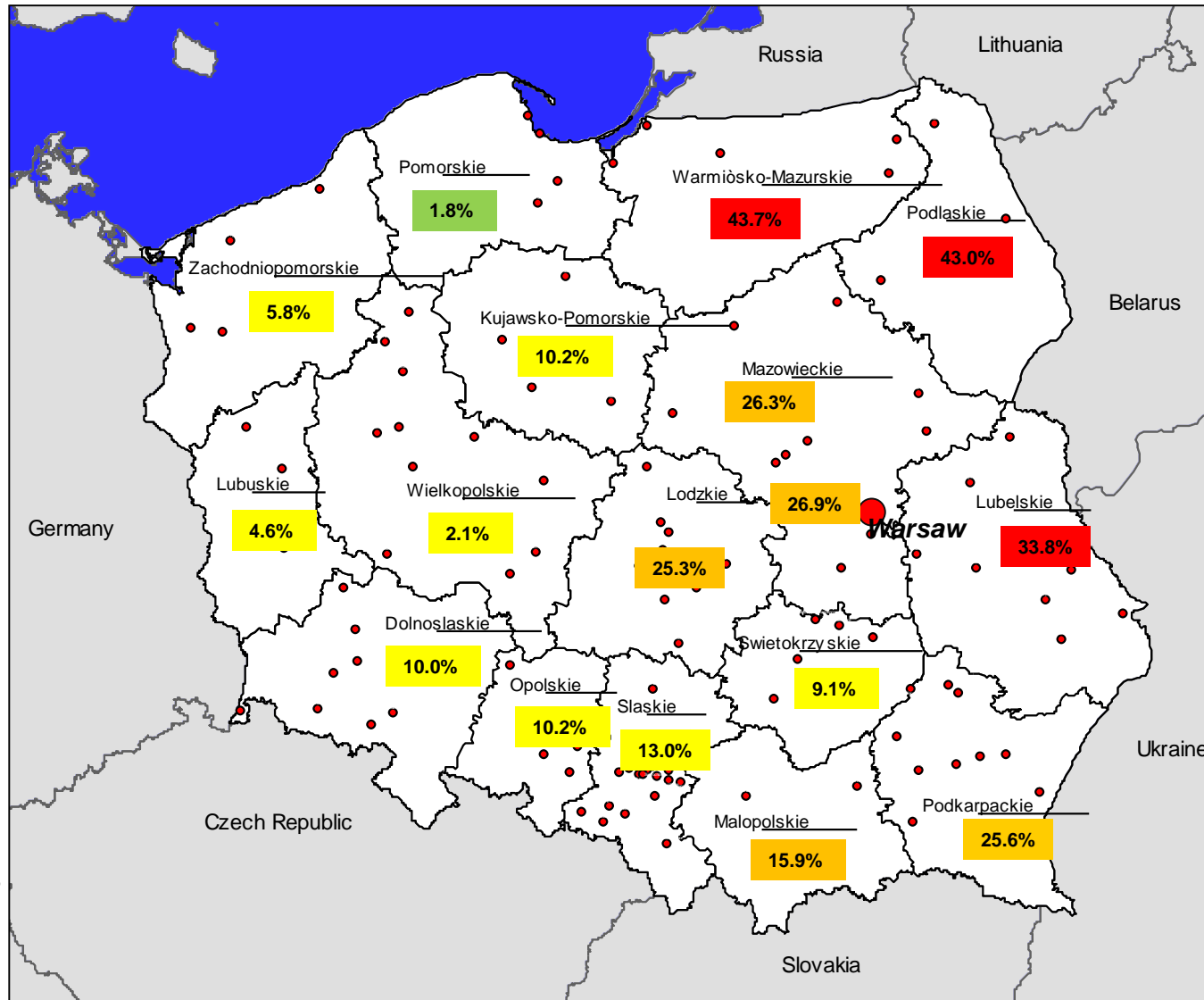
REGION	CITY	INCIDENCE
East	Sokółka	77,20%
	Braniewo	76,50%
	Lidzbark Warmiński	42,40%
	Krasnystaw	38,60%
	Hrubieszów	31,10%
	Olecko	28,40%
Radzyń Podlaski	24,60%	
South-East	Nisko	27,60%
	Jasło	24,60%
	Ropczyce	24,50%
	Przeworsk	23,30%
	Łańcut	22,60%
	Jędrzejów	9,30%
Staszów	7,90%	
Central	Radomsko	22,50%
	Łask	19,40%
	Milanówek	15,00%
	Kozienice	9,30%
	Sokolów Podlaski	8,50%
West	Międzyrzecz	8,50%
	Złotów	5,90%
	Oborniki	3,30%
	Szamotuły	1,30%
	Chodzież	0,70%
South-West	Złotoryja	18,10%
	Strzelce Opolskie	15,20%
	Krapkowice	7,90%
	Bogatynia	7,90%
	Namysłów	4,00%
North	Gryfice	1,30%

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

Q.4. 2014 N= 343,885 weighted sticks



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



(*): Mazowieckie including Warsaw

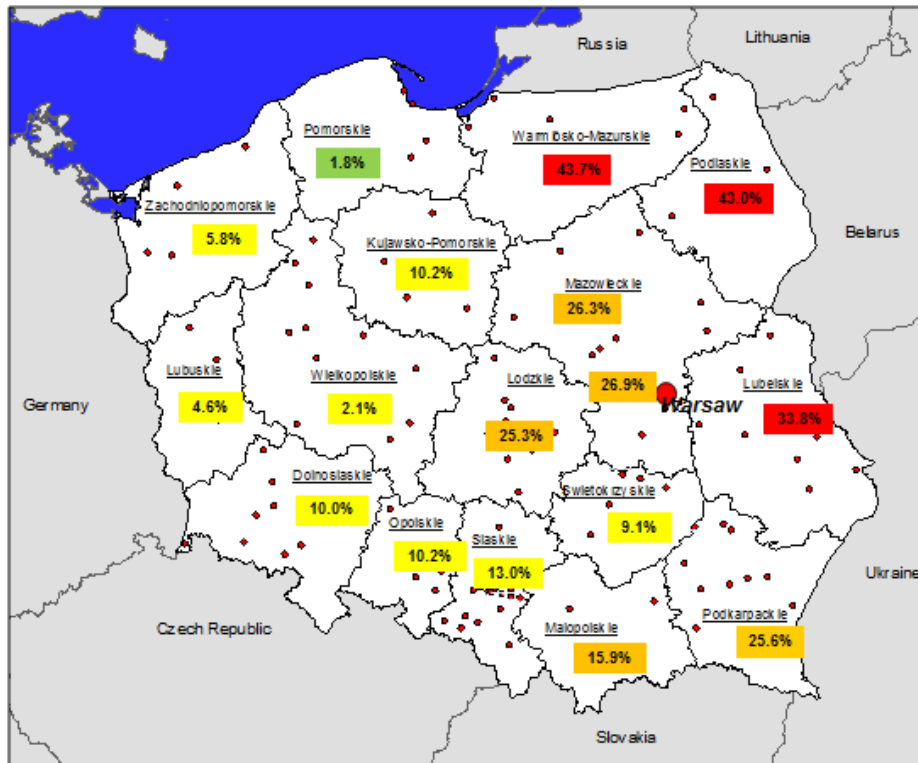
Q.4. 2014 N= 343,885 weighted sticks

Q.4. 2014 N= 343,885 weighted sticks

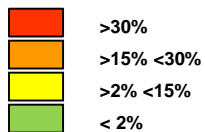
	Q3 2012	Q4 2012	Q2 2013	Q3 2013	Q4 2013	Q2 2014	Q3 2014	Q4 2014
WARSAW	24,7%	20,6%	24,2%	20,3%	21,3%	21,6%	21,9%	26,9%
Voivodships								
WARMINSKO-MAZURSKIE	32,30%	26,80%	59,00%	36,00%	33,00%	61,60%	59,40%	43,70%
PODLASKIE	35,60%	38,10%	49,40%	44,20%	30,30%	41,70%	44,20%	43,00%
LUBELSKIE	28,10%	19,60%	30,50%	31,10%	22,30%	30,30%	37,50%	33,80%
MAZOWIECKIE	24,30%	20,50%	23,20%	20,10%	21,60%	21,20%	23,80%	26,30%
PODKARPACKIE	26,90%	43,30%	21,50%	19,90%	40,30%	29,80%	27,20%	25,60%
LODZKIE	24,00%	26,90%	22,80%	20,00%	21,20%	23,10%	23,50%	25,30%
MALOPOLSKIE	10,80%	7,80%	8,70%	11,70%	14,20%	13,70%	8,20%	15,90%
SLASKIE	12,00%	9,90%	10,20%	10,10%	11,70%	9,40%	13,00%	13,00%
KUJAWSKO-POMORSKIE	7,20%	7,00%	8,50%	15,80%	9,90%	12,30%	14,60%	10,20%
OPOLSKIE	3,60%	1,80%	7,20%	3,10%	2,10%	2,10%	4,40%	10,20%
DOLNOSLASKIE	5,50%	4,30%	7,90%	5,60%	5,90%	7,10%	6,60%	10,00%
SWIETOKRZYSKIE	5,10%	5,60%	1,70%	4,20%	9,80%	3,90%	11,70%	9,10%
ZACHODNIOPOMORSKIE	2,30%	3,60%	4,00%	4,40%	7,00%	6,70%	6,60%	5,80%
LUBUSKIE	6,90%	1,40%	4,50%	2,90%	4,30%	2,50%	7,60%	4,60%
WIELKOPOLSKIE	0,60%	0,80%	1,70%	2,10%	1,90%	0,70%	2,70%	2,10%
POMORSKIE	2,60%	3,70%	0,30%	2,20%	4,80%	0,00%	0,90%	1,80%
Total Poland	14,5%	13,2%	15,1%	14,0%	14,5%	15,4%	17,0%	17,3%

(*): Mazowieckie including Warsaw

Q.4. 2014 N= 343,885 weighted sticks



(*): Mazowieckie including Warsaw

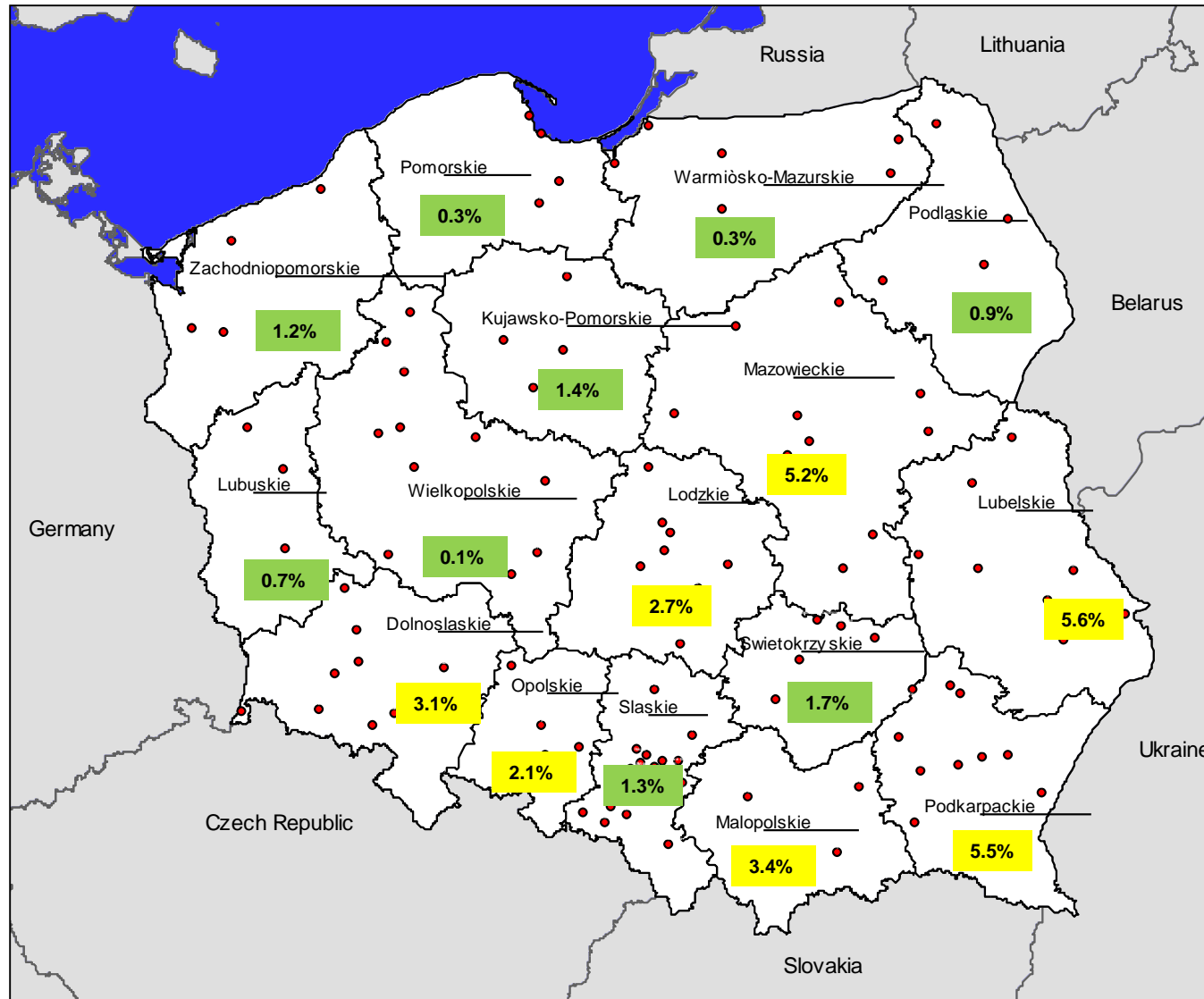


	Q3 2012	Q4 2012	Q2 2013	Q3 2013	Q4 2013	Q2 2014	Q3 2014	Q4 2014
WARSAW	24,7%	20,6%	24,2%	20,3%	21,3%	21,6%	21,9%	26,9%
<u>Voivodships</u>								
WARMINSKO-MAZURSKIE	32,30%	26,80%	59,00%	36,00%	33,00%	61,60%	59,40%	43,70%
PODLASKIE	35,60%	38,10%	49,40%	44,20%	30,30%	41,70%	44,20%	43,00%
LUBELSKIE	28,10%	19,60%	30,50%	31,10%	22,30%	30,30%	37,50%	33,80%
MAZOWIECKIE	24,30%	20,50%	23,20%	20,10%	21,60%	21,20%	23,80%	26,30%
PODKARPACKIE	26,90%	43,30%	21,50%	19,90%	40,30%	29,80%	27,20%	25,60%
LODZKIE	24,00%	26,90%	22,80%	20,00%	21,20%	23,10%	23,50%	25,30%
MALOPOLSKIE	10,80%	7,80%	8,70%	11,70%	14,20%	13,70%	8,20%	15,90%
SLASKIE	12,00%	9,90%	10,20%	10,10%	11,70%	9,40%	13,00%	13,00%
KUJAWSKO-POMORSKIE	7,20%	7,00%	8,50%	15,80%	9,90%	12,30%	14,60%	10,20%
OPOLSKIE	3,60%	1,80%	7,20%	3,10%	2,10%	2,10%	4,40%	10,20%
DOLNOSLASKIE	5,50%	4,30%	7,90%	5,60%	5,90%	7,10%	6,60%	10,00%
SWIETOKRZYSKIE	5,10%	5,60%	1,70%	4,20%	9,80%	3,90%	11,70%	9,10%
ZACHODNIOPOMORSKIE	2,30%	3,60%	4,00%	4,40%	7,00%	6,70%	6,60%	5,80%
LUBUSKIE	6,90%	1,40%	4,50%	2,90%	4,30%	2,50%	7,60%	4,60%
WIELKOPOLSKIE	0,60%	0,80%	1,70%	2,10%	1,90%	0,70%	2,70%	2,10%
POMORSKIE	2,60%	3,70%	0,30%	2,20%	4,80%	0,00%	0,90%	1,80%
Total Poland	14,5%	13,2%	15,1%	14,0%	14,5%	15,4%	17,0%	17,3%

non-domestic incidence 17,3% includes
2.5% of counterfeit

ALMARES

CF Incidence by Voivodship



(*): Mazowieckie including Warsaw

Q.4. 2014 N= 343,885 weighted sticks

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