

Poland Market Survey Report

Empty Discarded Pack Collection October / November 2013

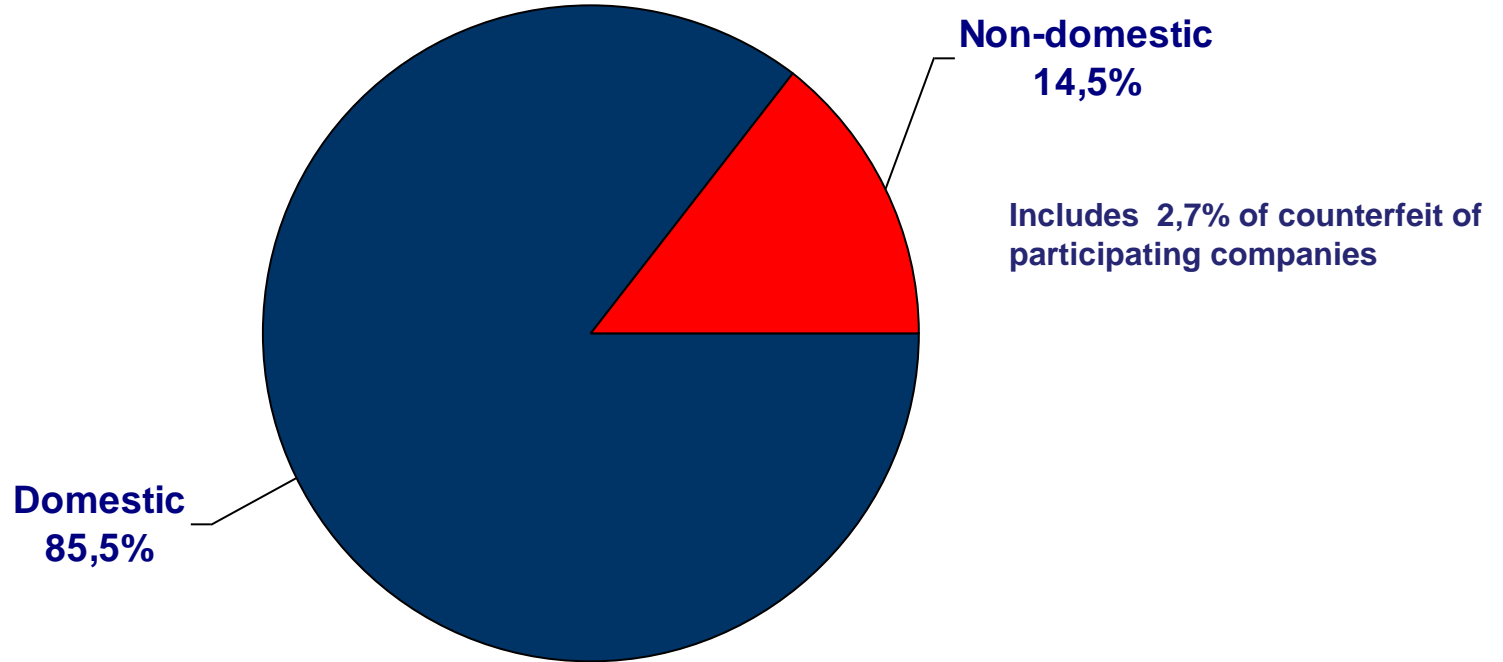
Conducted on behalf: British American Tobacco
Imperial Tobacco Group
Japan Tobacco International
Philip Morris International

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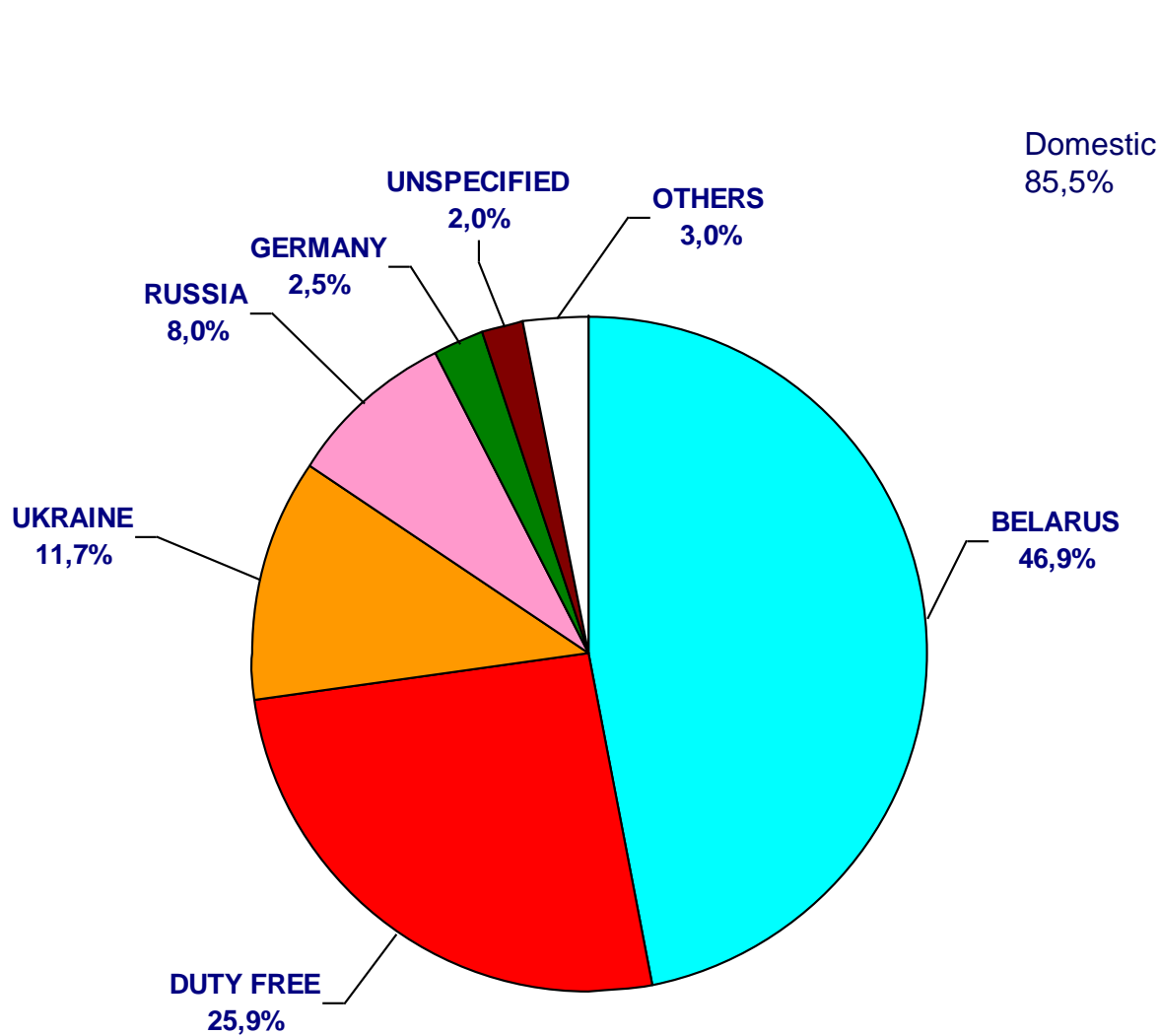
- **Provide an indication on the incidence of non-domestic or illicit cigarettes**
 - ✓ Tax paid and non tax paid cigarettes from other countries
 - ✓ Counterfeit cigarettes

- **Gain information related to non-domestic or illicit cigarettes by**
 - ✓ Companies
 - ✓ Regions and Cities
 - ✓ Brand families
 - ✓ Market variants

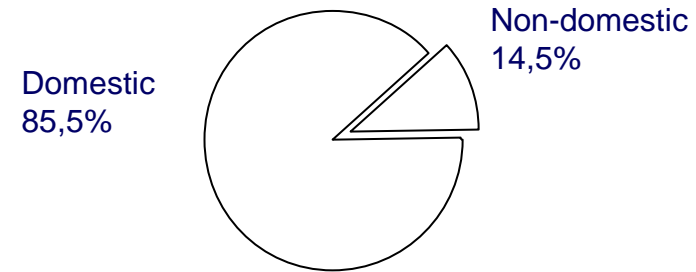
- **Empty Discarded Pack (EDP) collection**
 - ✓ Random collection from streets and public bins
 - ✓ Any brand and market variant
 - ✓ Total 70 cities (40 largest cities and 30 smaller towns)
 - ✓ Target main sample: 17,000 packs
 - ✓ City sample quotas proportional to population
 - ✓ Fieldwork conducted - 17.10-13.11.2013
- **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. 2013 N= 345,161 weighted sticks



National Sample



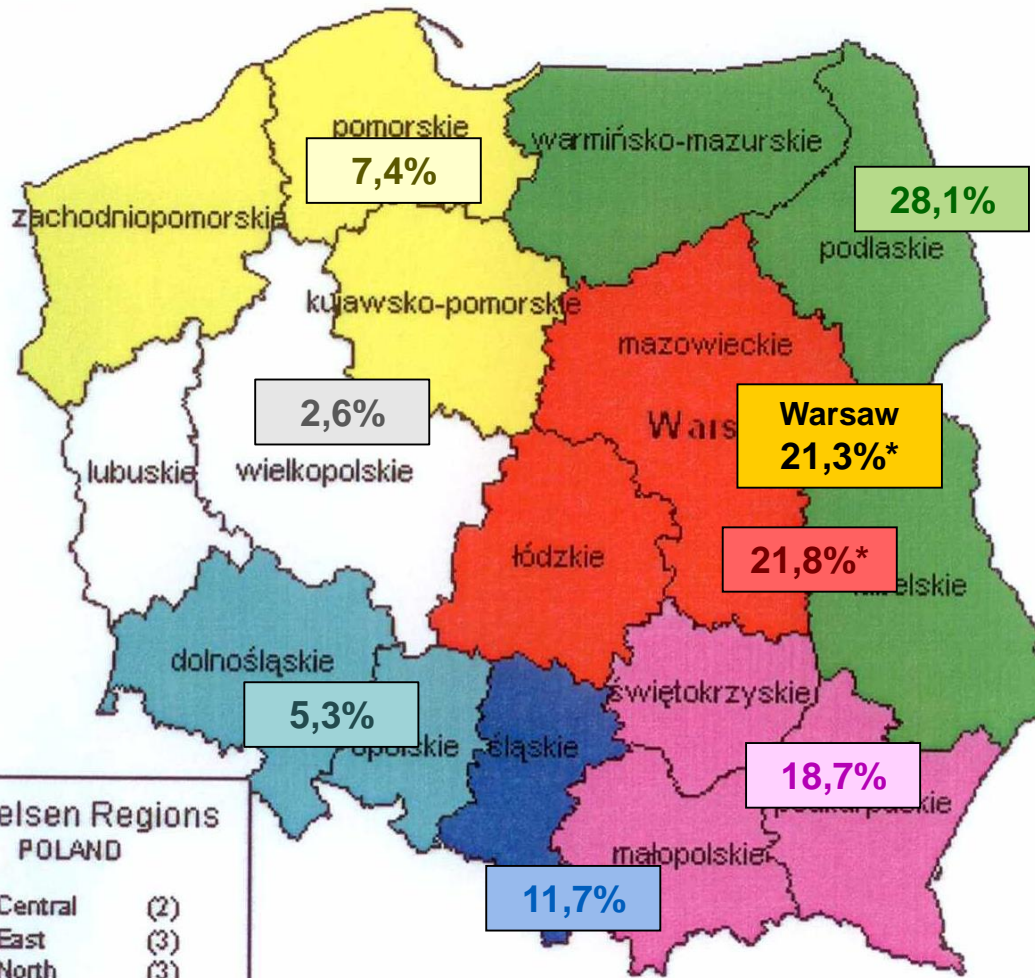
List of "Others"

Market Variant	Share
CZECH REPUBLIC	0,5%
UNITED KINGDOM	0,3%
SUB-SAHARAN AFRICA	0,3%
MOLDOVA	0,3%
CANARY ISLANDS	0,3%
SLOVAKIA	0,3%
others (less than 0,2%)	1,0%
Total	3,0%

Q.4. 2013 N = 49,987 weighted sticks

Q.4. 2013

Poland national incidence of non-domestic packs: 14.5%



ACNielsen Regions POLAND

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

Q.2. 2012

Warsaw	21.9%
Central	23.3%
East	39.4%
North	6.5%
South	11.1%
South-East	10.3%
South-West	3.6%
West	1.3%

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%

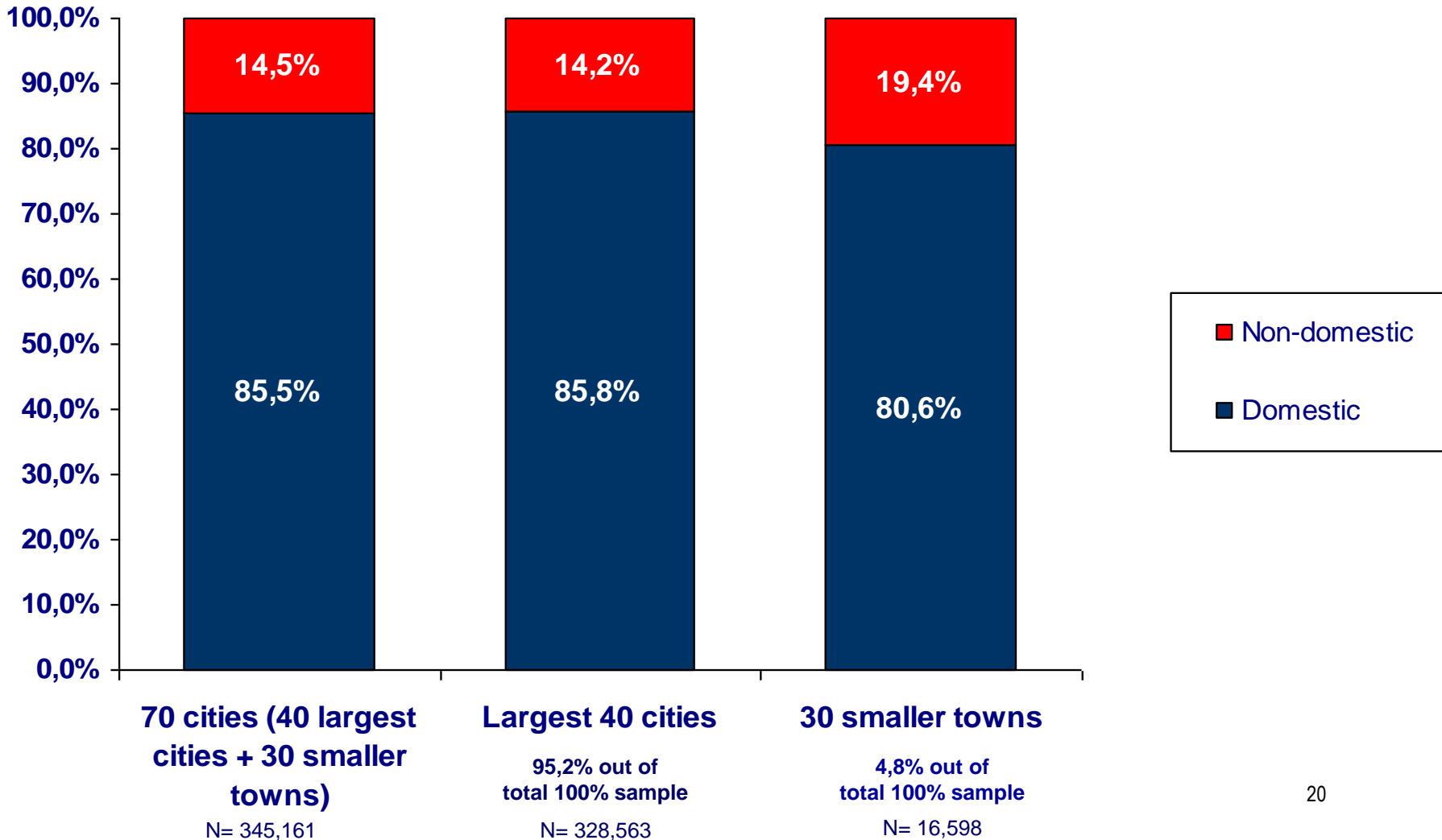
Q.3. 2013

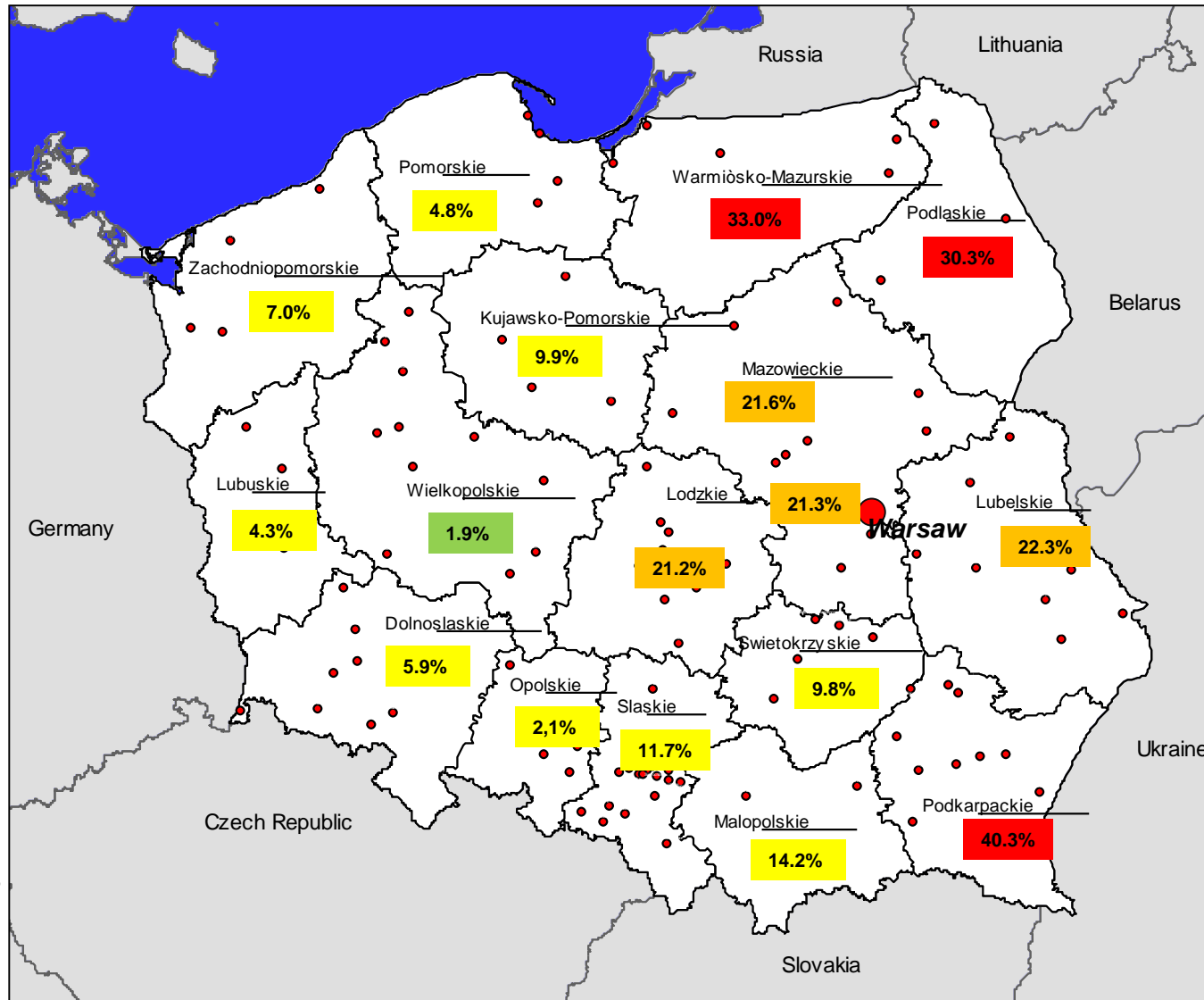
Warsaw	20.3%
Central	19.9%
East	36.5%
North	8.0%
South	10.1%
South-East	12.1%
South-West	5.2%
West	2.3%

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

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

Q.4. 2013 N= 345,161 weighted sticks





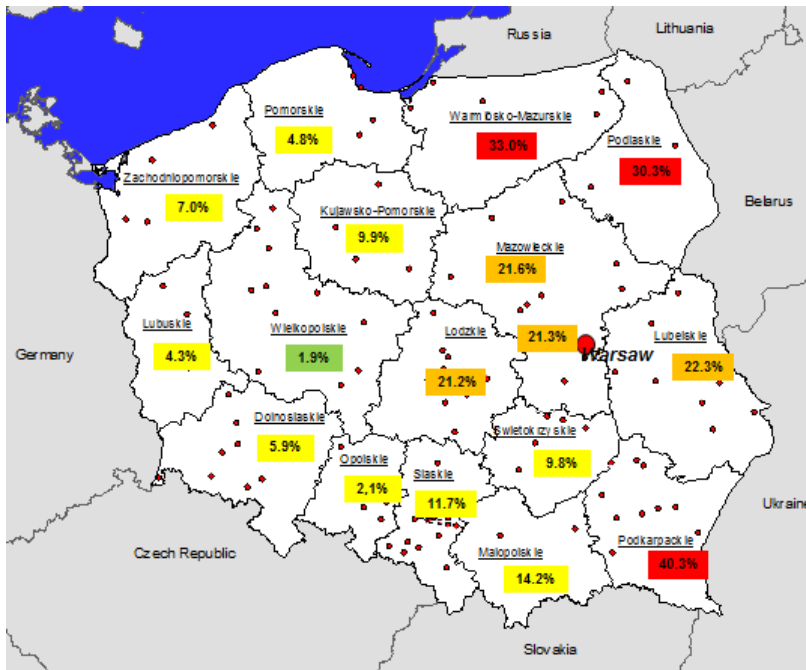
(*): Mazowieckie including Warsaw

Q.4. 2013 N= 345,161 weighted sticks

Q.4. 2013 N= 345,161 weighted sticks

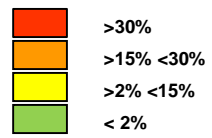
	Q2 2012	Q3 2012	Q4 2012	Q2 2013	Q3 2013	Q4 2013
WARSAW	21,9%	24,7%	20,6%	24,2%	20,3%	21,3%
Voivodships						
DOLNOSLASKIE	3,9%	5,5%	4,3%	7,9%	5,6%	5,9%
KUJAWSKO-POMORSKIE	10,9%	7,2%	7,0%	8,5%	15,8%	9,9%
LODZKIE	22,6%	24,0%	26,9%	22,8%	20,0%	21,2%
LUBELSKIE	26,4%	28,1%	19,6%	30,5%	31,1%	22,3%
LUBUSKIE	3,9%	6,9%	1,4%	4,5%	2,9%	4,3%
MALOPOLSKIE	5,8%	10,8%	7,8%	8,7%	11,7%	14,2%
MAZOWIECKIE	22,4%	24,3%	20,5%	23,2%	20,1%	21,6%
OPOLSKIE	2,3%	3,6%	1,8%	7,2%	3,1%	2,1%
PODKARPACKIE	31,3%	26,9%	43,3%	21,5%	19,9%	40,3%
PODLASKIE	52,2%	35,6%	38,1%	49,4%	44,2%	30,3%
POMORSKIE	3,7%	2,6%	3,7%	0,3%	2,2%	4,8%
SLASKIE	11,1%	12,0%	9,9%	10,2%	10,1%	11,7%
SWIETOKRZYSKIE	2,5%	5,1%	5,6%	1,7%	4,2%	9,8%
WARMINSKO-MAZURSKIE	42,7%	32,3%	26,8%	59,0%	36,0%	33,0%
WIELKOPOLSKIE	0,4%	0,6%	0,8%	1,7%	2,1%	1,9%
ZACHODNIOPOMORSKIE	3,7%	2,3%	3,6%	4,0%	4,4%	7,0%
Total Poland	14,5%	14,5%	13,2%	15,1%	14,0%	14,5%

(*) : Mazowieckie including Warsaw



	Q2 2012	Q3 2012	Q4 2012	Q2 2013	Q3 2013	Q4 2013
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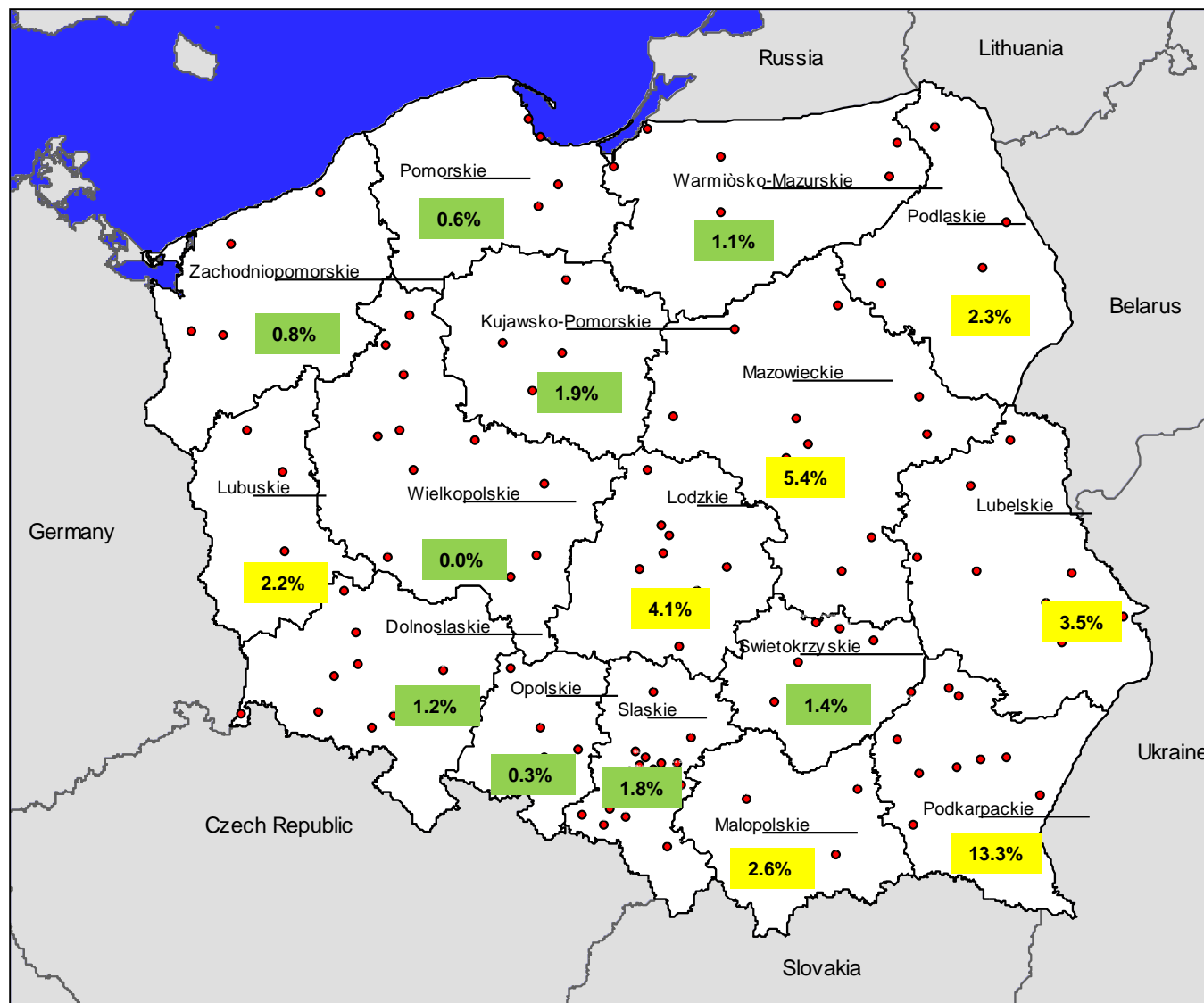
Q.4. 2013

N= 345,161 weighted sticks

non-domestic incidence 14,5% includes
2.7% of counterfeit

ALMARES

CF Incidence by Voivodship



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