

Poland Market Survey Report

Empty Discarded Pack Collection August 2013

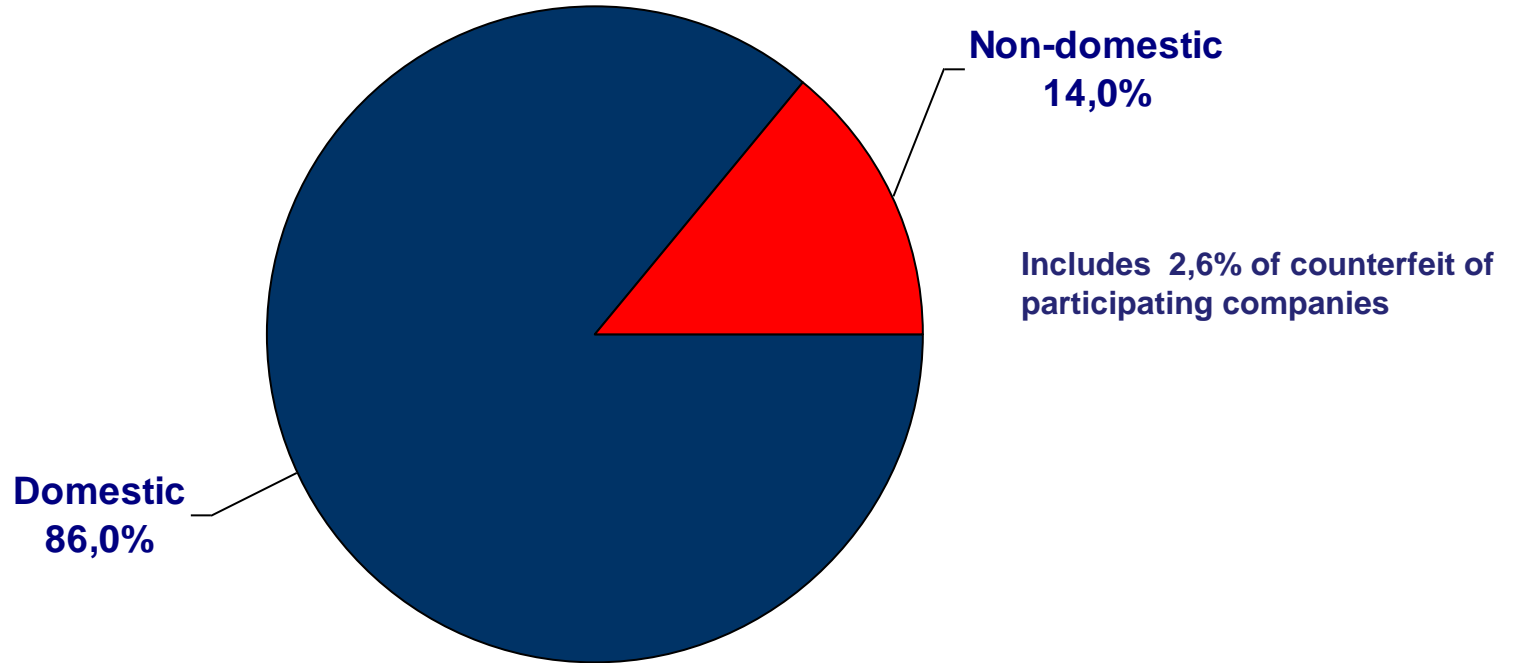
Conducted on behalf: British American Tobacco
Imperial Tobacco Group
Japan Tobacco International
Philip Morris International

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

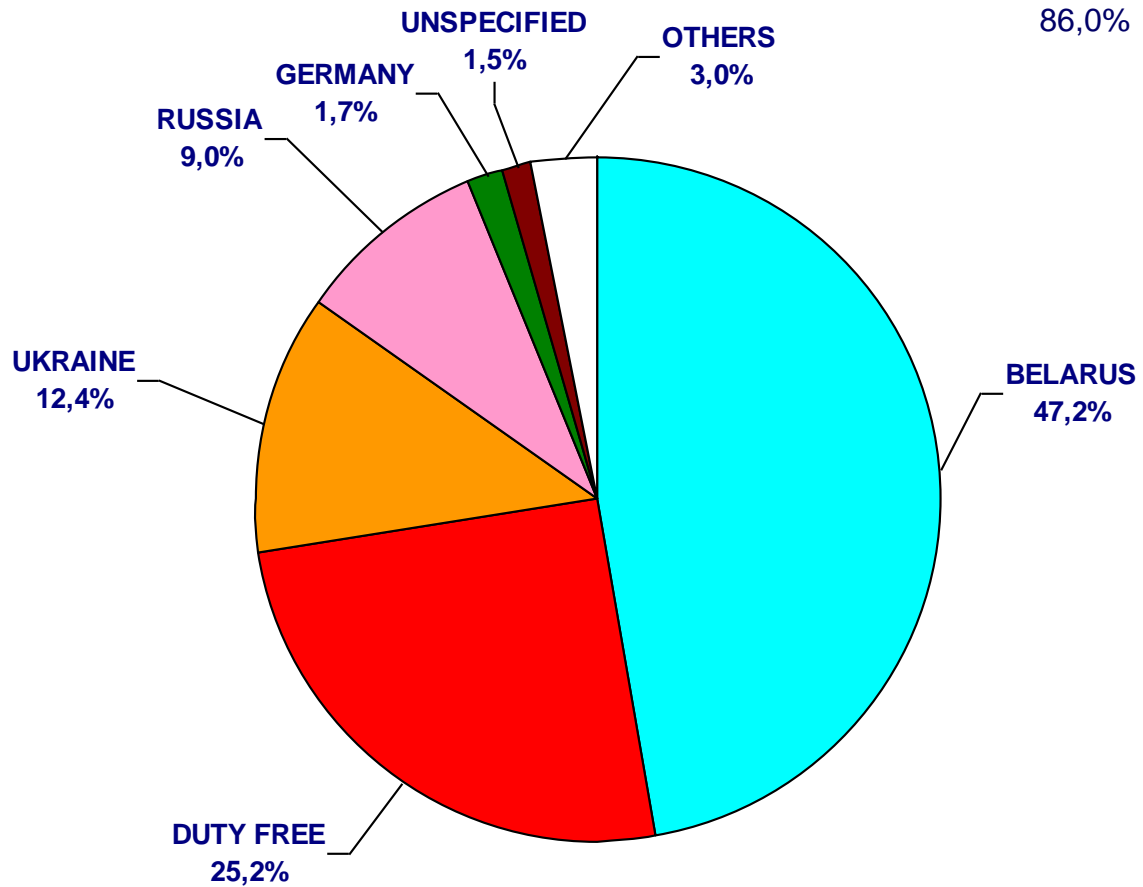
- **Provide an indication on the incidence of non-domestic or illicit cigarettes**
 - ✓ Tax paid and non tax paid cigarettes from other countries
 - ✓ Counterfeit cigarettes

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

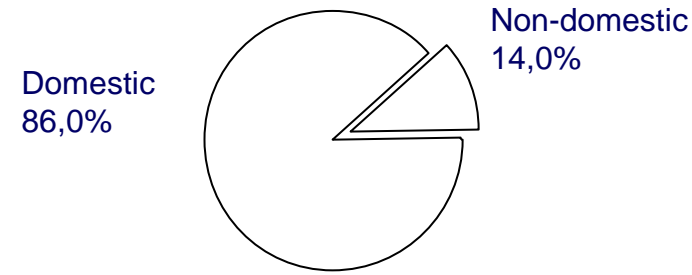
- **Empty Discarded Pack (EDP) collection**
 - ✓ Random collection from streets and public bins
 - ✓ Any brand and market variant
 - ✓ Total 70 cities (40 largest cities and 30 smaller towns)
 - ✓ Target main sample: 17,000 packs
 - ✓ City sample quotas proportional to population
 - ✓ Fieldwork conducted - 1.08.-26.08.2013
- **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.3. 2013 N= 346,044 weighted sticks



National Sample



List of "Others"

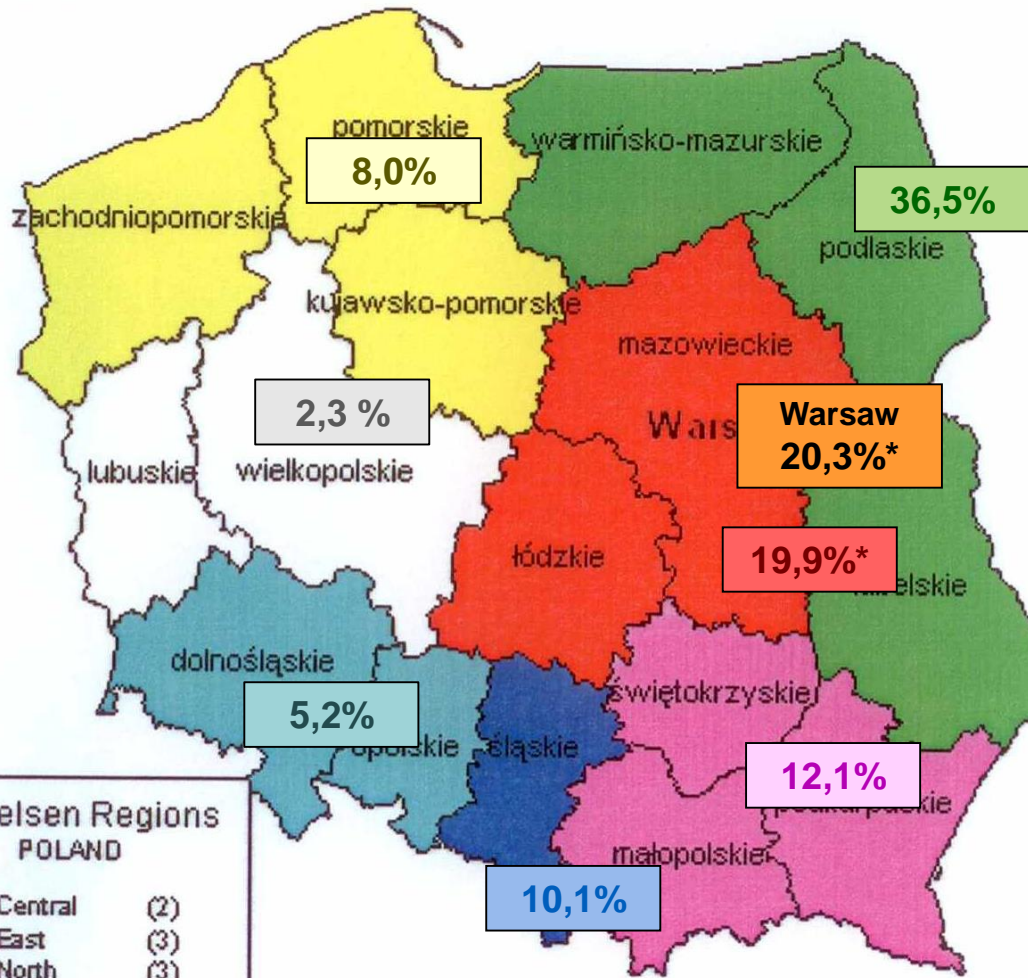
Market Variant	Share
CANARY ISLANDS	0,8%
MOLDOVA	0,3%
UNITED KINGDOM	0,2%
CZECH REPUBLIC	0,2%
FRANCE	0,2%
DENMARK	0,2%
KAZAKHSTAN	0,2%
others (less than 0,2%)	0,9%
Total	3,0%

Q.3. 2013 N = 48,533 weighted sticks

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

Q.3. 2013

Poland national incidence of non-domestic packs: 14.0%



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%

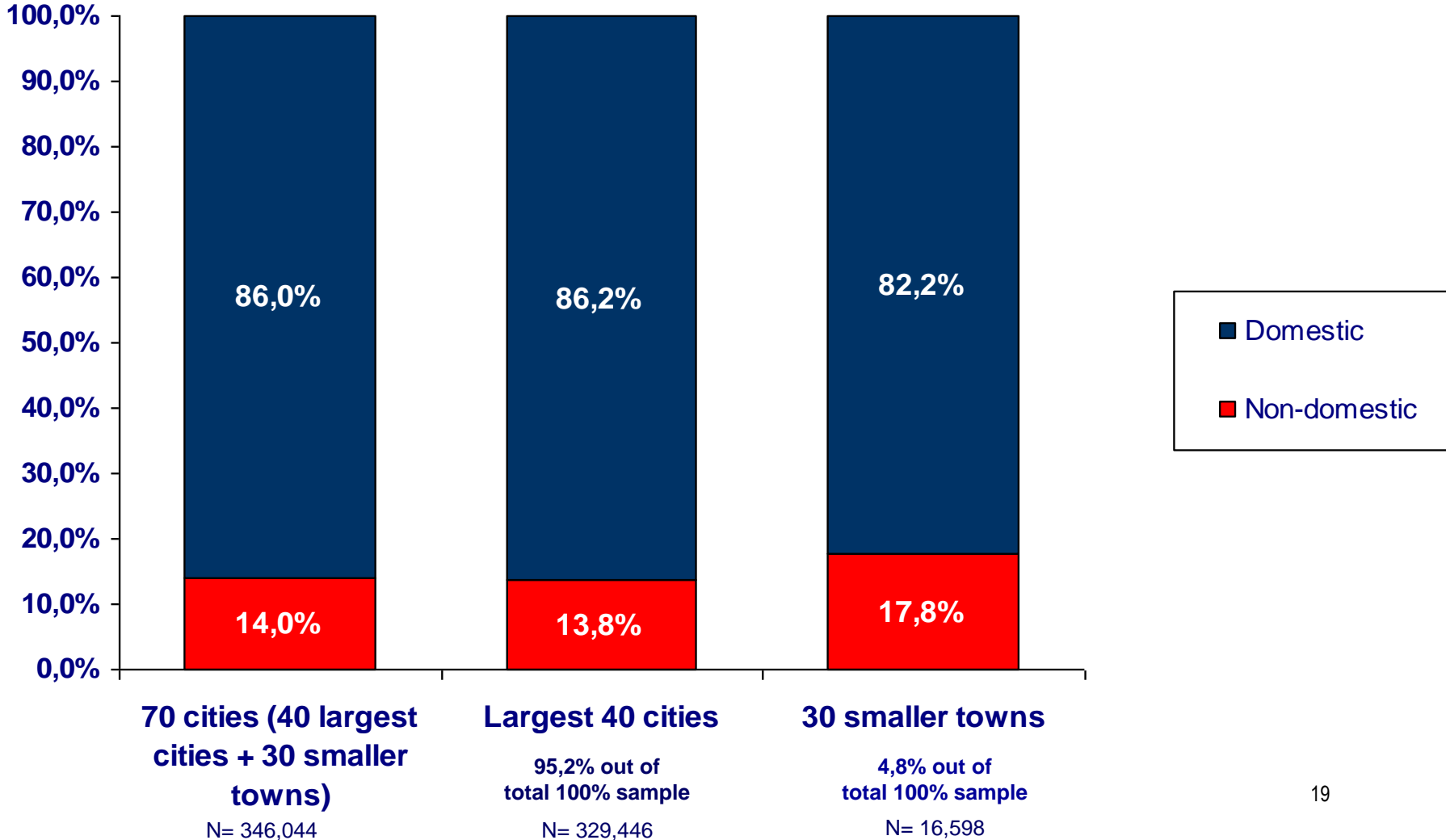
Q.2. 2013	
Warsaw	24.2%
Central	21.6%
East	45.4%
North	4.4%
South	10.2%
South-East	10.1%
South-West	7.8%
West	2.4%

ACNielsen Regions POLAND

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

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

Q.3. 2013 N= 346,044 weighted sticks



Poland national incidence of non-domestic packs: 14.0%

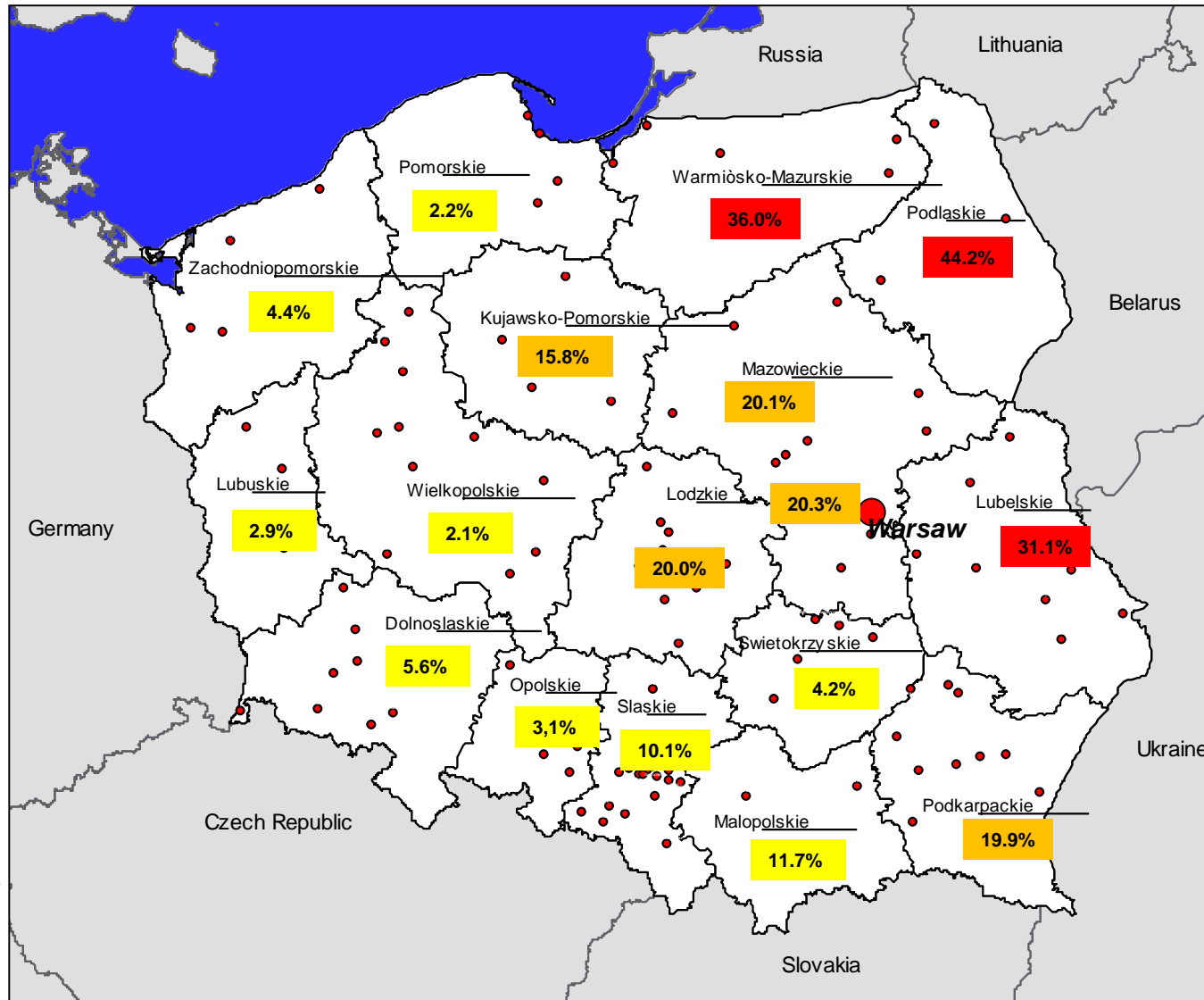
Q.3. 2013 N= 346,044 weighted sticks

Largest 40 cities



Small Towns

REGION	CITY	INCIDENCE
East	Braniewo	25,8%
	Lidzbark Warmiński	23,1%
	Sokółka	60,3%
	Olecko	47,3%
	Hrubieszów	39,7%
	Krasnystaw	34,6%
South-East	Radzyń Podlaski	30,2%
	Przeworsk	22,6%
	Łańcut	25,1%
	Ropczyce	21,9%
	Staszów	7,2%
	Nisko	44,6%
Central	Jasło	10,7%
	Jędrzejów	9,3%
	Koziencice	17,7%
	Sokołów Podlaski	20,3%
	Łask	13,8%
	Milanówek	28,5%
West	Radomsko	15,7%
	Międzyrzecz	7,2%
	Chodzież	3,1%
	Oborniki	2,6%
	Szamotuły	2,6%
	Złotów	1,9%
South-West	Strzelce Opolskie	3,3%
	Złotoryja	3,2%
	Krapkowice	7,9%
	Bogatynia	6,5%
	Namysłów	1,9%
North	Gryfice	1,9%



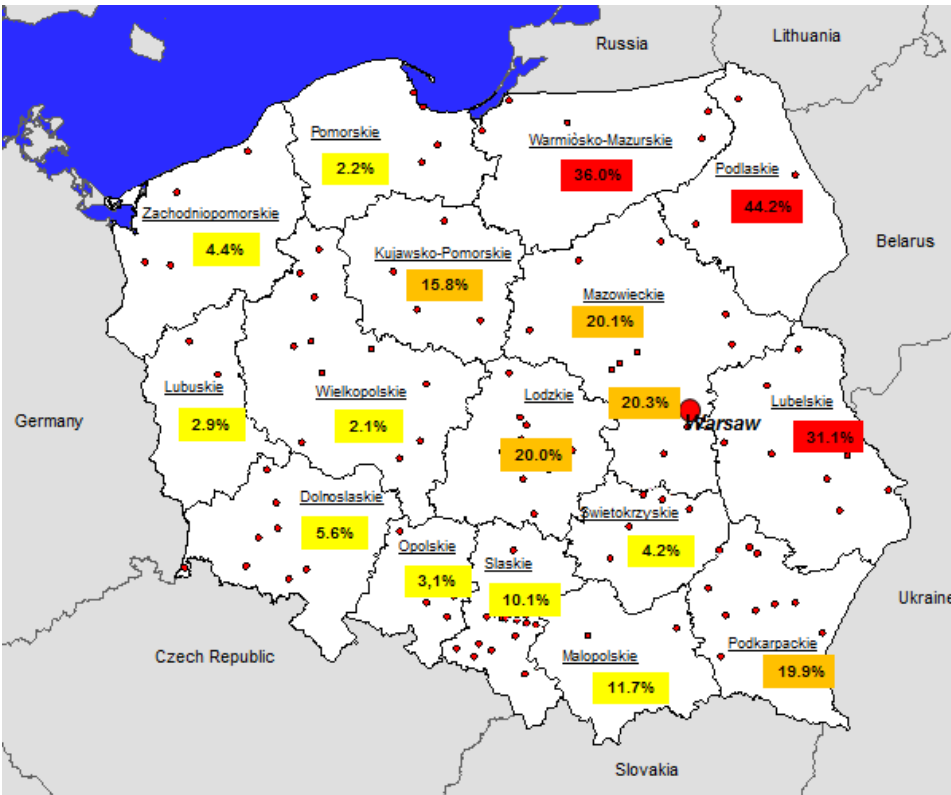
(*): Mazowieckie including Warsaw

Q.3. 2013 N= 346,044 weighted sticks

Q.3. 2013 N= 346,044 weighted sticks

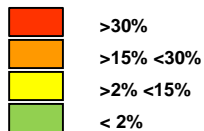
	Q2 2012	Q3 2012	Q4 2012	Q2 2013	Q3 2013
WARSAW	21,9%	24,7%	20,6%	24,2%	20,3%
Voivodships					
DOLNOSLASKIE	3,9%	5,5%	4,3%	7,9%	5,6%
KUJAWSKO-POMORSKIE	10,9%	7,2%	7,0%	8,5%	15,8%
LODZKIE	22,6%	24,0%	26,9%	22,8%	20,0%
LUBELSKIE	26,4%	28,1%	19,6%	30,5%	31,1%
LUBUSKIE	3,9%	6,9%	1,4%	4,5%	2,9%
MALOPOLSKIE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

(*): Mazowieckie including Warsaw



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

(*): Mazowieckie including Warsaw

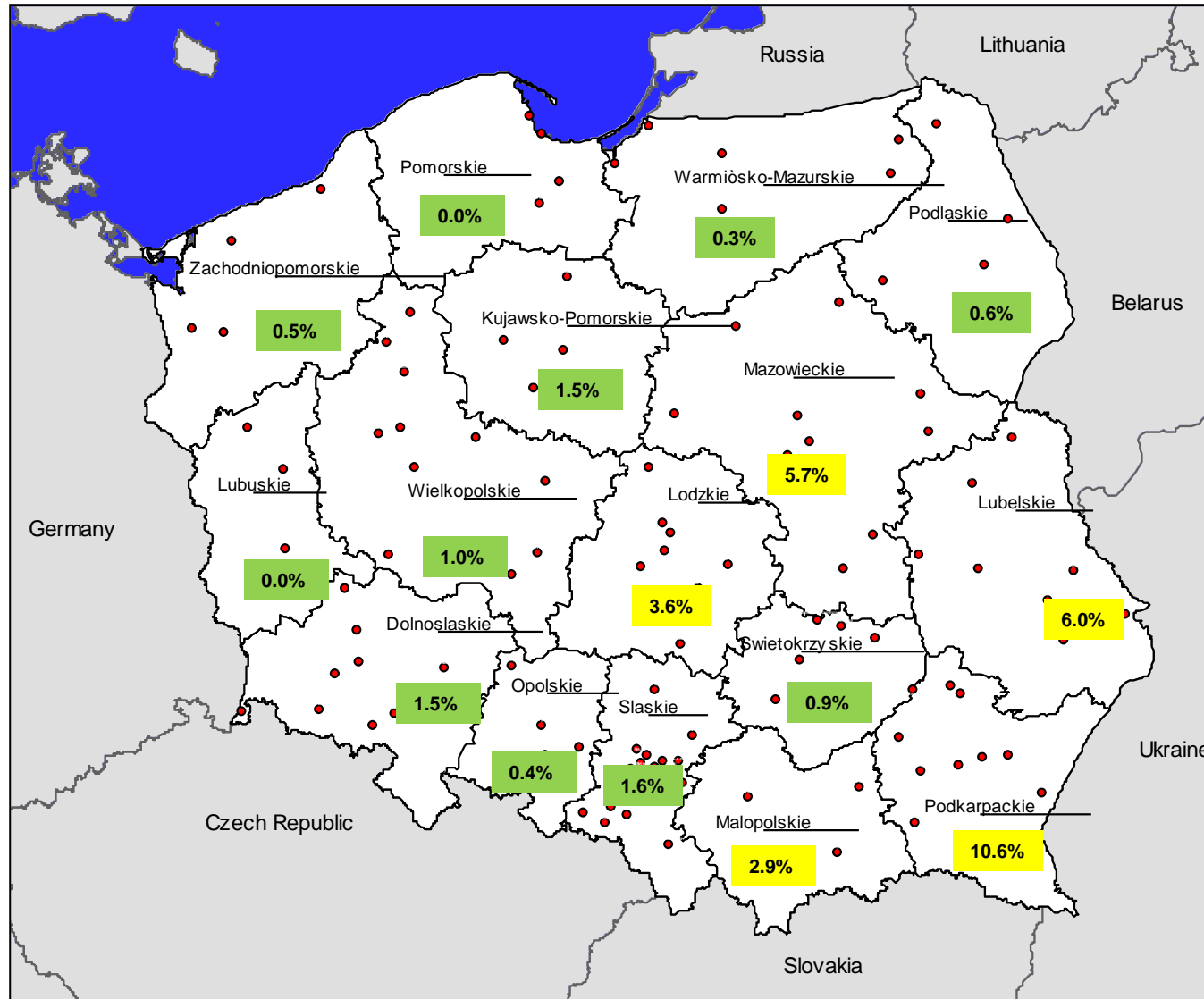


Q.3. 2013 N= 346,044 weighted sticks

non-domestic incidence 14,0% includes
2.6% of counterfeit

ALMARES

CF Incidence by Voivodship



(*): Mazowieckie including Warsaw

Q.3. 2013 N= 346,044 weighted sticks