

# WSPM GROUP

## EMPTY PACKS SURVEY

### NETHERLANDS Q4 2022

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February 2023

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NETHERLANDS



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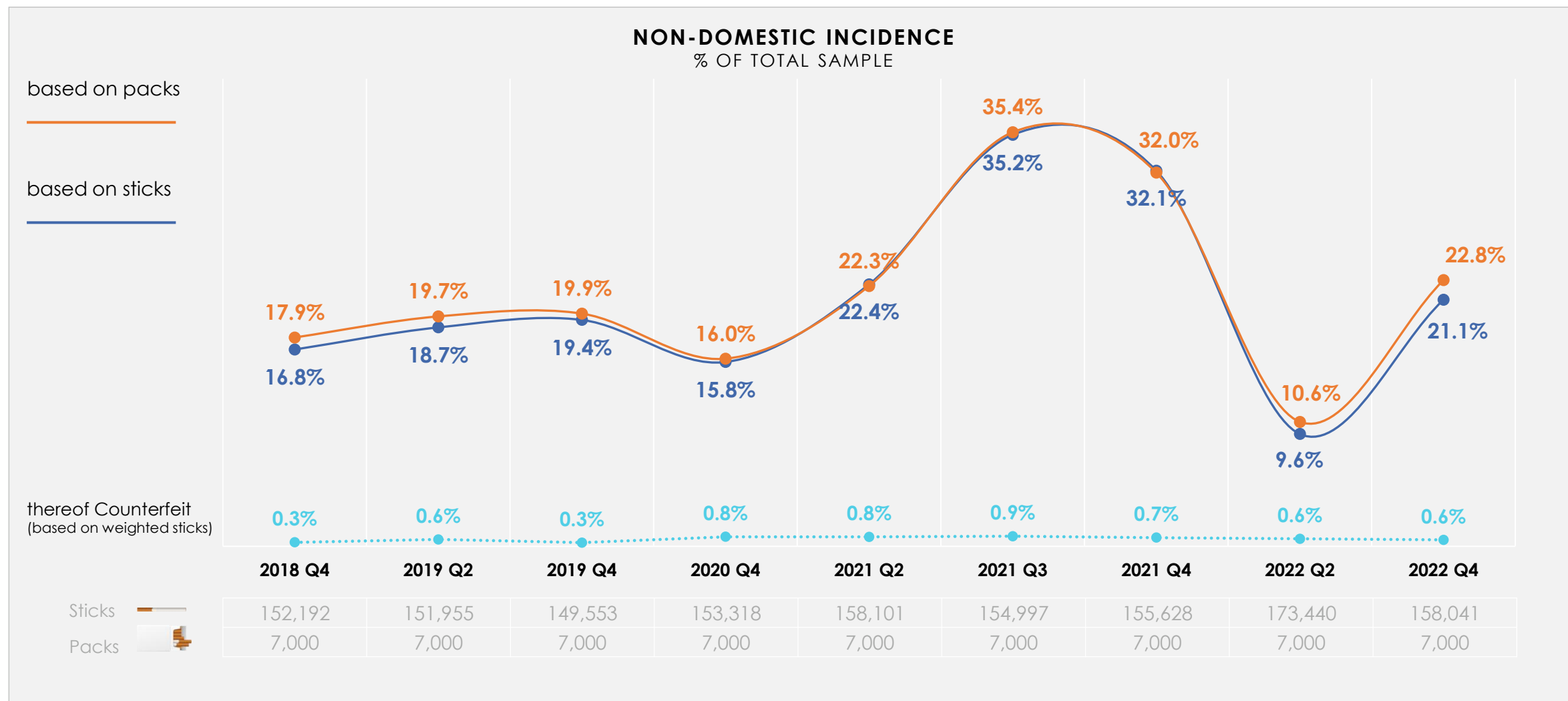


01.

# EXECUTIVE SUMMARY

QUARTER 4, 2022

# EXECUTIVE SUMMARY: NON-DOMESTIC TREND





# EXECUTIVE SUMMARY: KEY MESSAGES

## Industry overview

- **Non-domestic incidence** increased to **21.1%** (vs 9.6% in Q2 2022, 32.1% in Q4 2021).
- **Counterfeit incidence** stable at **0.6%** (0.6%, 0.7%).
- **Main non-domestic brands** found were (excl. counterfeit):
  - **MARLBORO** (PMI) with **8.1%** of all packs collected (3.3%, 10.6%).
  - **CAMEL** (JTI) with **1.8%** (0.8%, 1.7%).
  - **WINSTON** (JTI) with **1.6%** (0.6%, 0.9%).
- **Main non-domestic market variants** found were (excl. counterfeit):
  - **DUTY FREE** with **3.0%** of all packs collected (1.0%, 3.1%).
  - **GERMANY** with **2.7%** (1.0%, 1.9%).
  - **POLAND** with **2.0%** (1.5%, 0.9%).
- **At city level**, the highest non-domestic incidence was found in **OSS** at **45.8%** (8.1%, 73.6%), in **ALPHEN AAN DEN RIJN** at **43.7%** (2.5%, 30.1%), and **GRONINGEN** at **42.4%** (7.8%, 25.6%).

# EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks

— Total: 158,041 sticks (7,000 packs).

	Q4 2022	Q2 2022	Q4 2021
<b>NON-DOMESTIC INCIDENCE</b>	<b>21.1%</b>	9.6%	32.1%

## MAIN MARKET VARIANTS (excl. counterfeit)

DUTY FREE	<b>3.0%</b>	1.0%	3.1%
GERMANY	<b>2.7%</b>	1.0%	1.9%
POLAND	<b>2.0%</b>	1.5%	0.9%

## MAIN BRAND FAMILIES (excl. counterfeit)

MARLBORO (PMI)	<b>8.1%</b>	3.3%	10.6%
CAMEL (JTI)	<b>1.8%</b>	0.8%	1.7%
WINSTON (JTI)	<b>1.6%</b>	0.6%	0.9%

## MAIN CITIES (excl. counterfeit)

OSS	<b>45.8%</b>	8.1%	73.6%
ALPHEN AAN DEN RIJN	<b>43.7%</b>	2.5%	30.1%
GRONINGEN	<b>42.4%</b>	7.8%	25.6%

## COUNTERFEIT INCIDENCE

TOTAL COUNTERFEIT INCIDENCE	<b>0.6%</b>	0.6%	0.7%
PMI	<b>0.4%</b>	0.4%	0.5%
JTI	<b>0.1%</b>	0.0%	0.0%
BAT	<b>0.0%</b>	0.1%	0.0%
IMPERIAL TOBACCO	—	0.1%	0.2%

# EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks

— Total: 158,041 sticks (7,000 packs).

## MAIN INFLOWS

	COUNTERFEIT	DUTY FREE	GERMANY	POLAND	ITALY	BELGIUM	OTHERS	Total	2022 Q2	2021 Q4
MARLBORO (PMI)	0.4%	1.5%	1.5%	0.3%	0.5%	0.7%	3.5%	<b>8.5%</b>	3.8%	11.0%
CAMEL (JTI)	—	0.2%	0.1%	0.1%	0.1%	0.3%	1.0%	<b>1.8%</b>	0.8%	1.7%
WINSTON (JTI)	0.1%	0.2%	0.1%	0.5%	0.3%	0.1%	0.5%	<b>1.7%</b>	0.6%	1.0%
L&M (PMI)	—	0.1%	0.2%	0.3%	—	0.1%	0.5%	<b>1.1%</b>	0.8%	2.7%
PARLIAMENT (PMI)	—	0.1%	0.0%	0.1%	—	—	0.7%	<b>0.9%</b>	0.6%	2.0%
PALL MALL (BAT)	—	—	0.2%	0.3%	—	0.0%	0.2%	<b>0.7%</b>	0.3%	3.6%
OTHERS	0.0%	0.9%	0.6%	0.5%	0.3%	0.2%	3.9%	<b>6.4%</b>	2.8%	10.1%
<b>Total</b>	<b>0.6%</b>	<b>3.0%</b>	<b>2.7%</b>	<b>2.0%</b>	<b>1.3%</b>	<b>1.3%</b>	<b>10.2%</b>	<b>21.1%</b>	<b>9.6%</b>	<b>32.1%</b>
2022 Q2	0.6%	1.0%	1.0%	1.5%	0.1%	1.2%	4.2%	<b>9.6%</b>		
2021 Q4	0.7%	3.1%	1.9%	0.9%	0.7%	8.5%	16.2%	<b>32.1%</b>		

02.

# METHODOLOGY

QUARTER 4, 2022



# OBJECTIVES, PROVISIONS, LIMITATIONS

## OBJECTIVES

Provide an indication on the incidence of non-domestic or illicit cigarettes consumed in NETHERLANDS:

- 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. WSPM Group 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
- WSPM Group 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 allowances

## 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:  
01 – 29 Nov, 2022

## REPORTING

The results are calculated based on number of sticks equivalent to the number of packs collected.

## GEOGRAPHY

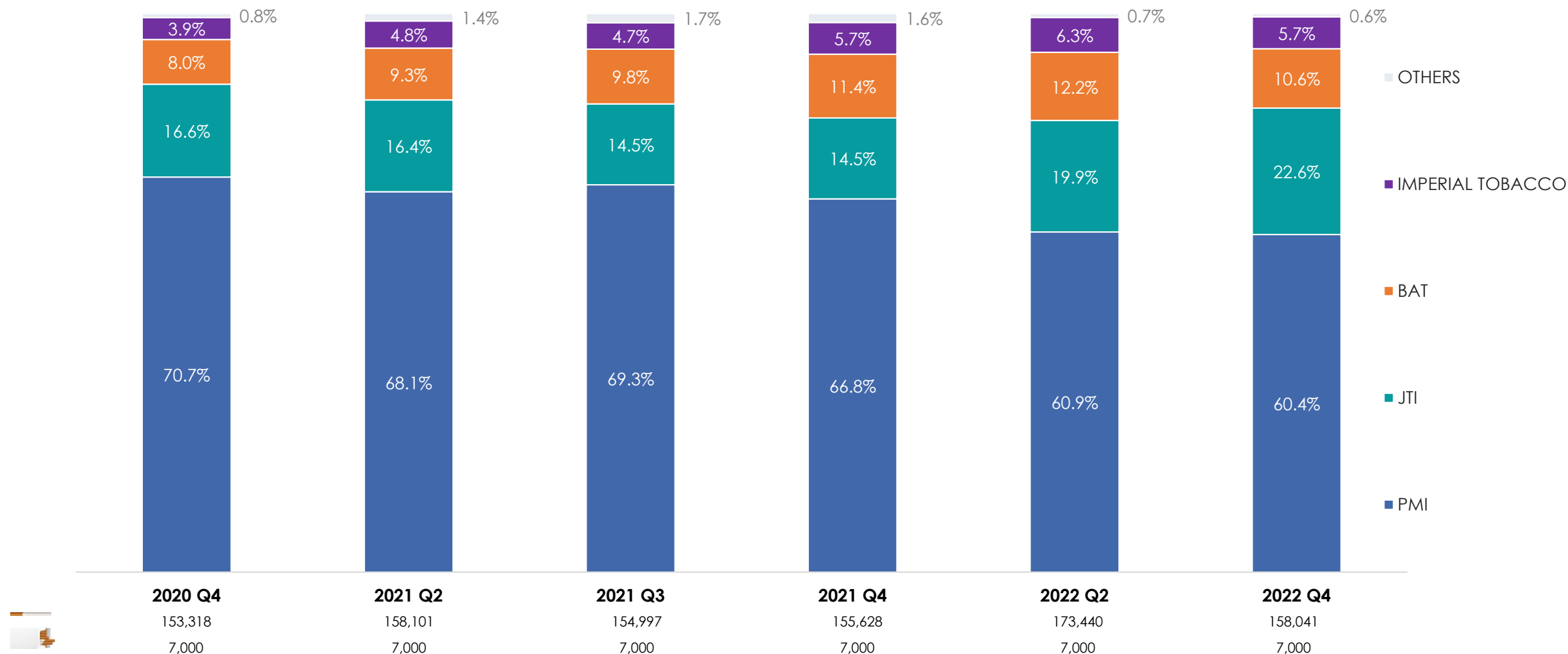
- The largest 50 cities
- 44.9% coverage of population



Region	Population Covered	Sample	Weighted Sample				
Amsterdam	799,278	743	743	Neeldwijk	102,698	95	95
Rotterdam	616,294	573	573	Venlo	100,159	93	93
The Hague	505,856	470	470	Deventer	98,581	92	92
Utrecht	321,916	299	299	Delft	99,097	92	92
Eindhoven	218,433	203	203	Leeuwarden	95,949	89	89
Tilburg	208,527	194	194	Alkmaar	94,505	88	88
Almere	195,213	182	182	Sittard-Geleen	94,024	87	87
Groningen	195,418	182	182	Helmond	89,023	83	83
Breda	178,140	166	166	Heerlen	88,747	83	83
Nijmegen	166,382	155	155	Hilversum	86,017	80	80
Enschede	158,627	147	147	Oss	84,861	79	79
Apeldoorn	157,315	146	146	Amstelveen	84,379	78	78
Haarlem	153,093	142	142	Seat (Sneek)	82,639	77	77
Arnhem	149,827	139	139	Hengelo	80,952	75	75
Amersfoort	149,662	139	139	Purmerend	79,482	74	74
Zaanstad	149,622	139	139	Roosendaal	77,155	72	72
Haarlemmermeer	144,153	134	134	Schiedam	76,216	71	71
S-Hertogenbosch	142,817	133	133	Lelystad	75,778	70	70
Zwolle	122,562	114	114	Alphen Aan.	72,913	68	68
Zoetermeer	123,092	114	114	Almelo	72,729	68	68
Maastricht	121,819	113	113	Vlaardingen	70,905	67	67
Leiden	119,800	111	111	Hoon	71,360	67	67
Dordrecht	118,466	110	110	Spijkensisse	72,375	67	67
Ede	109,823	102	102	Gouda	70,904	67	67
Emmen	108,392	101	101	Leidschendam	72,588	67	67
				<b>Total Sample</b>	<b>7,528,563</b>	<b>7,000</b>	<b>7,000</b>

# SAMPLE COMPOSITION: SHARE BY COMPANY

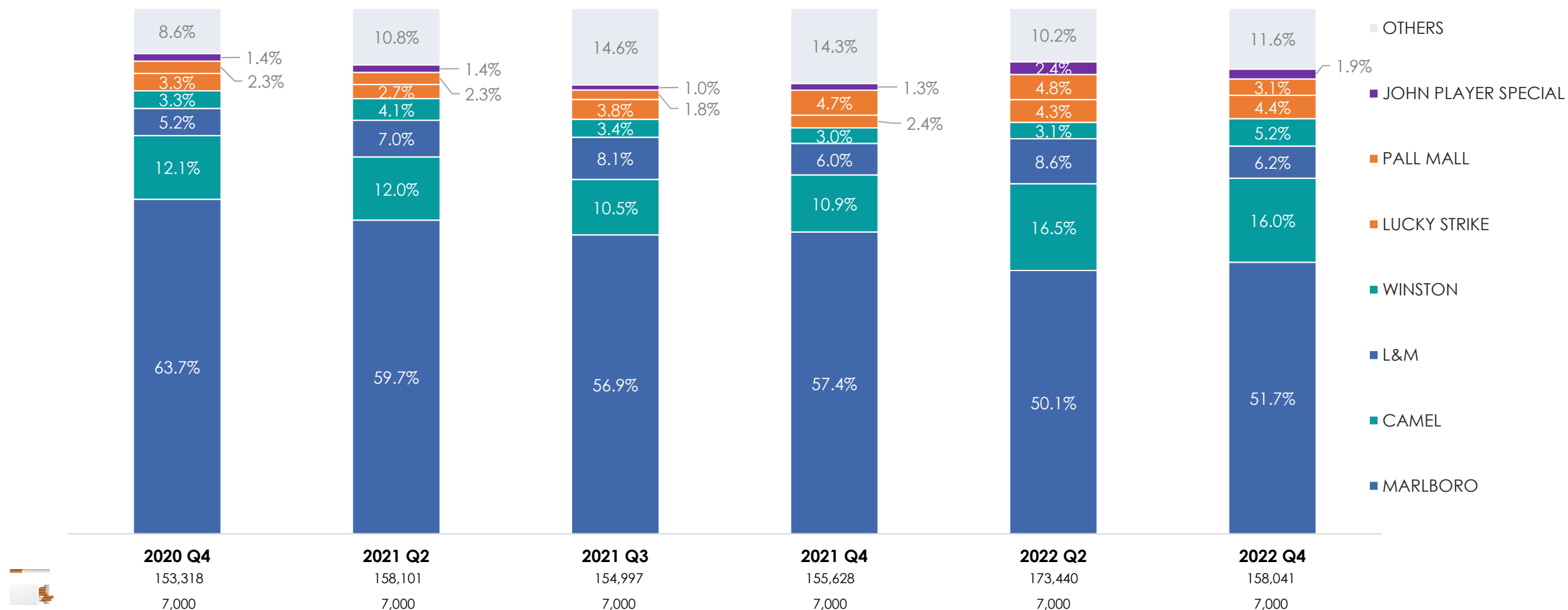
% OF TOTAL SAMPLE Based on number of sticks





# SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks





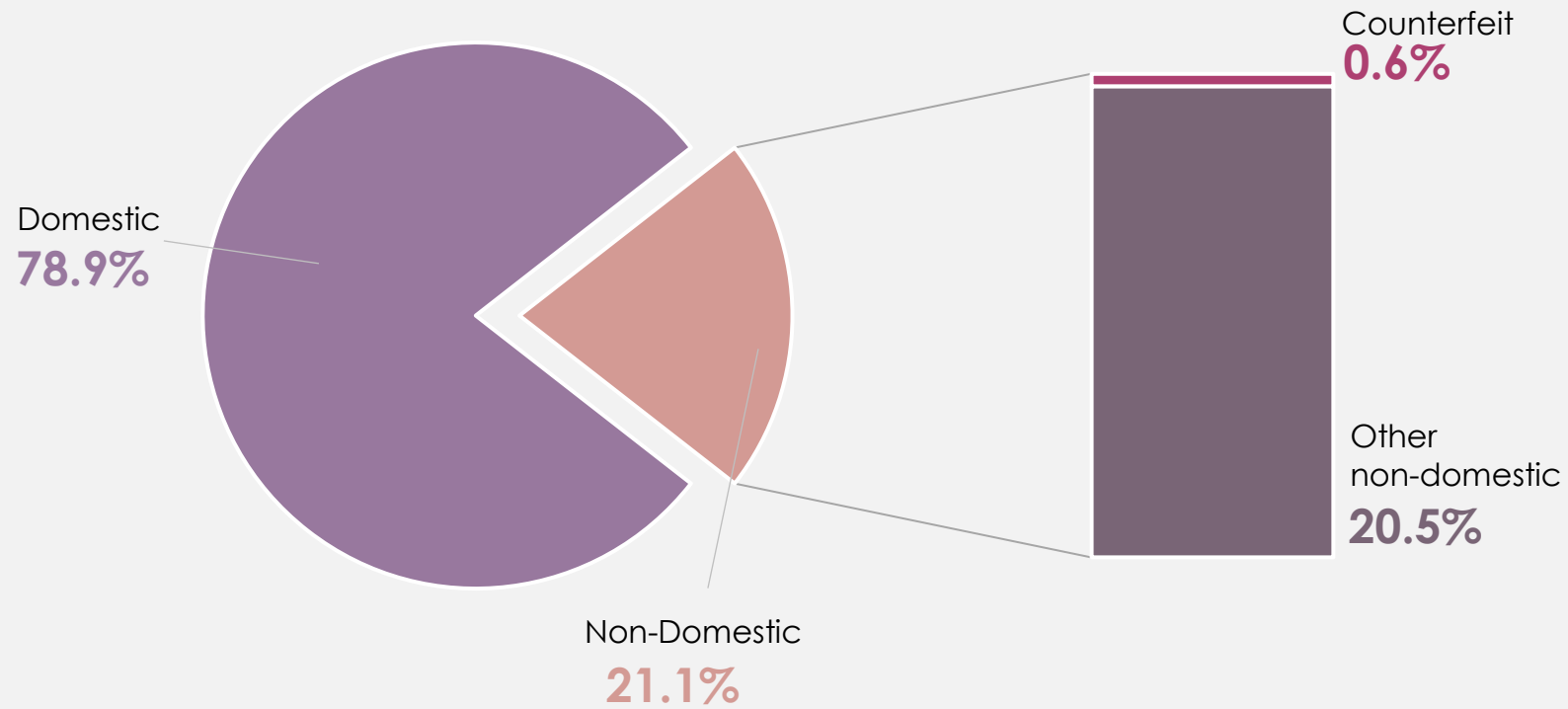
03.

# KEY RESULTS

QUARTER 4, 2022

# NON-DOMESTIC: CATEGORIES

**NON-DOMESTIC INCIDENCE CATEGORIES**  
% OF TOTAL SAMPLE

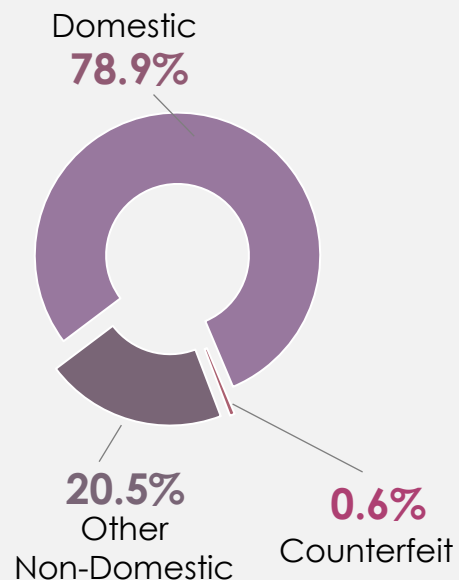


Total: 158,041 sticks (7,000 packs).



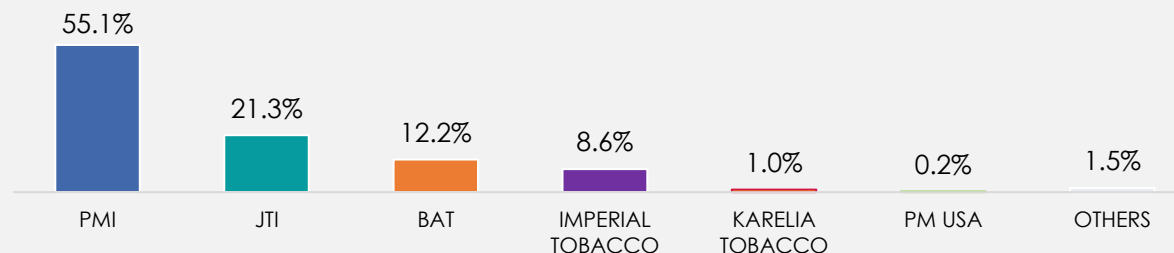
# OTHER NON-DOMESTIC: BREAKDOWN

## NON-DOMESTIC INCIDENCE % OF TOTAL SAMPLE



Total: 32,441 sticks (1,549 packs)

## SPLIT BY COMPANY % OF OTHER NON-DOMESTIC



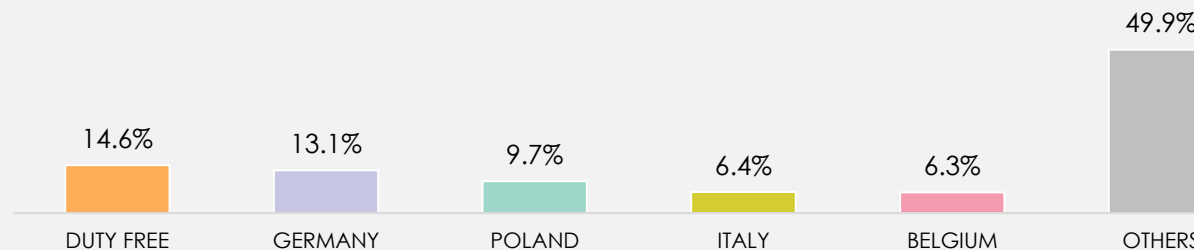
### Main Others ▼ e.g.

R.J. REYNOLDS	0.2%
ITC LTD	0.2%
KT&G	0.2%
HONGYUNHONGHE TOBACCO	0.2%
UNKNOWN	0.2%
H. VAN LANDEWYCK	0.1%
GRODNO TOBACCO FACTORY	0.1%

## SPLIT BY MAIN BRAND (TOP 5) % OF OTHER NON-DOMESTIC SAMPLE

MARLBORO	39.6%	CAMEL	8.7%	PALL MALL	3.2%	DAVIDOFF	2.5%	KARELIA	0.7%	MARLBORO	0.2%
L&M	5.3%	WINSTON	7.8%	LUCKY STRIKE	2.8%	LAMBERT & BUTLER	1.8%	OME	0.2%		
PARLIAMENT	4.3%	BENSON & HEDGES	1.2%	DUNHILL	1.7%	JOHN PLAYER SPECIAL	1.2%				
CHESTERFIELD	3.1%	STERLING	1.1%	KENT	1.5%	GAULOISES	1.2%				
PHILIP MORRIS	1.6%	SOBRANIE	0.7%	ROTHMANS	1.3%	WEST	0.4%				

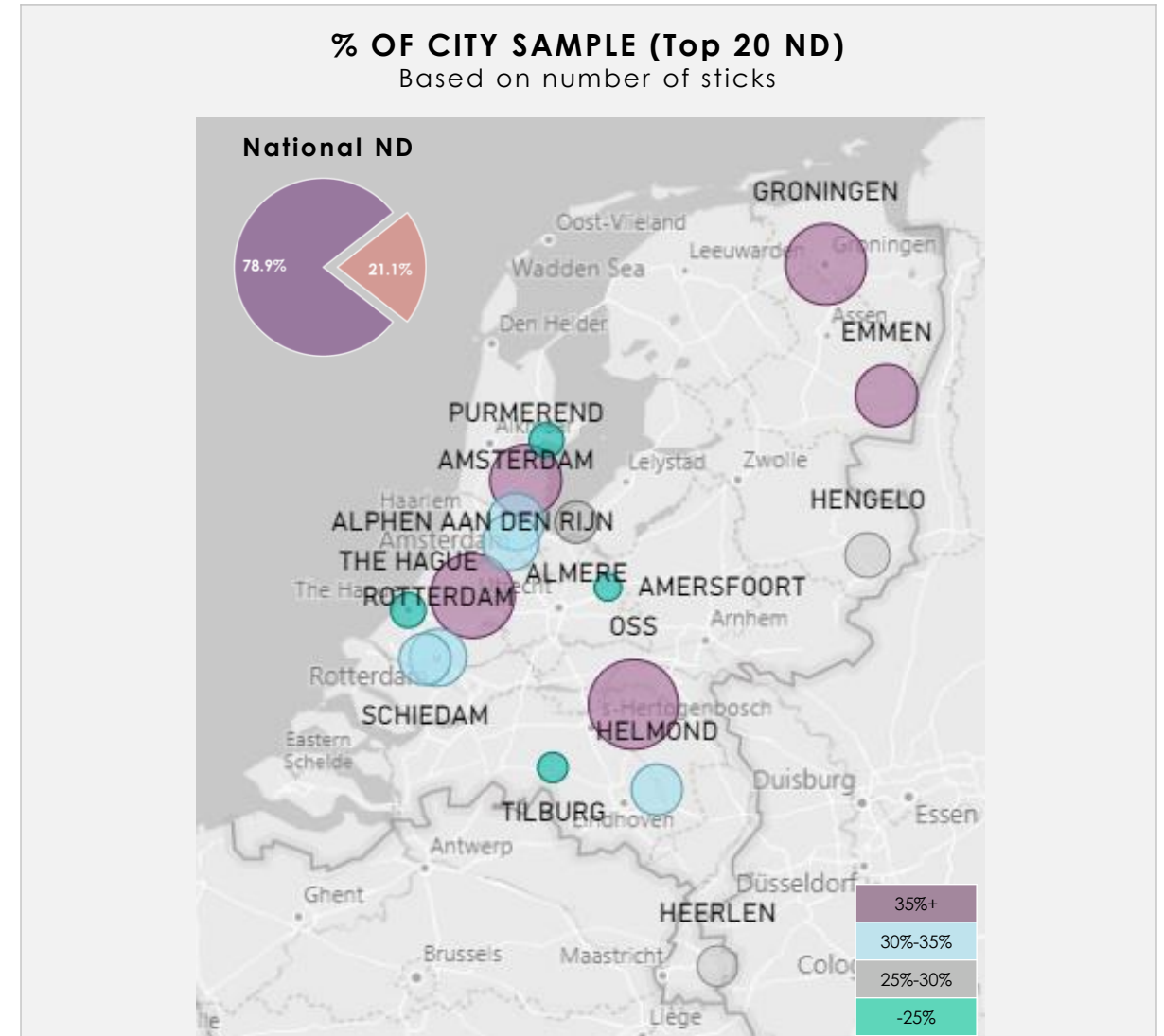
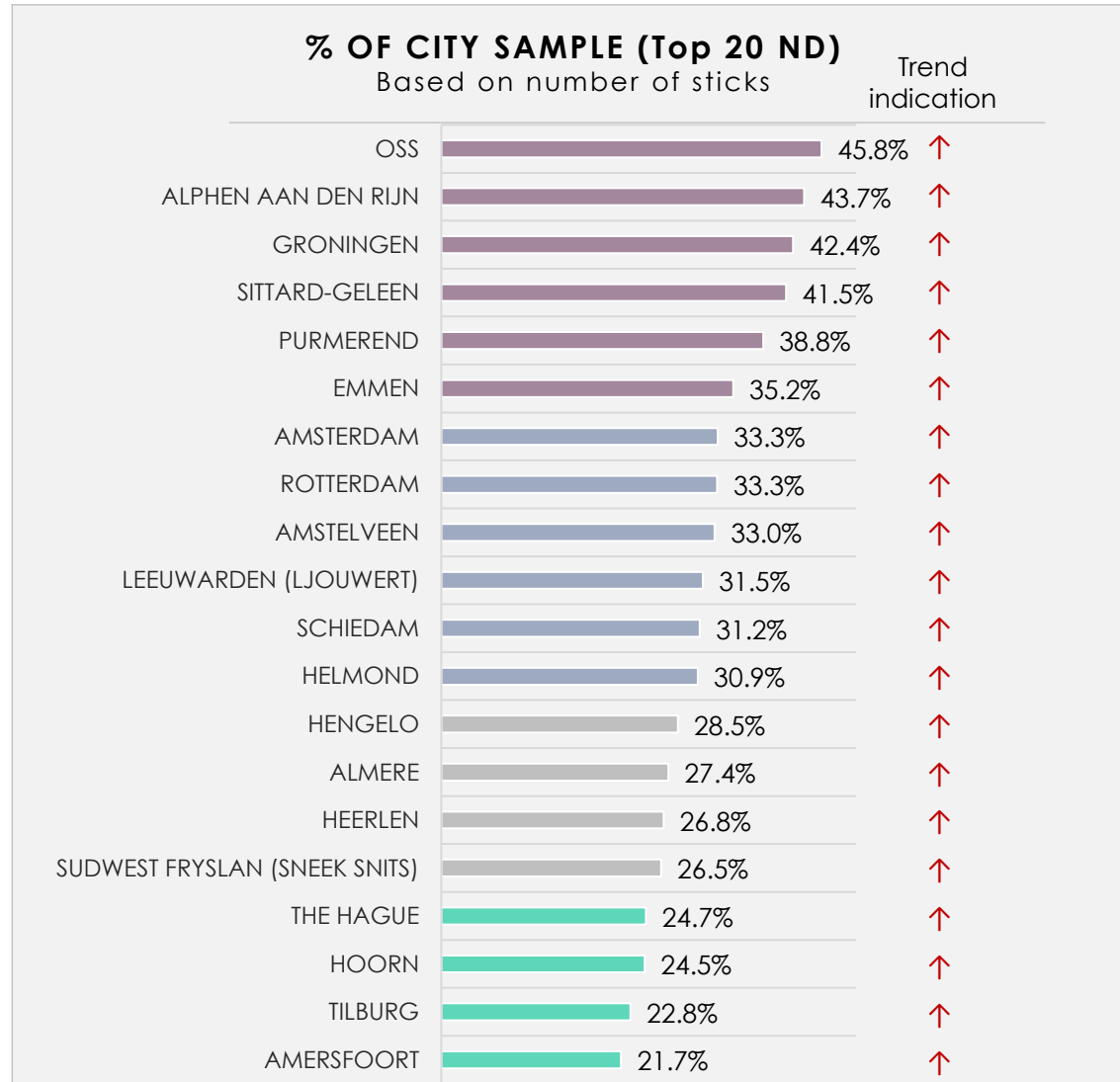
## SPLIT BY MARKET VARIANT % OF OTHER NON-DOMESTIC SAMPLE



### Main Others ▼ e.g.

TURKEY	7.7%
LUXEMBOURG	4.6%
SPAIN	3.5%
ROMANIA	1.9%
ITALY	1.3%
HUNGARY	1.2%
CANARY ISLANDS	0.9%

# NON-DOMESTIC: BY CITY (1/2)

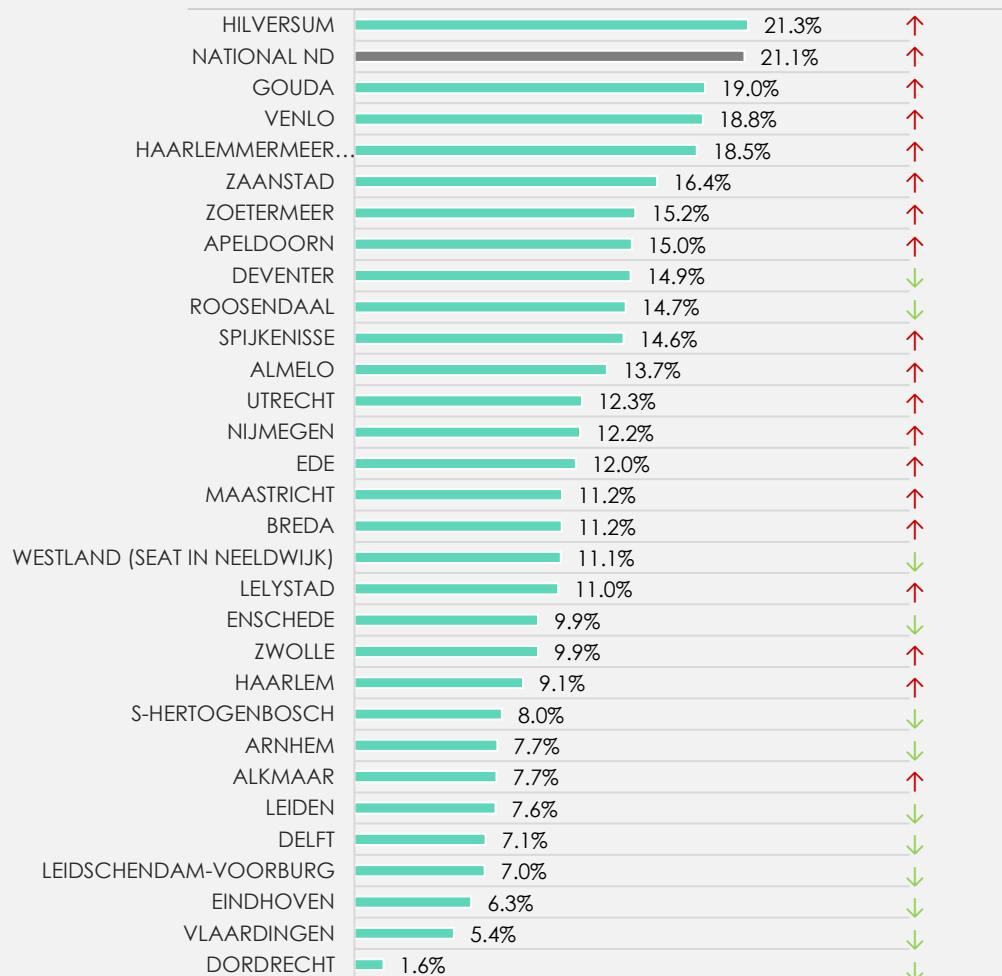


# NON-DOMESTIC: BY CITY (2/2)

## % OF CITY SAMPLE (Rest of cities)

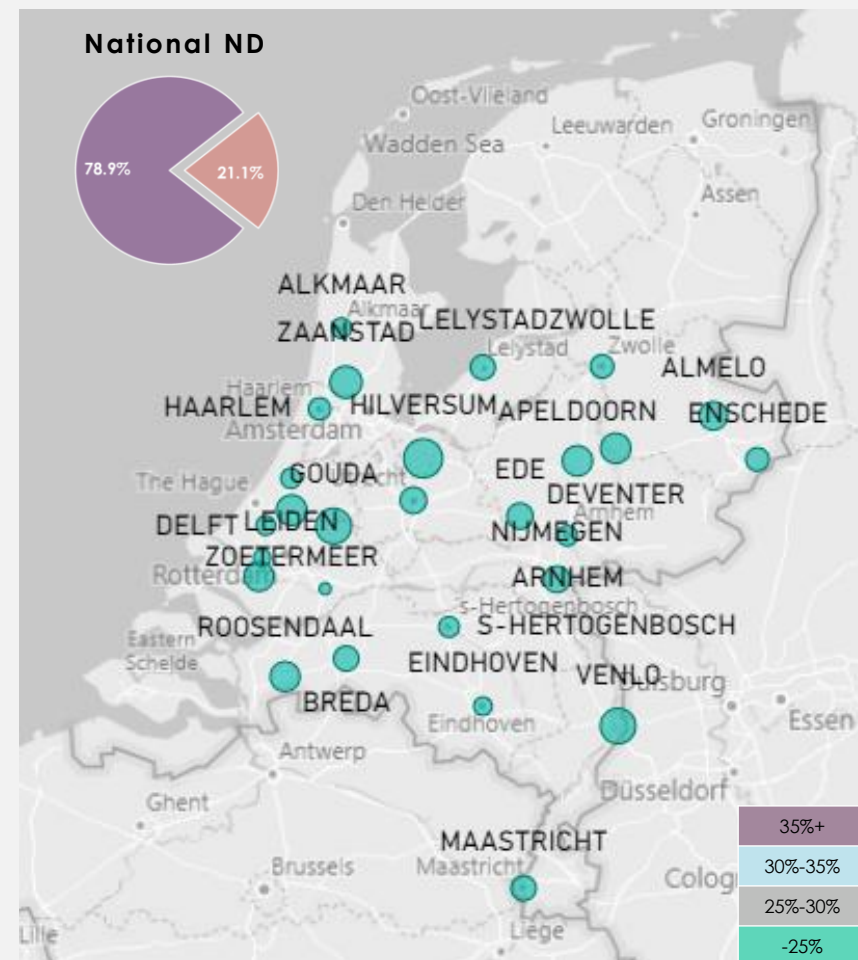
Based on number of sticks

Trend  
indication



## % OF CITY SAMPLE (Rest of cities)

Based on number of sticks





# NON-DOMESTIC: BY MAIN BRAND FAMILY & CITY (TOP 10)

% OF TOTAL SAMPLE Based on number of sticks

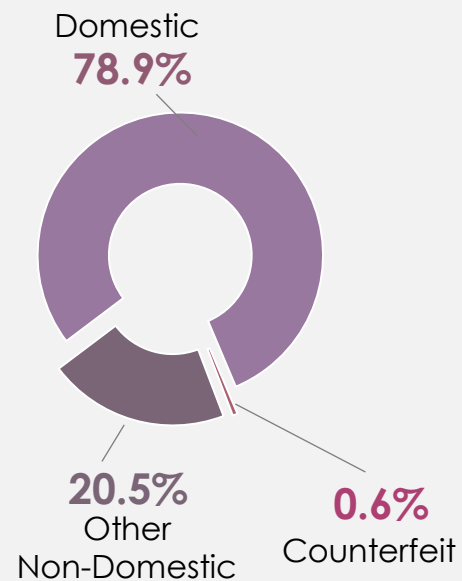
— Total: 158,041 sticks (7,000 packs).

## NON-DOMESTIC (TOP 10 CITIES)

	COUNTERFEIT	MARLBORO (PMI)	CAMEL (JTI)	WINSTON (JTI)	L&M (PMI)	OTHERS	TOTAL	2022 Q2	2021 Q4
AMSTERDAM	0.1%	1.4%	0.3%	0.2%	0.2%	1.2%	<b>3.4%</b>	1.5%	2.5%
ROTTERDAM	0.0%	0.9%	0.3%	0.2%	0.1%	1.2%	<b>2.6%</b>	1.1%	2.4%
THE HAGUE	0.0%	0.6%	0.1%	0.2%	0.1%	0.7%	<b>1.7%</b>	0.6%	1.7%
GRONINGEN	—	0.4%	0.1%	0.1%	0.1%	0.4%	<b>1.0%</b>	0.2%	0.7%
ALMERE	0.0%	0.2%	0.1%	0.1%	0.0%	0.3%	<b>0.7%</b>	0.2%	0.8%
TILBURG	0.1%	0.2%	0.1%	0.0%	0.0%	0.2%	<b>0.7%</b>	0.4%	2.1%
UTRECHT	0.0%	0.2%	0.0%	0.0%	0.1%	0.2%	<b>0.5%</b>	0.3%	1.2%
SITTARD-GELEEN	0.0%	0.2%	0.1%	0.0%	—	0.2%	<b>0.5%</b>	0.0%	0.6%
EMMEN	—	0.2%	0.1%	0.0%	—	0.1%	<b>0.5%</b>	0.1%	0.4%
OSS	—	0.1%	0.1%	0.0%	0.0%	0.2%	<b>0.5%</b>	0.1%	1.1%
OTHERS	0.3%	3.7%	0.6%	0.7%	0.5%	3.2%	<b>9.1%</b>	5.1%	18.8%
<b>TOTAL</b>	<b>0.6%</b>	<b>8.1%</b>	<b>1.8%</b>	<b>1.6%</b>	<b>1.1%</b>	<b>7.9%</b>	<b>21.1%</b>	<b>9.6%</b>	<b>32.1%</b>
2022 Q2	0.6%	3.3%	0.8%	0.6%	0.8%	3.5%	<b>9.6%</b>		
2021 Q4	0.7%	10.6%	1.7%	0.9%	2.7%	15.5%	<b>32.1%</b>		

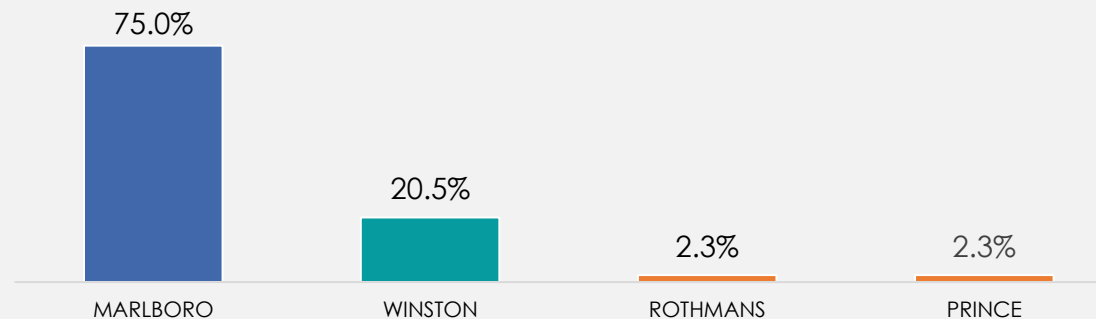
# COUNTERFEIT: BREAKDOWN

## NON-DOMESTIC INCIDENCE % OF TOTAL SAMPLE

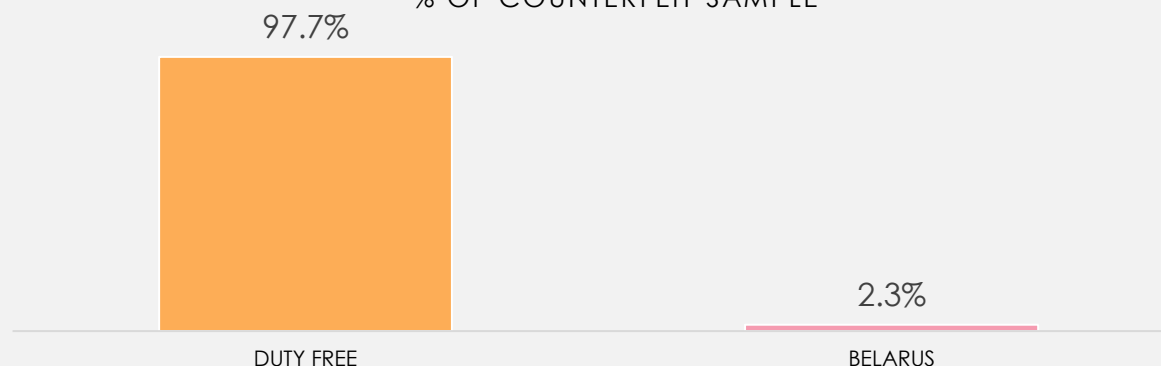


Total: 880 sticks (44 packs)

## SPLIT BY MAIN BRAND % OF COUNTERFEIT SAMPLE



## SPLIT BY LABELLING (MARKET VARIANT) % OF COUNTERFEIT SAMPLE



# COUNTERFEIT: BY MAIN BRAND FAMILY & CITY (TOP 10)

% OF TOTAL SAMPLE Based on number of sticks

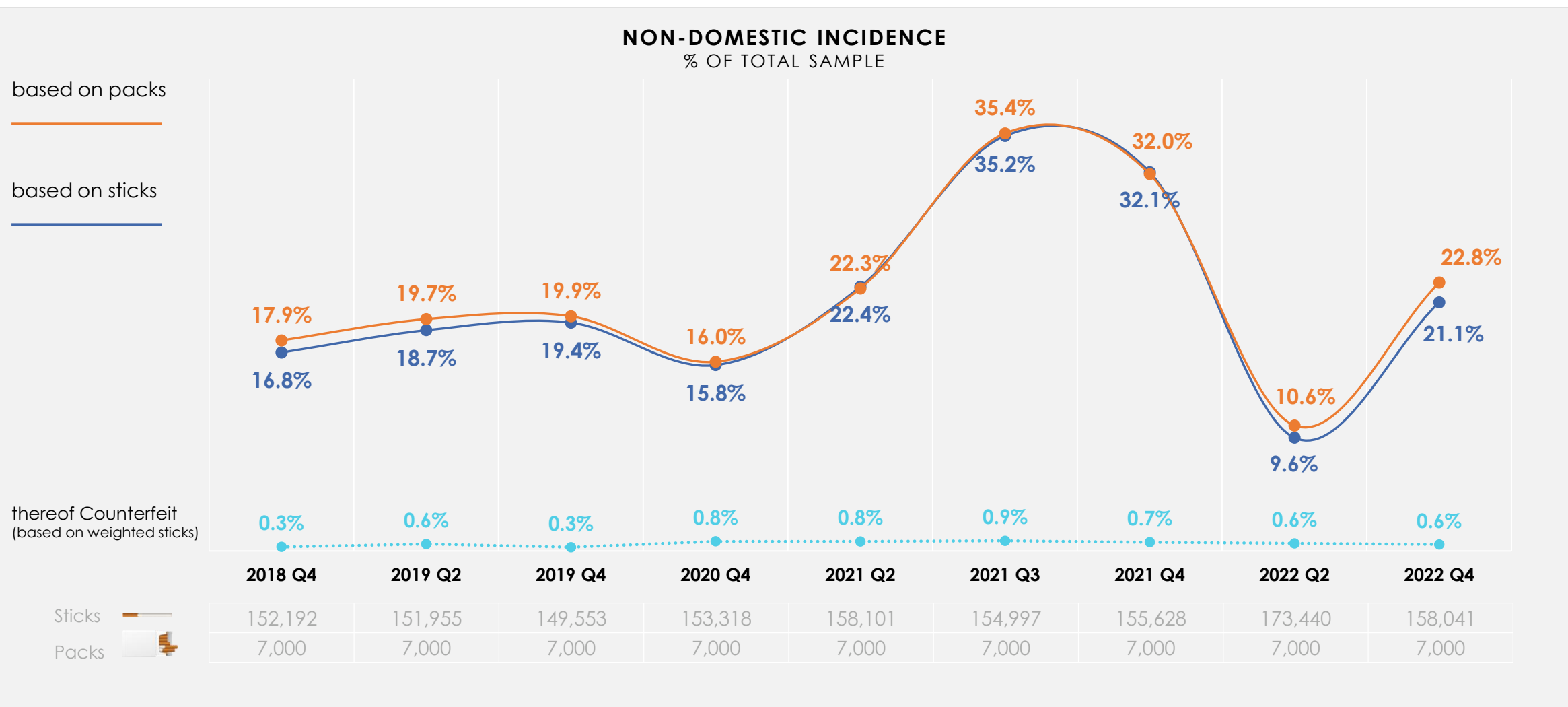
— Total: 158,041 sticks (7,000 packs).

## COUNTERFEIT (TOP 10 CITIES)

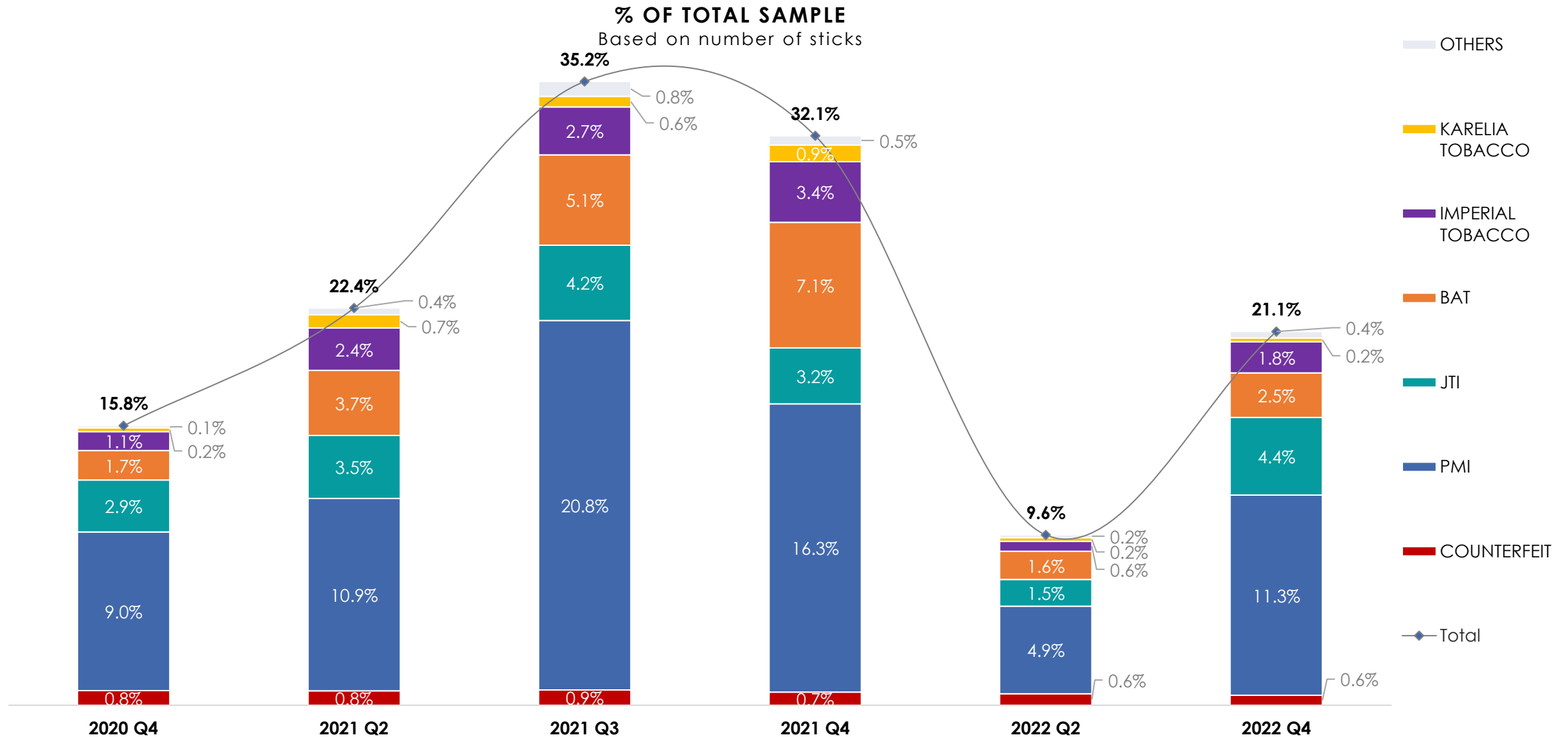
	MARLBORO (PMI)	WINSTON (JTI)	ROTHMANS (BAT)	PRINCE (BAT)	OTHERS	TOTAL	2022 Q2	2021 Q4
AMSTERDAM	0.1%	0.0%	—	—	—	0.1%	0.0%	0.1%
DELFT	0.1%	—	—	—	—	0.1%	—	0.0%
TILBURG	0.1%	0.0%	—	—	—	0.1%	0.0%	0.0%
NIJMEGEN	0.0%	—	—	—	—	0.0%	0.0%	0.0%
ROTTERDAM	0.0%	0.0%	—	—	—	0.0%	0.1%	0.1%
DEVENTER	0.0%	—	—	—	—	0.0%	0.0%	0.0%
HILVERSUM	0.0%	—	—	—	—	0.0%	—	0.0%
ALMELO	0.0%	—	—	—	—	0.0%	—	0.0%
ALMERE	—	0.0%	—	—	—	0.0%	—	0.0%
APELDOORN	0.0%	—	—	—	—	0.0%	—	0.0%
OTHERS	0.1%	0.0%	0.0%	0.0%	—	0.1%	0.5%	0.5%
<b>TOTAL</b>	<b>0.4%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>—</b>	<b>0.6%</b>	<b>0.6%</b>	<b>0.7%</b>
2022 Q2	0.4%	0.0%	0.1%	—	0.1%	0.6%		
2021 Q4	0.5%	0.0%	0.0%	—	0.2%	0.7%		



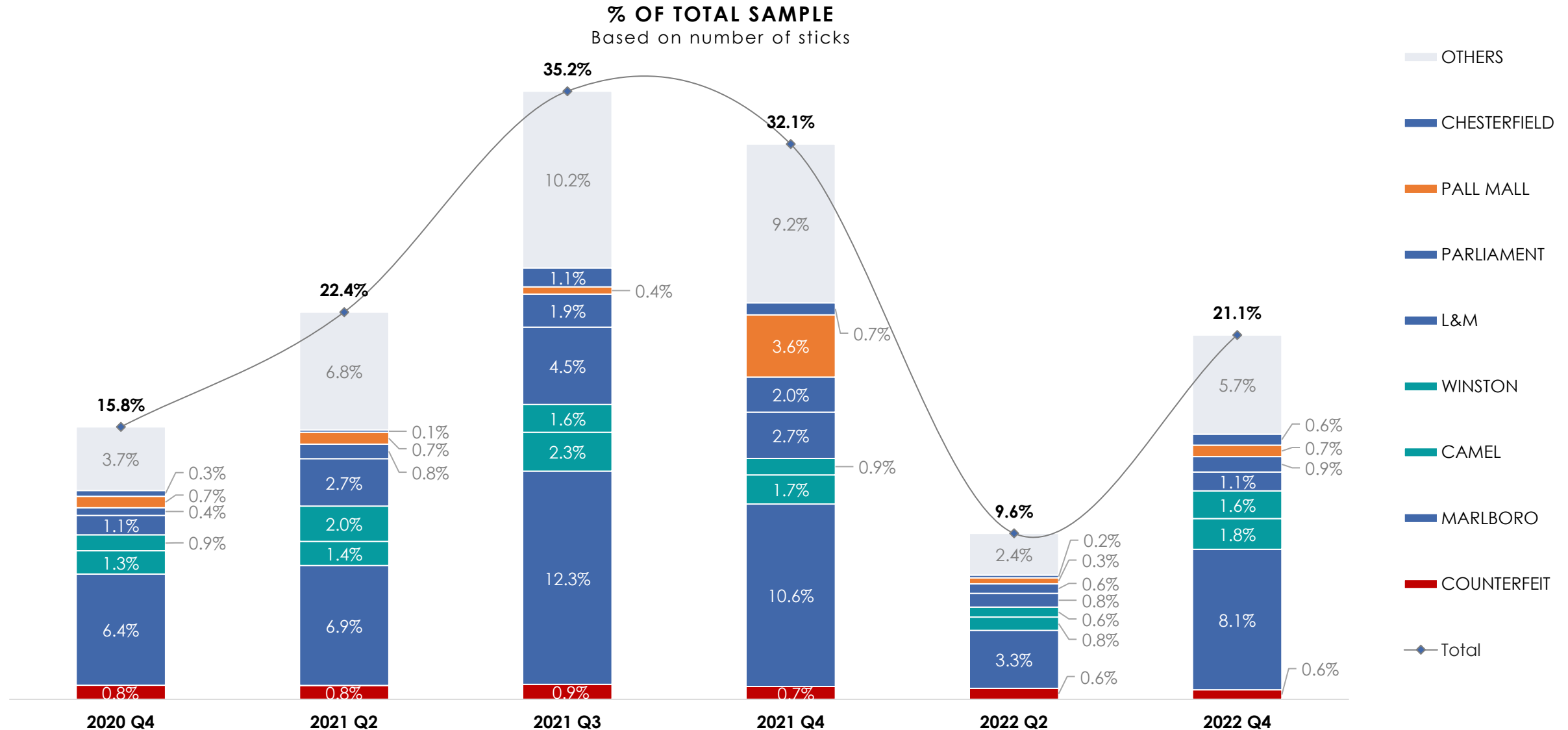
# NON-DOMESTIC: INCIDENCE TREND



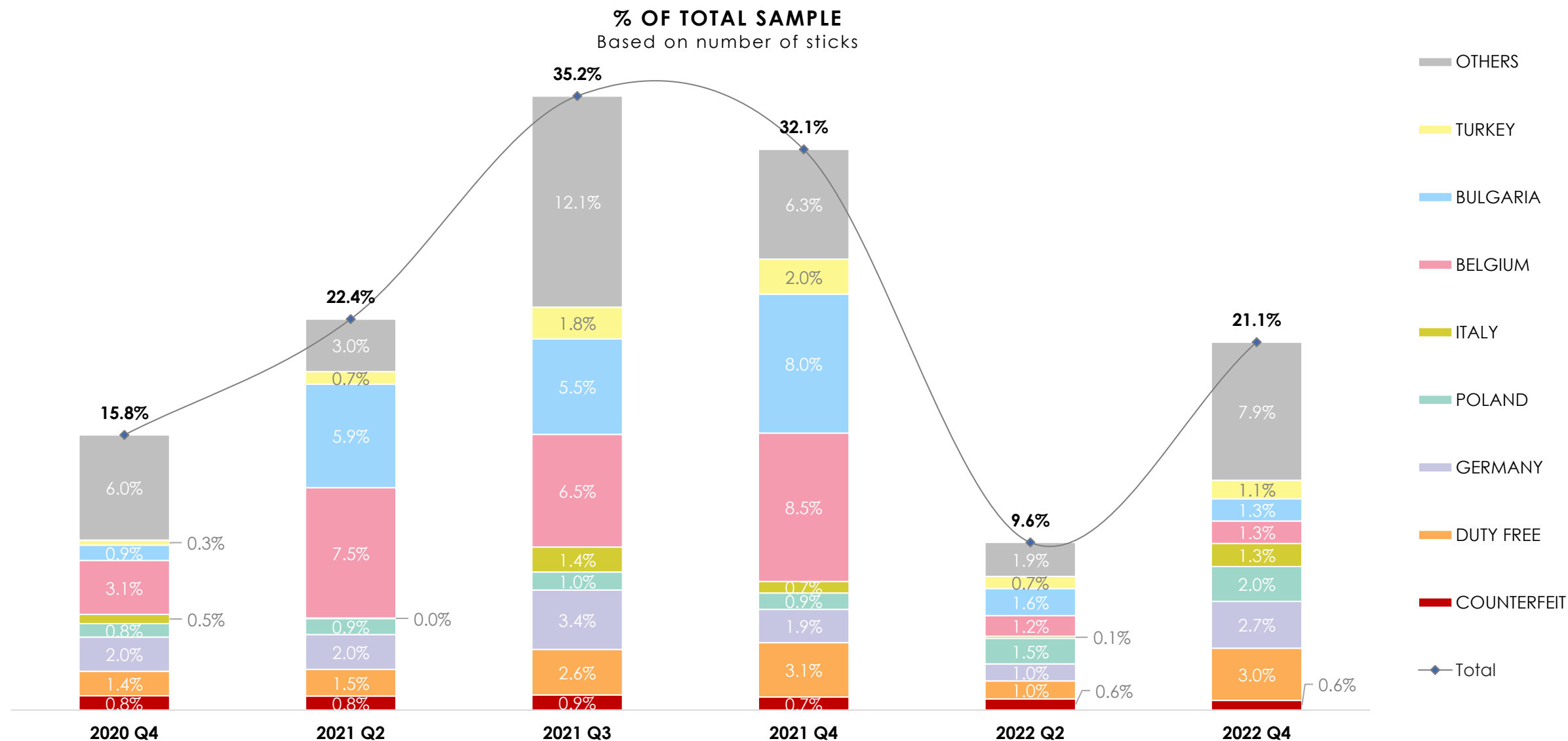
# NON-DOMESTIC: COMPANY TREND



# NON-DOMESTIC: BRAND FAMILY TREND



# NON-DOMESTIC: MARKET VARIANT TREND





# NON-DOMESTIC: CITY TREND (1/2)

SAMPLE			NON-DOMESTIC INCIDENCE PER CITY						
CITY	PACKS	STICKS	2019 Q4	2020 Q4	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4
OSS	79	1,698	3.8%	17.0%	6.7%	38.0%	73.6%	8.1%	45.8%
ALPHEN AAN DEN RIJN	68	1,521	22.9%	—	16.1%	48.3%	30.1%	2.5%	43.7%
GRONINGEN	182	3,896	9.5%	8.7%	8.4%	18.9%	25.6%	7.8%	42.4%
SITTARD-GELEEN	87	1,923	18.2%	6.3%	41.1%	42.2%	45.1%	3.1%	41.5%
PURMEREND	74	1,603	11.2%	18.6%	36.9%	50.5%	31.4%	14.1%	38.8%
EMMEN	101	2,222	27.4%	17.3%	25.9%	23.1%	25.7%	3.8%	35.2%
AMSTERDAM	743	15,973	28.0%	17.6%	7.4%	35.2%	24.5%	15.2%	33.3%
ROTTERDAM	573	12,379	17.0%	25.4%	18.2%	33.7%	30.2%	13.3%	33.3%
AMSTELVEEN	78	1,748	17.0%	22.2%	20.3%	45.4%	36.7%	14.6%	33.0%
LEEWARDEN (LJOUWERT)	89	1,941	12.3%	14.5%	14.1%	26.7%	27.7%	2.6%	31.5%
SCHIEDAM	71	1,608	24.5%	14.0%	32.7%	23.8%	32.0%	9.6%	31.2%
HELMOND	83	1,792	12.1%	17.7%	16.1%	19.8%	29.8%	1.9%	30.9%
HENGELO	75	1,609	17.3%	26.2%	24.5%	31.7%	20.7%	10.5%	28.5%
ALMERE	182	3,960	34.9%	13.5%	13.8%	28.2%	31.2%	7.8%	27.4%
HEERLEN	83	1,715	6.5%	7.5%	42.2%	21.9%	20.8%	5.7%	26.8%
SUDWEST FRYSLAN (SEAT IN SNEEK SNITS)	77	1,585	5.2%	7.8%	36.9%	16.1%	37.8%	13.6%	26.5%
THE HAGUE	470	10,600	18.0%	10.6%	16.7%	44.2%	25.8%	8.7%	24.7%
HOORN	67	1,453	2.7%	7.8%	40.8%	30.9%	28.6%	8.0%	24.5%
TILBURG	194	4,514	16.7%	24.9%	41.3%	38.6%	67.9%	13.8%	22.8%
AMERSFOORT	139	3,313	22.2%	9.0%	21.3%	32.9%	29.0%	6.4%	21.7%
HILVERSUM	80	1,711	23.8%	31.9%	26.1%	38.7%	28.1%	9.5%	21.3%
GOUDA	67	1,429	23.0%	23.3%	13.2%	31.2%	27.5%	1.2%	19.0%
VENLO	93	2,124	22.5%	22.8%	36.6%	37.3%	29.5%	10.6%	18.8%
HAARLEMMERMEER	134	2,929	18.1%	10.1%	9.6%	35.0%	23.7%	7.2%	18.5%
ZAANSTAD	139	3,099	30.3%	7.4%	12.4%	31.2%	31.0%	2.7%	16.4%

# NON-DOMESTIC: CITY TREND (2/2)

CITY	PACKS	STICKS	2019 Q2	2019 Q4	2020 Q4	2021 Q2	2021 Q3	2021 Q4	2022 Q2
ZOETERMEER	114	2,633	18.8%	5.5%	29.3%	47.1%	26.3%	4.9%	15.2%
APELDOORN	146	3,375	15.3%	14.4%	32.0%	38.3%	25.1%	4.5%	15.0%
DEVENTER	92	2,143	19.1%	17.7%	28.2%	24.7%	35.4%	15.9%	14.9%
ROOSENDAAL	72	1,637	20.7%	27.6%	62.3%	71.4%	48.7%	17.7%	14.7%
SPIJKENISSE	67	1,512	18.1%	11.3%	23.9%	35.2%	52.8%	10.3%	14.6%
ALMELO	68	1,465	20.9%	32.6%	35.9%	24.0%	39.4%	9.1%	13.7%
UTRECHT	299	6,631	17.8%	25.1%	23.1%	27.1%	27.9%	7.6%	12.3%
NIJMEGEN	155	3,527	16.5%	12.0%	15.7%	50.3%	25.5%	7.3%	12.2%
EDE	102	2,432	6.0%	18.0%	33.0%	29.1%	28.9%	6.9%	12.0%
MAASTRICHT	113	2,656	21.7%	12.2%	62.5%	36.5%	63.7%	9.2%	11.2%
BREDA	166	4,066	24.9%	17.6%	29.3%	65.3%	45.4%	11.0%	11.2%
WESTLAND (SEAT)	95	2,332	19.3%	14.7%	19.5%	46.8%	20.2%	12.1%	11.1%
LELYSTAD	70	1,669	19.4%	18.3%	25.7%	37.1%	25.1%	7.8%	11.0%
ENSCHDEDE	147	3,503	27.9%	16.8%	32.8%	40.8%	19.1%	10.3%	9.9%
ZWOLLE	114	2,619	17.3%	12.3%	28.2%	27.1%	27.2%	3.9%	9.9%
HAARLEM	142	3,338	17.8%	15.9%	17.7%	23.6%	22.3%	8.4%	9.1%
S-HERTOGENBOSCH	133	3,197	7.7%	5.5%	13.1%	14.1%	32.2%	19.5%	8.0%
ARNHEM	139	3,364	17.4%	15.4%	28.9%	19.1%	31.4%	12.9%	7.7%
ALKMAAR	88	2,030	12.3%	6.3%	13.8%	28.2%	44.8%	5.5%	7.7%
LEIDEN	111	2,625	22.0%	10.1%	16.0%	51.2%	36.8%	7.9%	7.6%
DELFT	92	2,256	30.5%	25.3%	16.7%	55.9%	17.4%	7.8%	7.1%
LEIDSCHEIDAM-VOORBURG	67	1,775	21.7%	9.6%	15.8%	38.2%	23.0%	7.6%	7.0%
EINDHOVEN	203	4,703	17.8%	9.0%	40.5%	25.7%	30.5%	8.5%	6.3%
VLAARDINGEN	67	1,654	15.9%	6.9%	14.0%	29.1%	29.9%	5.5%	5.4%
DORDRECHT	110	2,554	21.1%	13.9%	10.1%	32.4%	59.5%	12.8%	1.6%
<b>TOTAL SAMPLE</b>	<b>7,000</b>	<b>158,041</b>	<b>19.4%</b>	<b>15.8%</b>	<b>22.4%</b>	<b>35.2%</b>	<b>32.1%</b>	<b>9.3%</b>	<b>21.1%</b>



04.












# APPENDIX

QUARTER 4, 2022

## TOTAL SAMPLE: DETAILS PER COMPANY

## NUMBER OF STICKS PER CATEGORY AND COMPANY

## IN % OF COMPANY TOTAL

						Domestic	Genuine Non- Domestic	Non- Domestic	Counterfeit
		76,962	17,868	660	95,490	80.6%	18.7%	—	0.7%
		28,711	6,904	180	35,795	80.2%	19.3%	—	0.5%
		12,758	3,972	40	16,770	76.1%	23.7%	—	0.2%
		6,224	2,798	0	9,022	69.0%	31.0%	—	—
		0	0	320	320	—	—	100.0%	—
OTHERS		0	0	65	644	10.1%	—	89.9%	—



# TOTAL SAMPLE: DETAILS PER BRAND FAMILY

## NUMBER OF STICKS PER CATEGORY AND BRAND FAMILY



## IN % OF BRAND FAMILY TOTAL

					Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit	
MARLBORO (PMI)	<div><div>68,133</div><div>12,839</div><div>660</div></div>				81,632	83.5%	15.7%	—	0.8%
CAMEL (JTI)	<div><div>22,463</div><div>2,827</div></div>				25,290	88.8%	11.2%	—	—
L&M (PMI)	<div><div>7,991</div><div>1,729</div></div>				9,720	82.2%	17.8%	—	—
WINSTON (JTI)	<div><div>5,528</div><div>2,517</div><div>180</div></div>				8,225	67.2%	30.6%	—	2.2%
LUCKY STRIKE (BAT)	<div><div>6,130</div><div>901</div></div>				7,031	87.2%	12.8%	—	—
PALL MALL (BAT)	<div><div>3,830</div><div>1,051</div></div>				4,881	78.5%	21.5%	—	—
JOHN PLAYER SPECIAL (ITL)	<div><div>2,576</div><div>391</div></div>				2,967	86.8%	13.2%	—	—
GAULOISES (ITL)	<div><div>2,508</div><div>385</div></div>				2,893	86.7%	13.3%	—	—
KENT (BAT)	<div><div>1,624</div><div>500</div></div>				2,124	76.5%	23.5%	—	—
OTHERS	<div><div>3,937</div><div>8,402</div><div>899</div><div>40</div></div>				13,278	29.7%	63.3%	6.8%	0.3%

# NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

## NON-DOMESTIC INCIDENCE BY COMPANY – TREND

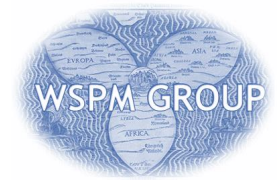
% OF TOTAL COMPANY SAMPLE

		PMI	JTI	BAT	IMPERIAL TOBACCO	OTHERS
2022 Q4	N (Sticks) 	95,490	35,795	16,770	9,022	964
	Packs 	4,269	1,599	690	393	49
	Non-Domestic	—	—	—	—	93.3%
	Counterfeit	0.7%	0.5%	0.2%	—	—
	Genuine non-domestic	18.7%	19.3%	23.7%	31.0%	—
2022 Q2	Non-Domestic	—	—	—	—	50.2%
	Counterfeit	0.7%	0.2%	0.7%	1.5%	—
	Genuine non-domestic	8.1%	7.5%	13.1%	9.0%	—
2021 Q4	Non-Domestic	—	—	—	—	89.3%
	Counterfeit	0.7%	0.2%	0.1%	3.9%	—
	Genuine non-domestic	24.3%	21.8%	62.2%	60.4%	—

## OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	KARELIA	OME	GOLD FLAKE
Company	KARELIA TOBACCO	KARELIA TOBACCO	ITC LTD
Market variant	BULGARIA	BULGARIA	INDIA
			

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WSPM GROUP

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THANK YOU