WSPM GROUP

EMPTY PACKS SURVEY

NETHERLANDS Q4 2023

February 2024

CONTENTS

EMPTY PACK SURVEY RESULTS Q4 2023: NETHERLANDS

01. EXECUTIVE SUMMARY

02. METHODOLOGY

03. KEY RESULTS

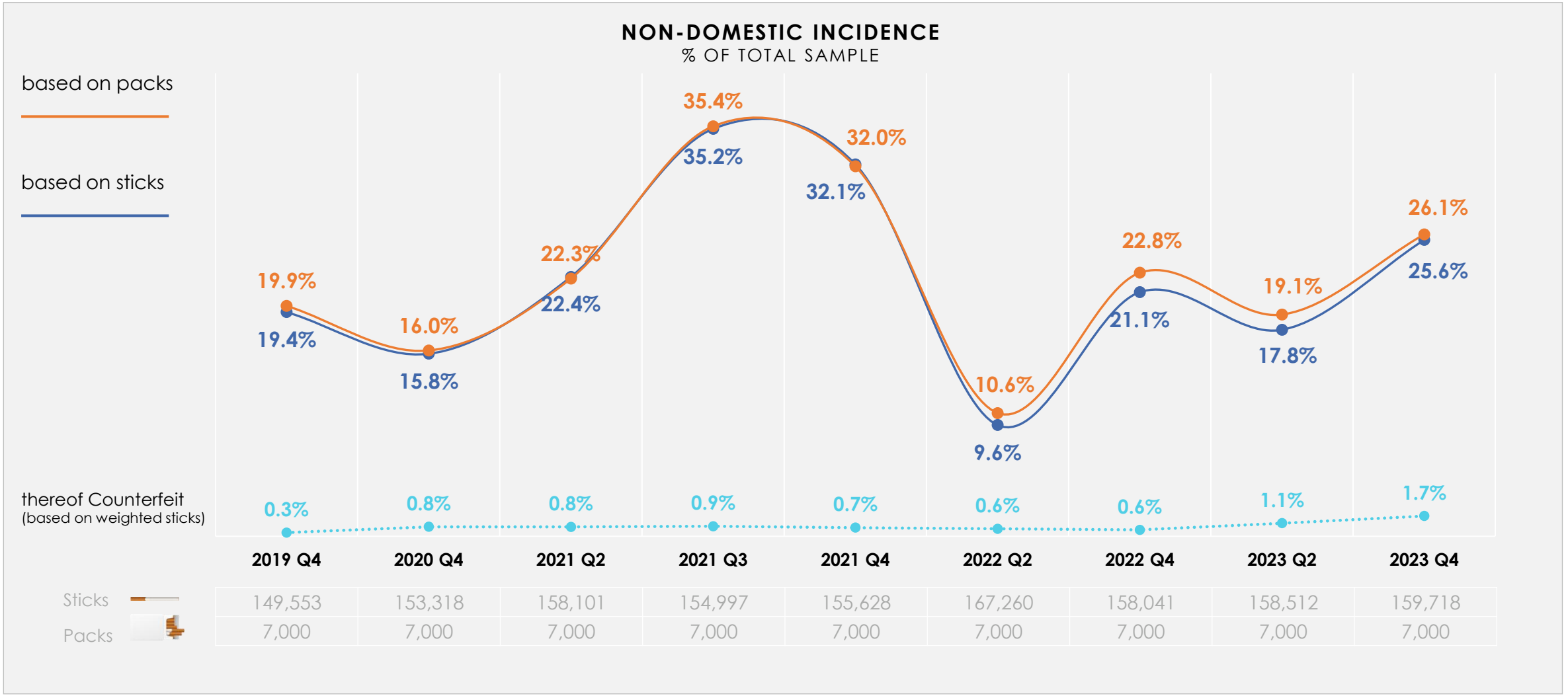
04. APPENDIX

01.

EXECUTIVE SUMMARY

QUARTER 4, 2023

EXECUTIVE SUMMARY: NON-DOMESTIC TREND



	2019 Q4	2020 Q4	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4
Sticks	149,553	153,318	158,101	154,997	155,628	167,260	158,041	158,512	159,718
Packs	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000

TOTAL SAMPLE = DOMESTIC AND NON-DOMESTIC PACKS

EXECUTIVE SUMMARY: KEY MESSAGES

Industry overview

- **Non-domestic incidence** increased to **25.6**% (vs 17.8% in Q2 2023, 21.1% in Q4 2022).
- **Counterfeit incidence** increased to **1.7**% (1.1%, 0.6%).
- **Main non-domestic brands** found were (excl. counterfeit):
  - **MARLBORO** (PMI) with **11.7**% of all packs collected (7.6%, 8.1%).
  - **CAMEL** (JTI) with **2.8**% (1.5%, 1.8%).
  - **WINSTON** (JTI) with **1.7**% (1.3%, 1.6%).
- **Main non-domestic market variants** found were (excl. counterfeit):
  - **DUTY FREE** with **3.9**% of all packs collected (2.5%, 3.0%).
  - **BELGIUM** with **3.2**% (1.3%, 1.3%).
  - **GERMANY** with **2.7**% (2.7%, 2.7%).
- **At city level**, the highest non-domestic incidence was found in **NIJMEGEN** at **43.5**% (25.1%, 12.2%), in **ALPHEN AAN DEN RIJN** at **40.2**% (7.9%, 43.7%), and **SCHIEDAM** at **38.7**% (10.5%, 31.2%).

EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks

Total: 159,718 sticks (7,000 packs).

	Q4 2023	Q2 2023	Q4 2022
NON-DOMESTIC INCIDENCE	**25.6%**	17.8%	21.1%
MAIN MARKET VARIANTS (excl. counterfeit)			
DUTY FREE	**3.9%**	2.5%	3.0%
BELGIUM	**3.2%**	1.3%	1.3%
GERMANY	**2.7%**	2.7%	2.7%
MAIN BRAND FAMILIES (excl. counterfeit)			
MARLBORO (PMI)	**11.7%**	7.6%	8.1%
CAMEL (JTI)	**2.8%**	1.5%	1.8%
WINSTON (JTI)	**1.7%**	1.3%	1.6%
MAIN CITIES (excl. counterfeit)			
NIJMEGEN	**43.5%**	25.1%	12.2%
ALPHEN AAN DEN RIJN	**40.2%**	7.9%	43.7%
SCHIEDAM	**38.7%**	10.5%	31.2%
COUNTERFEIT INCIDENCE			
TOTAL COUNTERFEIT INCIDENCE	**1.7%**	1.1%	0.6%
PMI	**1.4%**	0.7%	0.4%
BAT	**0.2%**	0.2%	0.0%
IMPERIAL TOBACCO	**0.1%**	0.1%	—
JTI	**0.1%**	0.1%	0.1%

EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks

Total: 159,718 sticks (7,000 packs).

MAIN INFLOWS

	COUNTERFEIT	DUTY FREE	BELGIUM	GERMANY	POLAND	SPAIN	OTHERS	**Total**	2023 Q2	2022 Q4
MARLBORO (PMI)	1.0%	2.1%	2.5%	1.4%	0.4%	1.0%	4.4%	**12.8%**	8.3%	8.5%
CAMEL (JTI)	—	0.5%	0.1%	0.3%	0.1%	0.3%	1.4%	**2.8%**	1.5%	1.8%
WINSTON (JTI)	0.1%	0.3%	0.0%	0.1%	0.5%	0.0%	0.7%	**1.7%**	1.4%	1.7%
L&M (PMI)	0.4%	0.1%	0.2%	0.1%	0.2%	0.1%	0.2%	**1.3%**	0.9%	1.1%
LUCKY STRIKE (BAT)	0.0%	0.1%	0.1%	0.2%	—	0.0%	0.3%	**0.7%**	0.8%	0.6%
PARLIAMENT (PMI)	—	0.2%	—	0.0%	0.2%	—	0.2%	**0.6%**	0.6%	0.9%
OTHERS	0.3%	0.7%	0.2%	0.6%	0.3%	0.1%	3.5%	**5.7%**	4.4%	6.5%
Total	**1.7%**	**3.9%**	**3.2%**	**2.7%**	**1.7%**	**1.6%**	**10.8%**	**25.6%**	**17.8%**	**21.1%**

2023 Q2	1.1%	2.5%	1.3%	2.7%	1.8%	0.8%	7.6%	**17.8%**
2022 Q4	0.6%	3.0%	1.3%	2.7%	2.0%	1.0%	10.5%	**21.1%**

02.

METHODOLOGY

QUARTER 4, 2023

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

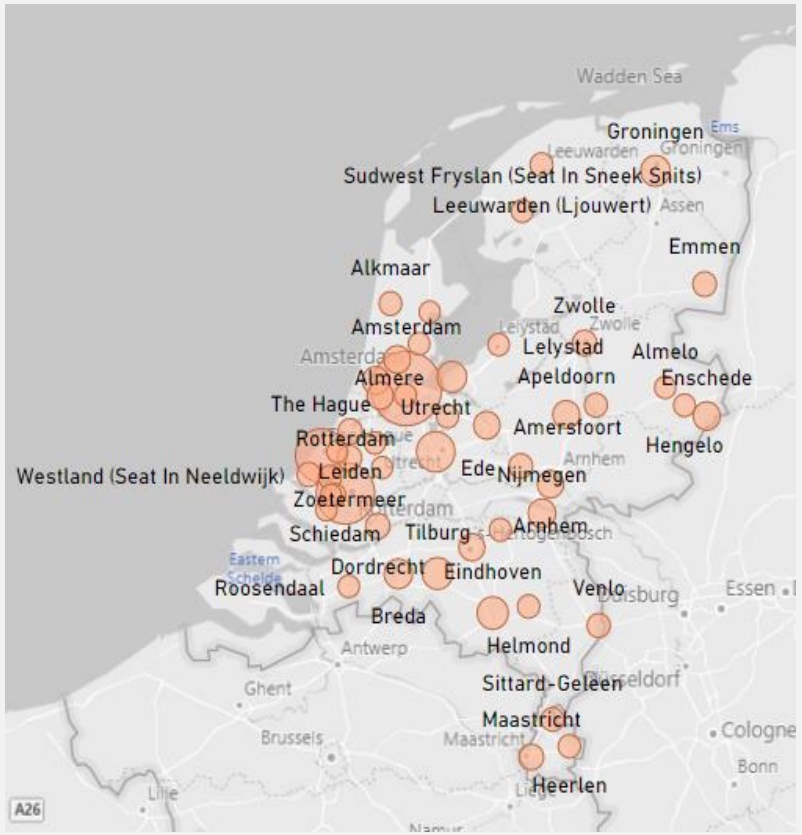
Fieldwork:
30 Oct – 15 Nov, 2023

REPORTING

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

GEOGRAPHY

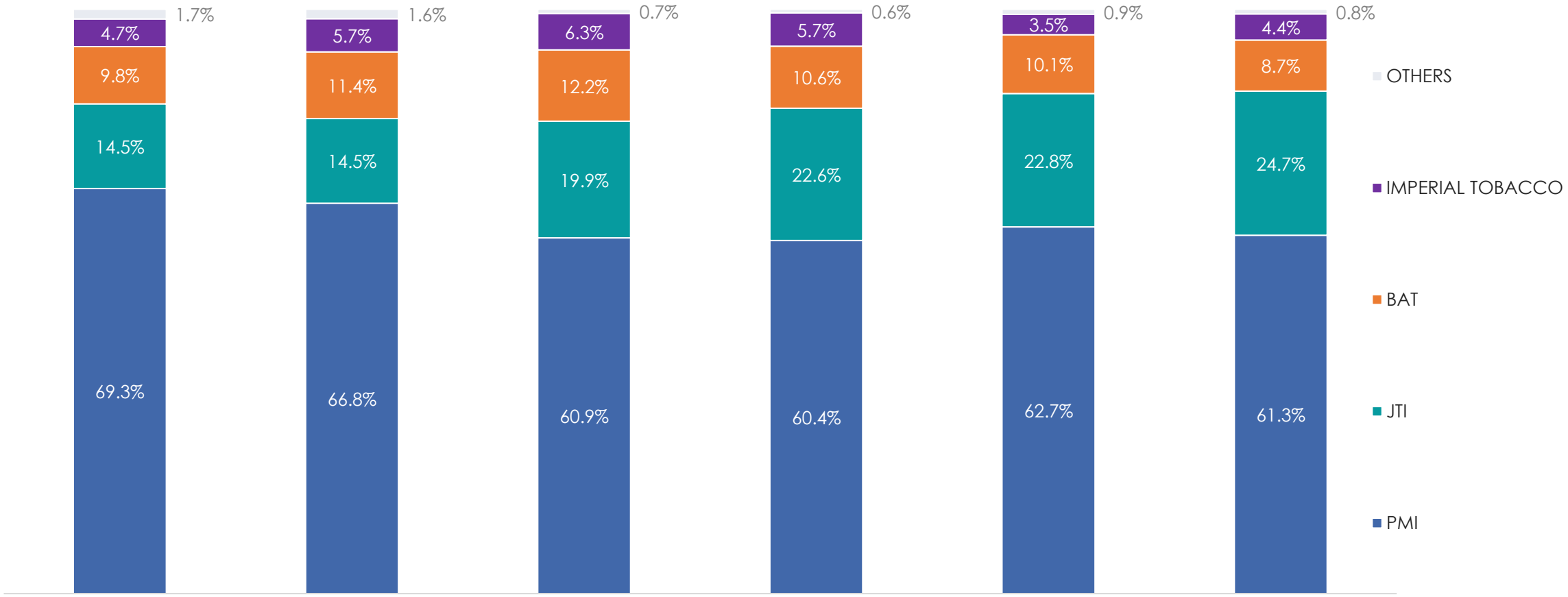
- The largest 50 cities
- 44.9% coverage of population



Region	Population Covered	Sample	Weighted Sample
Amsterdam	799,278	743	774
Rotterdam	616,294	573	562
The Hague	505,856	470	474
Utrecht	321,916	299	310
Eindhoven	218,433	203	204
Tilburg	208,527	194	192
Almere	195,213	182	187
Groningen	195,418	182	201
Breda	178,140	166	158
Nijmegen	166,382	155	153
Enschede	158,627	147	138
Apeldoorn	157,315	146	142
Haarlem	153,093	142	140
Arnhem	149,827	139	140
Amersfoort	149,662	139	136
Zaanstad	149,622	139	135
Haarlemmermee	144,153	134	137
S-Hertogenbosch	142,817	133	134
Zwolle	122,562	114	112
Zoetermeer	123,092	114	108
Maastricht	121,819	113	104
Leiden	119,800	111	107
Dordrecht	118,466	110	102
Ede	109,823	102	103
Emmen	108,392	101	92
Neeldwijk	102,698	95	96
Venlo	100,159	93	88
Deventer	98,581	92	87
Delft	99,097	92	90
Leeuwarden	95,949	89	108
Alkmaar	94,505	88	95
Sittard-Geleen	94,024	87	79
Helmond	89,023	83	80
Heerlen	88,747	83	74
Hilversum	86,017	80	79
Oss	84,861	79	80
Amstelveen	84,379	78	79
Seat (Sneek)	82,639	77	77
Hengelo	80,952	75	70
Purmerend	79,482	74	79
Roosendaal	77,155	72	66
Schiedam	76,216	71	68
Lelystad	75,778	70	70
Alphen Aan.	72,913	68	97
Almelo	72,729	68	63
Vlaardingen	70,905	67	64
Hoorn	71,360	67	64
Spijkenisse	72,375	67	74
Gouda	70,904	67	63
Leidschendam	72,588	67	66
Total Sample	7,528,563	7,000	7,000

SAMPLE COMPOSITION: SHARE BY COMPANY

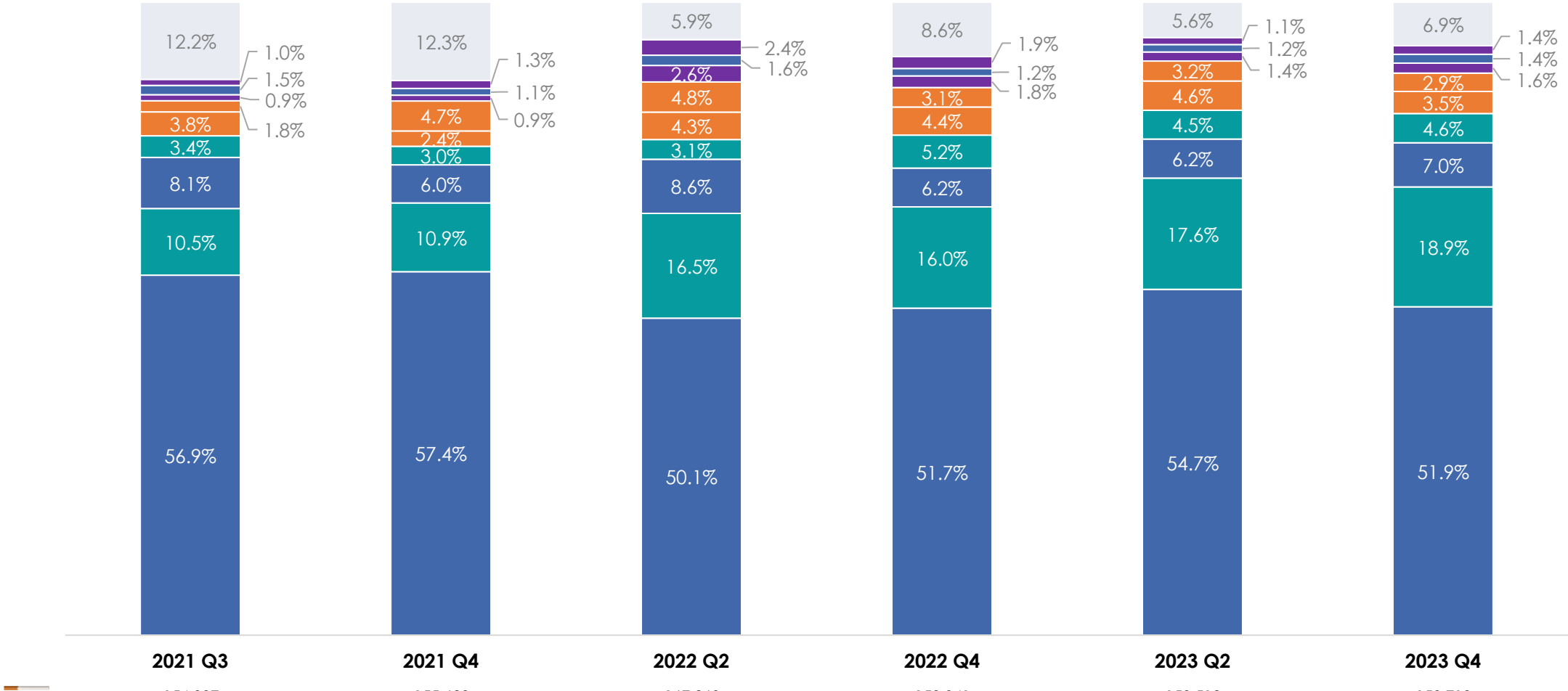
% OF TOTAL SAMPLE Based on number of sticks



	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4
	154,997	155,628	167,260	158,041	158,512	159,718
	7,000	7,000	7,000	7,000	7,000	7,000

SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks



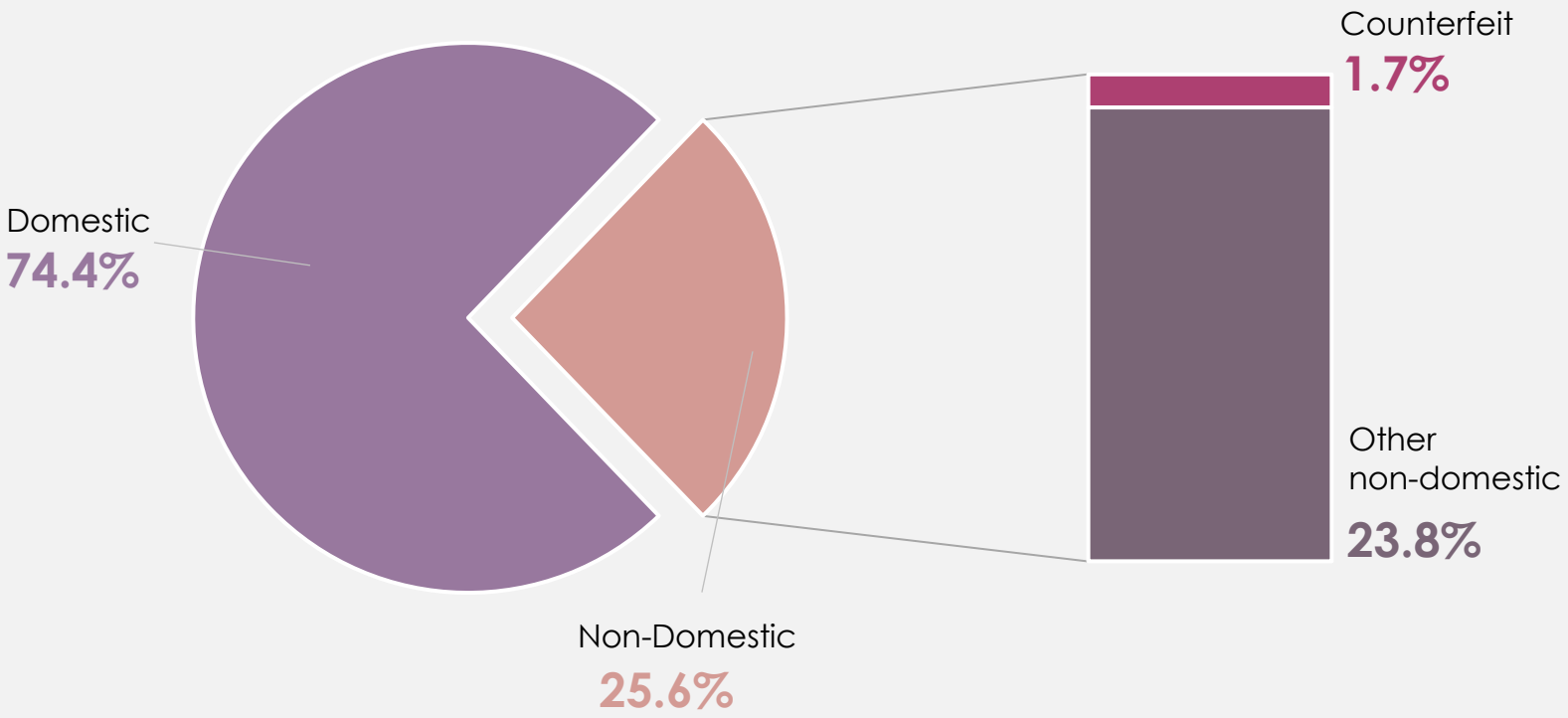
	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4
	154,997	155,628	167,260	158,041	158,512	159,718
	7,000	7,000	7,000	7,000	7,000	7,000

03.

KEY RESULTS

QUARTER 4, 2023

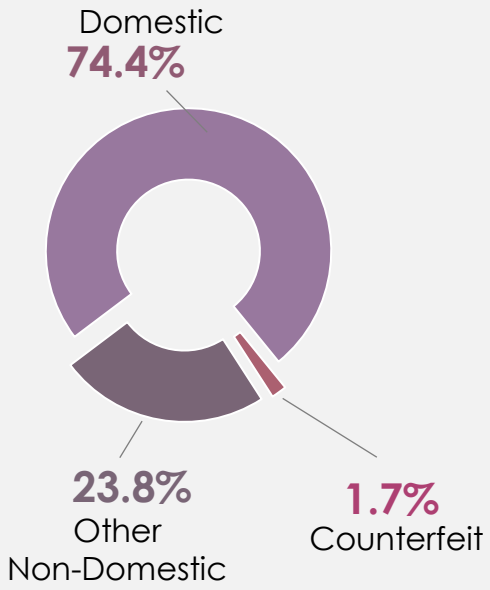
NON-DOMESTIC: CATEGORIES



Total: 159,718 sticks (7,000 packs).

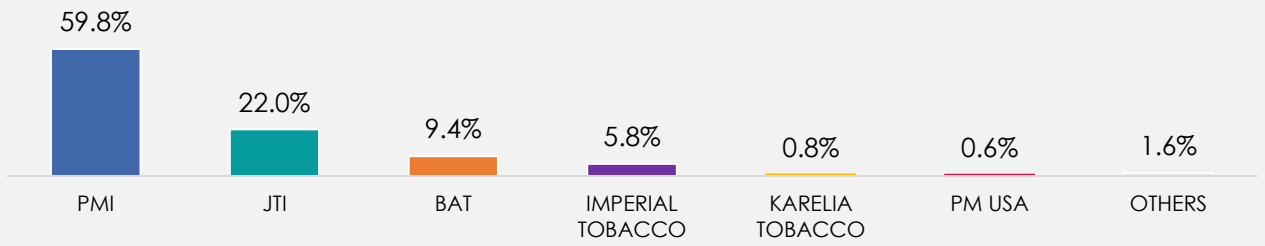
OTHER NON-DOMESTIC: BREAKDOWN

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE



Total: 38,080 sticks (1,685 packs)

SPLIT BY COMPANY % OF OTHER NON-DOMESTIC



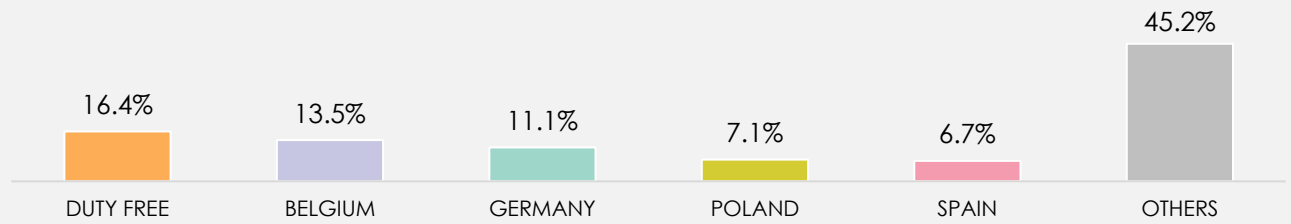
Main Others ▼ e.g.

ITC LTD	0.2%
H. VAN LANDEWYCK	0.1%
HONGTA	0.1%
INTL. MASIS TABAK	0.1%
KT&G	0.1%
EUROPEAN TOBACCO	0.1%
VON EICKEN	0.1%

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

MARLBORO	49.2%	CAMEL	11.6%	LUCKY STRIKE	3.0%	DAVIDOFF	2.3%	KARELIA	0.6%	MARLBORO	0.6%
L&M	3.9%	WINSTON	6.9%	PALL MALL	1.6%	GAULOISES	1.0%	OME	0.2%		
PARLIAMENT	2.7%	BENSON & HEDGES	0.9%	KENT	1.1%	LAMBERT & BUTLER	0.8%				
CHESTERFIELD	2.2%	SOBRANIE	0.8%	DUNHILL	1.0%	JOHN PLAYER SPECIAL	0.7%				
PHILIP MORRIS	0.9%	STERLING	0.6%	VOGUE	0.7%	WEST	0.3%				

SPLIT BY MARKET VARIANT % OF OTHER NON-DOMESTIC SAMPLE



Main Others ▼ e.g.

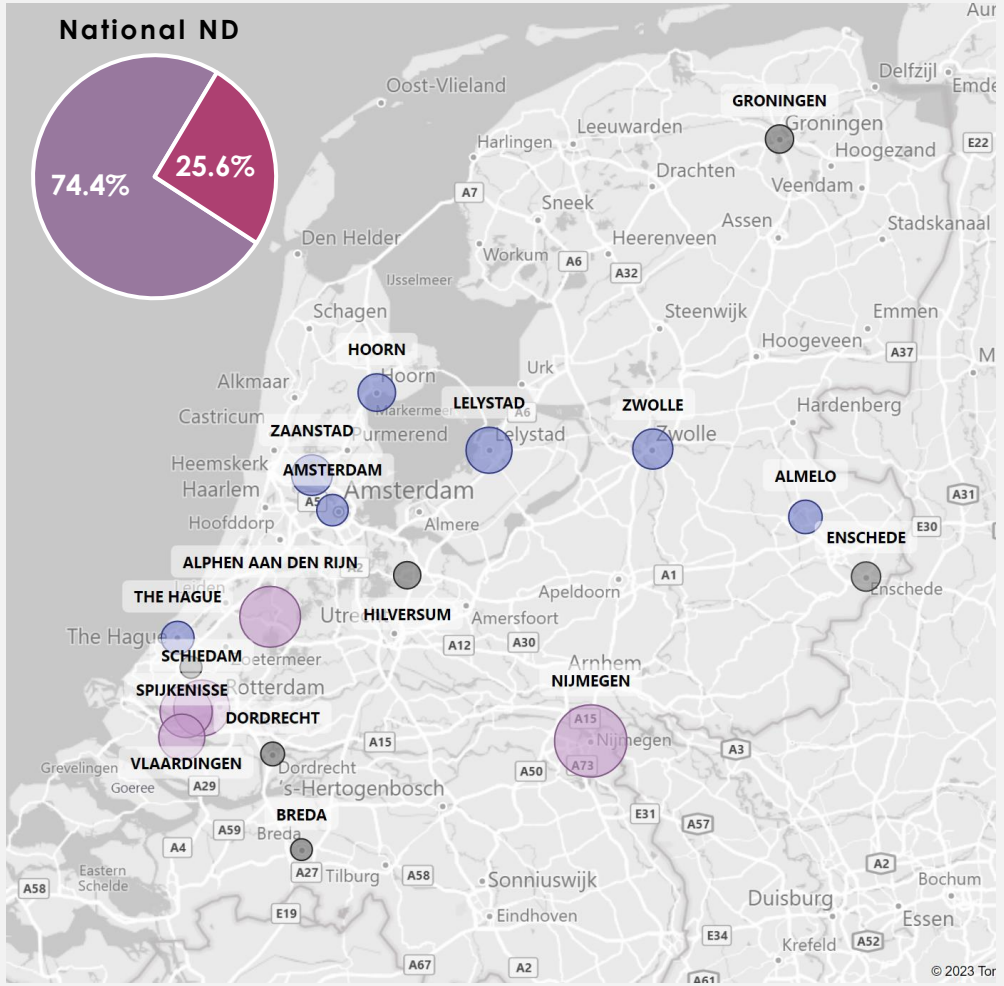
ITALY	5.3%
LUXEMBOURG	4.7%
TURKEY	3.8%
BULGARIA	3.0%
UNITED KINGDOM	2.9%
GREECE	2.8%
ROMANIA	2.1%

NON-DOMESTIC: BY CITY (1/2)

% OF CITY SAMPLE (Top 20 ND)
Based on number of sticks

		Trend indication
NIJMEGEN	43.5%	↑
ALPHEN AAN DEN RIJN	40.2%	↑
SCHIEDAM	38.7%	↑
VLAARDINGEN	37.6%	↑
SPIJKENISSE	35.8%	↑
LELYSTAD	35.8%	↑
ZAANSTAD	34.2%	↑
ZWOLLE	34.0%	↑
HOORN	33.3%	↑
WESTLAND	32.7%	↑
ALMELO	32.1%	↑
THE HAGUE	31.9%	↑
AMSTERDAM	31.5%	↑
ENSCHEDE	30.8%	↑
LEIDSCHENDAM-VOORBURG	30.7%	↑
GRONINGEN	30.5%	↑
HILVERSUM	30.2%	↑
DORDRECHT	29.2%	↑
DELFT	28.6%	↑
BREDA	28.6%	↑

% OF CITY SAMPLE (Top 20 ND)
Based on number of sticks



NON-DOMESTIC: BY CITY (2/2)

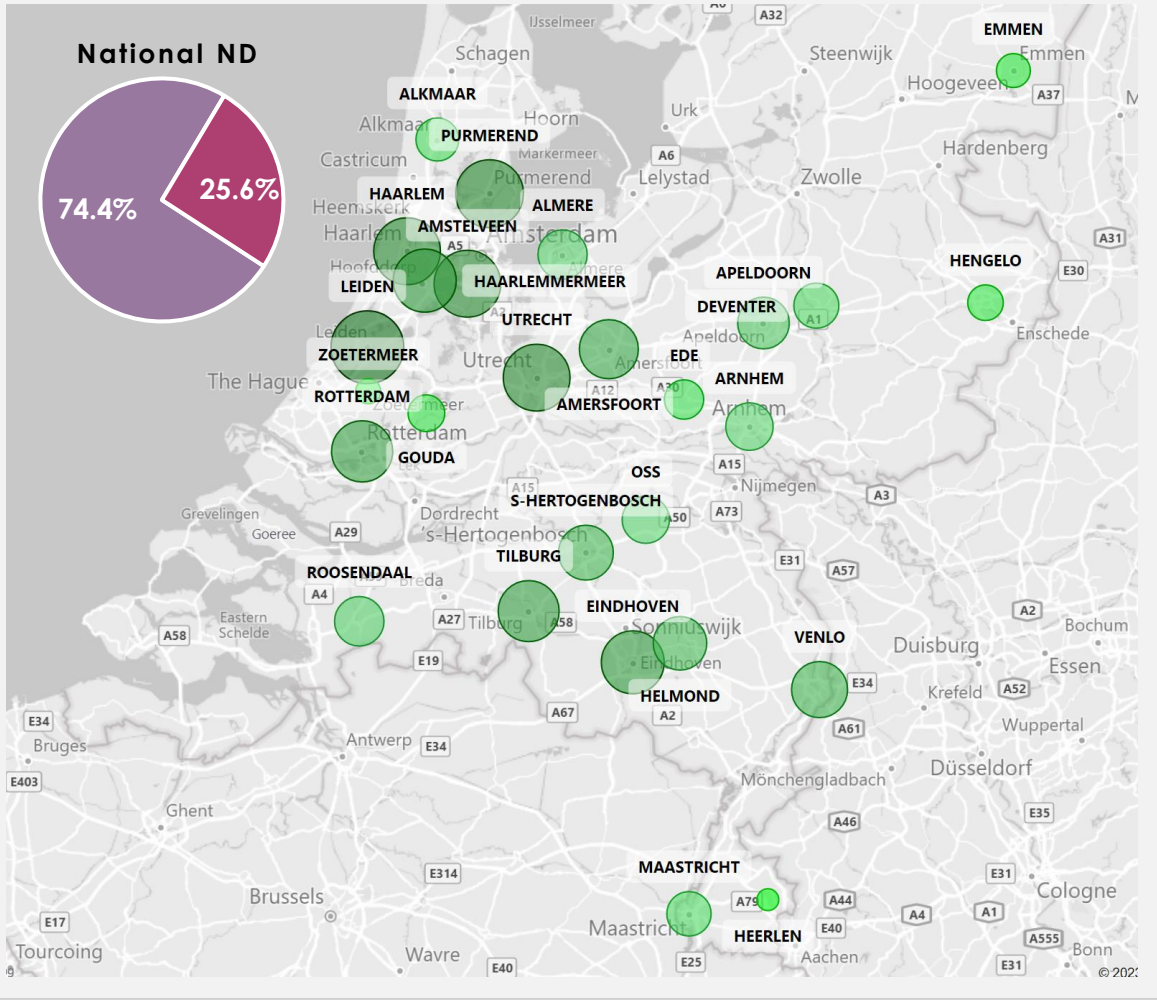
% OF CITY SAMPLE (Rest of cities)

Based on number of sticks

		Trend indication
LEIDEN	27.6%	↑
NATIONAL ND	25.6%	↑
PURMEREND	25.6%	↑
UTRECHT	25.2%	↑
HAARLEM	25.1%	↑
AMSTELVEEN	25.1%	↓
HAARLEMMERMEER	23.6%	↓
EINDHOVEN	23.6%	↑
ROTTERDAM	22.9%	↑
TILBURG	22.8%	↑
AMERSFOORT	22.0%	↑
VENLO	20.8%	↓
S-HERTOGENBOSCH	20.3%	↑
HELMOND	19.7%	↑
APELDOORN	19.0%	↑
ROOSENDAAL	18.1%	↑
ALMERE	18.0%	↓
ARNHEM	17.3%	↑
OSS	17.2%	↓
DEVENTER	16.3%	↑
MAASTRICHT	16.0%	↓
ALKMAAR	15.4%	↓
LEEUWARDEN (LJOUWERT)	14.8%	↓
SITTARD-GELEEN	14.8%	↓
EDE	13.9%	↑
GOUDA	12.9%	↑
HENGELO	12.4%	↓
EMMEN	11.7%	↑
SUDWEST FRYSLAN	9.3%	↓
ZOETERMEER	8.1%	↓
HEERLEN	6.8%	↓

% 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: 159,718 sticks (7,000 packs).

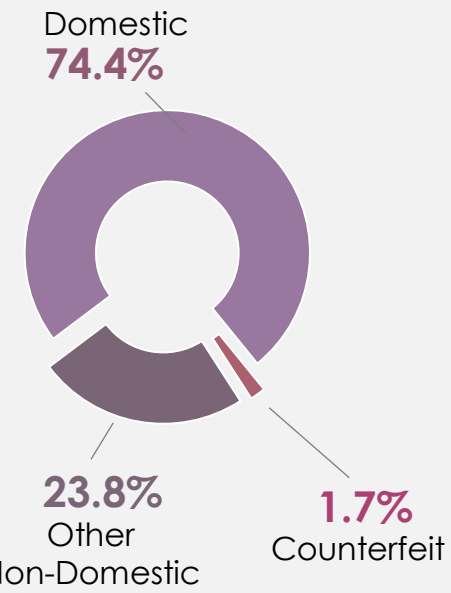
NON-DOMESTIC (TOP 10 CITIES)

	COUNTERFEIT	MARLBORO (PMI)	CAMEL (JTI)	WINSTON (JTI)	L&M (PMI)	OTHERS	**TOTAL**	2023 Q2	2022 Q4
AMSTERDAM	0.1%	1.5%	0.4%	0.3%	0.1%	0.8%	**3.2%**	2.5%	3.4%
THE HAGUE	0.1%	0.8%	0.2%	0.1%	0.1%	0.7%	**2.1%**	1.2%	1.7%
ROTTERDAM	0.2%	0.9%	0.2%	0.1%	0.1%	0.3%	**1.8%**	1.3%	2.6%
BREDA	0.0%	1.2%	0.0%	0.1%	0.0%	0.1%	**1.5%**	0.4%	0.3%
NIJMEGEN	0.0%	1.1%	0.1%	0.0%	0.0%	0.1%	**1.4%**	0.6%	0.3%
UTRECHT	—	0.4%	0.1%	0.1%	0.1%	0.6%	**1.3%**	0.6%	0.5%
GRONINGEN	0.4%	0.1%	0.0%	0.1%	—	0.3%	**0.9%**	0.5%	1.0%
EINDHOVEN	0.1%	0.3%	0.1%	—	0.0%	0.2%	**0.6%**	0.6%	0.2%
ZAANSTAD	0.0%	0.3%	0.1%	0.0%	0.0%	0.2%	**0.6%**	0.4%	0.3%
TILBURG	—	0.2%	0.1%	0.1%	0.0%	0.2%	**0.6%**	0.3%	0.7%
OTHERS	0.8%	5.0%	1.4%	0.8%	0.5%	3.2%	**11.7%**	9.4%	10.2%
TOTAL	**1.7%**	**11.7%**	**2.8%**	**1.7%**	**0.9%**	**6.7%**	**25.6%**	**17.8%**	**21.1%**

2023 Q2	1.1%	7.6%	1.5%	1.3%	0.8%	5.4%	**17.8%**
2022 Q4	0.6%	8.1%	1.8%	1.6%	1.1%	7.9%	**21.1%**

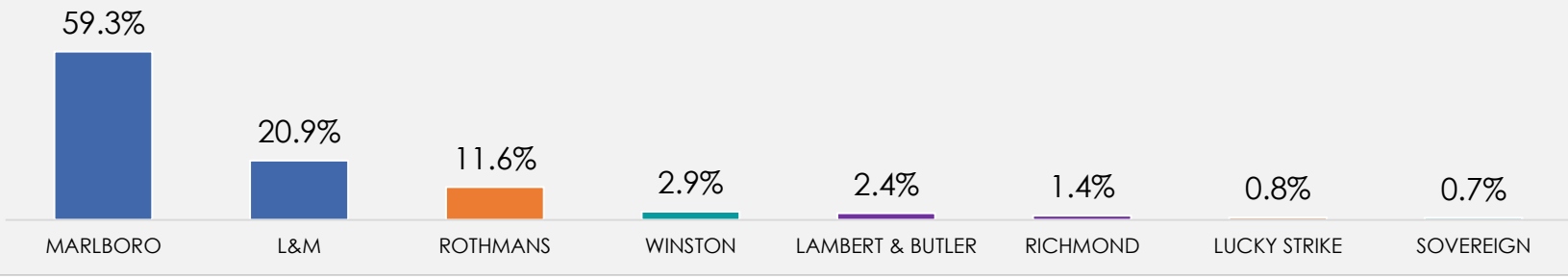
COUNTERFEIT: BREAKDOWN

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE

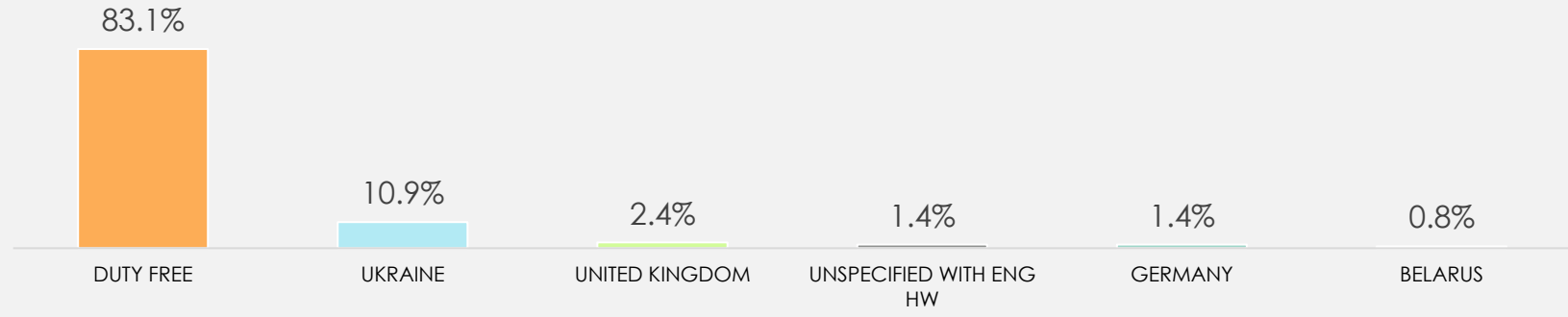


Total: 2,795 sticks (140 packs)

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

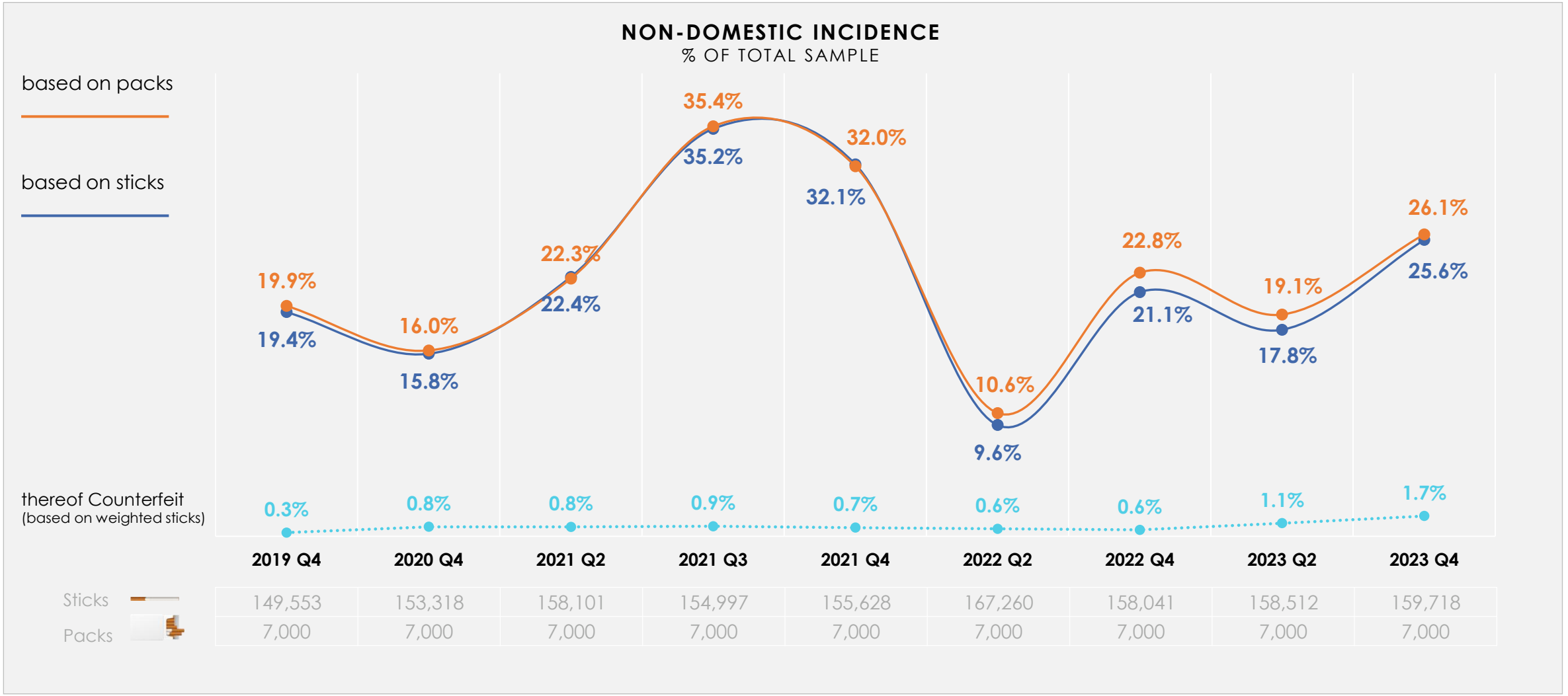
Total: 159,718 sticks (7,000 packs).

COUNTERFEIT (TOP 10 CITIES)

	MARLBORO (PMI)	L&M (PMI)	ROTHMANS (BAT)	WINSTON (JTI)	OTHERS	**TOTAL**	2023 Q2	2022 Q4
GRONINGEN	0.0%	0.2%	0.2%	0.0%	0.1%	**0.4%**	—	—
ROTTERDAM	0.1%	0.0%	0.0%	0.0%	0.0%	**0.2%**	0.0%	0.0%
AMSTERDAM	0.1%	—	0.0%	0.0%	0.0%	**0.1%**	0.1%	0.1%
THE HAGUE	0.1%	0.0%	—	—	—	**0.1%**	0.1%	0.0%
APELDOORN	0.1%	—	—	—	—	**0.1%**	0.0%	0.0%
ALMERE	0.1%	0.0%	—	—	—	**0.1%**	0.0%	0.0%
LEEUWARDEN (LJOUWERT)	0.1%	—	—	—	—	**0.1%**	—	0.0%
ENSCHEDE	0.0%	0.0%	—	—	0.0%	**0.1%**	—	0.0%
EDE	0.0%	0.0%	—	—	—	**0.1%**	0.0%	—
EINDHOVEN	0.0%	0.0%	0.0%	—	—	**0.1%**	0.0%	0.0%
OTHERS	0.4%	0.1%	0.0%	0.0%	0.0%	**0.5%**	0.8%	0.3%
TOTAL	**1.0%**	**0.4%**	**0.2%**	**0.1%**	**0.1%**	1.7%	**1.1%**	**0.6%**

2023 Q2	0.6%	0.1%	0.2%	0.1%	0.1%	**1.1%**
2022 Q4	0.4%	—	0.0%	0.1%	0.0%	**0.6%**

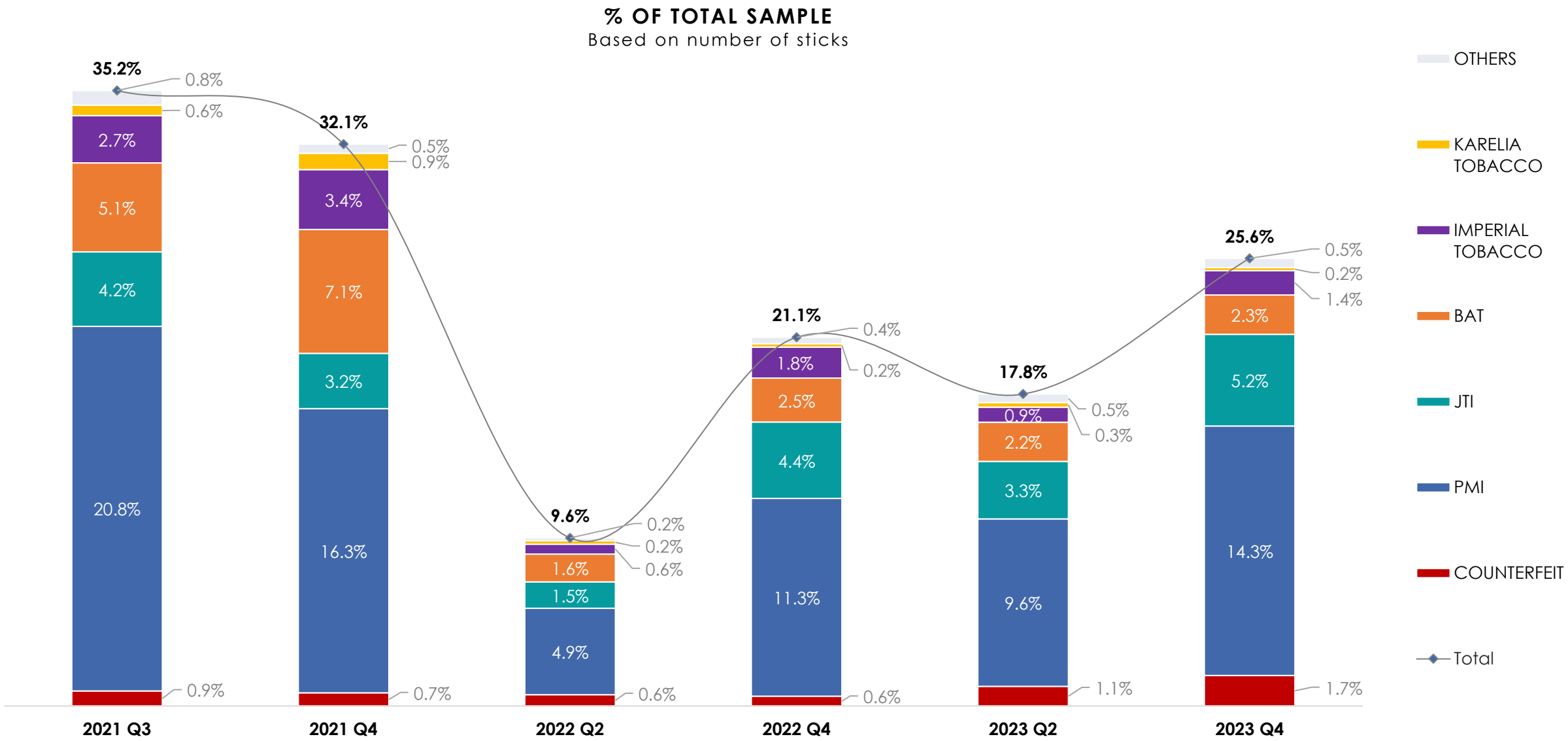
NON-DOMESTIC: INCIDENCE TREND



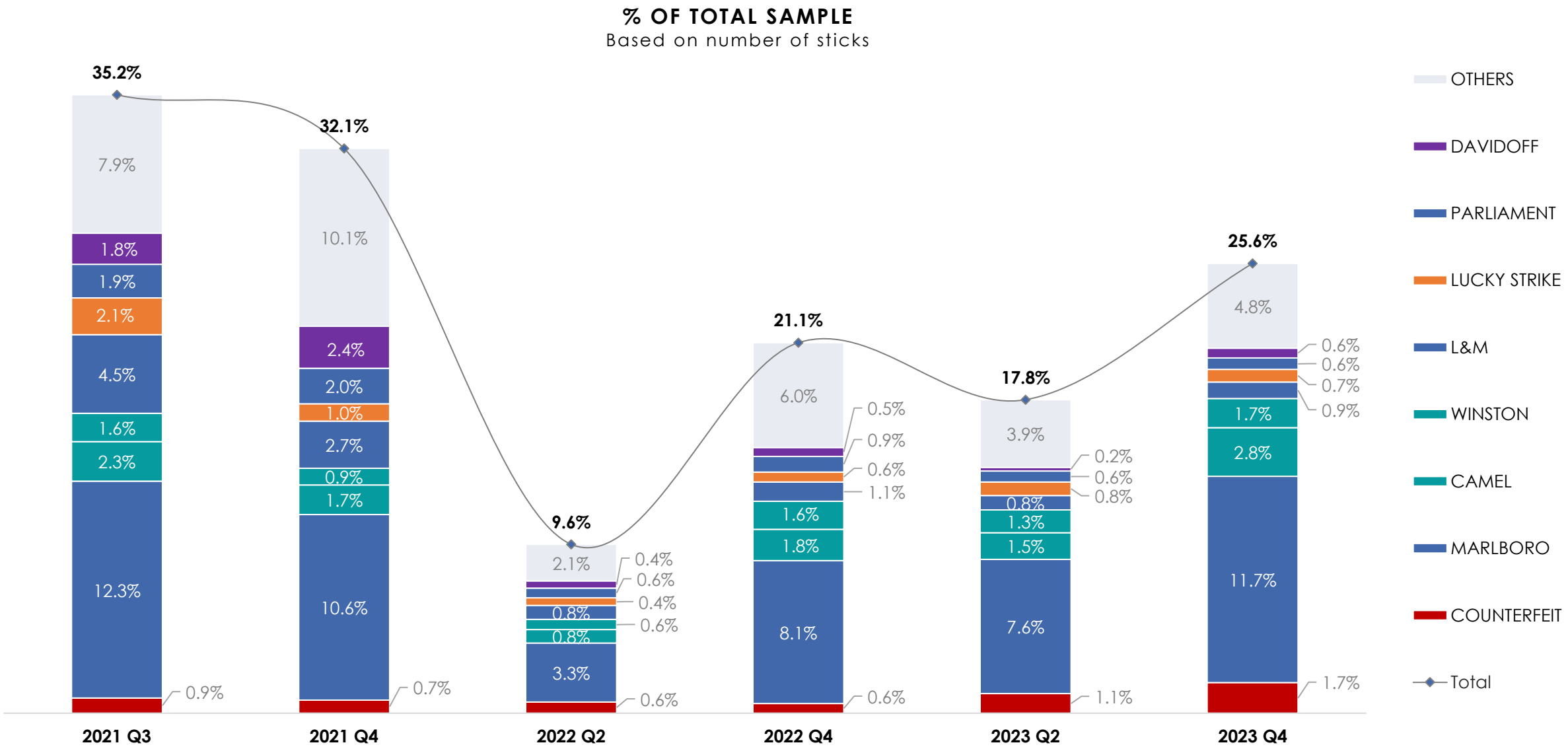
	2019 Q4	2020 Q4	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4
Sticks	149,553	153,318	158,101	154,997	155,628	167,260	158,041	158,512	159,718
Packs	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000

TOTAL SAMPLE = DOMESTIC AND NON-DOMESTIC PACKS

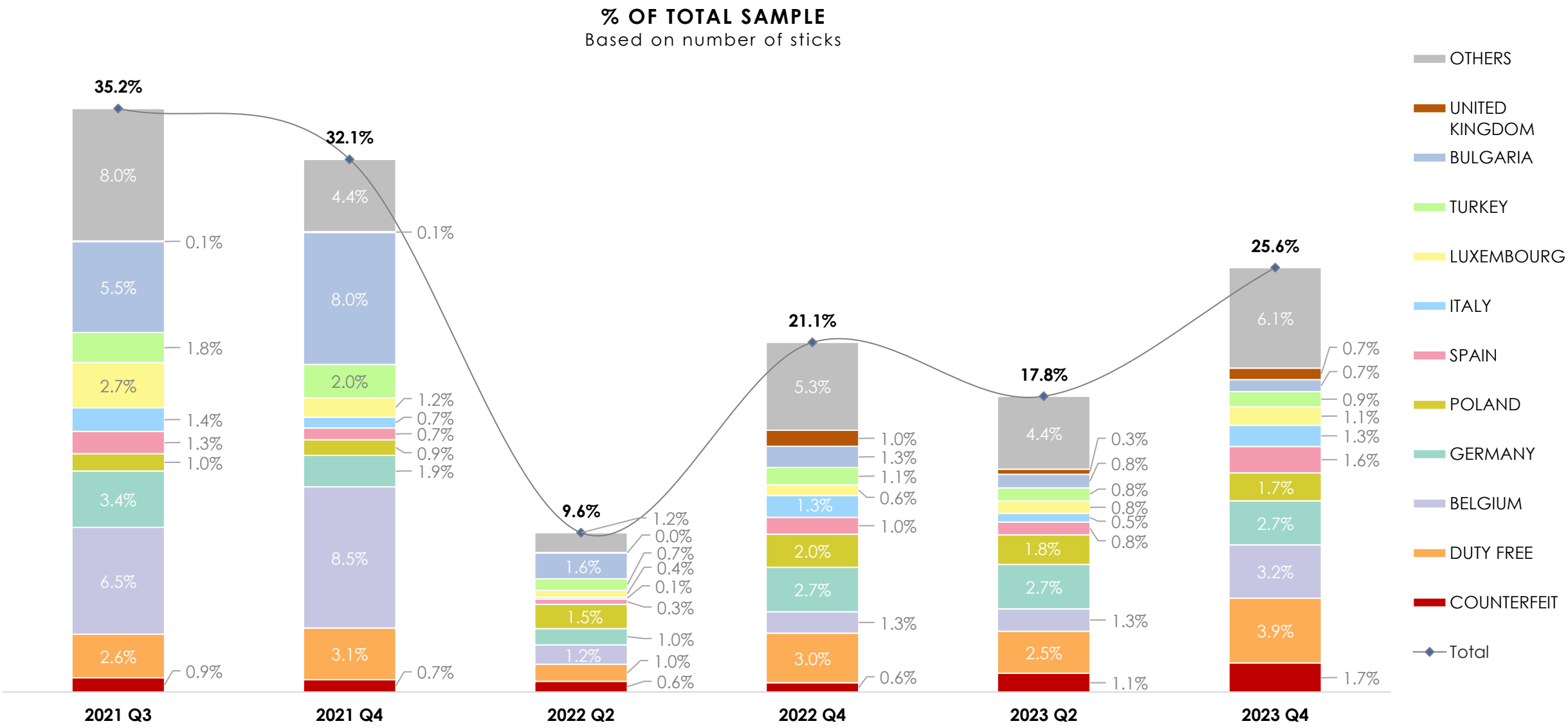
NON-DOMESTIC: COMPANY TREND



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	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	**2023 Q4**
NIJMEGEN	153	5,192	15.7%	50.3%	25.5%	7.3%	12.2%	25.1%	**43.5%**
ALPHEN AAN DEN RIJN	97	2,017	16.1%	48.3%	30.1%	2.5%	43.7%	7.9%	**40.2%**
SCHIEDAM	68	1,446	32.7%	23.8%	32.0%	9.6%	31.2%	10.5%	**38.7%**
VLAARDINGEN	64	1,342	14.0%	29.1%	29.9%	5.5%	5.4%	9.2%	**37.6%**
SPIJKENISSE	74	1,607	23.9%	35.2%	52.8%	10.3%	14.6%	18.5%	**35.8%**
LELYSTAD	70	1,446	25.7%	37.1%	25.1%	7.8%	11.0%	22.4%	**35.8%**
ZAANSTAD	135	2,798	12.4%	31.2%	31.0%	2.7%	16.4%	21.5%	**34.2%**
ZWOLLE	112	2,402	28.2%	27.1%	27.2%	3.9%	9.9%	24.1%	**34.0%**
HOORN	64	1,348	40.8%	30.9%	28.6%	8.0%	24.5%	11.8%	**33.3%**
WESTLAND (SEAT IN NEELDWIJK)	96	2,076	19.5%	46.8%	20.2%	12.1%	11.1%	21.4%	**32.7%**
ALMELO	63	1,352	35.9%	24.0%	39.4%	9.1%	13.7%	24.1%	**32.1%**
THE HAGUE	474	10,373	16.7%	44.2%	25.8%	8.7%	24.7%	17.7%	**31.9%**
AMSTERDAM	774	16,205	7.4%	35.2%	24.5%	15.2%	33.3%	24.5%	**31.5%**
ENSCHEDE	138	2,907	32.8%	40.8%	19.1%	10.3%	9.9%	10.6%	**30.8%**
LEIDSCHENDAM-VOORBURG	66	1,382	15.8%	38.2%	23.0%	7.6%	7.0%	20.1%	**30.7%**
GRONINGEN	201	4,594	8.4%	18.9%	25.6%	7.8%	42.4%	13.8%	**30.5%**
HILVERSUM	79	1,654	26.1%	38.7%	28.1%	9.5%	21.3%	17.0%	**30.2%**
DORDRECHT	102	2,179	10.1%	32.4%	59.5%	12.8%	1.6%	9.1%	**29.2%**
DELFT	90	1,930	16.7%	55.9%	17.4%	7.8%	7.1%	11.1%	**28.6%**
BREDA	158	8,214	29.3%	65.3%	45.4%	11.0%	11.2%	17.1%	**28.6%**
LEIDEN	107	2,240	16.0%	51.2%	36.8%	7.9%	7.6%	21.6%	**27.6%**
PURMEREND	79	1,625	36.9%	50.5%	31.4%	14.1%	38.8%	22.2%	**25.6%**
UTRECHT	310	8,101	23.1%	27.1%	27.9%	7.6%	12.3%	14.9%	**25.2%**
HAARLEM	140	2,905	17.7%	23.6%	22.3%	8.4%	9.1%	18.1%	**25.1%**
AMSTELVEEN	79	1,651	20.3%	45.4%	36.7%	14.6%	33.0%	31.1%	**25.1%**

NON-DOMESTIC: CITY TREND (2/2)

CITY	PACKS	STICKS	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	**2023 Q4**
HAARLEMMERMEER	137	2,879	9.6%	35.0%	23.7%	7.2%	18.5%	26.1%	**23.6%**
EINDHOVEN	204	4,291	40.5%	25.7%	30.5%	8.5%	6.3%	21.4%	**23.6%**
ROTTERDAM	562	12,565	18.2%	33.7%	30.2%	13.3%	33.3%	17.1%	**22.9%**
TILBURG	192	3,963	41.3%	38.6%	67.9%	13.8%	22.8%	10.6%	**22.8%**
AMERSFOORT	136	2,929	21.3%	32.9%	29.0%	6.4%	21.7%	20.3%	**22.0%**
VENLO	88	1,890	36.6%	37.3%	29.5%	10.6%	18.8%	21.9%	**20.8%**
S-HERTOGENBOSCH	134	2,842	13.1%	14.1%	32.2%	19.5%	8.0%	12.5%	**20.3%**
HELMOND	80	1,691	16.1%	19.8%	29.8%	1.9%	30.9%	10.8%	**19.7%**
APELDOORN	142	3,175	32.0%	38.3%	25.1%	4.5%	15.0%	8.0%	**19.0%**
ROOSENDAAL	66	1,363	62.3%	71.4%	48.7%	17.7%	14.7%	13.8%	**18.1%**
ALMERE	187	4,281	13.8%	28.2%	31.2%	7.8%	27.4%	24.1%	**18.0%**
ARNHEM	140	3,081	28.9%	19.1%	31.4%	12.9%	7.7%	7.9%	**17.3%**
OSS	80	1,648	6.7%	38.0%	73.6%	8.1%	45.8%	21.3%	**17.2%**
DEVENTER	87	2,021	28.2%	24.7%	35.4%	15.9%	14.9%	14.5%	**16.3%**
MAASTRICHT	104	2,206	62.5%	36.5%	63.7%	9.2%	11.2%	22.9%	**16.0%**
ALKMAAR	95	2,005	13.8%	28.2%	44.8%	5.5%	7.7%	23.2%	**15.4%**
LEEUWARDEN (LJOUWERT)	108	2,573	14.1%	26.7%	27.7%	2.6%	31.5%	18.1%	**14.8%**
SITTARD-GELEEN	79	1,635	41.1%	42.2%	45.1%	3.1%	41.5%	22.8%	**14.8%**
EDE	103	2,359	33.0%	29.1%	28.9%	6.9%	12.0%	12.7%	**13.9%**
GOUDA	63	1,325	13.2%	31.2%	27.5%	1.2%	19.0%	8.9%	**12.9%**
HENGELO	70	1,738	24.5%	31.7%	20.7%	10.5%	28.5%	23.6%	**12.4%**
EMMEN	92	2,257	25.9%	23.1%	25.7%	3.8%	35.2%	9.6%	**11.7%**
SUDWEST FRYSLAN	77	1,946	36.9%	16.1%	37.8%	13.6%	26.5%	15.2%	**9.3%**
ZOETERMEER	108	2,405	29.3%	47.1%	26.3%	4.9%	15.2%	15.8%	**8.1%**
HEERLEN	74	1,665	42.2%	21.9%	20.8%	5.7%	26.8%	26.2%	**6.8%**
TOTAL SAMPLE	**7,000**	**158,512**	**22.4%**	**35.2%**	**32.1%**	**9.6%**	**21.1%**	**17.8%**	**25.6%**

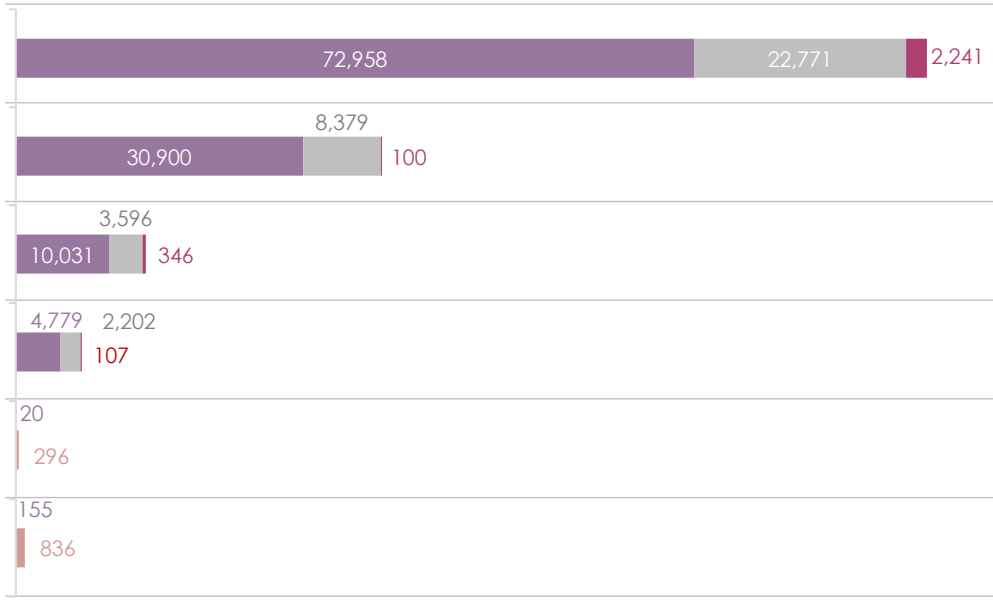
04.

APPENDIX

QUARTER 4, 2023

TOTAL SAMPLE: DETAILS PER COMPANY

NUMBER OF STICKS PER CATEGORY AND COMPANY

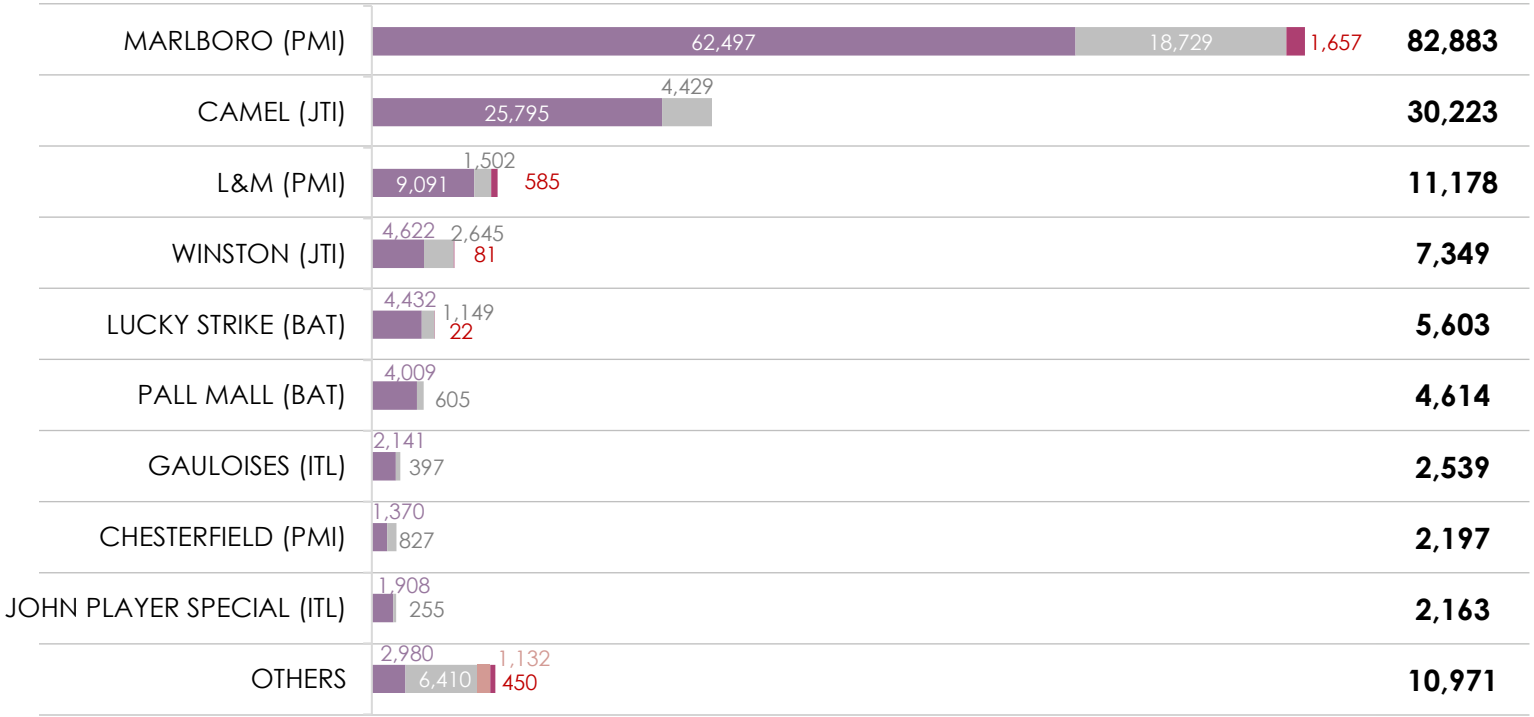


IN % OF COMPANY TOTAL

		Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit
PHILIP MORRIS INTERNATIONAL	97,971	74.5%	23.2%	—	2.3%
JTI	39,380	78.5%	21.3%	—	0.3%
BRITISH AMERICAN TOBACCO	13,973	71.8%	25.7%	—	2.5%
Imperial Tobacco	7,088	67.4%	31.1%	—	1.5%
KARELIA	316	6.4%	—	93.6%	—
OTHERS	991	15.6%	—	84.4%	—

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)	82,883	75.4%	22.6%	-	2.0%
CAMEL (JTI)	30,223	85.3%	14.7%	-	-
L&M (PMI)	11,178	81.3%	13.4%	-	5.2%
WINSTON (JTI)	7,349	62.9%	36.0%	-	1.1%
LUCKY STRIKE (BAT)	5,603	79.1%	20.5%	-	0.4%
PALL MALL (BAT)	4,614	86.9%	13.1%	-	-
GAULOISES (ITL)	2,539	84.3%	15.7%	-	-
CHESTERFIELD (PMI)	2,197	62.4%	37.6%	-	-
JOHN PLAYER SPECIAL (ITL)	2,163	88.2%	11.8%	-	-
OTHERS	10,971	27.2%	58.4%	10.3%	4.1%

NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

NON-DOMESTIC INCIDENCE BY COMPANY – TREND

% OF TOTAL COMPANY SAMPLE

		PMI	JTI	BAT	IMPERIAL TOBACCO	OTHERS
	N (Sticks)	97,971	39,380	13,973	7,088	1,307
	Packs	4,214	1,811	602	307	65
2023 Q4	Non-Domestic	—	—	—	—	86.6%
	Counterfeit	2.3%	0.3%	2.5%	1.5%	—
	Genuine non-domestic	23.2%	21.3%	25.7%	31.1%	—
2023 Q2	Non-Domestic	—	—	—	—	86.5%
	Counterfeit	1.2%	0.4%	2.2%	2.2%	—
	Genuine non-domestic	15.2%	14.4%	22.2%	24.8%	—
2022 Q4	Non-Domestic	—	—	—	—	93.3%
	Counterfeit	0.7%	0.5%	0.2%	—	—
	Genuine non-domestic	18.7%	19.3%	23.7%	31.0%	—

OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	OME	GOLD FLAKE	ESSE
Company	KARELIA TOBACCO	ITC LTD	KT&G
Market variant	BULGARIA	INDIA	CHINA

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WSPM GROUP

THANK YOU