

WSPM GROUP  
**EMPTY PACKS SURVEY**  
NETHERLANDS Q4 2024

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January 2025

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NETHERLANDS



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# EXECUTIVE SUMMARY

QUARTER 4, 2024



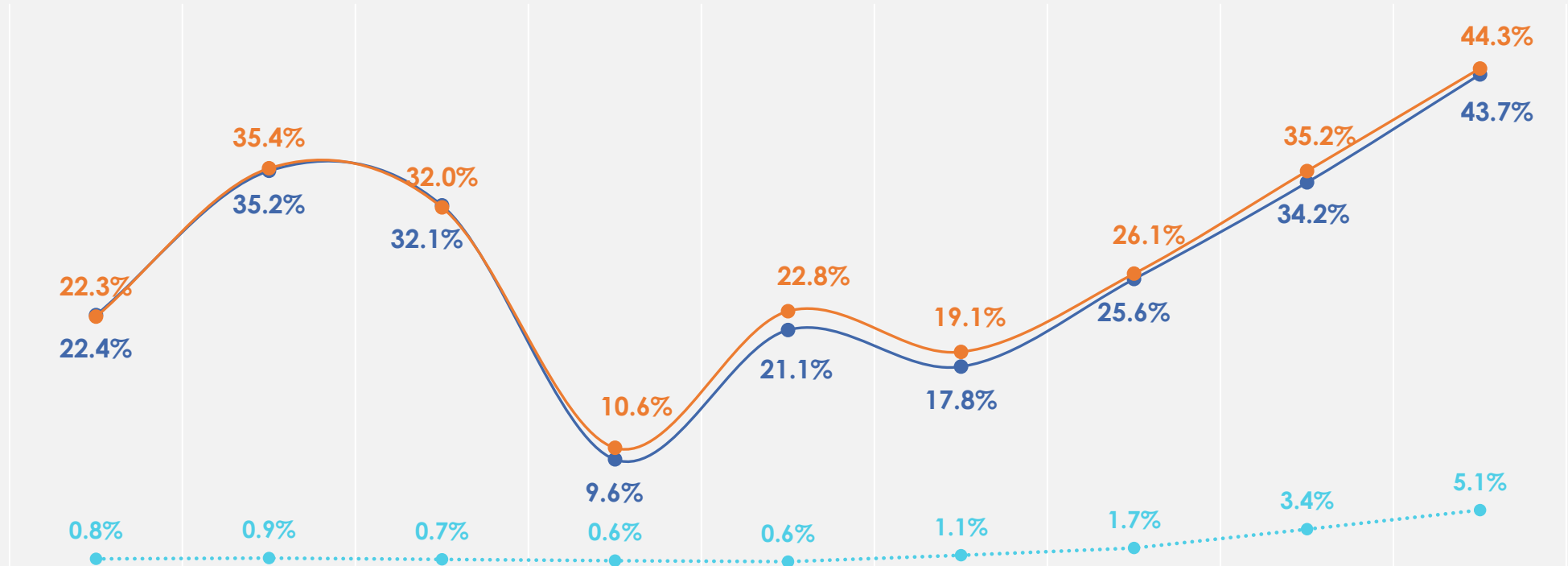
# EXECUTIVE SUMMARY: NON-DOMESTIC TREND

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

based on packs

based on sticks

thereof Counterfeit  
(based on weighted sticks)



	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4
Sticks	158,101	154,997	155,628	167,260	158,041	158,512	159,718	150,232	146,602
Packs	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000

# EXECUTIVE SUMMARY: KEY MESSAGES

## Industry overview

- **Non-domestic incidence** increased to **43.7%** (vs 34.2% in Q2 2024, 25.6% in Q4 2023).
- **Counterfeit incidence** increased to **5.1%** (3.4%, 1.7%).
- **Main non-domestic brands** found were (excl. counterfeit):
  - **MARLBORO** (PMI) with **18.5%** of all packs collected (14.8%, 11.7%).
  - **CAMEL** (JTI) with **5.2%** (3.5%, 2.8%).
  - **WINSTON** (JTI) with **2.7%** (2.0%, 1.7%).
- **Main non-domestic market variants** found were (excl. counterfeit):
  - **DUTY FREE** with **6.3%** of all packs collected (5.4%, 3.9%).
  - **SPAIN** with **4.9%** (2.8%, 1.6%).
  - **GERMANY** with **4.5%** (4.5%, 2.7%).
- **At city level**, the highest non-domestic incidence was found in **ALKMAAR** at **54.5%** (48.6%, 15.4%), in **AMSTELVEEN** at **54.0%** (25.3%, 25.1%), and **SCHIEDAM** at **53.1%** (28.4%, 38.7%).



# EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks

— Total: 146,602 sticks (7,000 packs).

	Q4 2024	Q2 2024	Q4 2023
<b>NON-DOMESTIC INCIDENCE</b>	<b>43.7%</b>	34.2%	25.6%
<b>MAIN MARKET VARIANTS</b> (excl. counterfeit)			
DUTY FREE	6.3%	5.4%	3.9%
SPAIN	4.9%	2.8%	1.6%
GERMANY	4.5%	4.5%	2.7%
<b>MAIN BRAND FAMILIES</b> (excl. counterfeit)			
MARLBORO (PMI)	18.5%	14.8%	11.7%
CAMEL (JTI)	5.2%	3.5%	2.8%
WINSTON (JTI)	2.7%	2.0%	1.7%
<b>MAIN CITIES</b> (excl. counterfeit)			
ALKMAAR	54.5%	48.6%	15.4%
AMSTELVEEN	54.0%	25.3%	25.1%
SCHIEDAM	53.1%	28.4%	38.7%
<b>COUNTERFEIT INCIDENCE</b>			
TOTAL COUNTERFEIT INCIDENCE	5.1%	3.4%	1.7%
PMI	4.7%	3.0%	1.4%
IMPERIAL TOBACCO	0.2%	0.1%	0.1%
BAT	0.2%	0.1%	0.2%
JTI	0.1%	0.2%	0.1%



# EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks

— Total: 146,602 sticks (7,000 packs).

## MAIN INFLOWS

	COUNTERFEIT	DUTY FREE	SPAIN	GERMANY	POLAND	ITALY	OTHERS	Total	2024 Q2	2023 Q4
MARLBORO (PMI)	4.7%	2.9%	3.5%	2.4%	0.6%	0.9%	8.2%	<b>23.2%</b>	17.7%	12.8%
CAMEL (JTI)	—	1.3%	0.6%	0.4%	0.4%	0.4%	2.1%	<b>5.2%</b>	3.5%	2.8%
WINSTON (JTI)	0.1%	0.1%	0.0%	0.1%	1.1%	0.3%	1.0%	<b>2.7%</b>	2.2%	1.7%
L&M (PMI)	—	0.4%	0.1%	0.2%	0.2%	0.0%	0.5%	<b>1.5%</b>	1.4%	1.3%
PARLIAMENT (PMI)	—	0.1%	—	0.1%	0.1%	—	0.9%	<b>1.3%</b>	1.2%	0.6%
LUCKY STRIKE (BAT)	—	0.1%	0.2%	0.3%	—	0.1%	0.4%	<b>1.1%</b>	0.9%	0.7%
OTHERS	0.3%	1.3%	0.5%	0.9%	0.2%	0.5%	4.9%	<b>8.7%</b>	7.3%	5.7%
<b>Total</b>	<b>5.1%</b>	<b>6.3%</b>	<b>4.9%</b>	<b>4.5%</b>	<b>2.7%</b>	<b>2.3%</b>	<b>17.9%</b>	<b>43.7%</b>	<b>34.2%</b>	<b>25.6%</b>
2024 Q2	3.4%	5.4%	2.8%	4.5%	2.2%	1.5%	14.3%	<b>34.2%</b>		
2023 Q4	1.7%	3.9%	1.6%	2.7%	1.7%	1.3%	12.7%	<b>25.6%</b>		

02.

# METHODOLOGY

QUARTER 4, 2024





# 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:  
14 – 31 Oct, 2024

## REPORTING

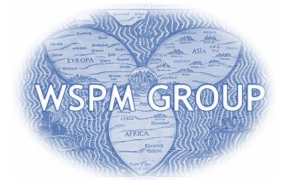
The results are calculated based on number of sticks equivalent to the number of packs collected.

## GEOGRAPHY

- The largest 50 cities
- 44.9% coverage of population

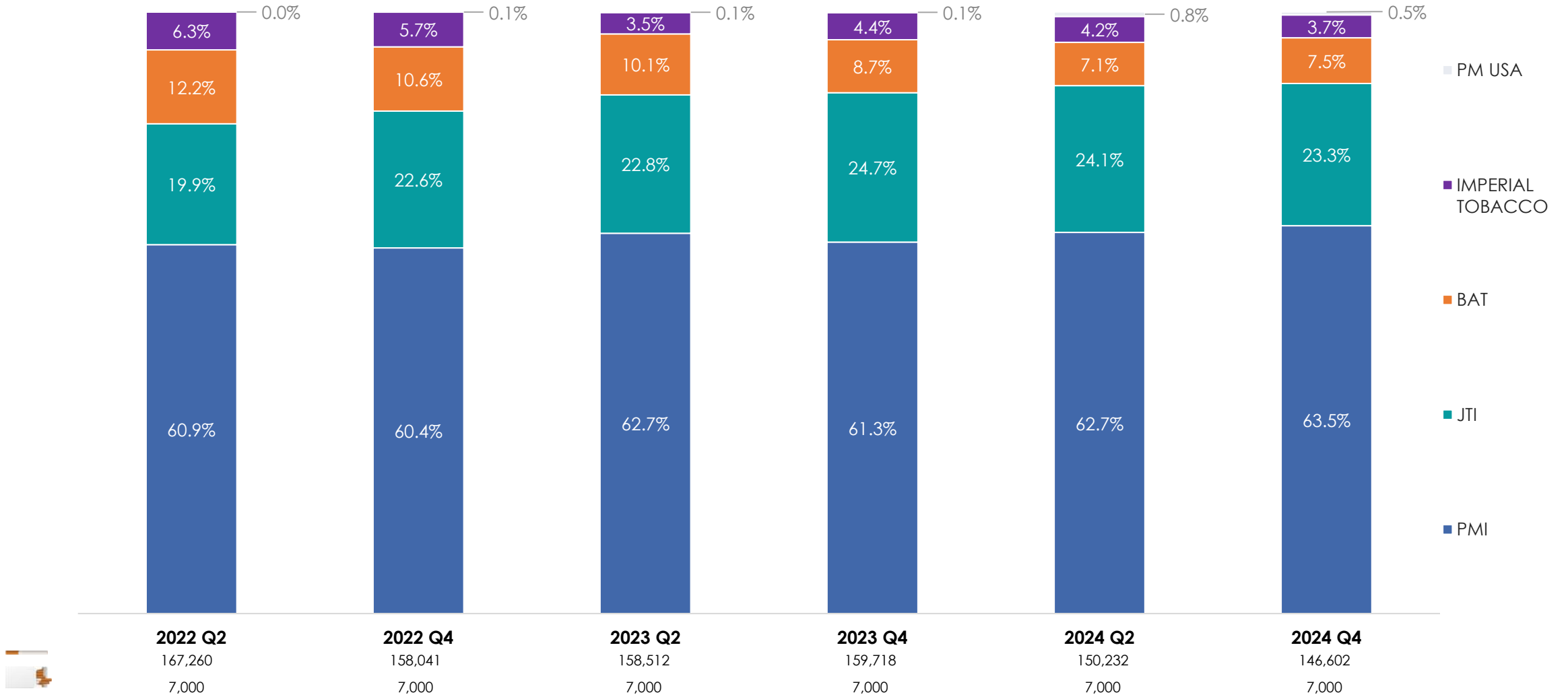


Region	Population Covered	Sample	Weighted Sample				
Amsterdam	799,278	743	774	Neeldwijk	102,698	95	96
Rotterdam	616,294	573	562	Venlo	100,159	93	88
The Hague	505,856	470	474	Deventer	98,581	92	87
Utrecht	321,916	299	310	Delft	99,097	92	90
Eindhoven	218,433	203	204	Leeuwarden	95,949	89	108
Tilburg	208,527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



# SAMPLE COMPOSITION: SHARE BY COMPANY

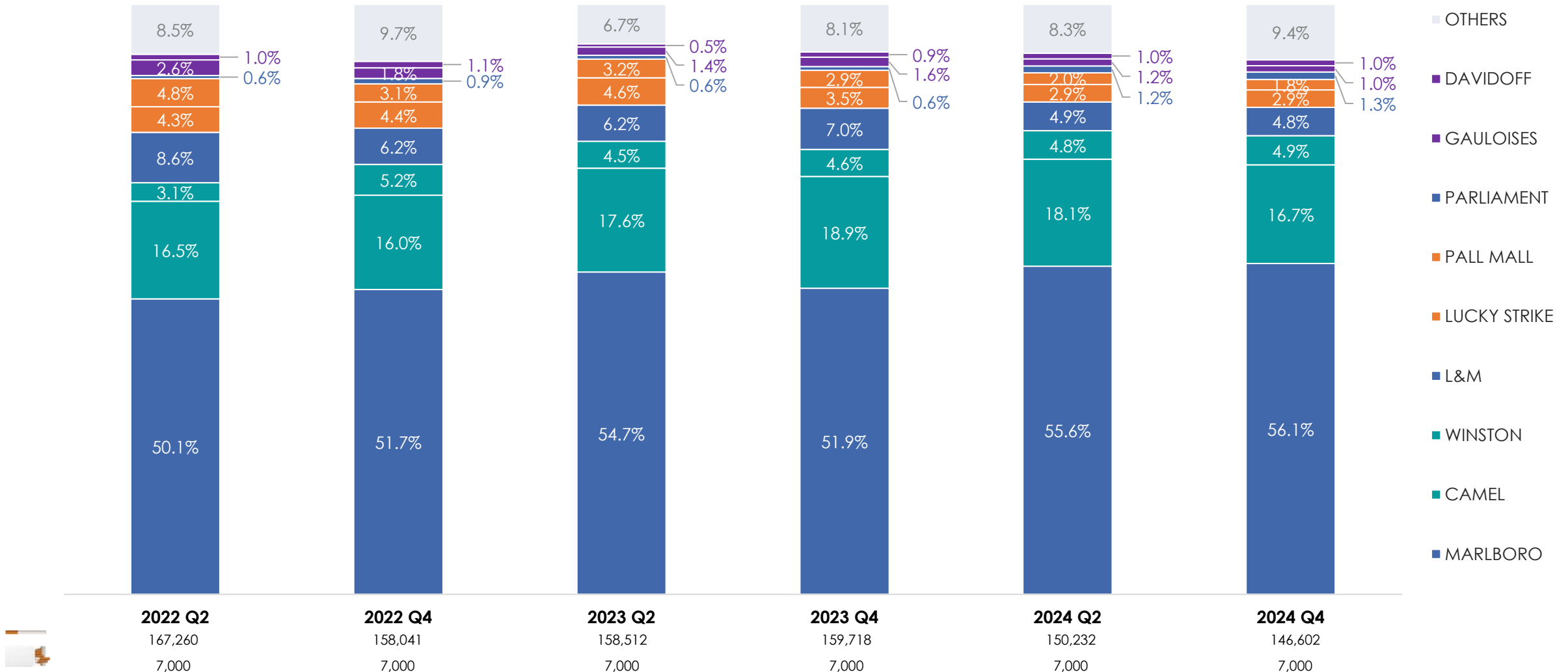
% OF TOTAL SAMPLE Based on number of sticks





# SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks





03.

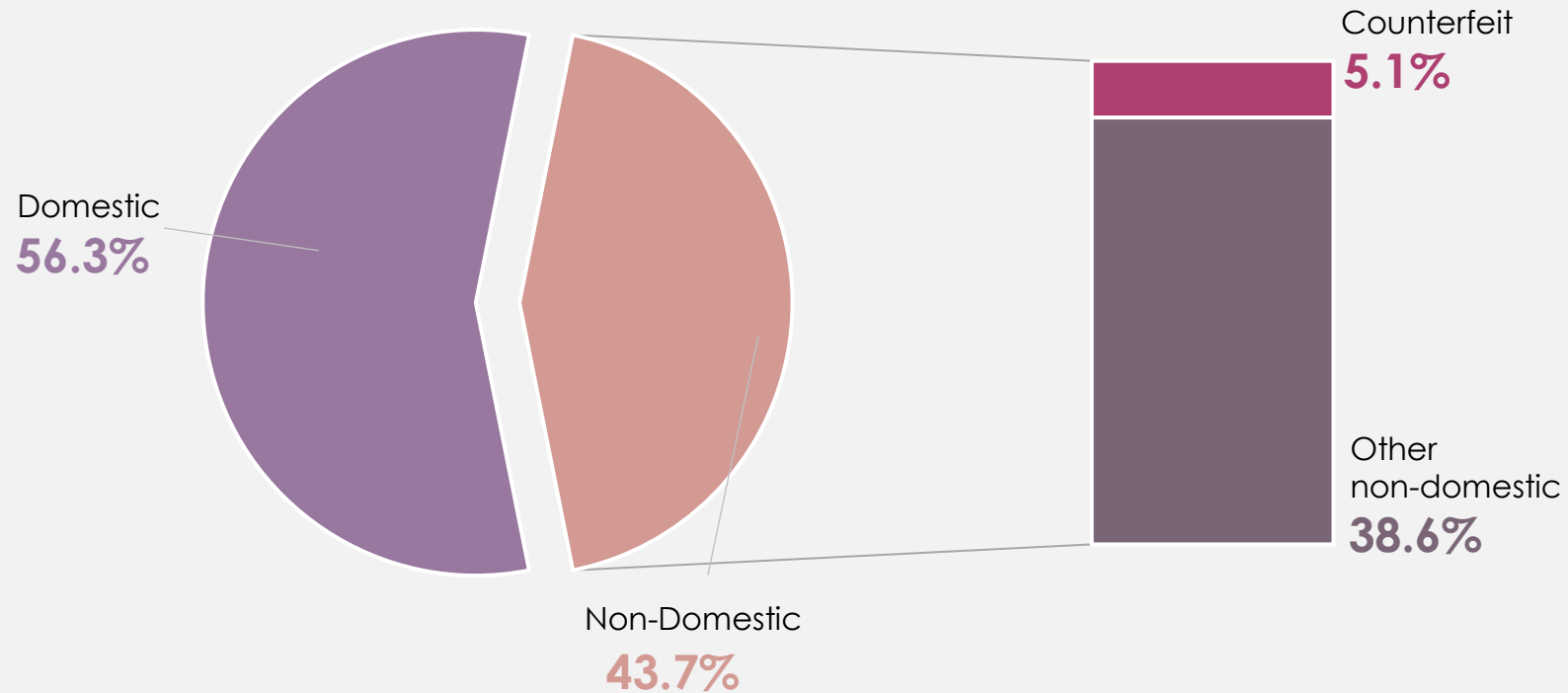
# KEY RESULTS

QUARTER 4, 2024



# NON-DOMESTIC: CATEGORIES

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

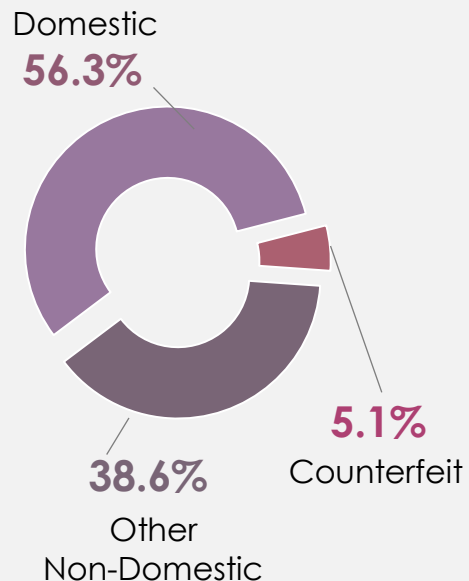


Total: 146,602 sticks (7,000 packs).



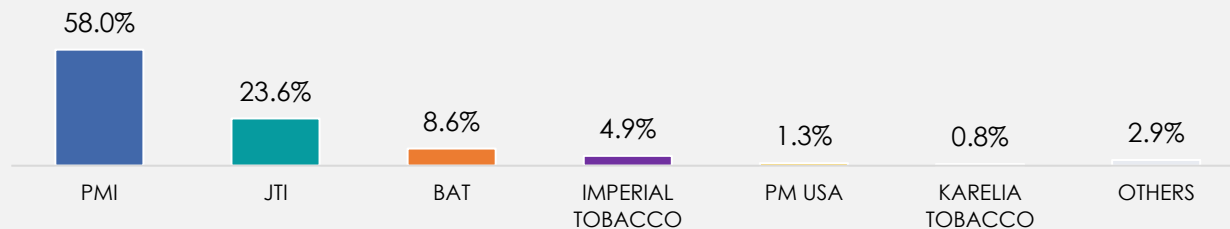
# OTHER NON-DOMESTIC: BREAKDOWN

## NON-DOMESTIC INCIDENCE % OF TOTAL SAMPLE



Total: 57,056 sticks (2,746 packs)

## SPLIT BY COMPANY % OF OTHER NON-DOMESTIC SAMPLE



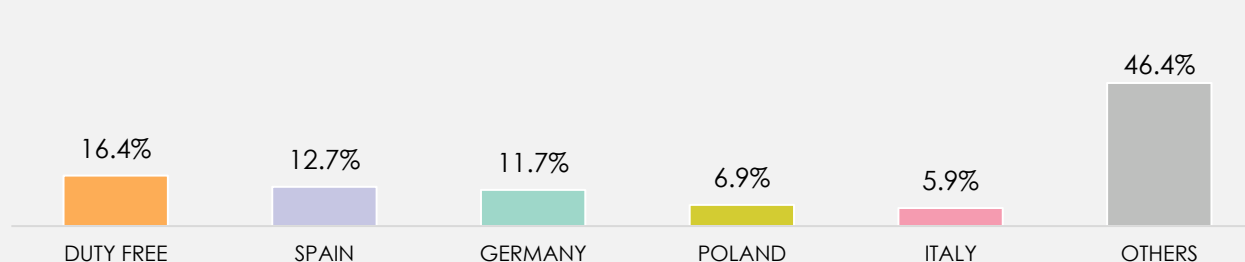
Main Others ▼ e.g.

ITC LTD	0.5%
H. VAN LANDEWYCK	0.3%
KT&G	0.3%
GULBAHAR TOBACCO INTERNATIONAL	0.3%
VON EICKEN	0.2%
UNKNOWN	0.2%
POESCHL TABAK	0.1%

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

MARLBORO	47.9%	CAMEL	13.4%	LUCKY STRIKE	2.8%	DAVIDOFF	1.6%	MARLBORO	1.2%	KARELIA	0.4%
L&M	3.9%	WINSTON	6.9%	DUNHILL	1.5%	GAULOISES	1.0%	PARLIAMENT	0.0%	OME	0.3%
PARLIAMENT	3.3%	SOBRANIE	0.8%	KENT	1.1%	JOHN PLAYER SPECIAL	0.7%			GEORGE KARELIAS&SONS	0.0%
CHESTERFIELD	1.4%	BENSON & HEDGES	0.6%	VOGUE	0.9%	LAMBERT & BUTLER	0.4%				
PHILIP MORRIS	0.5%	MAYFAIR	0.4%	PALL MALL	0.8%	FORTUNA	0.2%				

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

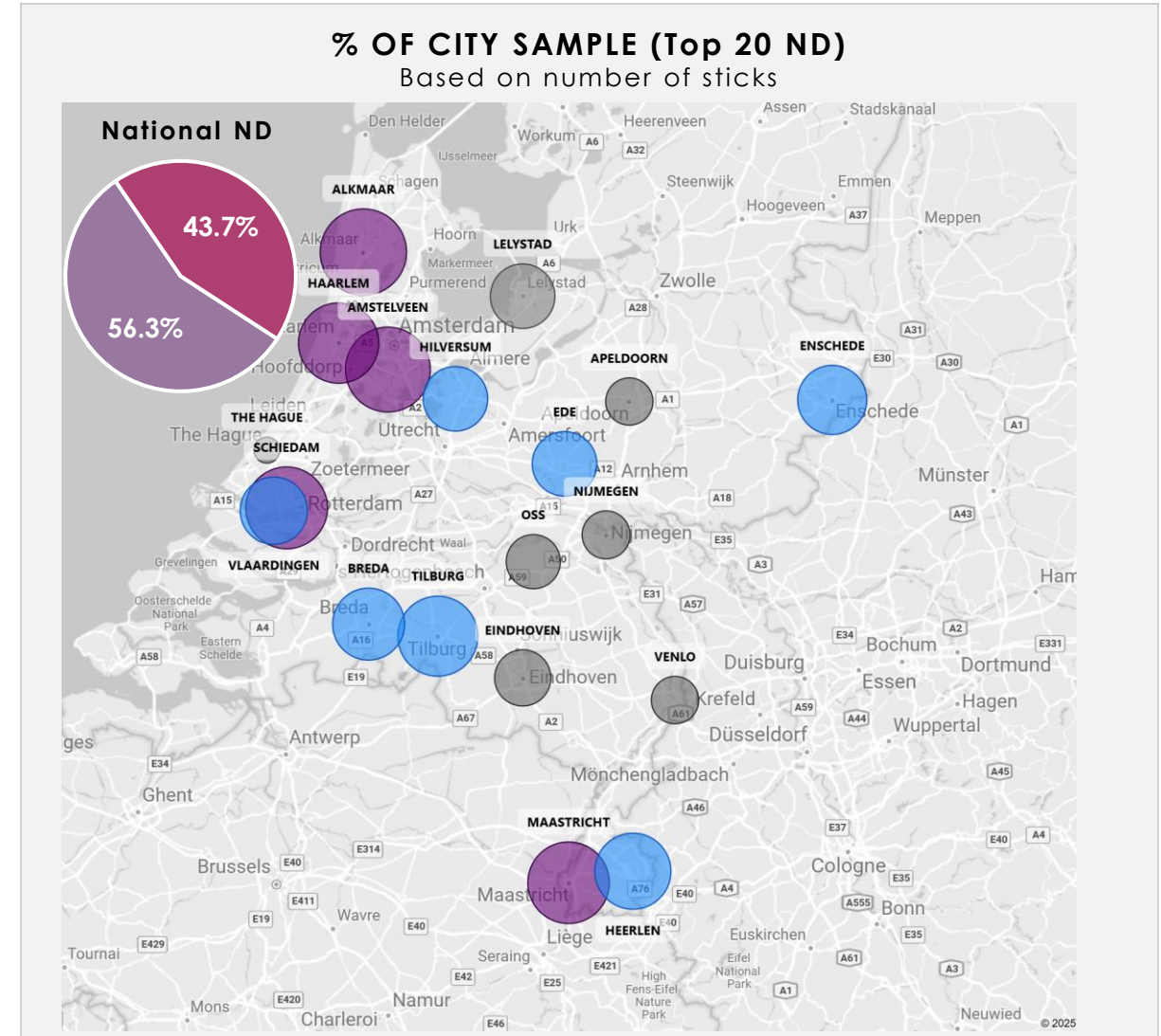
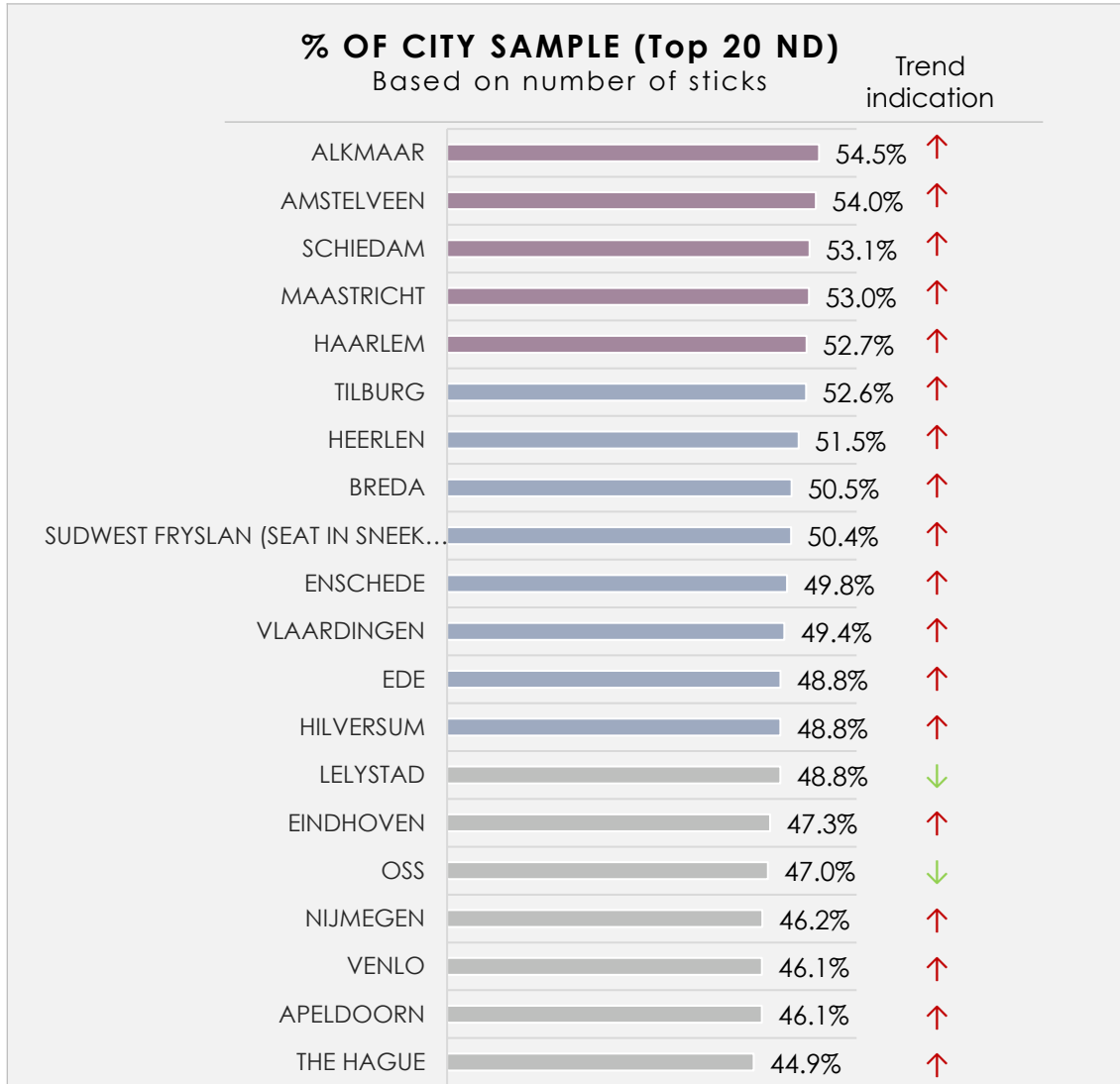


Main Others ▼ e.g.

LUXEMBOURG	5.4%
TURKEY	4.9%
GREECE	4.1%
BELGIUM	3.2%
BULGARIA	3.1%
PORTUGAL	2.9%
ROMANIA	2.1%



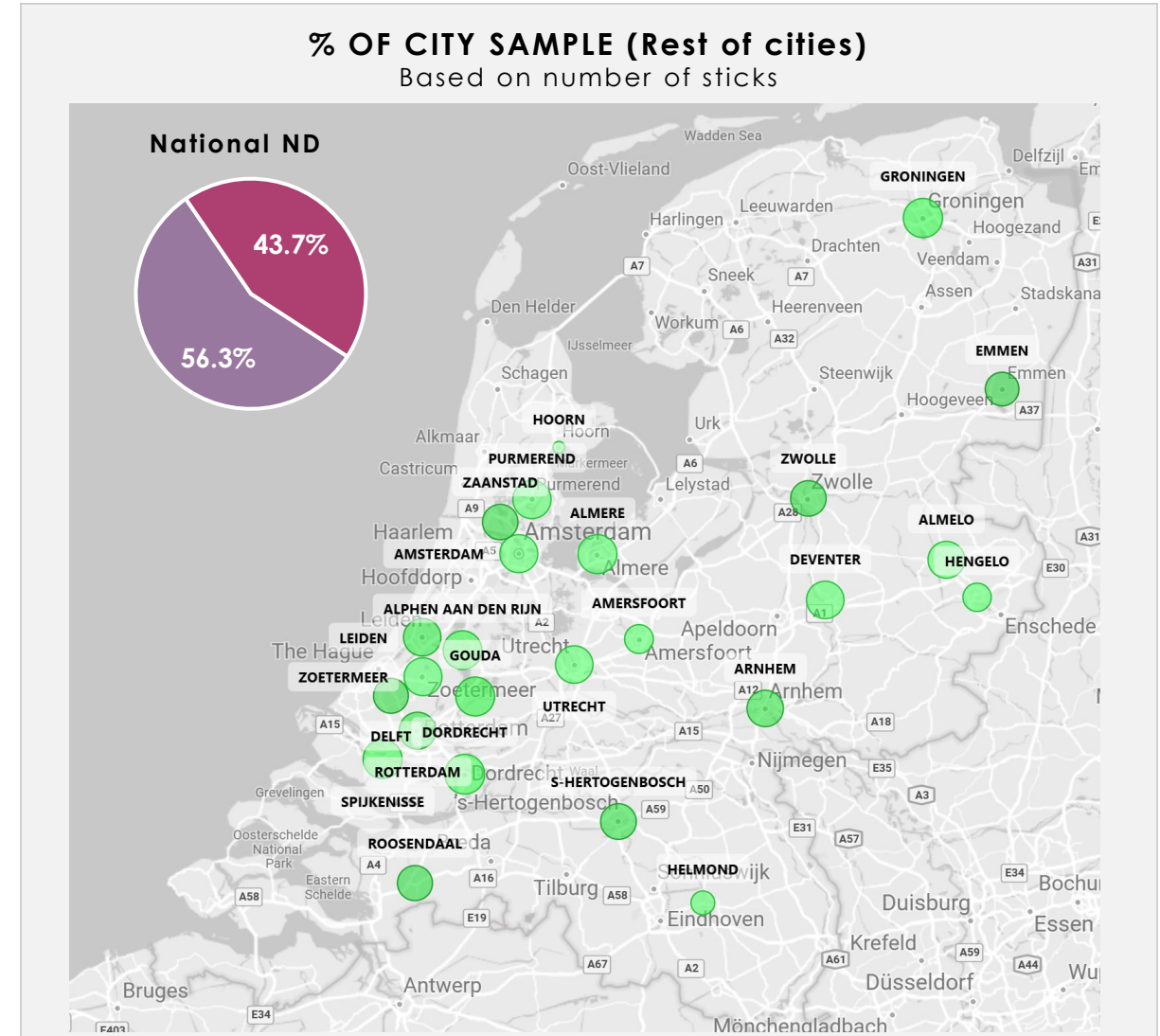
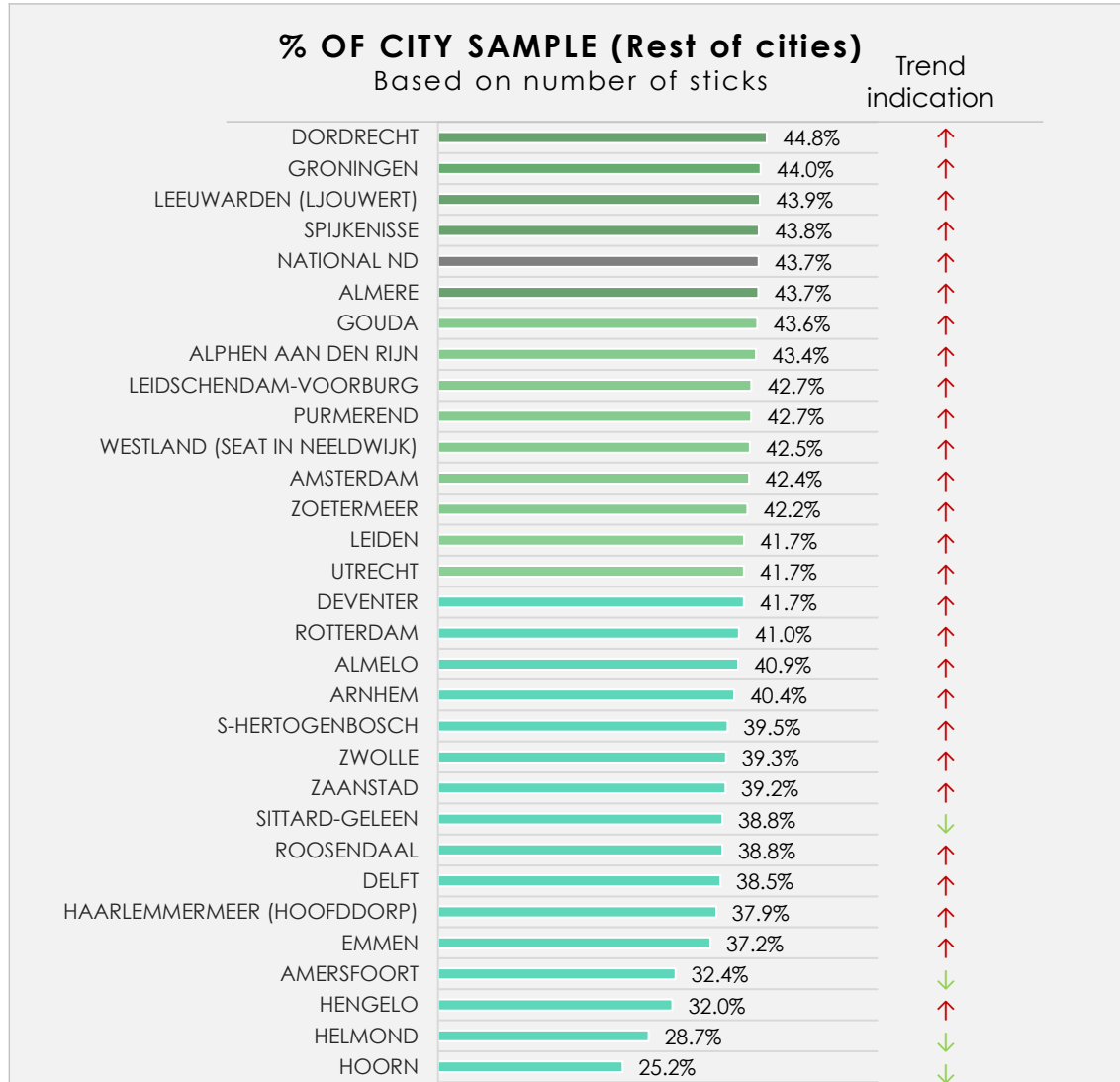
# NON-DOMESTIC: BY CITY (1/2)







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





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

% OF TOTAL SAMPLE Based on number of sticks

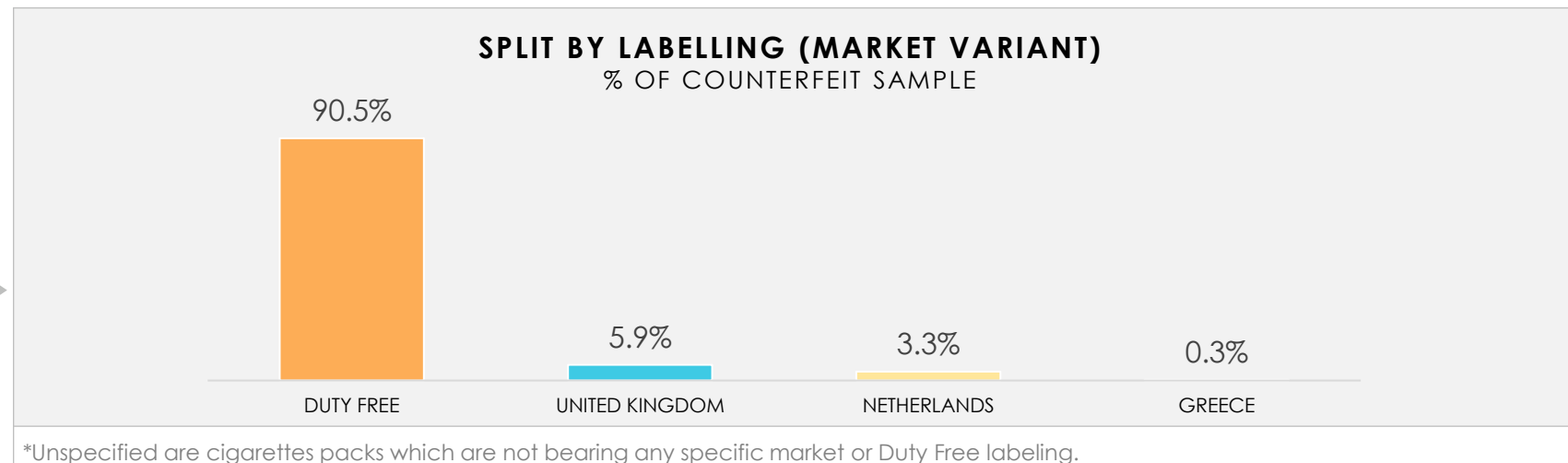
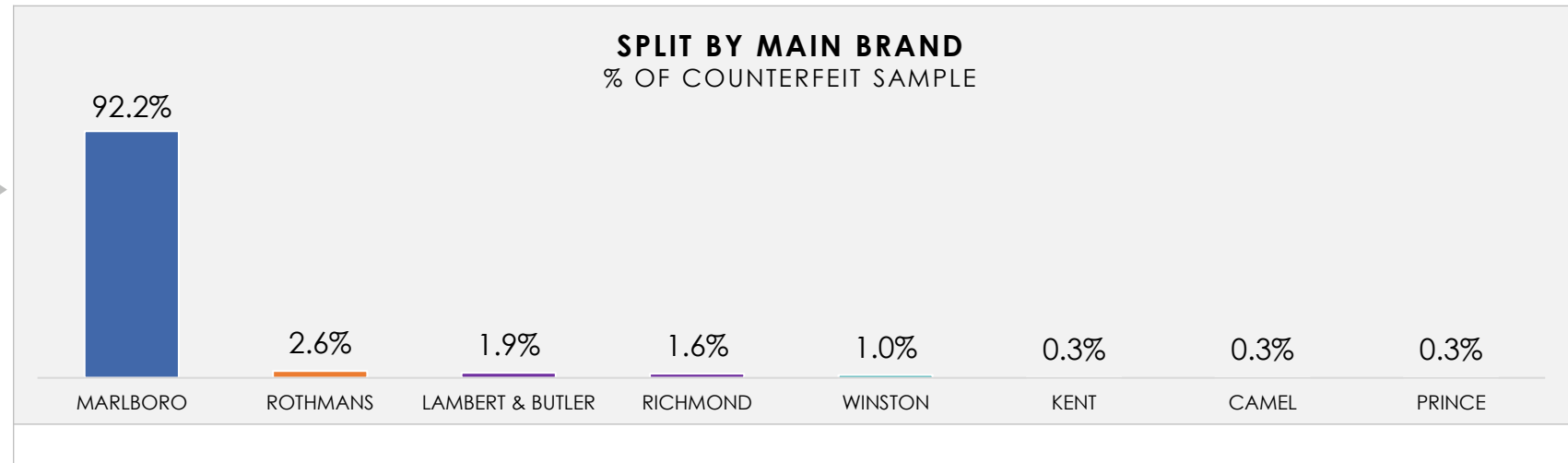
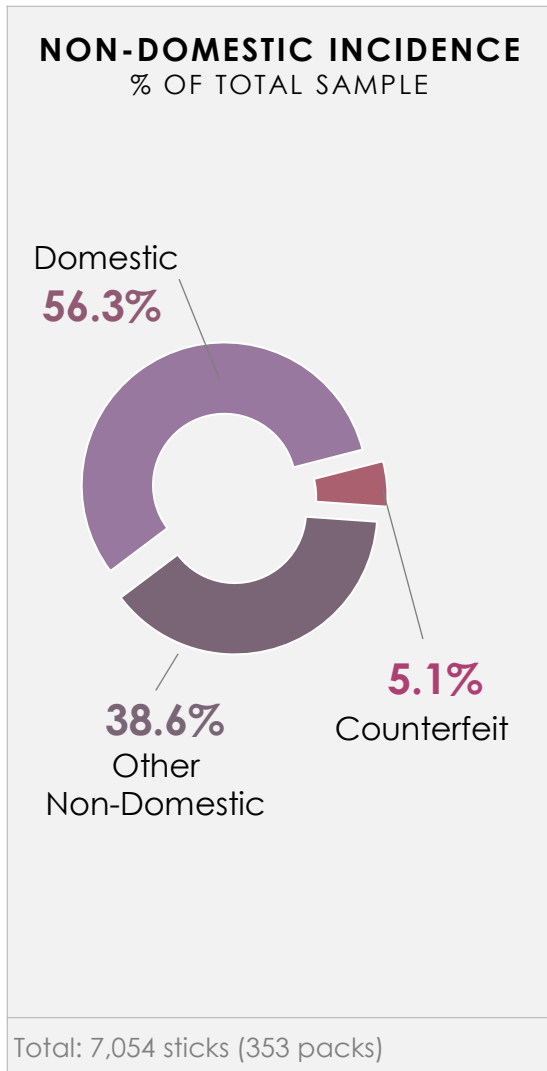
— Total: 146,602 sticks (7,000 packs).

## NON-DOMESTIC (TOP 10 CITIES)

	COUNTERFEIT	MARLBORO (PMI)	CAMEL (JTI)	WINSTON (JTI)	L&M (PMI)	OTHERS	TOTAL	2024 Q2	2023 Q4
AMSTERDAM	0.6%	1.9%	0.8%	0.3%	0.1%	1.1%	<b>4.6%</b>	4.0%	3.2%
ROTTERDAM	0.4%	1.2%	0.4%	0.4%	0.2%	0.7%	<b>3.3%</b>	2.4%	1.8%
THE HAGUE	0.2%	1.6%	0.3%	0.1%	0.2%	0.7%	<b>3.0%</b>	2.1%	2.1%
UTRECHT	0.3%	0.7%	0.3%	0.1%	0.0%	0.4%	<b>1.8%</b>	1.6%	1.3%
TILBURG	0.2%	0.6%	0.1%	0.1%	0.1%	0.4%	<b>1.5%</b>	1.0%	0.6%
EINDHOVEN	0.1%	0.5%	0.1%	0.2%	—	0.4%	<b>1.4%</b>	1.0%	0.6%
GRONINGEN	0.2%	0.5%	0.2%	0.1%	0.0%	0.3%	<b>1.3%</b>	0.8%	0.9%
ALMERE	0.2%	0.5%	0.1%	0.1%	0.1%	0.2%	<b>1.2%</b>	1.1%	0.5%
BREDA	0.1%	0.4%	0.1%	0.1%	0.1%	0.3%	<b>1.1%</b>	0.7%	1.5%
HAARLEM	0.2%	0.3%	0.2%	0.0%	—	0.3%	<b>1.1%</b>	0.6%	0.5%
OTHERS	2.6%	10.2%	2.5%	1.3%	0.9%	5.9%	<b>23.4%</b>	18.7%	12.8%
<b>TOTAL</b>	<b>5.1%</b>	<b>18.5%</b>	<b>5.2%</b>	<b>2.7%</b>	<b>1.5%</b>	<b>10.7%</b>	<b>43.7%</b>	<b>34.2%</b>	<b>25.6%</b>
2024 Q2	3.4%	14.8%	3.5%	2.0%	1.3%	9.1%	<b>34.2%</b>		
2023 Q4	1.7%	11.7%	2.8%	1.7%	0.9%	6.7%	<b>25.6%</b>		



# COUNTERFEIT: BREAKDOWN





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

% OF TOTAL SAMPLE Based on number of sticks

— Total: 146,602 sticks (7,000 packs).

## COUNTERFEIT (TOP 10 CITIES)

	MARLBORO (PMI)	ROTHMANS (BAT)	LAMBERT & BUTLER (ITL)	RICHMOND (ITL)	OTHERS	TOTAL	2024 Q2	2023 Q4
AMSTERDAM	0.6%	—	—	—	—	<b>0.6%</b>	0.4%	0.1%
ROTTERDAM	0.4%	—	—	0.0%	—	<b>0.4%</b>	0.2%	0.2%
UTRECHT	0.3%	0.0%	0.0%	—	0.0%	<b>0.3%</b>	0.2%	—
ALMERE	0.2%	—	0.0%	—	0.0%	<b>0.2%</b>	0.1%	0.1%
HAARLEM	0.2%	—	—	0.0%	—	<b>0.2%</b>	0.1%	0.0%
THE HAGUE	0.2%	—	—	—	—	<b>0.2%</b>	0.2%	0.1%
HAARLEMMERMEER (HOOFDDORP)	0.2%	—	0.0%	—	—	<b>0.2%</b>	0.1%	0.0%
TILBURG	0.1%	—	0.0%	0.0%	—	<b>0.2%</b>	0.1%	—
GRONINGEN	0.2%	—	—	—	—	<b>0.2%</b>	0.1%	0.4%
EDE	0.1%	0.0%	—	—	—	<b>0.1%</b>	0.0%	0.1%
OTHERS	2.3%	0.1%	0.0%	0.0%	0.1%	<b>2.6%</b>	2.1%	0.7%
<b>TOTAL</b>	<b>4.7%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>5.1%</b>	<b>3.4%</b>	<b>1.7%</b>
2024 Q2	2.9%	0.1%	0.1%	—	0.3%	<b>3.4%</b>		
2023 Q4	1.0%	0.2%	0.0%	0.0%	0.4%	<b>1.7%</b>		



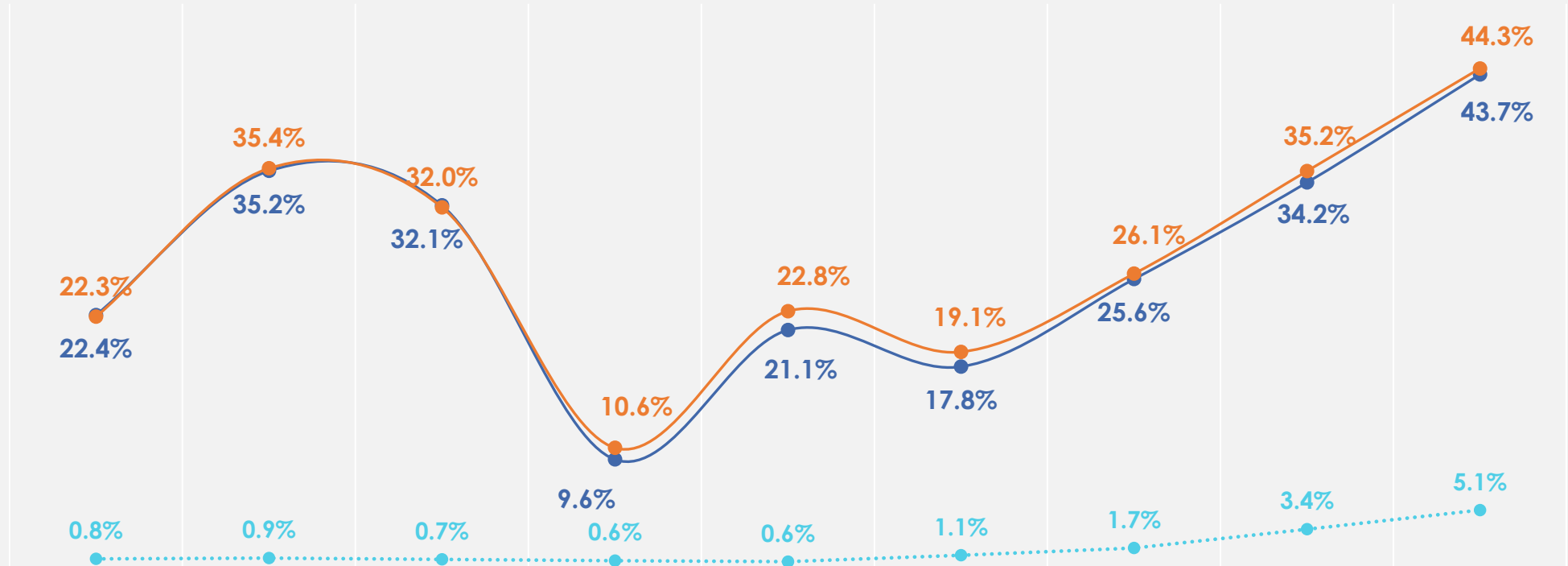
# NON-DOMESTIC: INCIDENCE TREND

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

based on packs

based on sticks

thereof Counterfeit  
(based on weighted sticks)

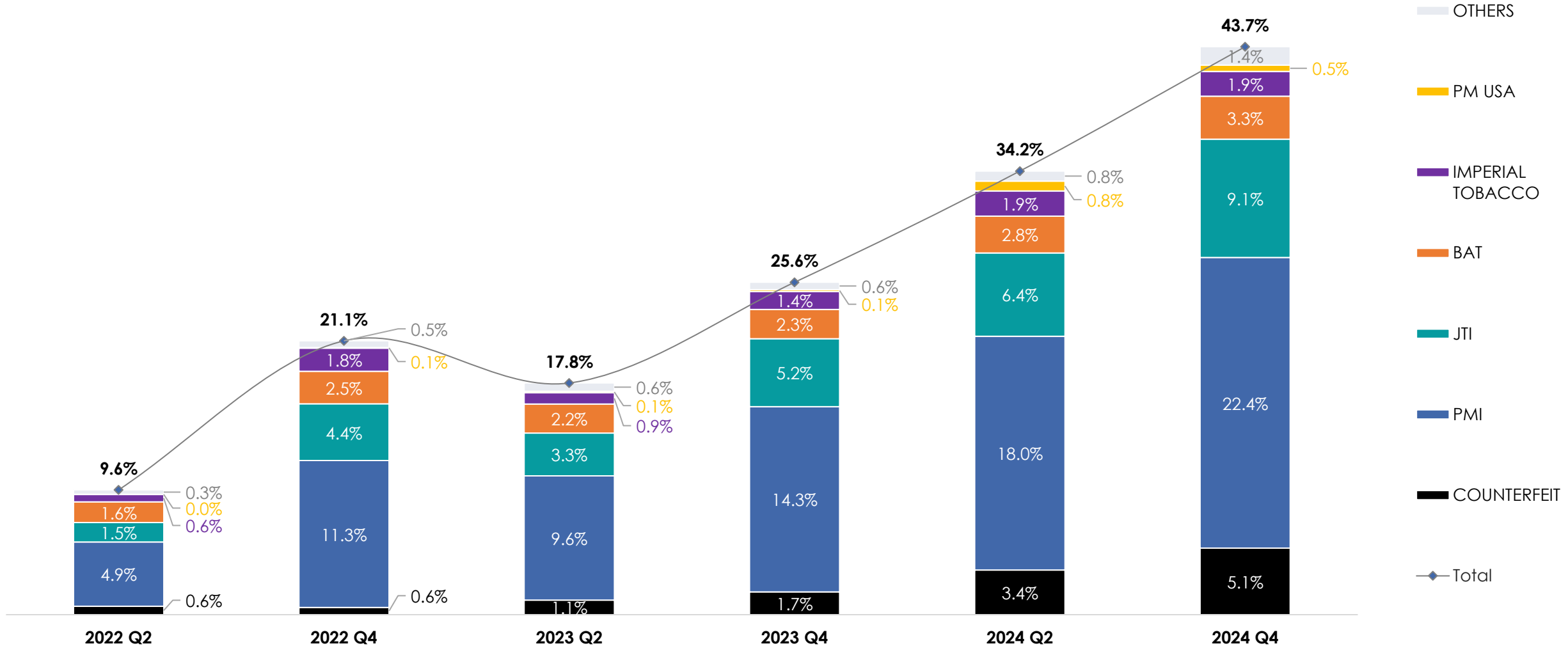


	2021 Q2	2021 Q3	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4
Sticks	158,101	154,997	155,628	167,260	158,041	158,512	159,718	150,232	146,602
Packs	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000



# NON-DOMESTIC: COMPANY TREND

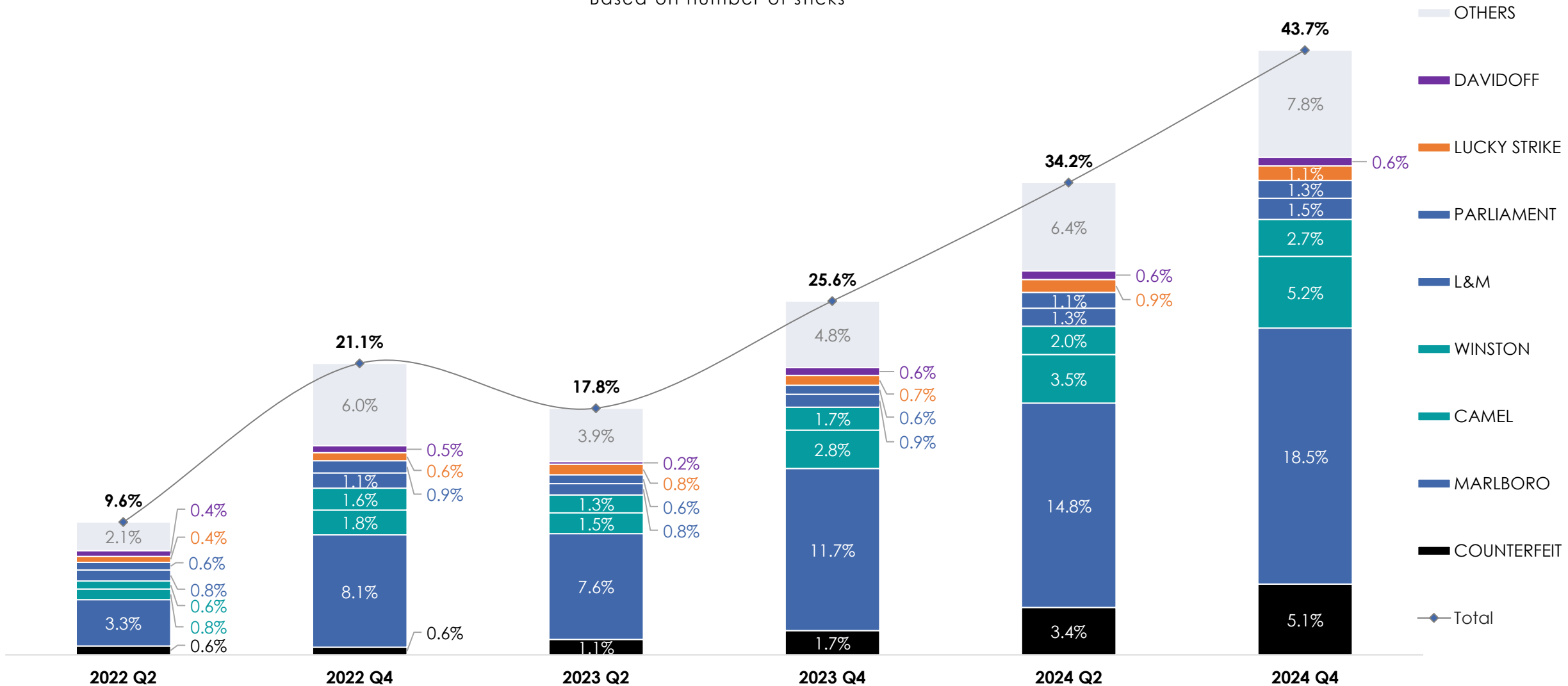
**% OF TOTAL SAMPLE**  
Based on number of sticks





# NON-DOMESTIC: BRAND FAMILY TREND

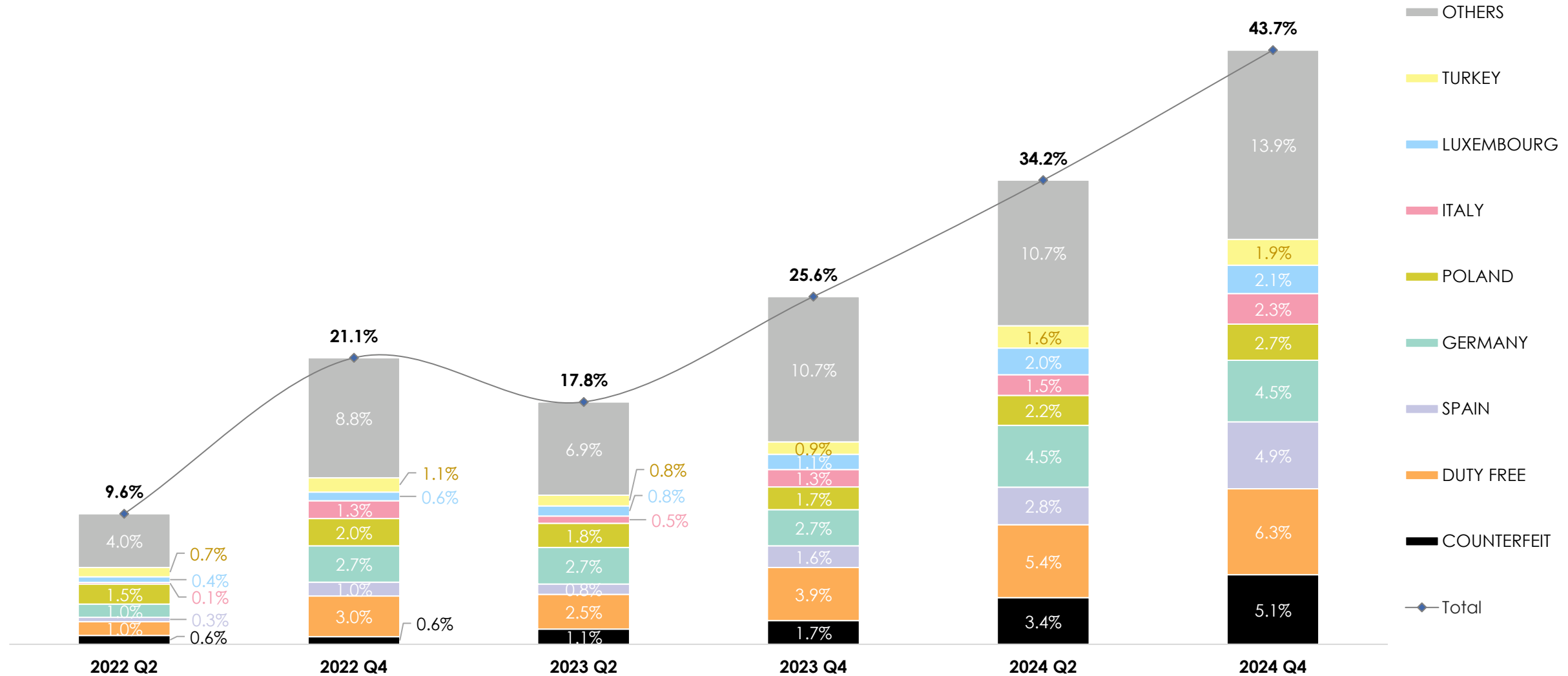
**% OF TOTAL SAMPLE**  
Based on number of sticks





# NON-DOMESTIC: MARKET VARIANT TREND

**% OF TOTAL SAMPLE**  
Based on number of sticks







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

SAMPLE			NON-DOMESTIC INCIDENCE PER CITY						
CITY	PACKS	STICKS	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4
ALKMAAR	95	1,980	44.8%	5.5%	7.7%	23.2%	15.4%	48.6%	54.5%
AMSTELVEEN	79	1,637	36.7%	14.6%	33.0%	31.1%	25.1%	25.3%	54.0%
SCHIEDAM	68	1,439	32.0%	9.6%	31.2%	10.5%	38.7%	28.4%	53.1%
MAASTRICHT	104	2,144	63.7%	9.2%	11.2%	22.9%	16.0%	34.0%	53.0%
HAARLEM	140	2,964	22.3%	8.4%	9.1%	18.1%	25.1%	33.4%	52.7%
TILBURG	192	4,060	67.9%	13.8%	22.8%	10.6%	22.8%	36.5%	52.6%
HEERLEN	74	1,577	20.8%	5.7%	26.8%	26.2%	6.8%	24.4%	51.5%
BREDA	158	3,338	45.4%	11.0%	11.2%	17.1%	28.6%	30.6%	50.5%
SUDWEST FRYSLAN (SNEEK SNITS)	77	1,627	37.8%	13.6%	26.5%	15.2%	9.3%	26.2%	50.4%
ENSCHDEDE	138	2,918	19.1%	10.3%	9.9%	10.6%	30.8%	45.4%	49.8%
VLAARDINGEN	64	1,361	29.9%	5.5%	5.4%	9.2%	37.6%	33.6%	49.4%
EDE	103	2,180	28.9%	6.9%	12.0%	12.7%	13.9%	31.0%	48.8%
HILVERSUM	79	1,640	28.1%	9.5%	21.3%	17.0%	30.2%	32.8%	48.8%
LELYSTAD	70	1,444	25.1%	7.8%	11.0%	22.4%	35.8%	51.3%	48.8%
EINDHOVEN	204	4,265	30.5%	8.5%	6.3%	21.4%	23.6%	35.0%	47.3%
OSS	80	1,686	73.6%	8.1%	45.8%	21.3%	17.2%	47.6%	47.0%
NIJMEGEN	153	3,196	25.5%	7.3%	12.2%	25.1%	43.5%	45.3%	46.2%
VENLO	88	1,808	29.5%	10.6%	18.8%	21.9%	20.8%	41.0%	46.1%
APELDOORN	142	2,924	25.1%	4.5%	15.0%	8.0%	19.0%	41.4%	46.1%
THE HAGUE	474	9,912	25.8%	8.7%	24.7%	17.7%	31.9%	31.2%	44.9%
DORDRECHT	102	2,083	59.5%	12.8%	1.6%	9.1%	29.2%	31.0%	44.8%
GRONINGEN	201	4,194	25.6%	7.8%	42.4%	13.8%	30.5%	28.5%	44.0%
LEEUWARDEN (LJOUWERT)	108	2,279	27.7%	2.6%	31.5%	18.1%	14.8%	30.0%	43.9%
SPIJKENISSE	74	1,557	52.8%	10.3%	14.6%	18.5%	35.8%	29.3%	43.8%
ALMERE	187	3,890	31.2%	7.8%	27.4%	24.1%	18.0%	43.0%	43.7%



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

CITY	PACKS	STICKS	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4
GOUDA	63	1,345	27.5%	1.2%	19.0%	8.9%	12.9%	31.2%	43.6%
ALPHEN AAN DEN RIJN	97	2,028	30.1%	2.5%	43.7%	7.9%	40.2%	19.6%	43.4%
LEIDSCHENDAM-VOORBURG	66	1,349	23.0%	7.6%	7.0%	20.1%	30.7%	25.0%	42.7%
PURMEREND	79	1,635	31.4%	14.1%	38.8%	22.2%	25.6%	41.2%	42.7%
WESTLAND (NEELDWIJK)	96	2,044	20.2%	12.1%	11.1%	21.4%	32.7%	33.6%	42.5%
AMSTERDAM	774	16,047	24.5%	15.2%	33.3%	24.5%	31.5%	36.2%	42.4%
ZOETERMEER	108	2,267	26.3%	4.9%	15.2%	15.8%	8.1%	35.4%	42.2%
LEIDEN	107	2,284	36.8%	7.9%	7.6%	21.6%	27.6%	32.6%	41.7%
UTRECHT	310	6,434	27.9%	7.6%	12.3%	14.9%	25.2%	37.4%	41.7%
DEVENTER	87	1,767	35.4%	15.9%	14.9%	14.5%	16.3%	37.4%	41.7%
ROTTERDAM	562	11,933	30.2%	13.3%	33.3%	17.1%	22.9%	30.8%	41.0%
ALMELO	63	1,286	39.4%	9.1%	13.7%	24.1%	32.1%	39.3%	40.9%
ARNHEM	140	2,985	31.4%	12.9%	7.7%	7.9%	17.3%	31.3%	40.4%
S-HERTOGENBOSCH	134	2,758	32.2%	19.5%	8.0%	12.5%	20.3%	18.6%	39.5%
ZWOLLE	112	2,326	27.2%	3.9%	9.9%	24.1%	34.0%	30.3%	39.3%
ZAANSTAD	135	2,880	31.0%	2.7%	16.4%	21.5%	34.2%	32.7%	39.2%
SITTARD-GELEEN	79	1,607	45.1%	3.1%	41.5%	22.8%	14.8%	42.5%	38.8%
ROOSENDAAL	66	1,385	48.7%	17.7%	14.7%	13.8%	18.1%	32.2%	38.8%
DELFT	90	1,833	17.4%	7.8%	7.1%	11.1%	28.6%	28.8%	38.5%
HAARLEMMERMEER (HOOFDDORP)	137	2,862	23.7%	7.2%	18.5%	26.1%	23.6%	35.1%	37.9%
EMMEN	92	2,002	25.7%	3.8%	35.2%	9.6%	11.7%	35.0%	37.2%
AMERSFOORT	136	2,821	29.0%	6.4%	21.7%	20.3%	22.0%	39.6%	32.4%
HENGELO	70	1,572	20.7%	10.5%	28.5%	23.6%	12.4%	26.3%	32.0%
HELMOND	80	1,743	29.8%	1.9%	30.9%	10.8%	19.7%	37.4%	28.7%
HOORN	64	1,302	28.6%	8.0%	24.5%	11.8%	33.3%	41.9%	25.2%
<b>TOTAL SAMPLE</b>	<b>7,000</b>	<b>146,602</b>	<b>32.1%</b>	<b>9.6%</b>	<b>21.1%</b>	<b>17.8%</b>	<b>25.6%</b>	<b>34.2%</b>	<b>43.7%</b>



04.

# APPENDIX






QUARTER 4, 2024



# TOTAL SAMPLE: DETAILS PER COMPANY

## NUMBER OF STICKS PER CATEGORY AND COMPANY

## IN % OF COMPANY TOTAL

					Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit
	53,289	32,809	6,925	<b>93,023</b>	57.3%	35.3%	—	7.4%
	20,725	13,356	79	<b>34,160</b>	60.7%	39.1%	—	0.2%
	4,856	5,842	251	<b>10,949</b>	53.4%	44.4%	—	2.3%
	2,445	2,784	258	<b>5,487</b>	44.6%	50.7%	—	4.7%
	713			<b>713</b>	—	—	100.0%	—
OTHERS	191	2,079		<b>2,270</b>	8.4%	—	91.6%	—



# 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)	48,149	27,136	6,925	<b>82,211</b>	<b>58.6%</b>	33.0%	-	<b>8.4%</b>
CAMEL (JTI)	16,907	7,594		<b>24,501</b>	<b>69.0%</b>	31.0%	-	-
WINSTON (JTI)	3,258	3,912	79	<b>7,249</b>	<b>44.9%</b>	54.0%	-	<b>1.1%</b>
L&M (PMI)	4,833	2,233		<b>7,066</b>	<b>68.4%</b>	31.6%	-	-
LUCKY STRIKE (BAT)	2,742	1,563		<b>4,304</b>	<b>63.7%</b>	36.3%	-	-
PALL MALL (BAT)	2,129	477		<b>2,607</b>	<b>81.7%</b>	18.3%	-	-
PARLIAMENT (PMI)	1,885			<b>1,885</b>	-	100.0%	-	-
GAULOISES (ITL)	969	552		<b>1,521</b>	<b>63.7%</b>	36.3%	-	-
DAVIDOFF (ITL)	543	906		<b>1,449</b>	<b>37.5%</b>	62.5%	-	-
OTHERS	2,961	7,547	2,792	<b>13,810</b>	<b>21.4%</b>	54.7%	<b>20.2%</b>	<b>3.7%</b>



# NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

## NON-DOMESTIC INCIDENCE BY COMPANY – TREND

% OF TOTAL COMPANY SAMPLE

	PMI	JTI	BAT	IMPERIAL TOBACCO	OTHERS
N (Sticks)	93,023	34,160	10,949	5,487	2,983
Packs	4,476	1,616	500	259	148
<b>2024 Q4</b>					
Non-Domestic	—	—	—	—	93.6%
Counterfeit	7.4%	0.2%	2.3%	4.7%	—
Genuine non-domestic	35.3%	39.1%	44.4%	50.7%	—
<b>2024 Q2</b>					
Non-Domestic	—	—	—	—	88.0%
Counterfeit	4.8%	0.7%	2.1%	2.6%	—
Genuine non-domestic	28.7%	26.5%	39.7%	45.8%	—
<b>2023 Q4</b>					
Non-Domestic	—	—	—	—	86.6%
Counterfeit	2.3%	0.3%	2.5%	1.5%	—
Genuine non-domestic	23.2%	21.3%	25.7%	31.1%	—

# OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	OME	MOND	CLASSIC
Company	KARELIA TOBACCO	GULBAHAR TOBACCO INTERNATIONAL	ITC LTD
Market variant	BULGARIA	UNSPECIFIED*	INDIA



\*Unspecified are cigarettes packs which are not bearing any specific market or Duty Free labeling.

# AGENCY CONTACTS



## Head of BI

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Tomer Touati

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Tomer.Touati@wspm.org

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+1-917-250-3056

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## Survey Project Manager

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Yaki Hepstein

---

Yaki.Hepstein@wspm.org

---

+357-22-030-084

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## COO

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Tami Vansower

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Tami.Vansower@wspm.org

---

+357-22-030-084

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## CEO

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Daniel Touati

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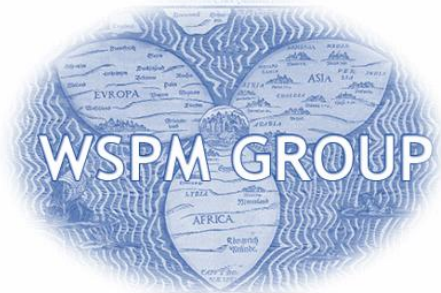
Daniel.Touati@wspm.org

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+972-54-433-9200

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WSPM GROUP

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THANK YOU