

WSPM GROUP
EMPTY PACKS SURVEY
NETHERLANDS Q4 2025

January 2026

CONTENTS

EMPTY PACK SURVEY RESULTS Q4 2025:
NETHERLANDS



01.



EXECUTIVE SUMMARY



02.



METHODOLOGY



03.



KEY RESULTS



04.



APPENDIX



01.

EXECUTIVE SUMMARY

QUARTER 4, 2025



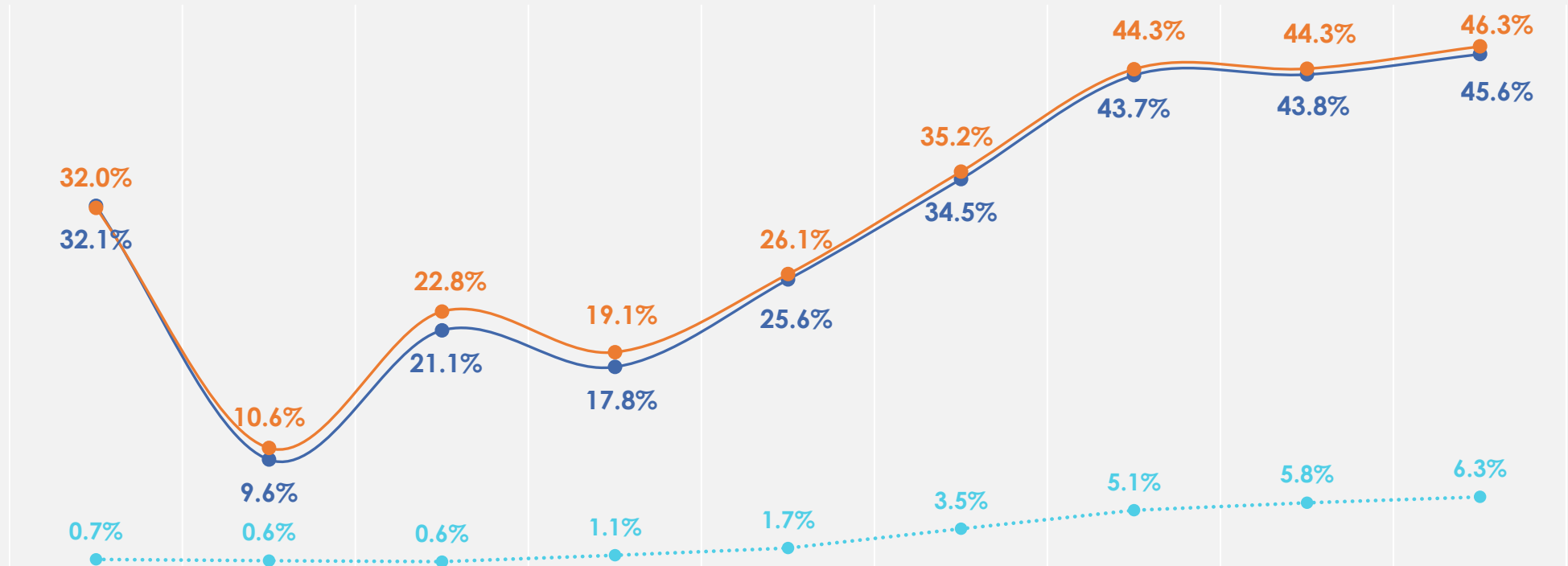
EXECUTIVE SUMMARY: NON-DOMESTIC TREND

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE

based on packs

based on sticks

thereof Counterfeit
(based on weighted sticks)



Sticks 
Packs 

	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
Sticks	155,628	167,260	158,041	158,512	159,718	148,696	146,602	147,408	146,634
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 **45.6%** (vs 43.8% in Q2 2025, 43.7% in Q4 2024).
- **Counterfeit incidence** increased to **6.3%** (5.8%, 5.1%).
- **Main non-domestic brands** found were (excl. counterfeit):
 - **MARLBORO** (PMI) with **19.3%** of all packs collected (18.9%, 18.5%).
 - **CAMEL** (JTI) with **4.9%** (5.0%, 5.2%).
 - **WINSTON** (JTI) with **3.1%** (2.9%, 2.7%).
- **Main non-domestic market variants** found were (excl. counterfeit):
 - **DUTY FREE** with **7.9%** of all packs collected (6.1%, 6.3%).
 - **GERMANY** with **4.3%** (5.1%, 4.5%).
 - **POLAND** with **3.7%** (2.9%, 2.7%).
- **At city level**, the highest non-domestic incidence was found in **ENSCHEDÉ** at **66.8%** (41.3%, 49.8%), in **ALPHEN AAN DEN RIJN** at **61.5%** (50.4%, 43.4%), and **GOUDA** at **58.1%** (29.2%, 43.6%).



EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks

Total: 146,634 sticks (7,000 packs).

	Q4 2025	Q2 2025	Q4 2024
NON-DOMESTIC INCIDENCE	45.6%	43.8%	43.7%
MAIN MARKET VARIANTS (excl. counterfeit)			
DUTY FREE	7.9%	6.1%	6.3%
GERMANY	4.3%	5.1%	4.5%
POLAND	3.7%	2.9%	2.7%
MAIN BRAND FAMILIES (excl. counterfeit)			
MARLBORO (PMI)	19.3%	18.9%	18.5%
CAMEL (JTI)	4.9%	5.0%	5.2%
WINSTON (JTI)	3.1%	2.9%	2.7%
MAIN CITIES (excl. counterfeit)			
ENSCHEDÉ	66.8%	41.3%	49.8%
ALPHEN AAN DEN RIJN	61.5%	50.4%	43.4%
GOUDA	58.1%	29.2%	43.6%
COUNTERFEIT INCIDENCE			
TOTAL COUNTERFEIT INCIDENCE	6.3%	5.8%	5.1%
PMI	5.3%	4.7%	4.7%
JTI	0.7%	0.9%	0.1%
BAT	0.2%	0.1%	0.2%
IMPERIAL TOBACCO	0.1%	0.1%	0.2%



EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks

— Total: 146,634 sticks (7,000 packs).

MAIN INFLOWS

	COUNTERFEIT	DUTY FREE	GERMANY	POLAND	TURKEY	LUXEMBOURG	OTHERS	Total	2025 Q2	2024 Q4
MARLBORO (PMI)	5.0%	5.1%	2.1%	0.5%	1.3%	1.2%	9.1%	24.3%	23.5%	23.2%
CAMEL (JTI)	0.1%	0.8%	0.4%	0.3%	0.1%	0.6%	2.7%	5.0%	5.0%	5.2%
WINSTON (JTI)	0.6%	0.3%	0.2%	1.5%	0.2%	0.2%	0.8%	3.7%	3.8%	2.7%
L&M (PMI)	0.3%	0.3%	0.3%	0.5%	0.0%	0.1%	0.5%	1.9%	1.4%	1.5%
PARLIAMENT (PMI)	—	0.2%	0.1%	0.1%	0.9%	—	0.3%	1.6%	1.6%	1.3%
LUCKY STRIKE (BAT)	—	0.1%	0.2%	—	—	0.1%	0.6%	0.9%	0.9%	1.1%
OTHERS	0.3%	1.2%	1.1%	0.8%	0.1%	0.3%	4.3%	8.2%	7.5%	8.7%
Total	6.3%	7.9%	4.3%	3.7%	2.6%	2.4%	18.3%	45.6%	43.8%	43.7%
2025 Q2	5.8%	6.1%	5.1%	2.9%	2.9%	3.3%	17.7%	43.8%		
2024 Q4	5.1%	6.3%	4.5%	2.7%	1.9%	2.1%	21.1%	43.7%		

02.

METHODOLOGY

QUARTER 4, 2025



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:
06 – 29 Oct, 2025

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

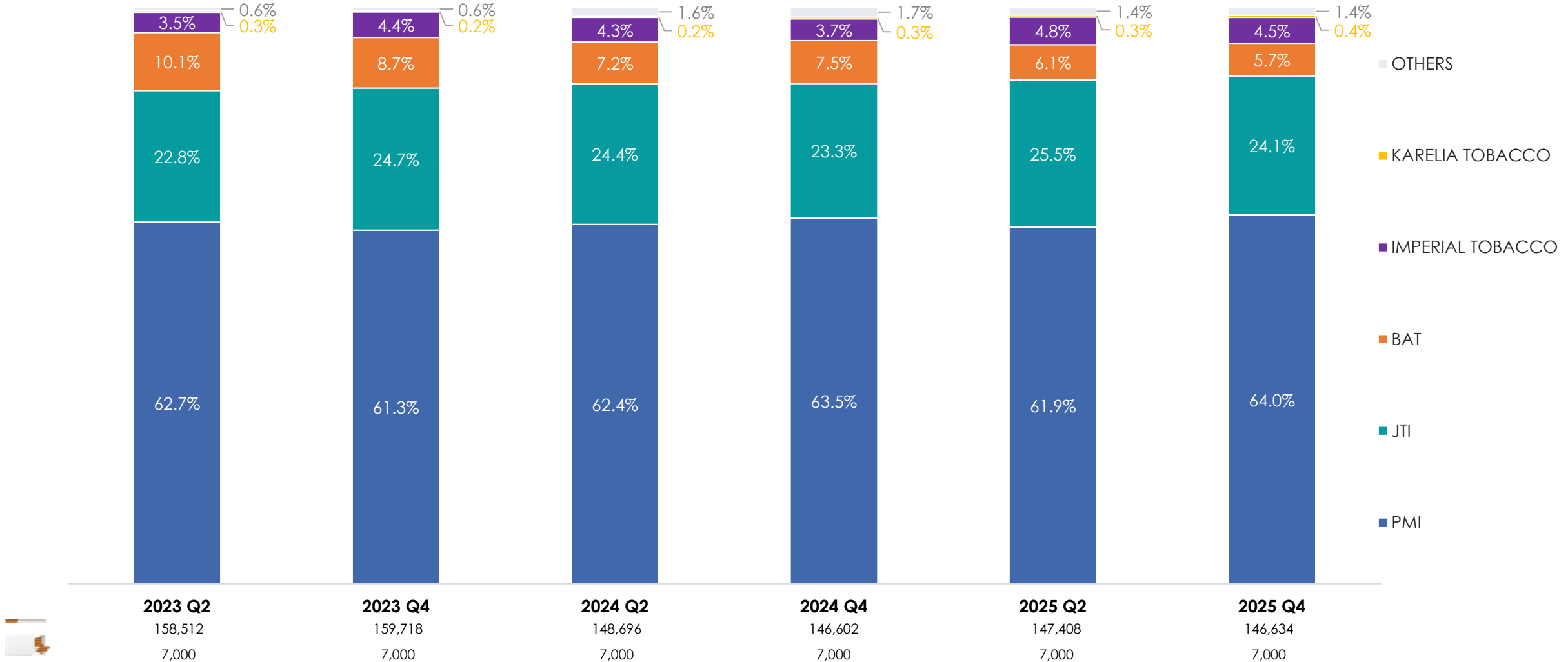


Region	Population Covered	Sample	Weighted Sample				
Amsterdam	799,278	743	774	Neeldwijk	102,698	95	96
Rotterdam	616,294	573	562	Venlo	100,159	93	88
The Hague	505,856	470	474	Deventer	98,581	92	87
Utrecht	321,916	299	310	Delft	99,097	92	90
Eindhoven	218,433	203	204	Leeuwarden	95,949	89	108
Tilburg	208,527	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
				Total Sample	7,528,563	7,000	7,000



SAMPLE COMPOSITION: SHARE BY COMPANY

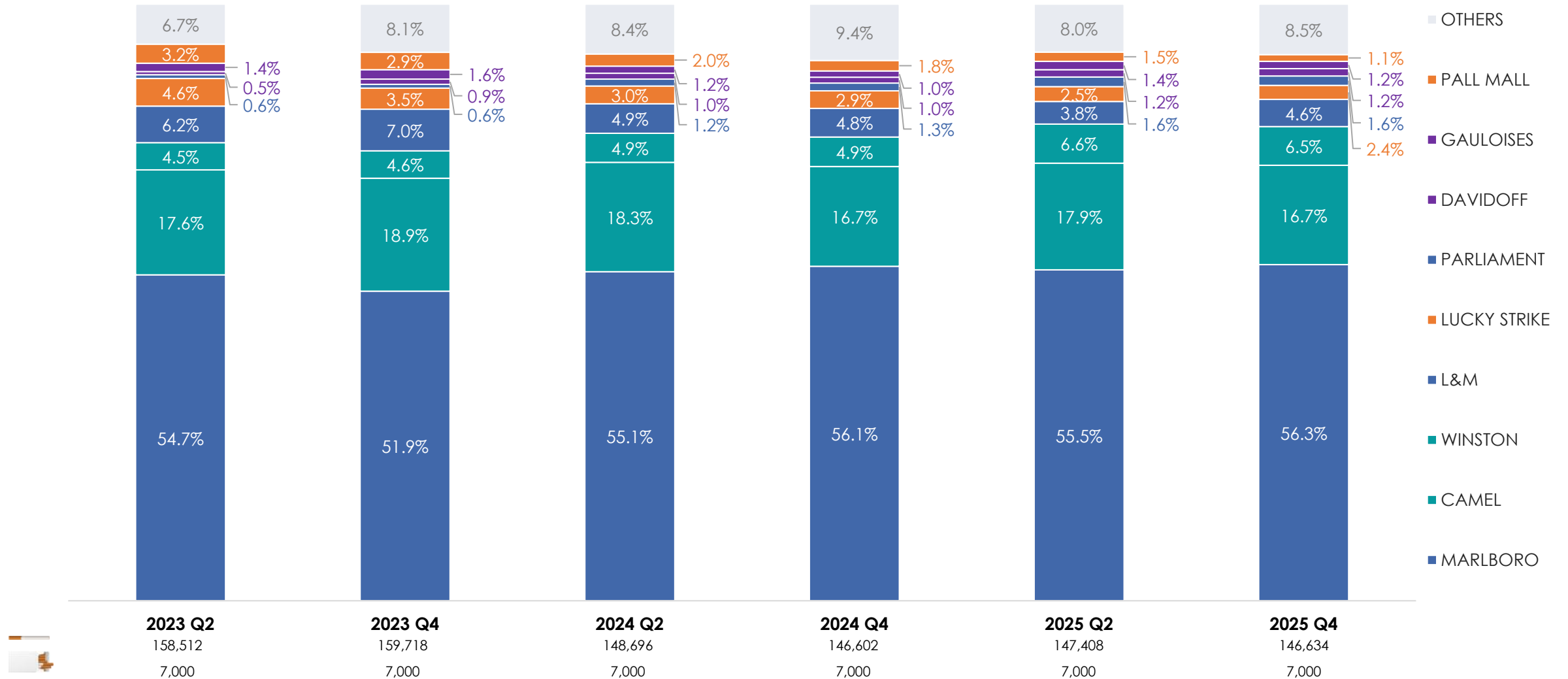
% OF TOTAL SAMPLE Based on number of sticks





SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks





03.

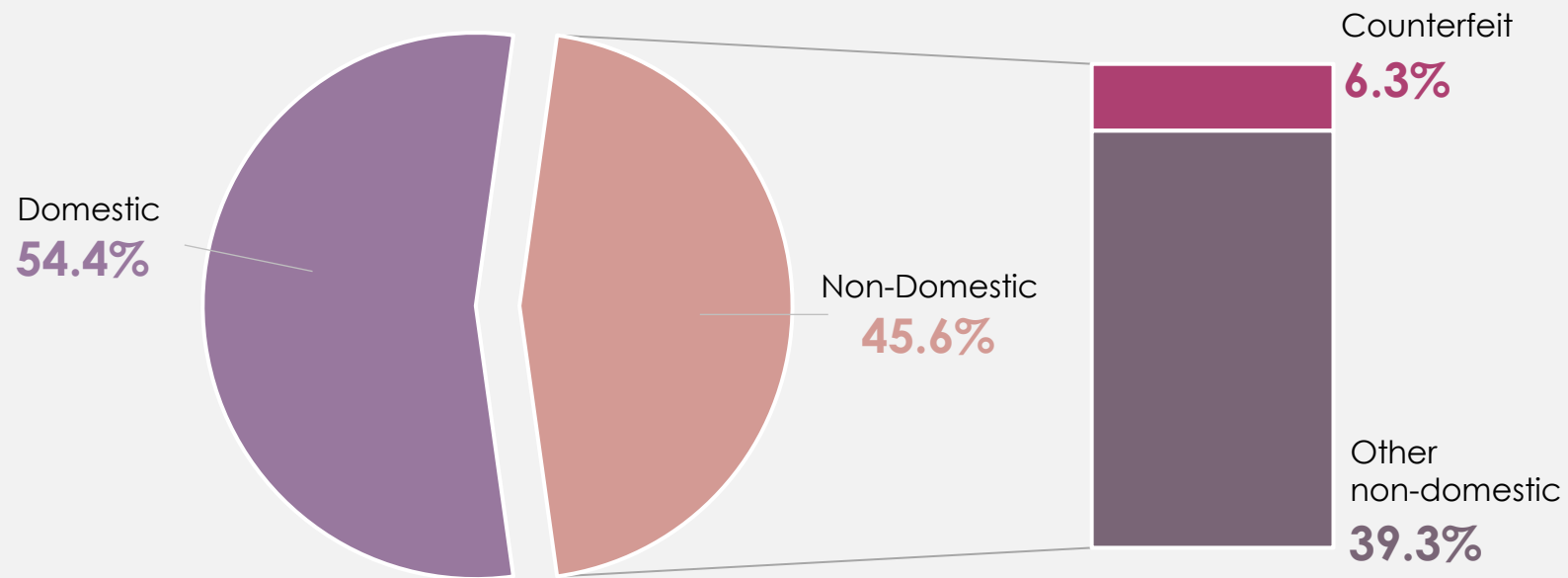
KEY RESULTS

QUARTER 4, 2025



NON-DOMESTIC: CATEGORIES

NON-DOMESTIC INCIDENCE CATEGORIES
% OF TOTAL SAMPLE

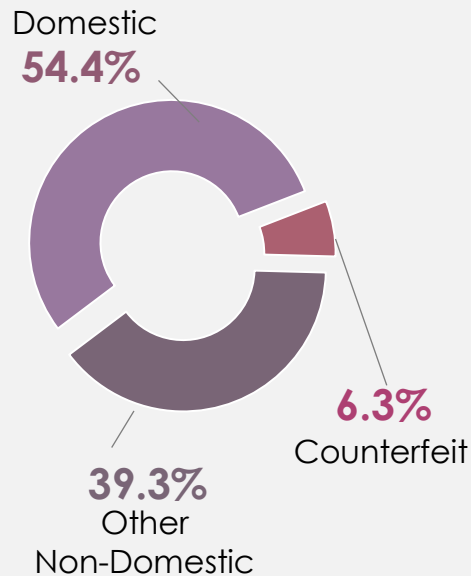


Total: 146,634 sticks (7,000 packs).



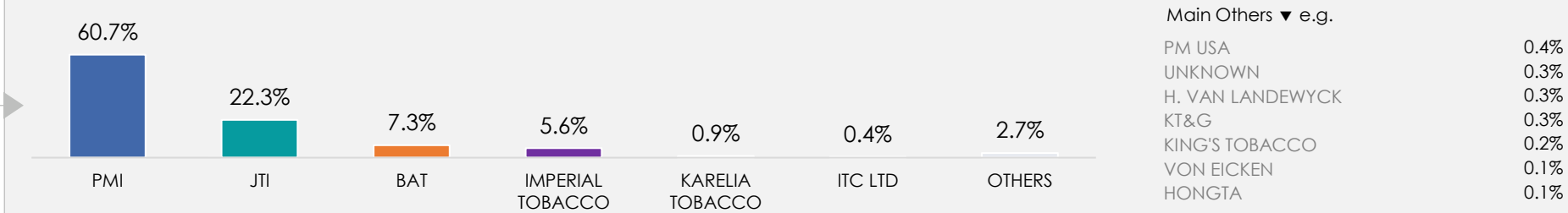
OTHER NON-DOMESTIC: BREAKDOWN

NON-DOMESTIC INCIDENCE % OF TOTAL SAMPLE



Total: 57,624 sticks (2,778 packs)

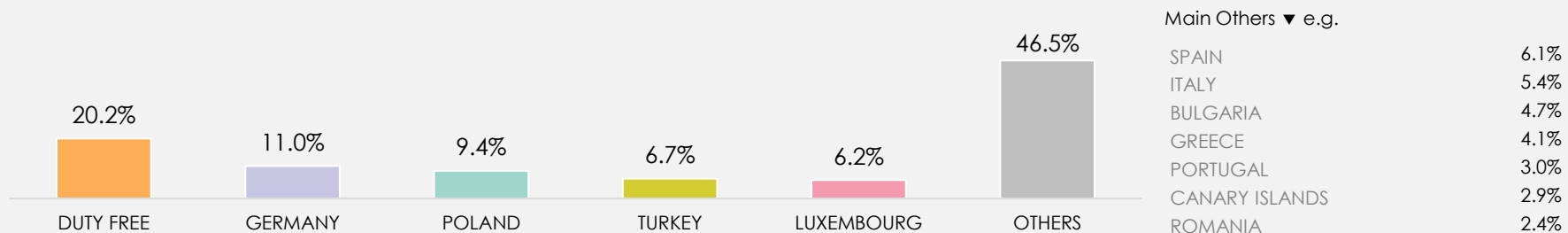
SPLIT BY COMPANY % OF OTHER NON-DOMESTIC SAMPLE



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

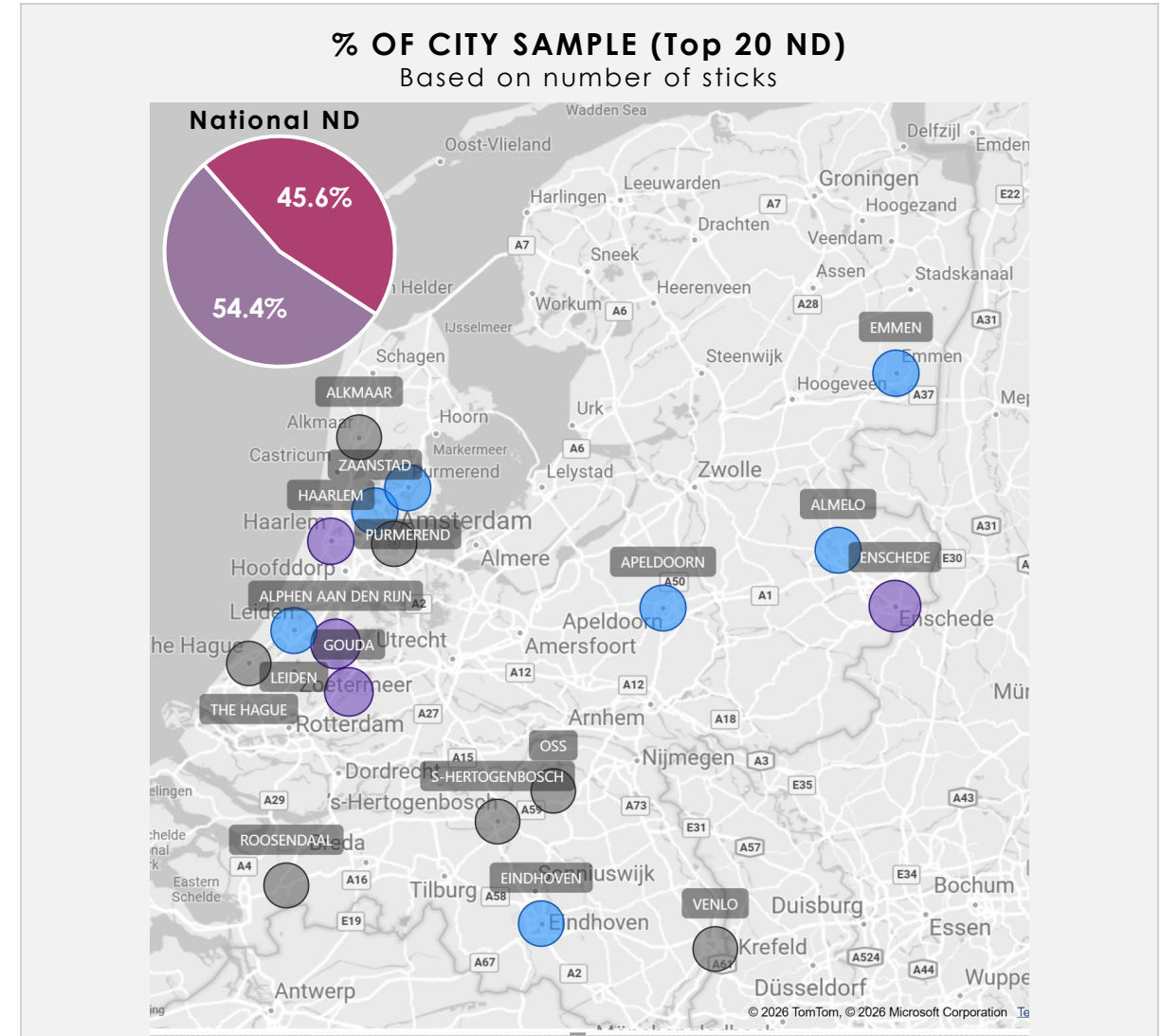
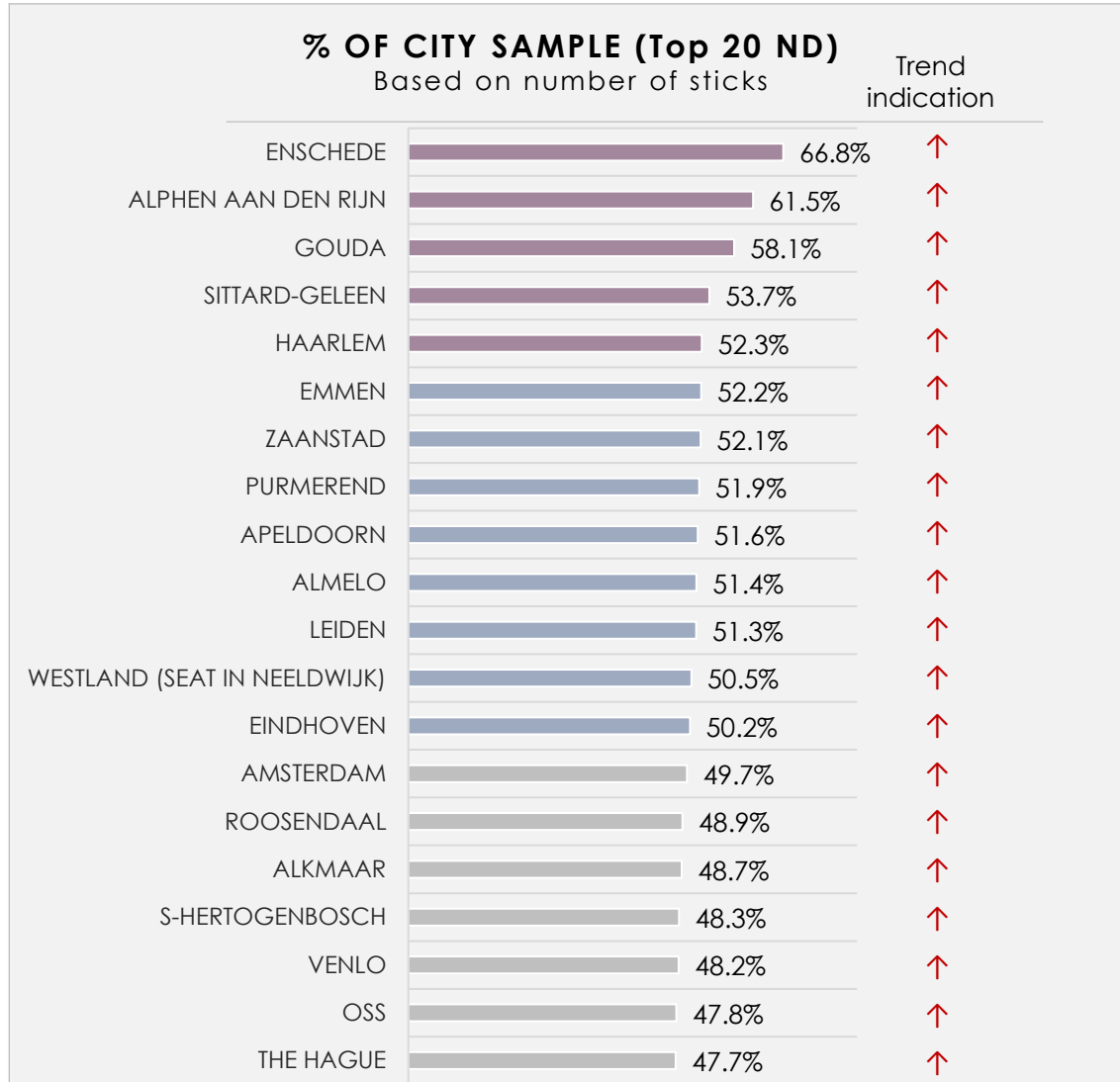
MARLBORO	49.1%	CAMEL	12.5%	LUCKY STRIKE	2.3%	DAVIDOFF	1.9%	OME	0.6%	WILLS	0.4%
L&M	4.2%	WINSTON	7.9%	KENT	1.4%	GAULOISES	1.3%	KARELIA	0.3%	GOLD FLAKE	0.1%
PARLIAMENT	4.0%	SOBRANIE	0.5%	DUNHILL	1.2%	LAMBERT & BUTLER	0.5%			WILLS NAVY CUT	0.0%
CHESTERFIELD	2.2%	BENSON & HEDGES	0.4%	PALL MALL	1.1%	JOHN PLAYER SPECIAL	0.5%				
PHILIP MORRIS	0.4%	LD	0.2%	ROTHMANS	0.4%	PARAMOUNT	0.2%				

SPLIT BY MARKET VARIANT % OF OTHER NON-DOMESTIC SAMPLE



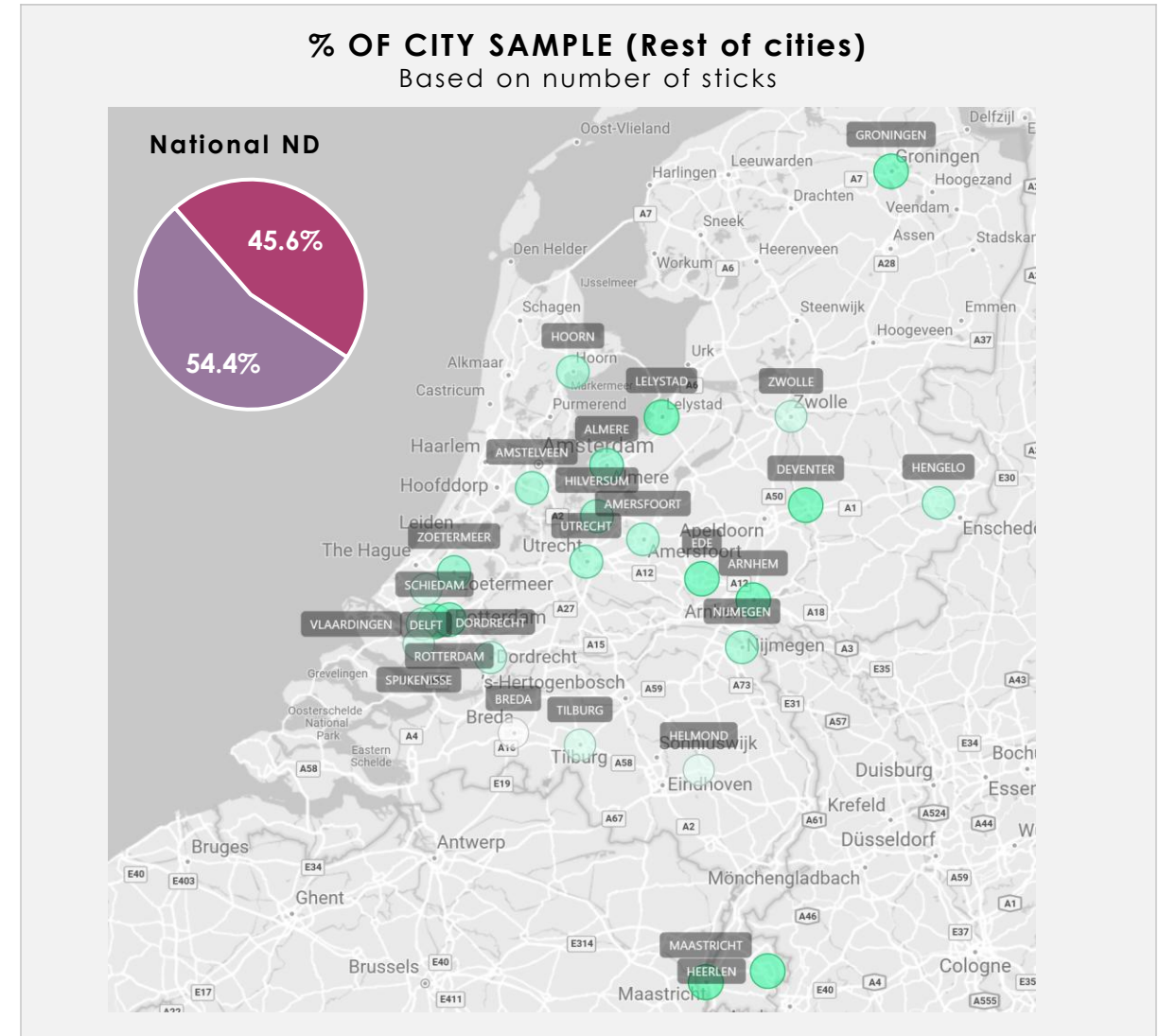
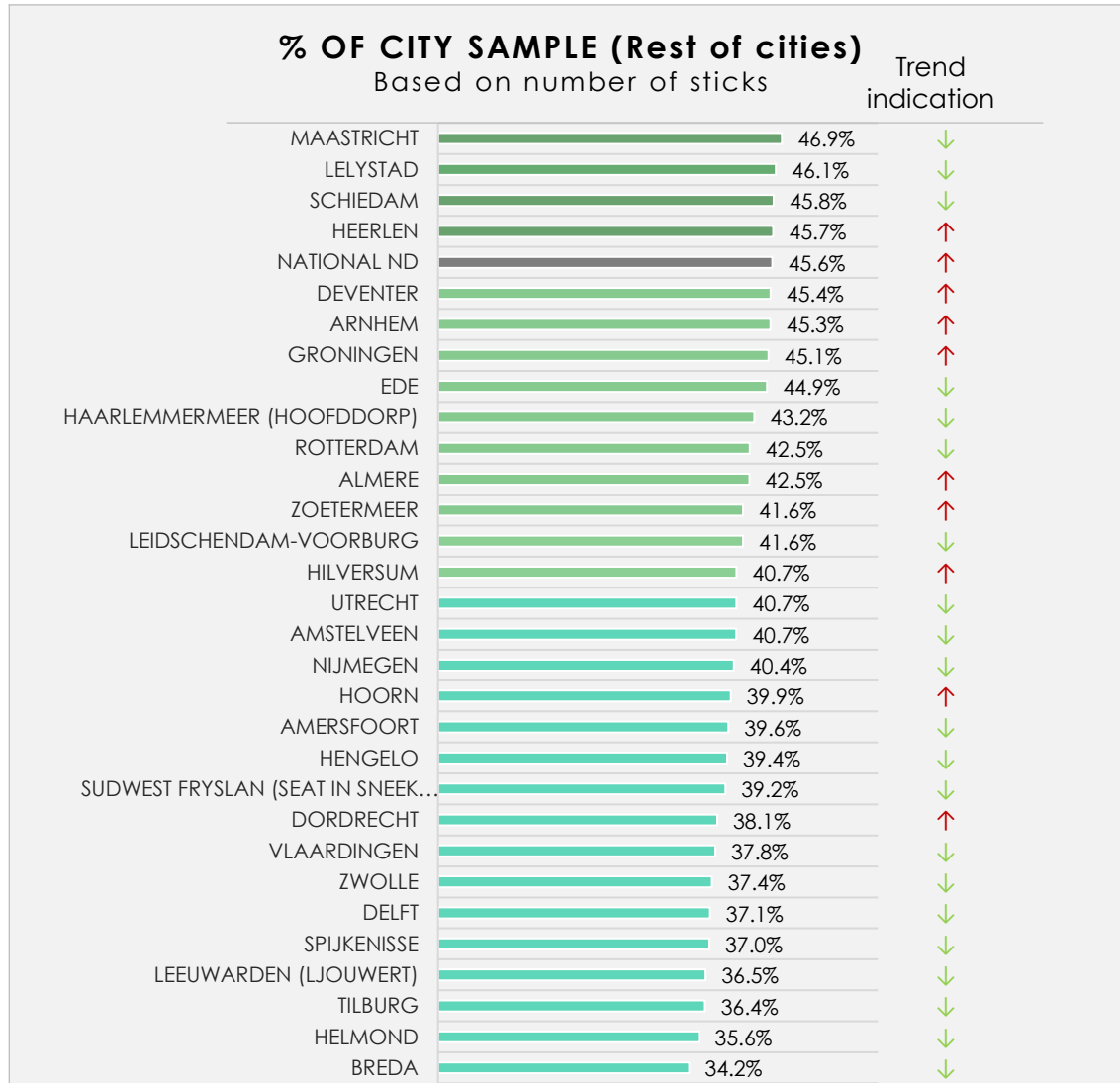


NON-DOMESTIC: BY CITY (1/2)





NON-DOMESTIC: BY CITY (2/2)





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

% OF TOTAL SAMPLE Based on number of sticks

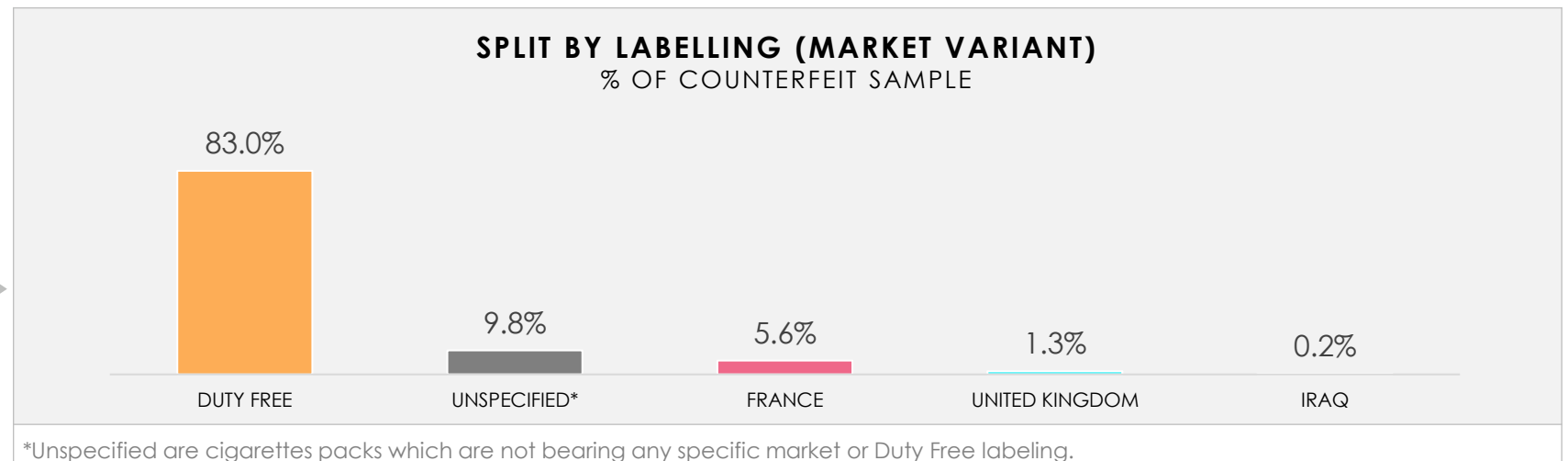
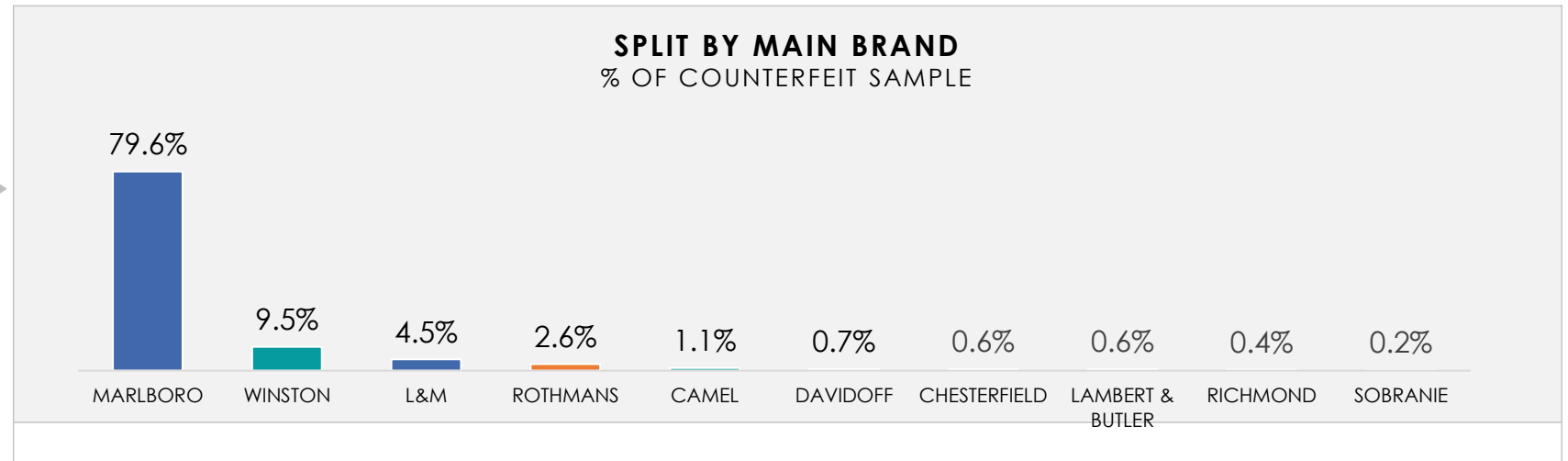
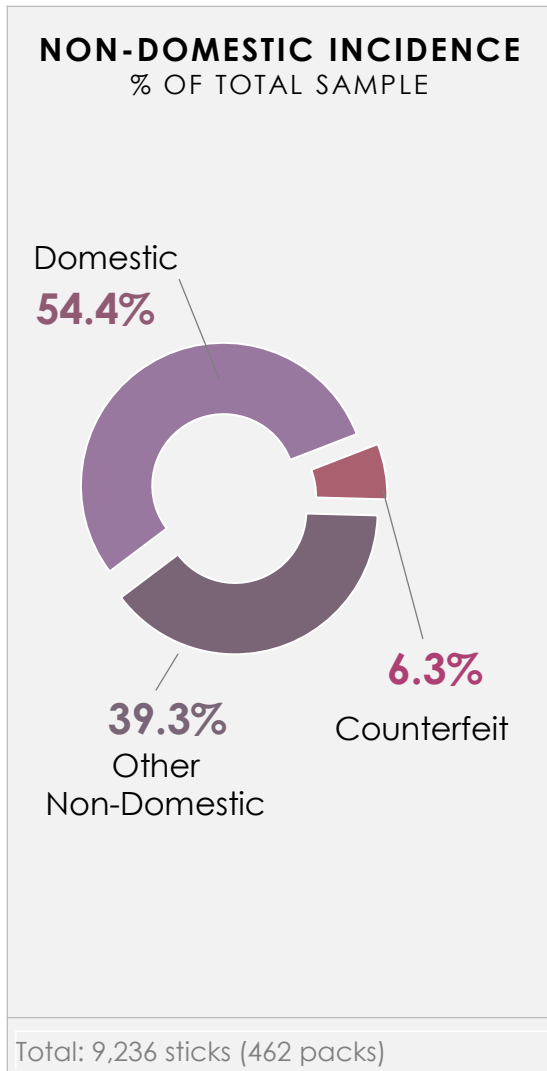
— Total: 146,634 sticks (7,000 packs).

NON-DOMESTIC (TOP 10 CITIES)

	COUNTERFEIT	MARLBORO (PMI)	CAMEL (JTI)	WINSTON (JTI)	L&M (PMI)	OTHERS	TOTAL	2025 Q2	2024 Q4
AMSTERDAM	0.6%	2.3%	0.5%	0.2%	0.2%	1.6%	5.5%	5.2%	4.6%
ROTTERDAM	0.7%	1.2%	0.3%	0.4%	0.2%	0.7%	3.5%	3.8%	3.3%
THE HAGUE	0.4%	1.2%	0.4%	0.2%	0.1%	1.0%	3.2%	2.7%	3.0%
UTRECHT	0.2%	0.9%	0.1%	0.2%	0.1%	0.3%	1.8%	1.9%	1.8%
EINDHOVEN	0.2%	0.7%	0.3%	0.0%	0.0%	0.2%	1.4%	1.1%	1.4%
ENSCHEDÉ	0.1%	0.4%	0.1%	0.1%	0.1%	0.6%	1.3%	0.8%	1.0%
GRONINGEN	0.1%	0.5%	0.2%	0.1%	0.1%	0.3%	1.3%	1.0%	1.3%
ALMERE	0.2%	0.4%	0.1%	0.1%	0.1%	0.2%	1.1%	1.1%	1.2%
APELDOORN	0.2%	0.4%	0.1%	0.1%	0.0%	0.3%	1.0%	0.8%	0.9%
HAARLEM	0.2%	0.3%	0.1%	0.1%	0.0%	0.3%	1.0%	0.7%	1.1%
OTHERS	3.5%	10.9%	2.7%	1.6%	0.8%	4.8%	24.3%	24.7%	24.1%
TOTAL	6.3%	19.3%	4.9%	3.1%	1.7%	10.3%	45.6%	43.8%	43.7%
2025 Q2	5.8%	18.9%	5.0%	2.9%	1.2%	9.9%	43.8%		
2024 Q4	5.1%	18.5%	5.2%	2.7%	1.5%	10.7%	43.7%		



COUNTERFEIT: BREAKDOWN





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

% OF TOTAL SAMPLE Based on number of sticks

— Total: 146,634 sticks (7,000 packs).

COUNTERFEIT (TOP 10 CITIES)

	MARLBORO (PMI)	WINSTON (JTI)	L&M (PMI)	ROTHMANS (BAT)	OTHERS	TOTAL	2025 Q2	2024 Q4
ROTTERDAM	0.5%	0.1%	0.1%	—	0.0%	0.7%	0.5%	0.4%
AMSTERDAM	0.4%	0.0%	0.0%	0.1%	0.0%	0.6%	0.6%	0.6%
THE HAGUE	0.3%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%	0.2%
HAARLEM	0.2%	0.0%	0.0%	—	0.0%	0.2%	0.2%	0.2%
UTRECHT	0.2%	—	0.0%	—	—	0.2%	0.1%	0.3%
ALMERE	0.2%	0.0%	—	—	0.0%	0.2%	0.1%	0.2%
ZAANSTAD	0.2%	—	—	—	—	0.2%	0.2%	0.1%
EINDHOVEN	0.2%	—	—	—	0.0%	0.2%	0.1%	0.1%
APELDOORN	0.1%	0.0%	—	0.0%	0.0%	0.2%	0.1%	0.1%
NIJMEGEN	0.1%	0.0%	0.0%	—	—	0.1%	0.1%	0.1%
OTHERS	2.8%	0.3%	0.1%	0.1%	0.1%	3.4%	3.4%	2.8%
TOTAL	5.0%	0.6%	0.3%	0.2%	0.2%	6.3%	5.8%	5.1%
2025 Q2	4.5%	0.9%	0.2%	0.0%	0.1%	5.8%		
2024 Q4	4.7%	0.1%	—	0.1%	0.2%	5.1%		



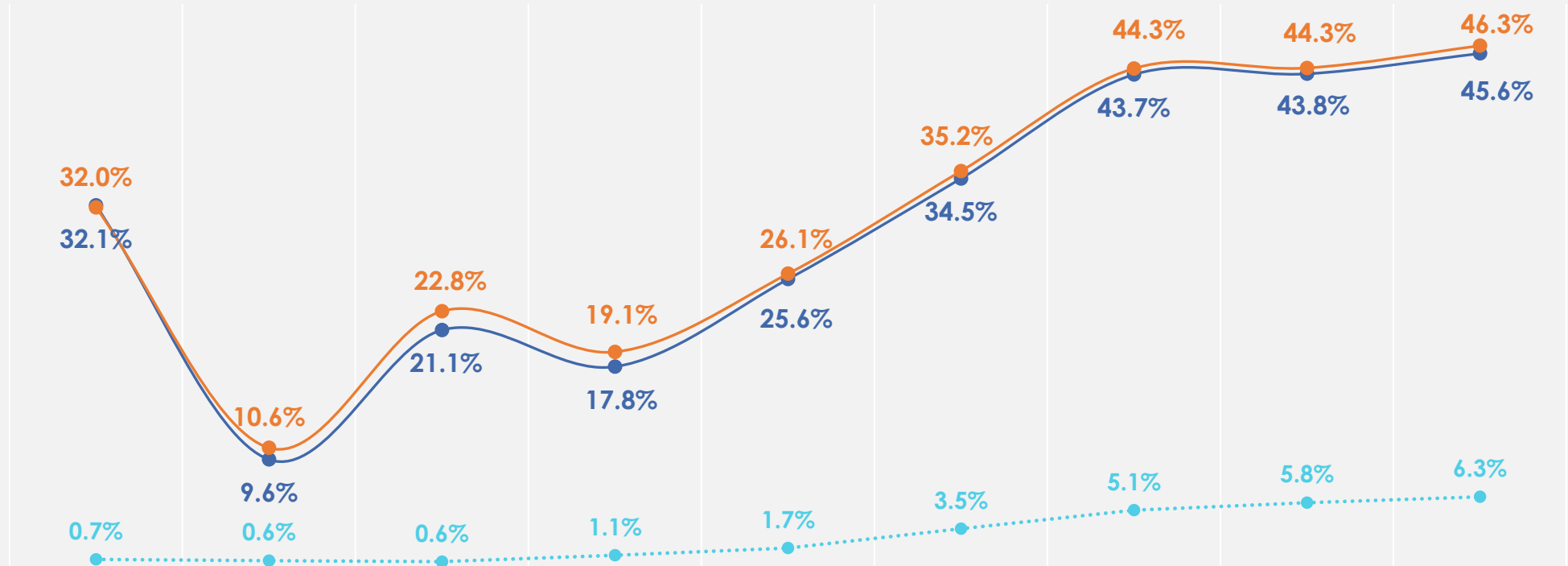
NON-DOMESTIC: INCIDENCE TREND

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE

based on packs

based on sticks

thereof Counterfeit
(based on weighted sticks)



Sticks

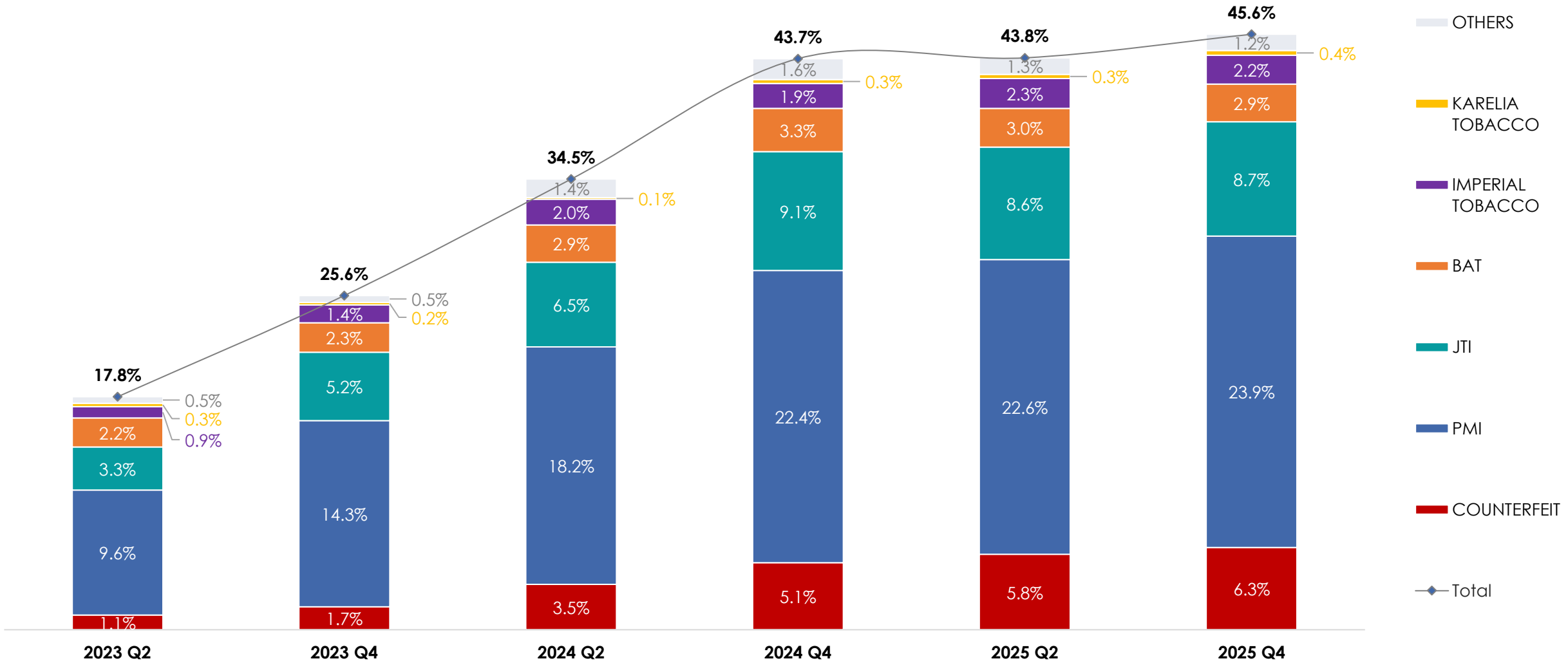
Packs

Period	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
Sticks	155,628	167,260	158,041	158,512	159,718	148,696	146,602	147,408	146,634
Packs	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000



NON-DOMESTIC: COMPANY TREND

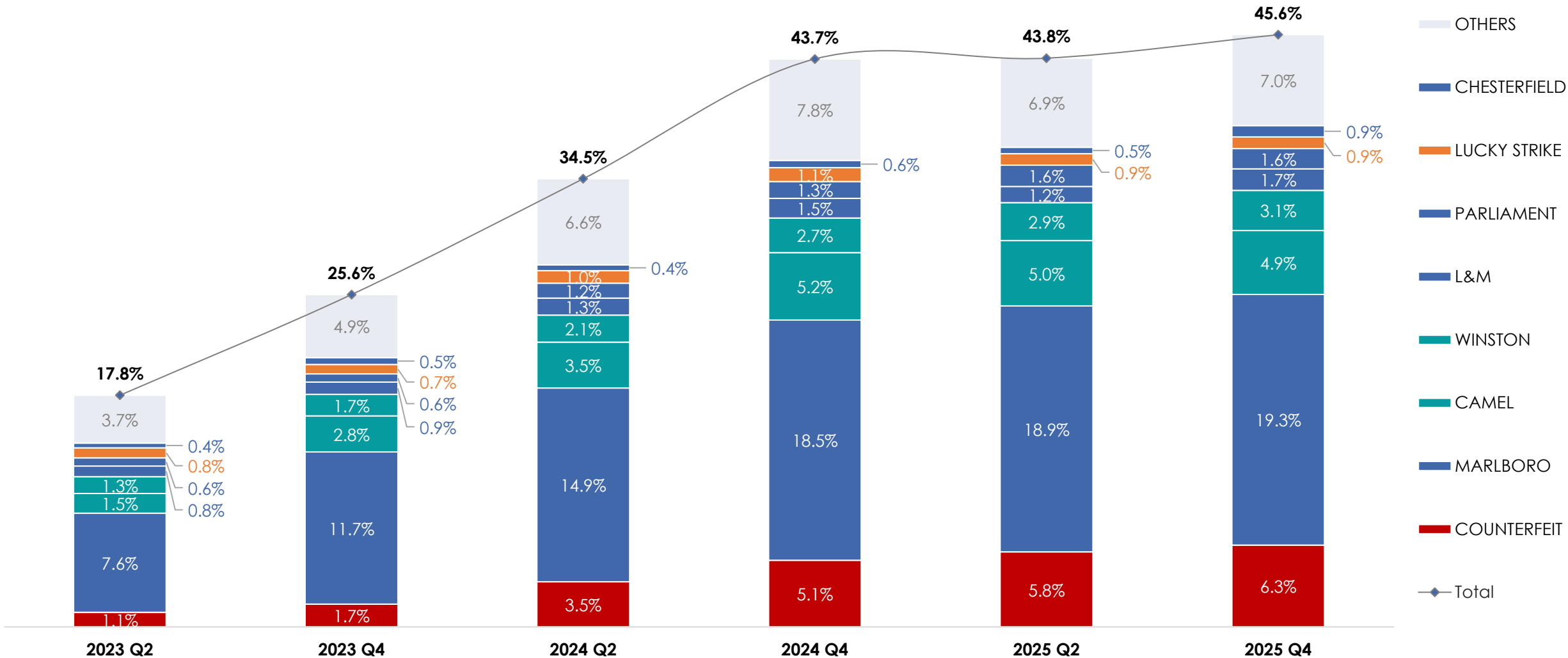
% OF TOTAL SAMPLE
Based on number of sticks





NON-DOMESTIC: BRAND FAMILY TREND

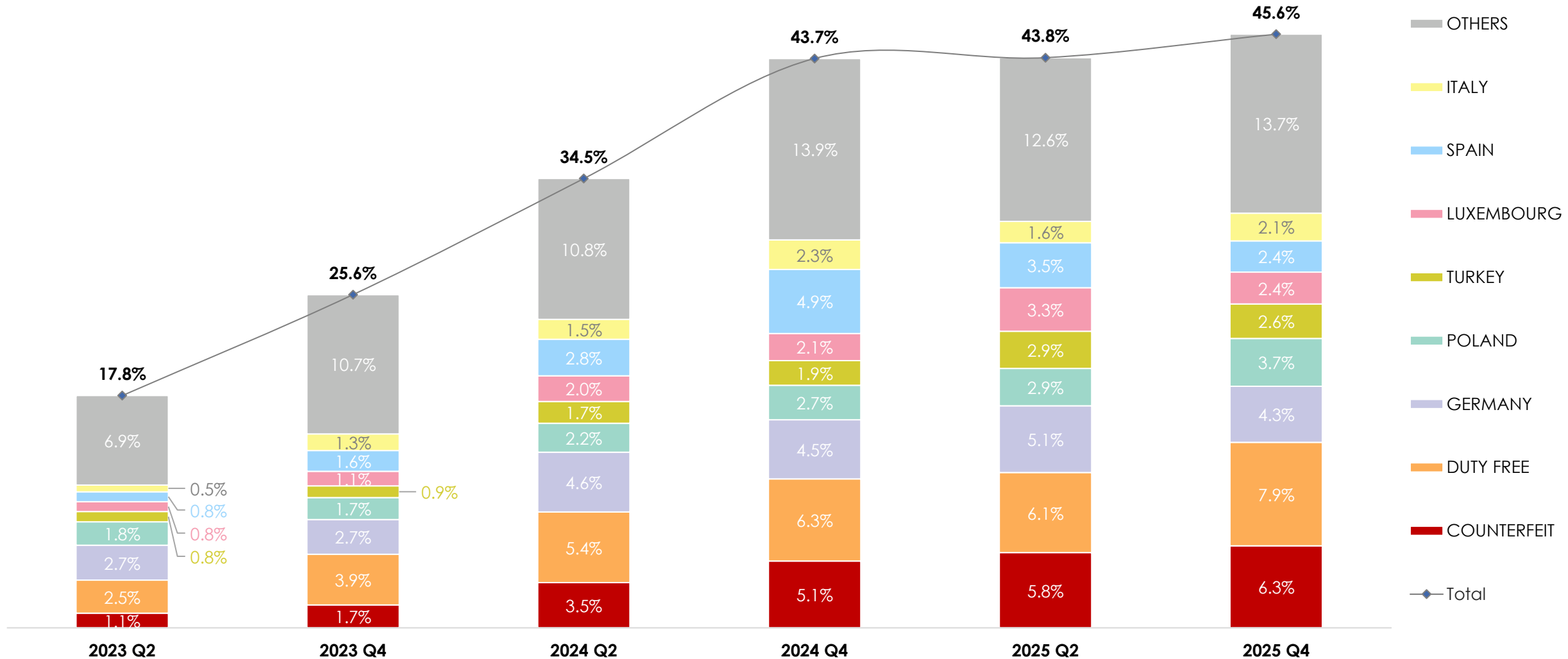
% OF TOTAL SAMPLE
Based on number of sticks





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	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
ENSCHEDÉ	138	2,945	9.9%	10.6%	30.8%	45.4%	49.8%	41.3%	66.8%
ALPHEN AAN DEN RIJN	97	2,079	43.7%	7.9%	40.2%	19.6%	43.4%	50.4%	61.5%
GOUDA	63	1,307	19.0%	8.9%	12.9%	31.2%	43.6%	29.2%	58.1%
SITTARD-GELEEN	79	1,640	41.5%	22.8%	14.8%	42.5%	38.8%	46.3%	53.7%
HAARLEM	140	2,938	9.1%	18.1%	25.1%	33.4%	52.7%	34.8%	52.3%
EMMEN	92	1,949	35.2%	9.6%	11.7%	35.0%	37.2%	44.2%	52.2%
ZAA NSTAD	135	2,888	16.4%	21.5%	34.2%	32.7%	39.2%	45.5%	52.1%
PURMEREND	79	1,640	38.8%	22.2%	25.6%	41.2%	42.7%	35.7%	51.9%
APELDOORN	142	2,982	15.0%	8.0%	19.0%	41.4%	46.1%	38.0%	51.6%
ALMELO	63	1,293	13.7%	24.1%	32.1%	39.3%	40.9%	29.4%	51.4%
LEIDEN	107	2,236	7.6%	21.6%	27.6%	32.6%	41.7%	38.2%	51.3%
WESTLAND (NEELDWIJK)	96	1,952	11.1%	21.4%	32.7%	33.6%	42.5%	42.0%	50.5%
EINDHOVEN	204	4,227	6.3%	21.4%	23.6%	35.0%	47.3%	38.2%	50.2%
AMSTERDAM	774	16,120	33.3%	24.5%	31.5%	36.2%	42.4%	47.1%	49.7%
ROOSENDAAL	66	1,390	14.7%	13.8%	18.1%	32.2%	38.8%	46.4%	48.9%
ALKMAAR	95	1,922	7.7%	23.2%	15.4%	48.6%	54.5%	43.1%	48.7%
S-HERTOGENBOSCH	134	2,757	8.0%	12.5%	20.3%	28.2%	39.5%	38.5%	48.3%
VENLO	88	1,846	18.8%	21.9%	20.8%	41.0%	46.1%	47.2%	48.2%
OSS	80	1,665	45.8%	21.3%	17.2%	47.6%	47.0%	43.7%	47.8%
THE HAGUE	474	9,905	24.7%	17.7%	31.9%	31.2%	44.9%	40.9%	47.7%
MAASTRICHT	104	2,137	11.2%	22.9%	16.0%	34.0%	53.0%	58.7%	46.9%
LELYSTAD	70	1,435	11.0%	22.4%	35.8%	51.3%	48.8%	46.9%	46.1%
SCHIEDAM	68	1,480	31.2%	10.5%	38.7%	28.4%	53.1%	48.8%	45.8%
HEERLEN	74	1,593	26.8%	26.2%	6.8%	24.4%	51.5%	42.3%	45.7%
DEVENTER	87	1,794	14.9%	14.5%	16.3%	37.4%	41.7%	44.1%	45.4%



NON-DOMESTIC: CITY TREND (2/2)

CITY	PACKS	STICKS	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
ARNHEM	140	2,930	7.7%	7.9%	17.3%	31.3%	40.4%	40.6%	45.3%
GRONINGEN	201	4,160	42.4%	13.8%	30.5%	28.5%	44.0%	35.1%	45.1%
EDE	103	2,165	12.0%	12.7%	13.9%	31.0%	48.8%	48.9%	44.9%
HAARLEMMERMEER (HOOFDDORP)	137	2,782	18.5%	26.1%	23.6%	35.1%	37.9%	43.8%	43.2%
ROTTERDAM	562	12,073	33.3%	17.1%	22.9%	30.8%	41.0%	47.1%	42.5%
ALMERE	187	3,856	27.4%	24.1%	18.0%	43.0%	43.7%	39.9%	42.5%
ZOETERMEER	108	2,295	15.2%	15.8%	8.1%	35.4%	42.2%	36.9%	41.6%
LEIDSCHENDAM-VOORBURG	66	1,397	7.0%	20.1%	30.7%	25.0%	42.7%	43.5%	41.6%
HILVERSUM	79	1,752	21.3%	17.0%	30.2%	32.8%	48.8%	39.0%	40.7%
UTRECHT	310	6,432	12.3%	14.9%	25.2%	37.4%	41.7%	43.7%	40.7%
AMSTELVEEN	79	1,640	33.0%	31.1%	25.1%	25.3%	54.0%	54.6%	40.7%
NIJMEGEN	153	3,273	12.2%	25.1%	43.5%	45.3%	46.2%	41.7%	40.4%
HOORN	64	1,332	24.5%	11.8%	33.3%	41.9%	25.2%	33.4%	39.9%
AMERSFOORT	136	2,942	21.7%	20.3%	22.0%	39.6%	32.4%	45.0%	39.6%
HENGELO	70	1,416	28.5%	23.6%	12.4%	26.3%	32.0%	44.1%	39.4%
SUDWEST FRYSLAN (SNEEK)	77	1,637	26.5%	15.2%	9.3%	26.2%	50.4%	53.6%	39.2%
DORDRECHT	102	2,147	1.6%	9.1%	29.2%	31.0%	44.8%	36.1%	38.1%
VLAARDINGEN	64	1,312	5.4%	9.2%	37.6%	33.6%	49.4%	52.9%	37.8%
ZWOLLE	112	2,334	9.9%	24.1%	34.0%	30.3%	39.3%	49.0%	37.4%
DELFT	90	1,913	7.1%	11.1%	28.6%	28.8%	38.5%	43.6%	37.1%
SPIJKENISSE	74	1,531	14.6%	18.5%	35.8%	29.3%	43.8%	60.7%	37.0%
LEEUWARDEN (LJOUWERT)	108	2,267	31.5%	18.1%	14.8%	30.0%	43.9%	49.5%	36.5%
TILBURG	192	4,004	22.8%	10.6%	22.8%	36.5%	52.6%	54.7%	36.4%
HELMOND	80	1,689	30.9%	10.8%	19.7%	37.4%	28.7%	53.9%	35.6%
BREDA	158	3,238	11.2%	17.1%	28.6%	30.6%	50.5%	35.9%	34.2%
TOTAL SAMPLE	7,000	146,634	21.1%	17.8%	25.6%	34.5%	43.7%	43.8%	45.6%



04.

APPENDIX






QUARTER 4, 2025



TOTAL SAMPLE: DETAILS PER COMPANY

NUMBER OF STICKS PER CATEGORY AND COMPANY

IN % OF COMPANY TOTAL

					Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit
	51,030	34,978	7,833	93,842	54.4%	37.3%	—	8.3%
	21,494	12,828	1,001	35,323	60.9%	36.3%	—	2.8%
	3,830	4,224	243	8,297	46.2%	50.9%	—	2.9%
	3,177	3,233	159	6,569	48.4%	49.2%	—	2.4%
	530			530	—	—	100.0%	—
OTHERS	242	1,830		2,072	11.7%	—	88.3%	—



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)	46,956	28,311	7,354	82,621	56.8%	34.3%	—	8.9%
CAMEL (JTI)	17,114	7,204	99	24,418	70.1%	29.5%	—	0.4%
WINSTON (JTI)	4,076	4,549	881	9,506	42.9%	47.9%	—	9.3%
L&M (PMI)	3,846	2,424	420	6,690	57.5%	36.2%	—	6.3%
LUCKY STRIKE (BAT)	2,137	1,324		3,460	61.7%	38.3%	—	—
PARLIAMENT (PMI)	2,278			2,278	—	100.0%	—	—
DAVIDOFF (ITL)	650	1,119	60	1,829	35.5%	61.2%	—	3.3%
GAULOISES (ITL)	1,046	756		1,802	58.0%	42.0%	—	—
PALL MALL (BAT)	1,025	614		1,639	62.5%	37.5%	—	—
OTHERS	2,924	6,685	2,360	12,391	23.6%	54.0%	19.0%	3.4%



NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

NON-DOMESTIC INCIDENCE BY COMPANY – TREND

% OF TOTAL COMPANY SAMPLE

		PMI	JTI	BAT	IMPERIAL TOBACCO	OTHERS
2025 Q4	N (Sticks)	93,842	35,323	8,297	6,569	2,602
	Packs	4,519	1,675	378	300	128
	Non-Domestic	—	—	—	—	90.7%
	Counterfeit	8.3%	2.8%	2.9%	2.4%	—
	Genuine non-domestic	37.3%	36.3%	50.9%	49.2%	—
	Non-Domestic	—	—	—	—	94.1%
	Counterfeit	7.6%	3.5%	1.1%	1.8%	—
	Genuine non-domestic	36.5%	33.8%	48.2%	47.5%	—
	Non-Domestic	—	—	—	—	93.6%
	Counterfeit	7.4%	0.2%	2.3%	4.7%	—
Genuine non-domestic	35.3%	39.1%	44.4%	50.7%	—	

OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	OME	KARELIA	ESSE
Company	KARELIA TOBACCO	KARELIA TOBACCO	KT&G
Market variant	BULGARIA	BULGARIA	UNSPECIFIED*



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

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WSPM GROUP

THANK YOU