



Norway Q2-2011 Industry Market Survey

Empty Discarded Pack Collection

Survey Objectives and Methodology

Objectives



- **Provide an indication on the incidence of non-domestic or counterfeit cigarettes**

- **Gain information related to non-domestic or counterfeit cigarettes by**
 - Manufacturers
 - Regions
 - Brand families

Survey Objectives and Methodology Overview



- **Empty Discarded Pack (EDP) collection**
 - Random collection from streets and public bins
 - Any brand and market variant
 - 8 principal cities
 - Cities sample quotas proportional to population
 - Actual collection: 5,000 packs
 - This market survey was jointly conducted for JTI, BAT and PMI
 - Fieldwork conducted between 27th of May – 06th of June, 2011
- **Limitations**
 - Homes and workplaces are not covered
 - Other competitors' pack analysis: identification of domestic and non-domestic variants only
- **Caution**
 - Findings cannot be used to extrapolate volumes
 - The survey is designed to focus on trends rather than incidence at a single point in time

Survey Objectives and Methodology

Regional Split



City	Sample (packs)	Sample (%)
OSLO	2,000	40.00
BERGEN	870	17.40
TRONDHEIM	579	11.58
STAVANGER	421	8.42
BAERUM	377	7.54
KRISTIANSAND	275	5.50
FREDRIKSTAD	250	5.00
TROMSO	228	4.56
	5,000	100%



*Population of selected cities represents 30% of total Norway population.

Executive Summary

Key Findings



Industry

- High level of non domestic incidence 34.7% which is an increase compared to 2010 (33.0%).
- The highest non domestic incidence was found in the cities of Kristiansand (39.3%) and Oslo (38.3%).
- Main non domestic variants are Duty Free (50.7%), Sweden variant (29.3%) and Poland variant (6.3%).

BAT

- Genuine Non Domestic incidence 24.0%
- Counterfeit incidence 0.6%

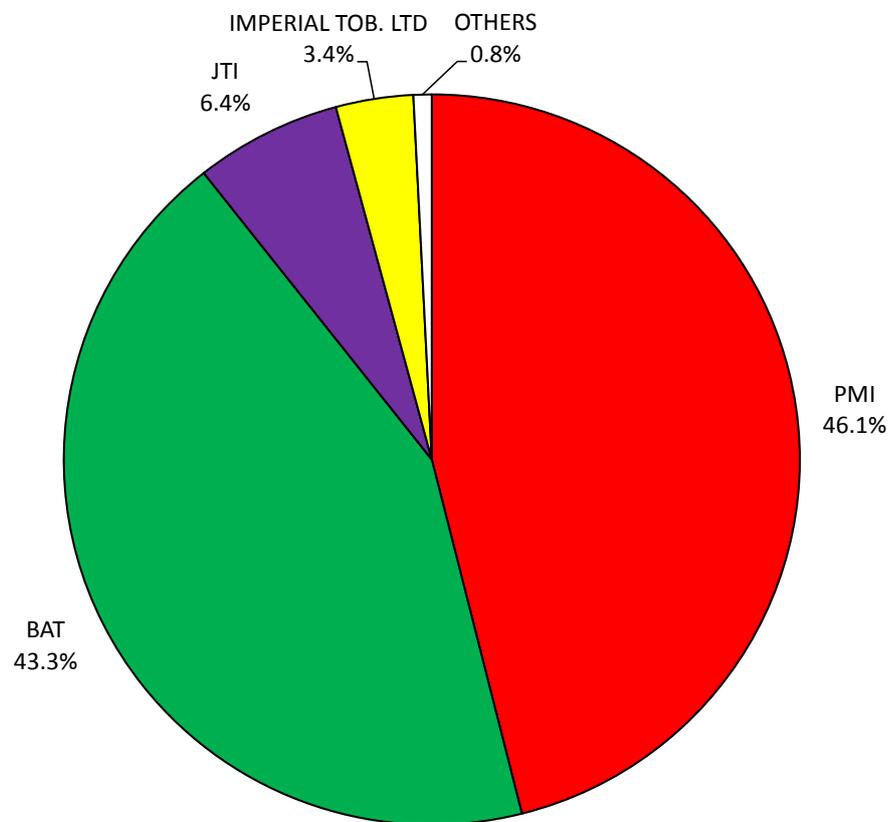
PMI

- Genuine Non Domestic incidence 40.9%
- Counterfeit incidence 0.1%

JTI

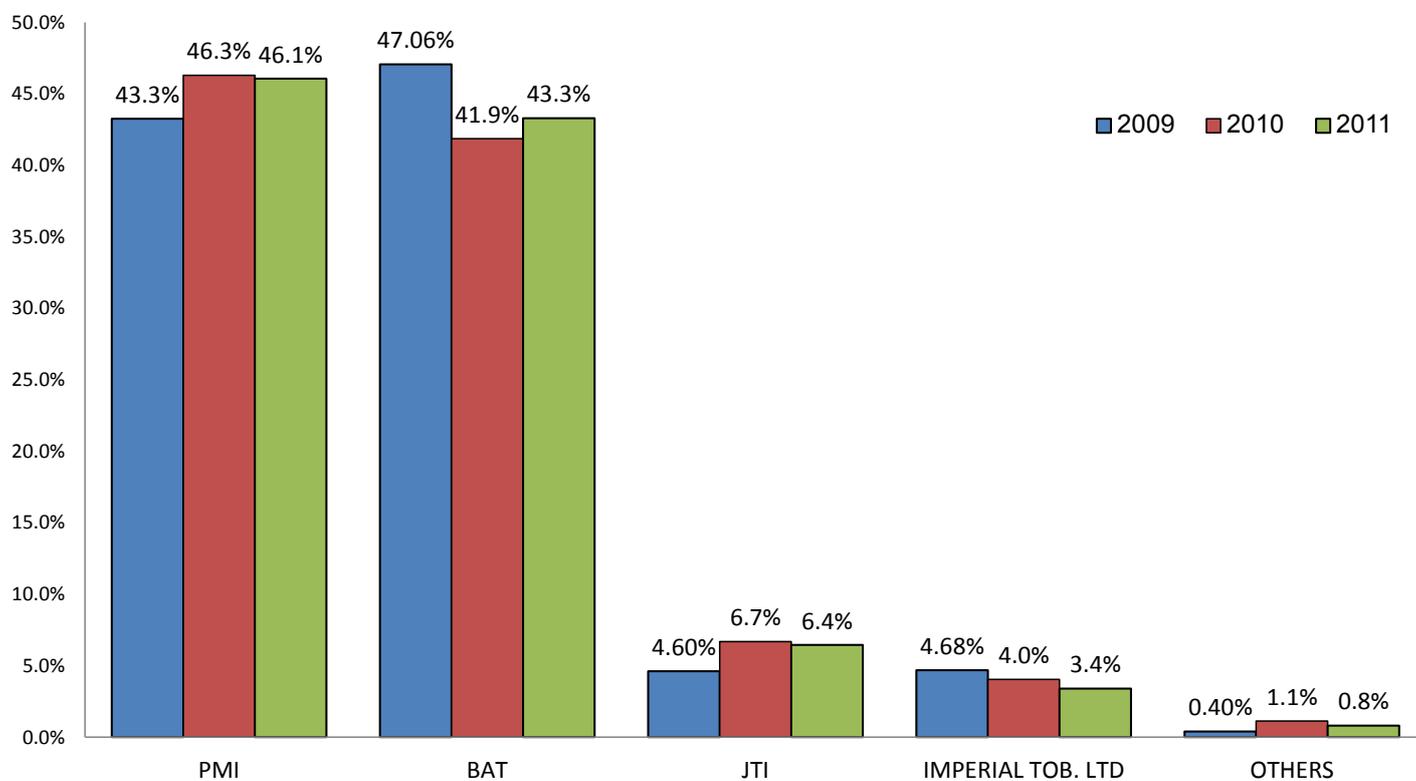
- Genuine Non Domestic incidence 49.7%
- No Counterfeit packs were collected

Results – All Packs Collected Share of Sample by Company



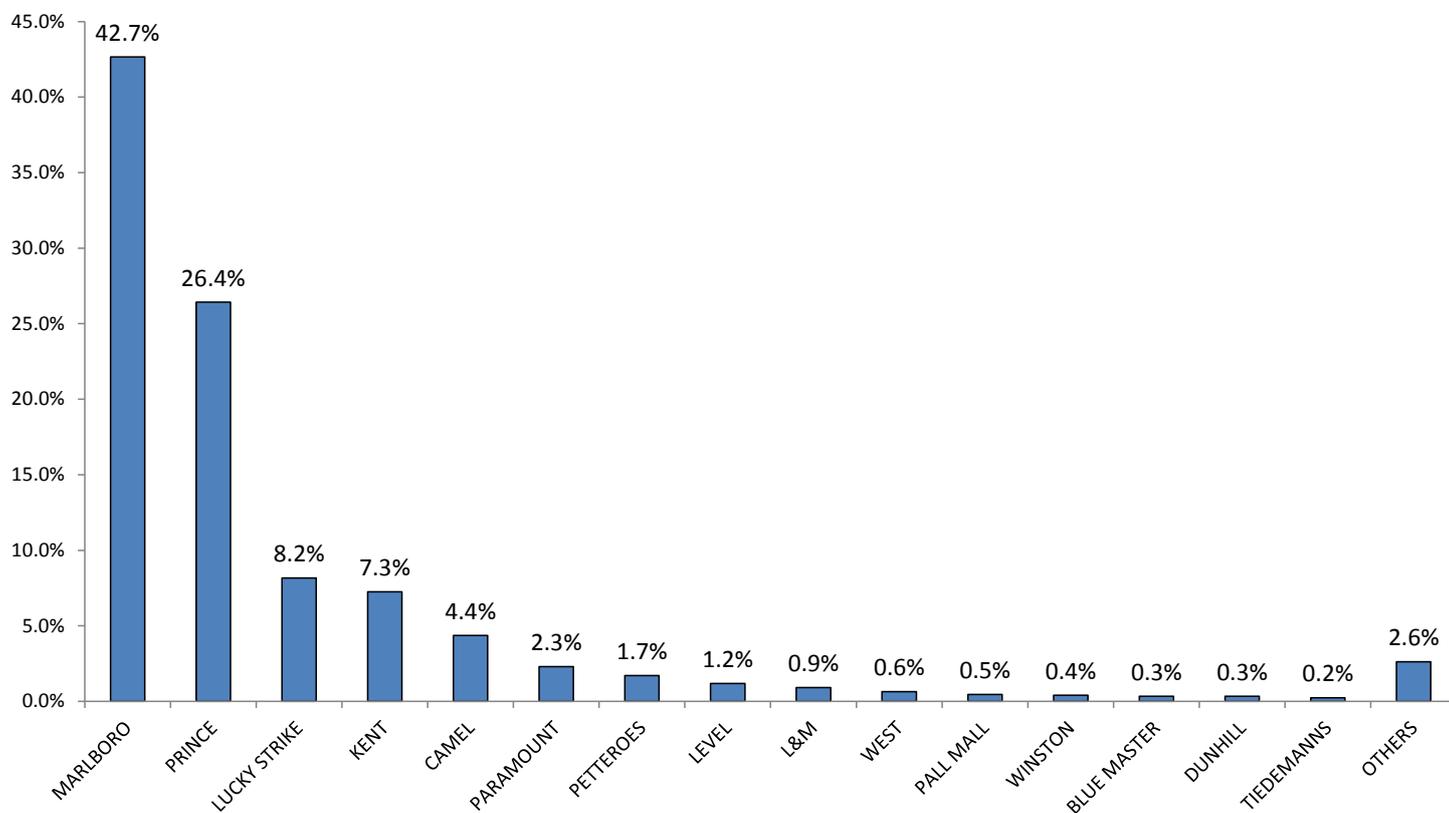
N= 5000 packs.

Results – All Packs Collected Share of sample by Company - Trends



N2011= 5000; N2010= 5000 packs; N2009= 4998 packs.

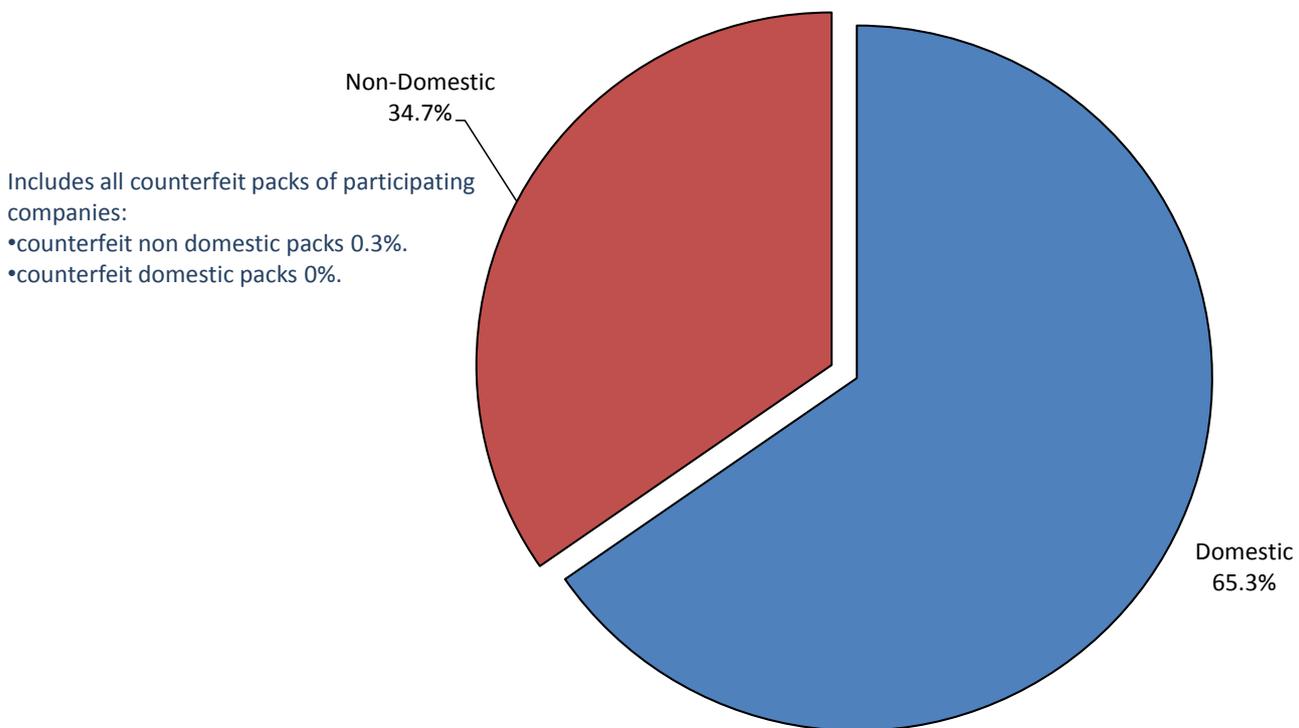
Results – All Packs Collected Share of sample by Brand family



N= 5000 packs.

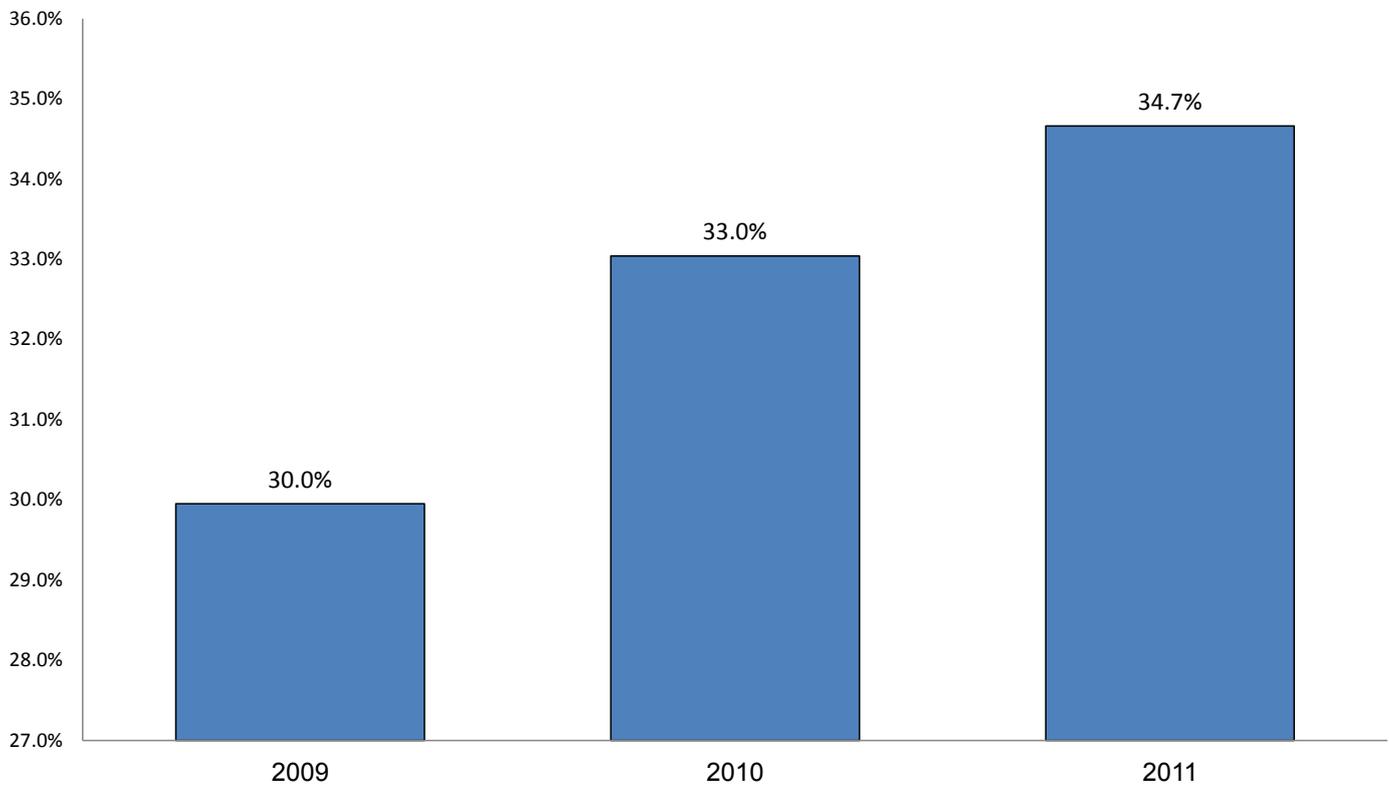
OTHERS are all brands with less than 10 packs.

Results – All Packs Collected Non Domestic Incidence



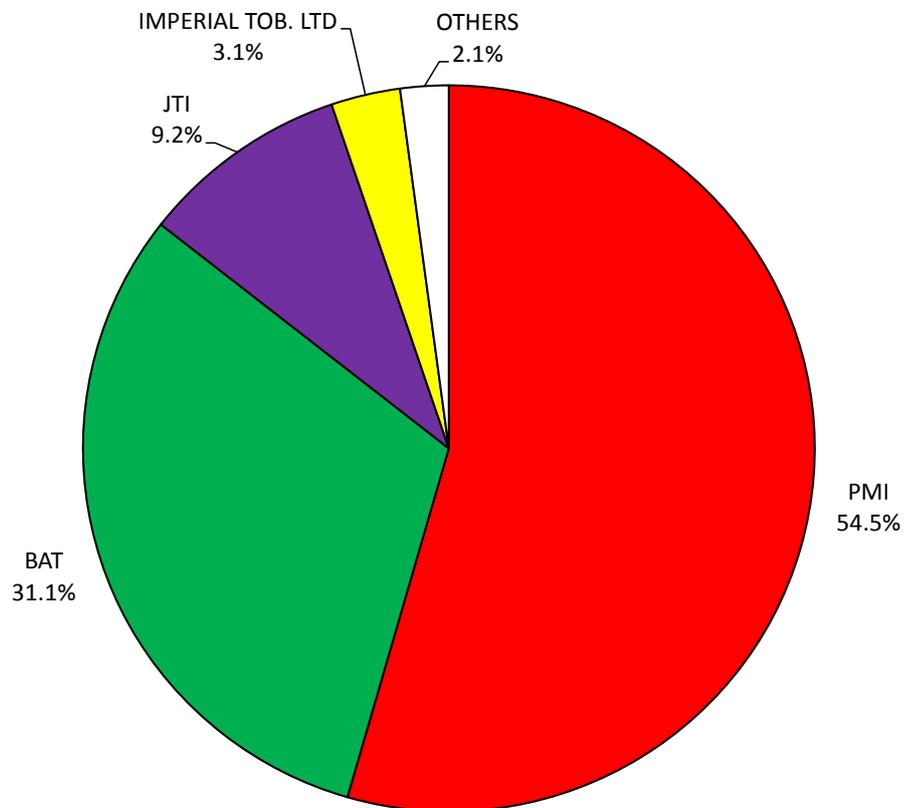
N= 5000 Packs.

Results – All Packs Collected Non Domestic Incidence - Trends



N2011= 5000; N2010= 5000 packs; N2009= 4998 packs.

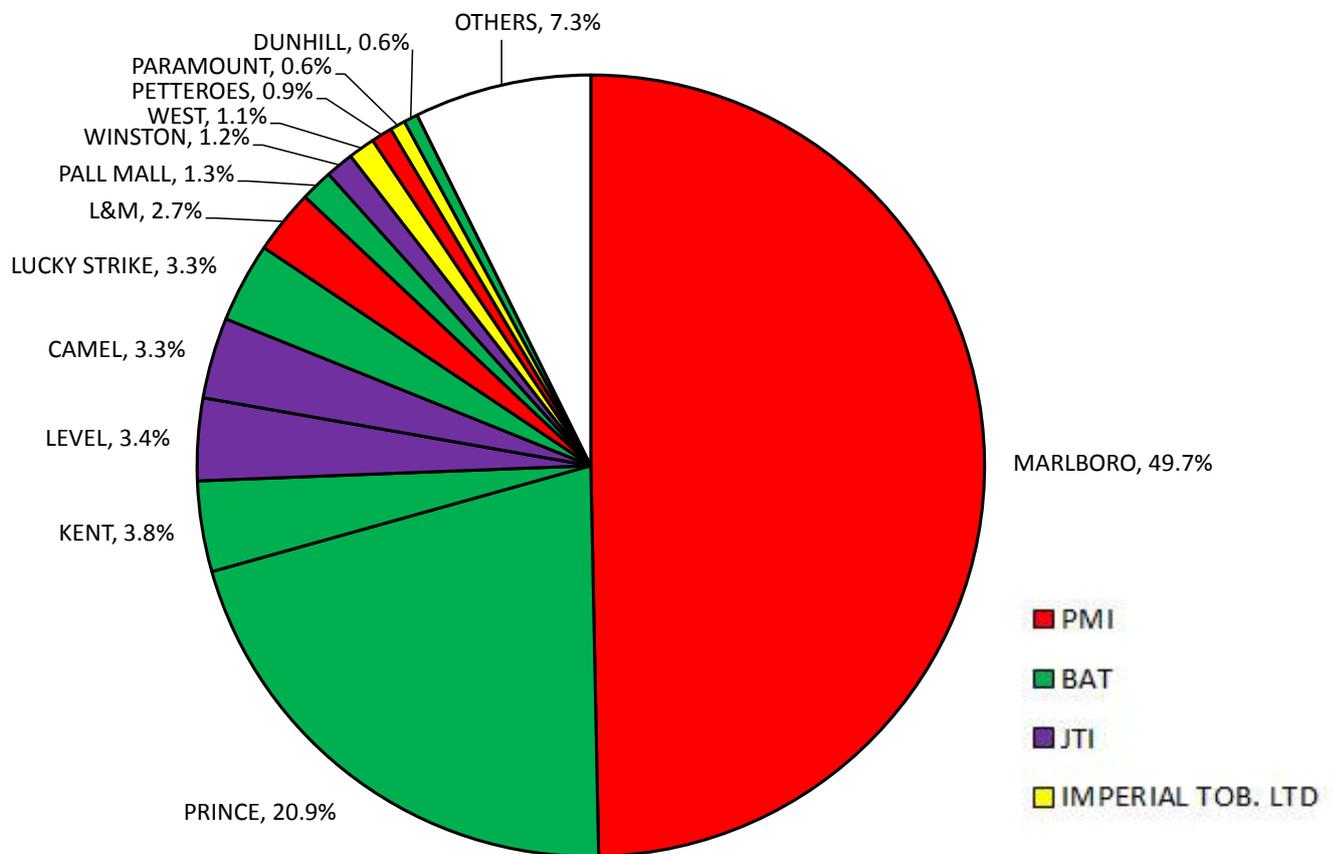
Results – Non Domestic Non Domestic packs - breakdown by Company



N= 1733 Non Domestic Packs.

Results – Non Domestic

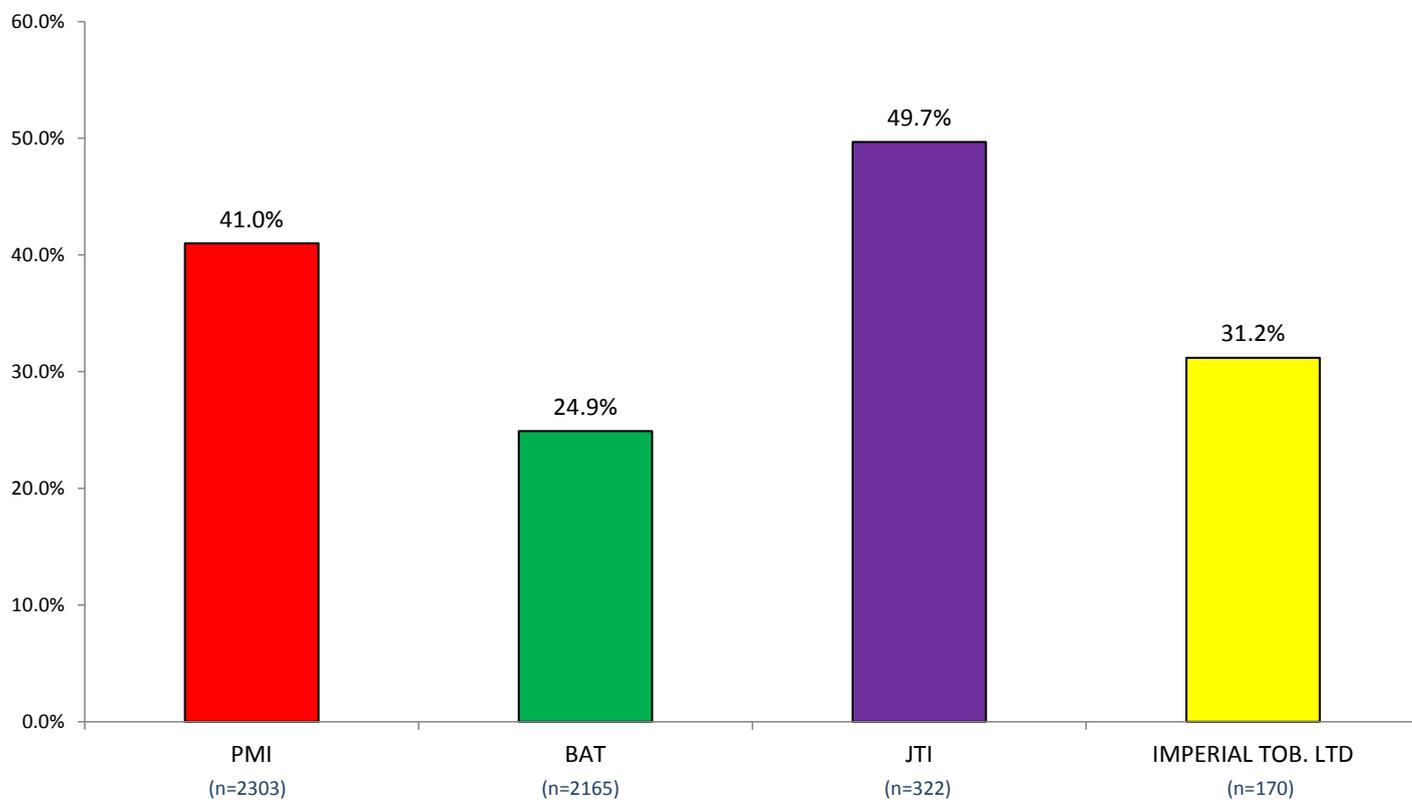
Non Domestic packs - breakdown by Brand



N= 1733 Non Domestic Packs.
 OTHERS are all brands with less than 10 packs.

Results – Non Domestic

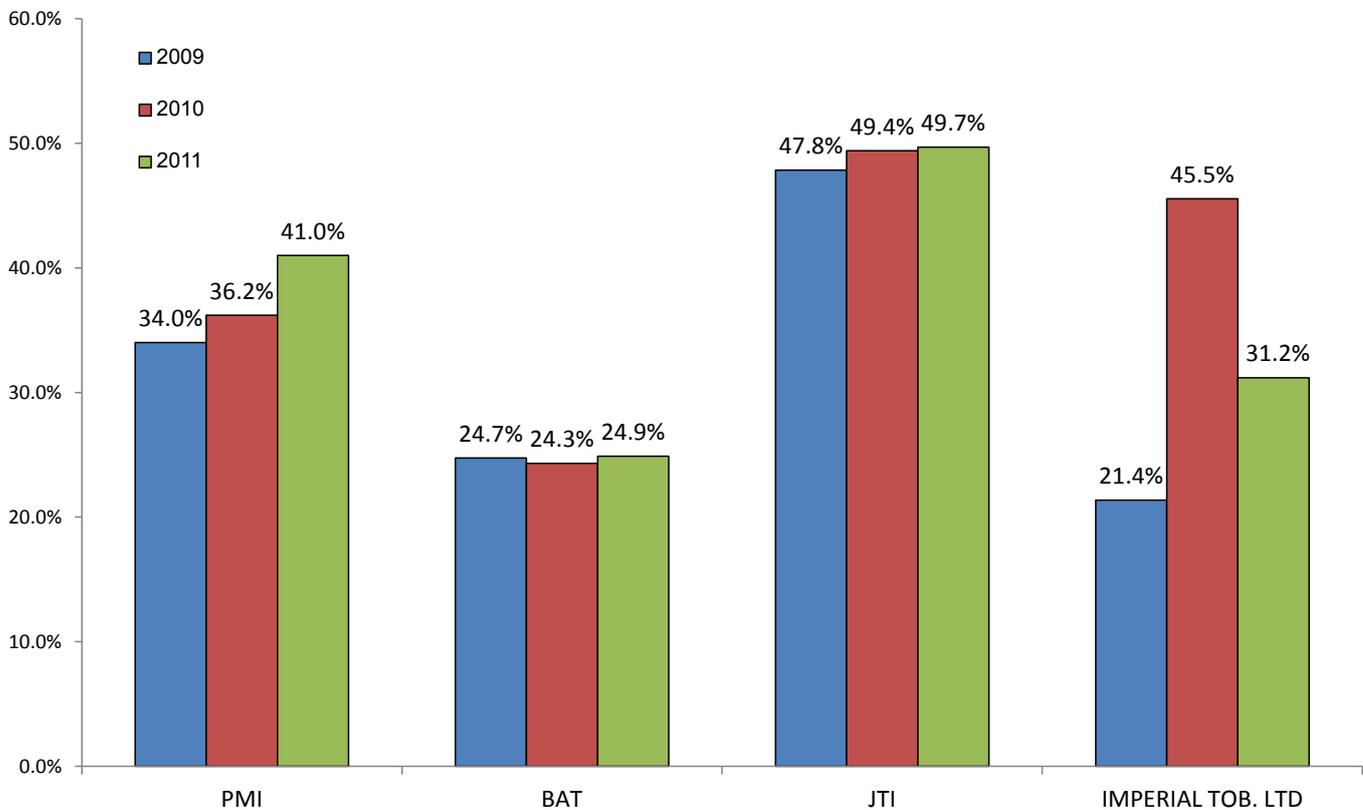
Non Domestic incidence by company



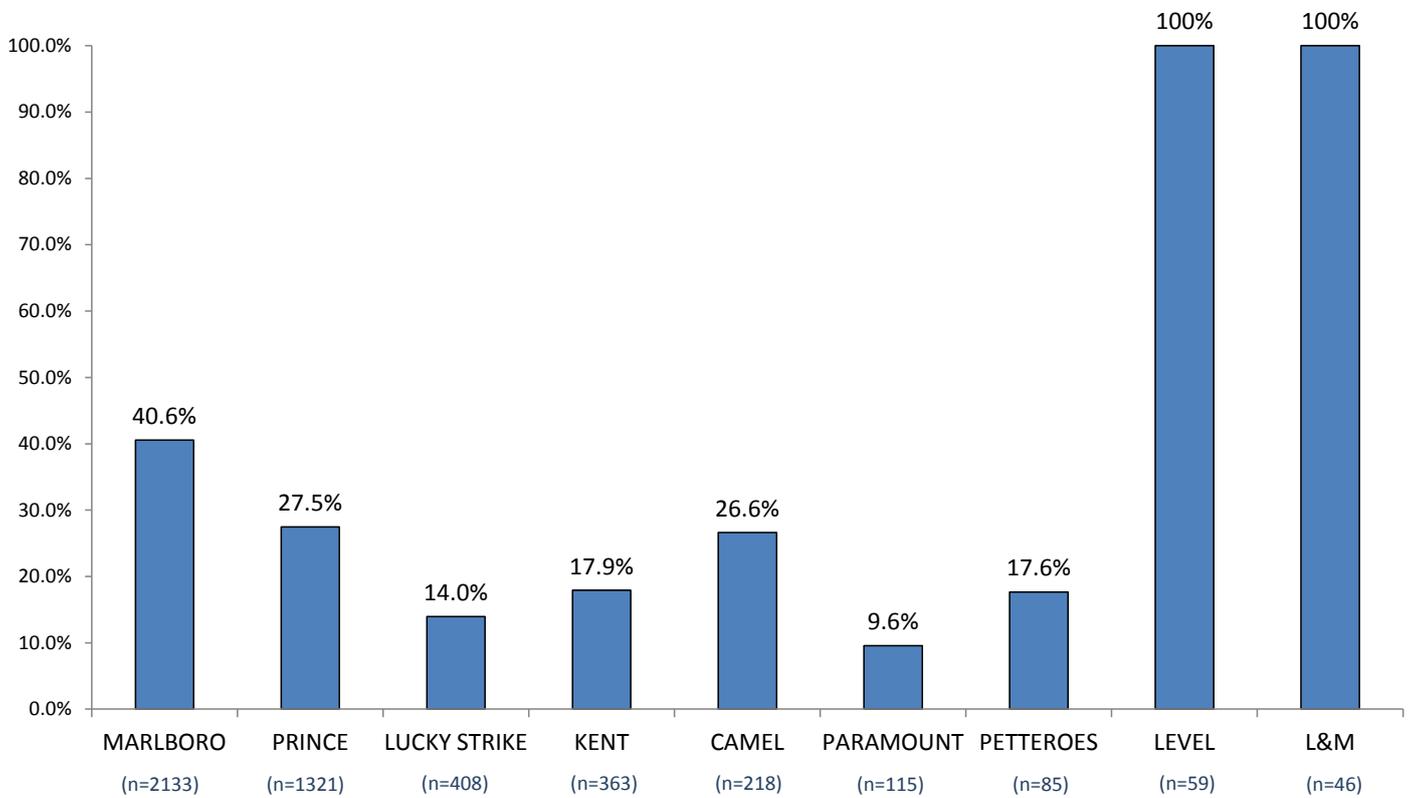
Other companies have fewer packs than required for reliable statistics.

Results – Non Domestic

Non Domestic incidence by Company - Trends

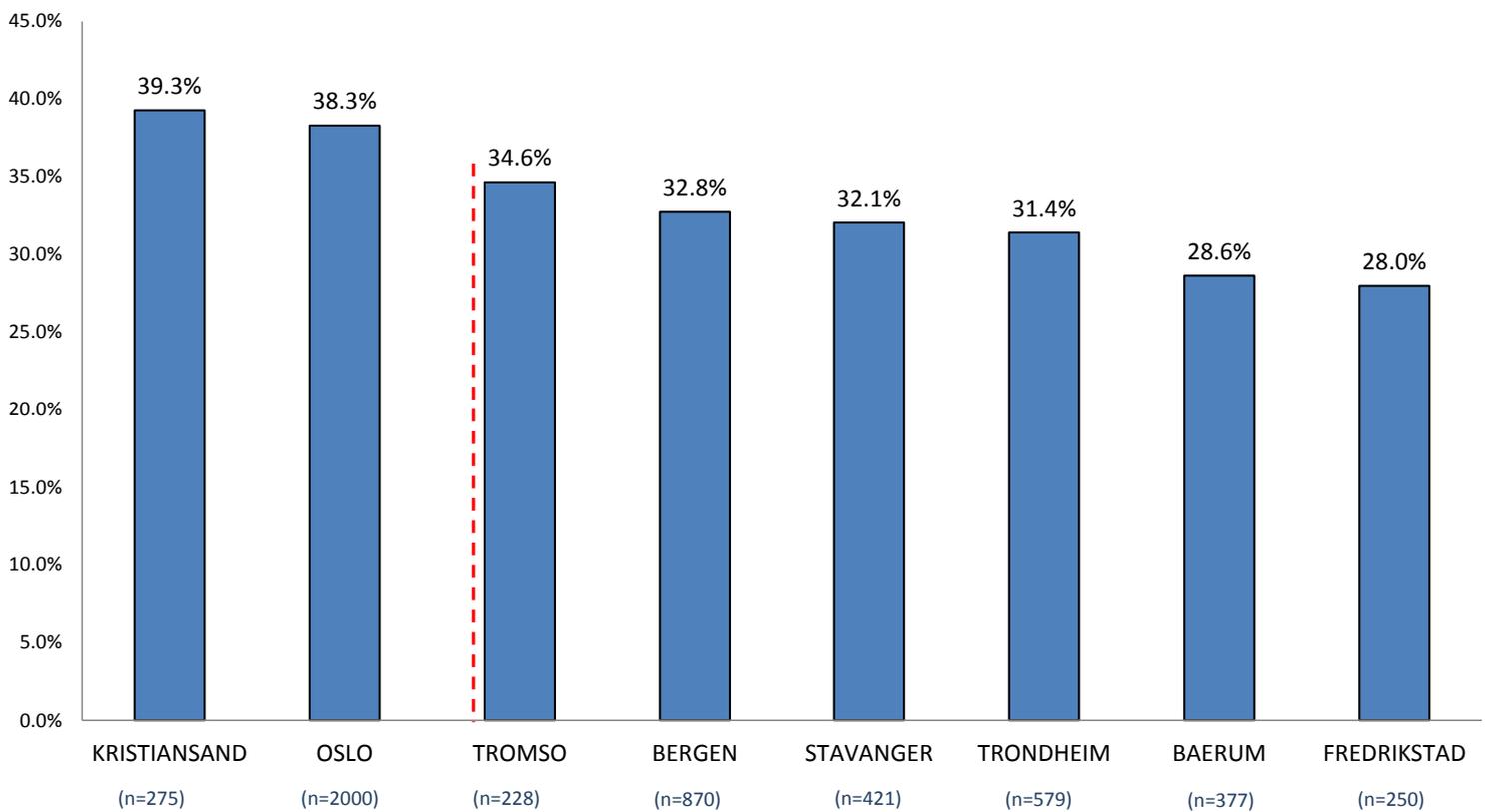


Results – Non Domestic Non Domestic incidence by Brand



Brands with a basis lower than 45 packs are not shown.

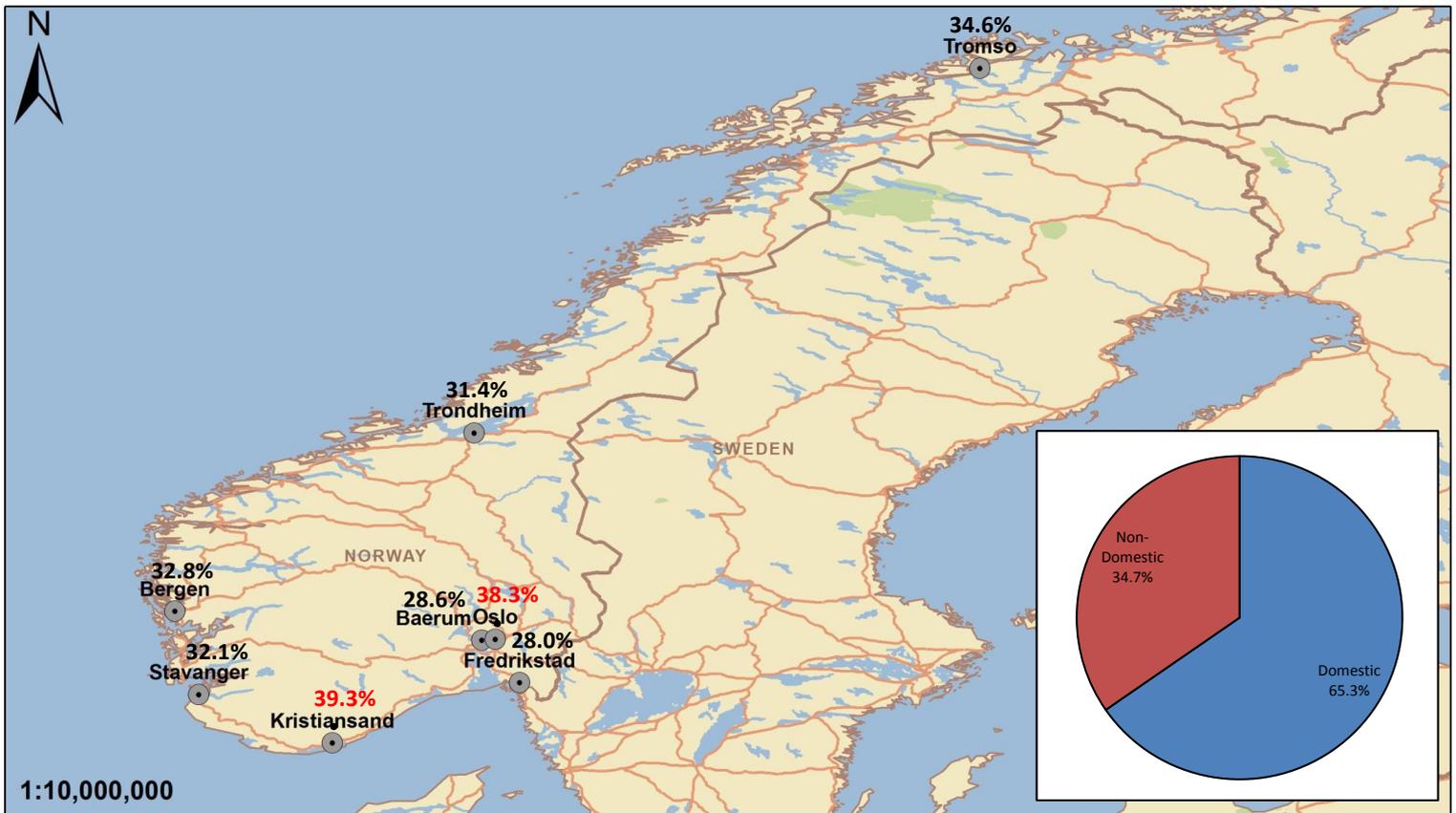
Results – All Packs Collected Non Domestic Incidence by City



The red line indicates the national ND level of 34.7%.

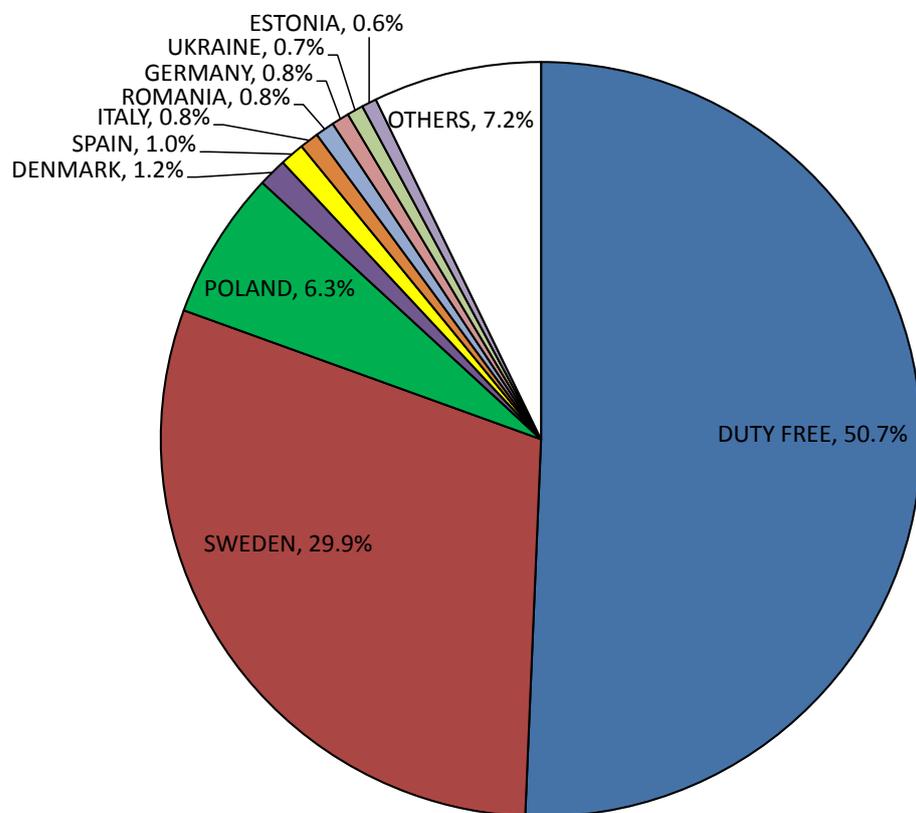
Results – All Packs Collected

Non Domestic Incidence by City



Cities with ND incidence above the national level of 34.7% are shown in red.

Results – Non domestic Market variant split



N= 1733 Non domestic packs.
OTHERS are all market variants with less than 10 packs.

Results – All Packs Collected

Market variant split vs. 2010

