



ESTONIA

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Choose country from the dropdown list to customise view

Country ESTONIA

1.5bn



cigarettes consumed

-0.1bn on 2017

0.1bn



C&C cigarettes consumed

0.0bn on 2017

9.5%



of total consumption was C&C

-1.9%pts on 2017

€21m



total tax revenue lost from C&C

-4m on 2017

C&C continued to decline in Estonia to below 10% of total consumption for the first time since the study began.

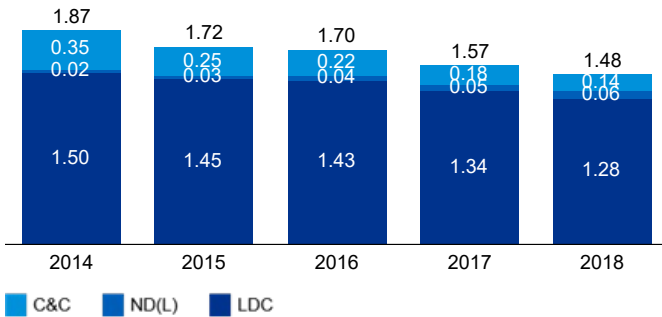
The geographical position next to Russia (a lower-priced country) has traditionally led to high levels of C&C, but additional law enforcement protections on the border and a narrowing price gap between Russia and Estonia has led to lower flows identified.

Overall consumption volumes were consistent with Estonia's long-term total consumption decline.

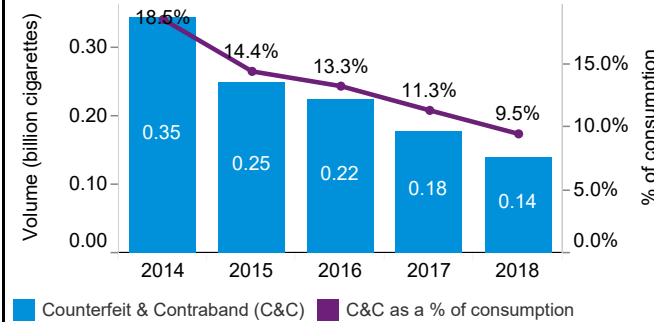
Illicit flows still originated from neighbouring Russia and Belarus, where cigarettes can be brought into Russia legally as long as they are not sold.

C&C consumption was higher in regions bordering Latvia than regions bordering Russia, indicating that illicit flows may be entering Estonia from Latvia rather than the EU border with Russia.

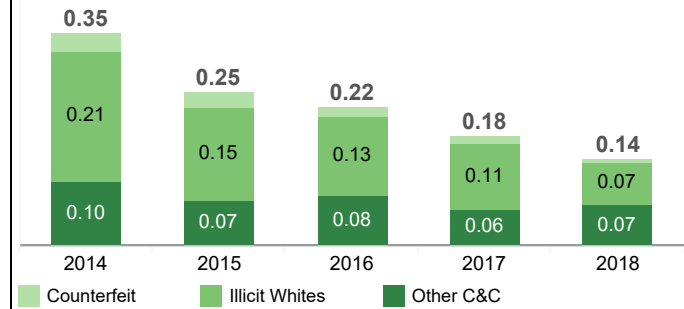
Total consumption, 2014-18 (bn cigarettes)



Manufactured cigarette C&C volumes and share of overall cigarette consumption, 2014-2018



C&C breakdown by type, 2014-2018 (bn cigarettes)



Sources: KPMG EU flows model 2014-2018; travel data taken from World Travel Organisation statistics



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Country ESTONIA

Key Inflows and Outflows from ESTONIA, 2018 (bn cigarettes)

Weighted average price in ESTONIA: €3.55 (9.57% change from 2017)



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Map shows major flows. Countries which are both a source and a destination are coded according to the larger flow.

Flow Colours

- Inflow to Country of Study
- Outflow from Country of Study

Country Colours

- Country of Study
- Destination
- Source

Country label format:

Country Name
(Average price per pack)

Breakdown of Total Consumption, 2014-2018 (bn cigarettes)

	2014	2015	2016	2017	2018
Legal Domestic Sales (LDS)	1.827	1.796	1.743	1.648	1.539
Outflows	-0.331	-0.351	-0.309	-0.305	-0.261
Legal Domestic Consumption (LDC)	1.505	1.445	1.434	1.344	1.279
Non-Domestic Legal (ND(L))	0.022	0.030	0.036	0.049	0.063
Counterfeit & Contraband (C&C)	0.346	0.249	0.225	0.178	0.140
Total Non-Domestic	0.367	0.279	0.261	0.227	0.204
Total Consumption	1.863	1.724	1.695	1.571	1.482

Total inflows by country, 2014-2018 (bn cigarettes)

	2014	2015	2016	2017	2018
Russia	0.169	0.119	0.073	0.071	0.053
Belarus	0.121	0.090	0.097	0.071	0.049
Latvia	0.007	0.003	0.015	0.029	0.030
Duty Free Labelled	0.028	0.024	0.032	0.020	0.024
Ukraine	0.000	0.002	0.003	0.002	0.011
Other	0.041	0.040	0.040	0.034	0.036
Total Inflows	0.367	0.279	0.261	0.227	0.204

Total outflows by country, 2014-2018 (bn cigarettes)

	2014	2015	2016	2017	2018
Finland	-0.294	-0.291	-0.266	-0.271	-0.230
Sweden	-0.006	-0.005	-0.005	-0.008	-0.007
Norway	-0.006	-0.008	-0.005	-0.004	-0.006
Netherlands	-0.004	-0.004	-0.002	-0.003	-0.005
Germany	-0.002	-0.004	-0.003	0.000	-0.003
Other	-0.019	-0.039	-0.029	-0.018	-0.009
Total Outflows	-0.331	-0.351	-0.309	-0.305	-0.261



Sources: KPMG EU flows model 2014-2018; travel data taken from World Travel Organisation statistics



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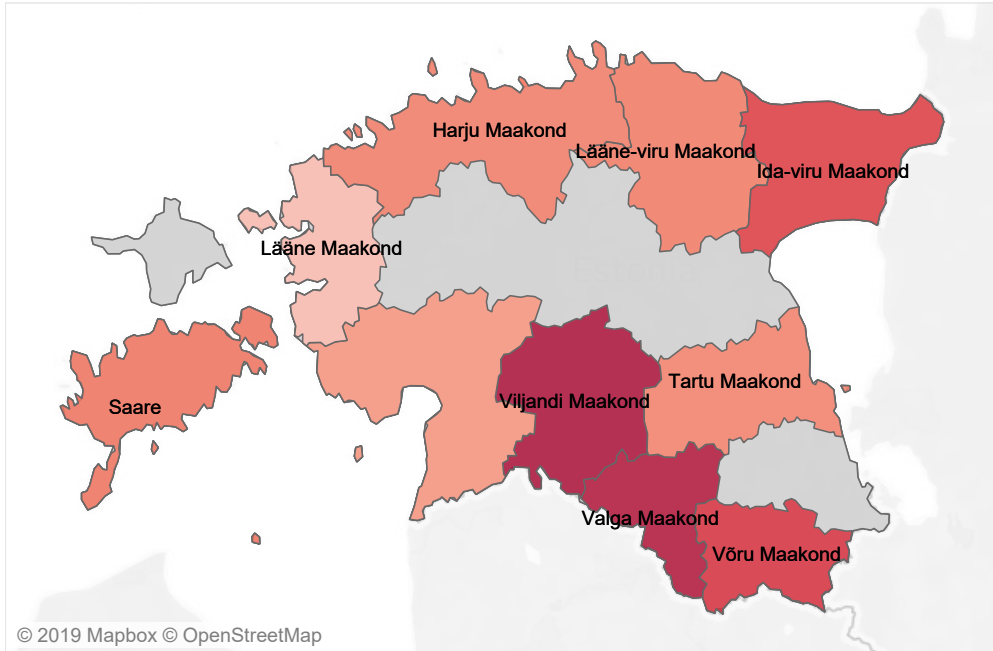
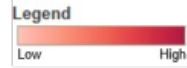
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Select country and type to customise view

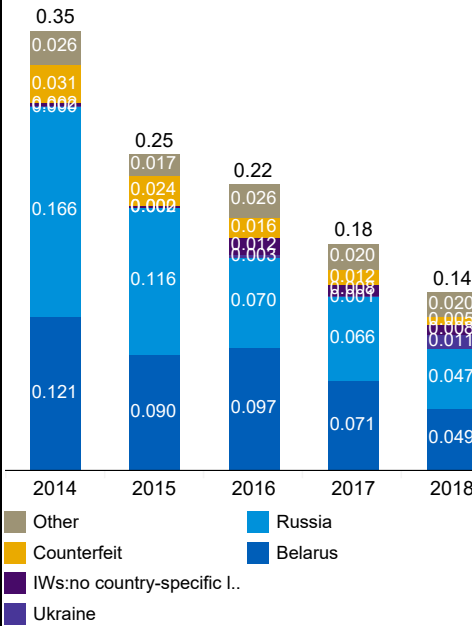
Country
ESTONIA

Type
C&C

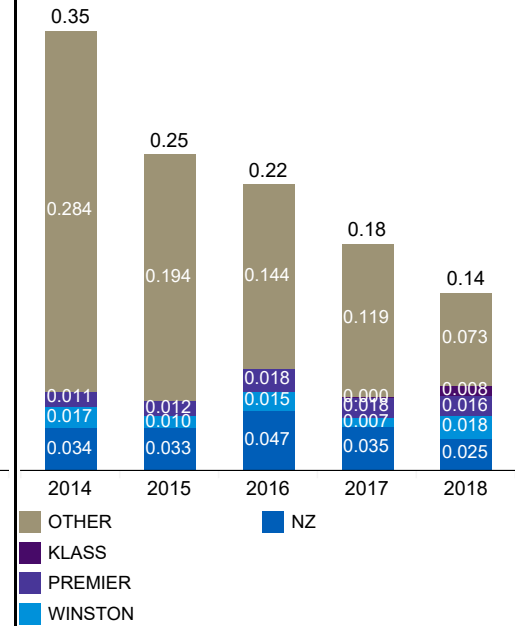
C&C% by region



C&C by country of origin, 2014-2018 (bn cigarettes)



C&C by brand, 2014-2018 (bn cigarettes)



Sources: KPMG EU flows model 2014-2018; travel data taken from World Travel Organisation statistics



ESTONIA

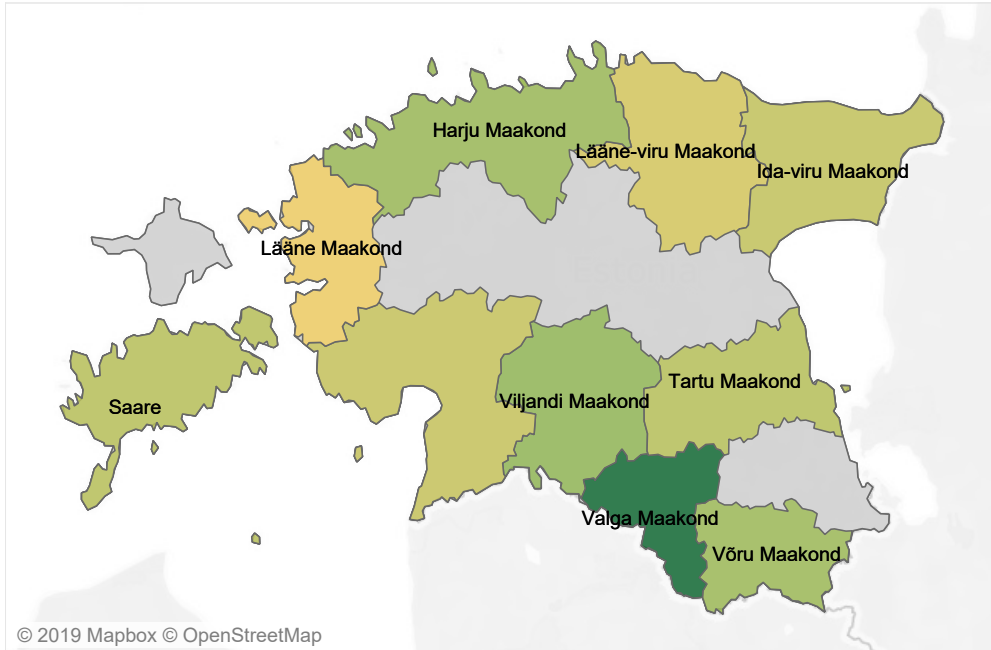
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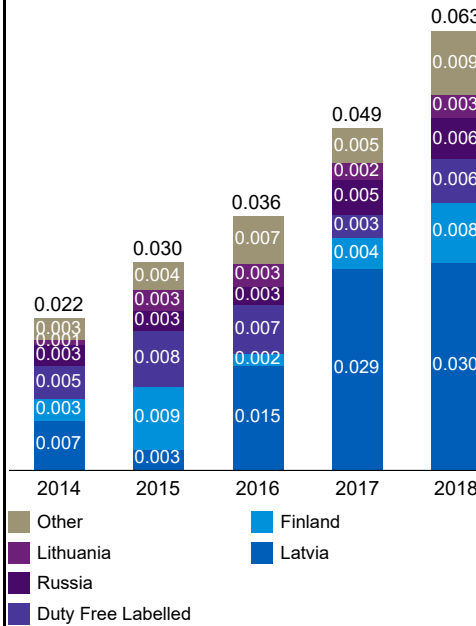
Country
ESTONIA

Type
ND(L)

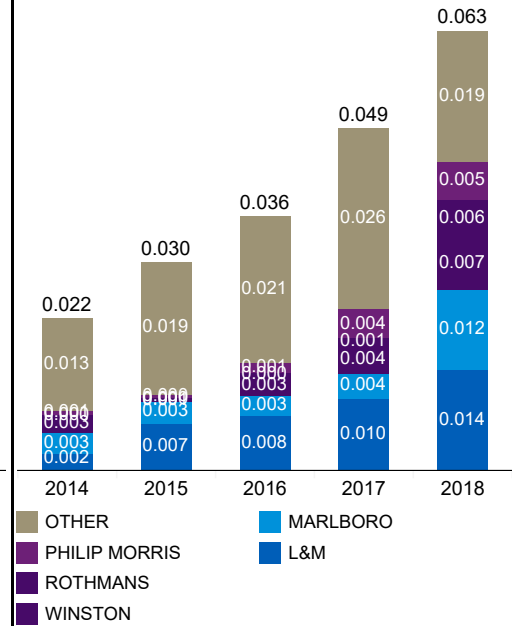
ND(L)% by region



ND(L) by country of origin, 2014-2018 (bn cigarettes)



ND(L) by brand, 2014-2018 (bn cigarettes)



Sources: KPMG EU flows model 2014-2018; travel data taken from World Travel Organisation statistics