



GERMANY

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Country GERMANY

87.4bn cigarettes consumed -3.3bn on 2017	2.8bn C&C cigarettes consumed -1.4bn on 2017	3.2% of total consumption was C&C -1.4%pts on 2017	€588m total tax revenue lost from C&C -257m on 2017
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C&C volumes continued to decline to 3.2% of total consumption in 2018, indicating the success that Germany is having at reducing illicit trade.

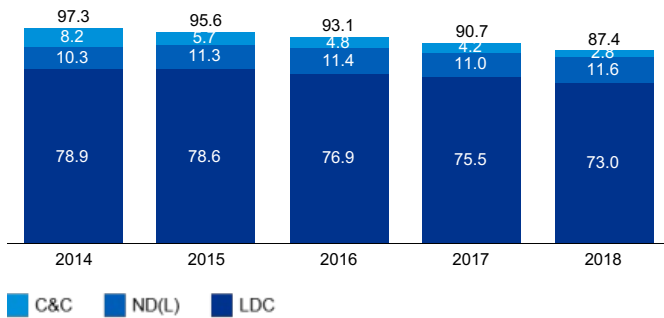
Albeit at historically low levels, Poland remains the largest single source of C&C, as whilst a large proportion of the flows from Poland are ND(L) the overall volume is not supported.

C&C is highest in the regions nearest the Polish border and the Czech Republic, suggesting this is an entry point for C&C into Germany.

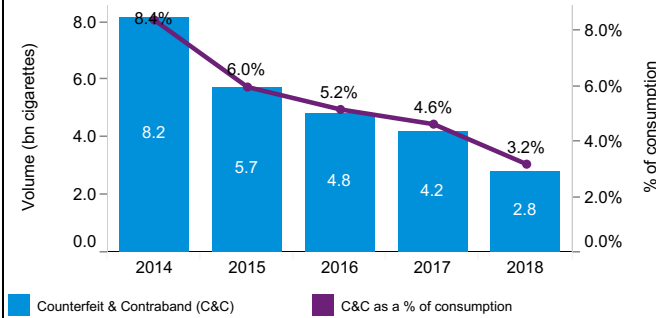
Total consumption is also following a similar declining trend.

In addition, Germany experienced much lower flows from Belarus, indicating the successes of countries in the Eastern EU in preventing smuggling from this destination.

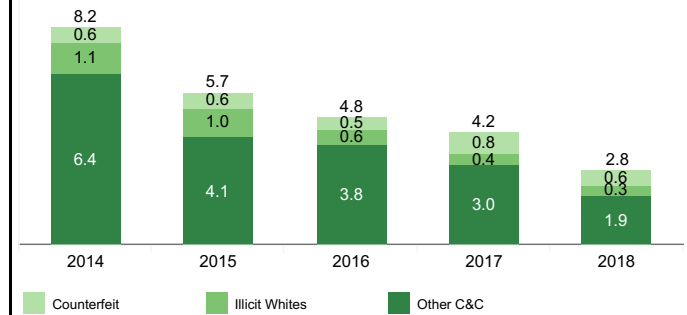
Total consumption, 2014-18 (bn cigarettes)



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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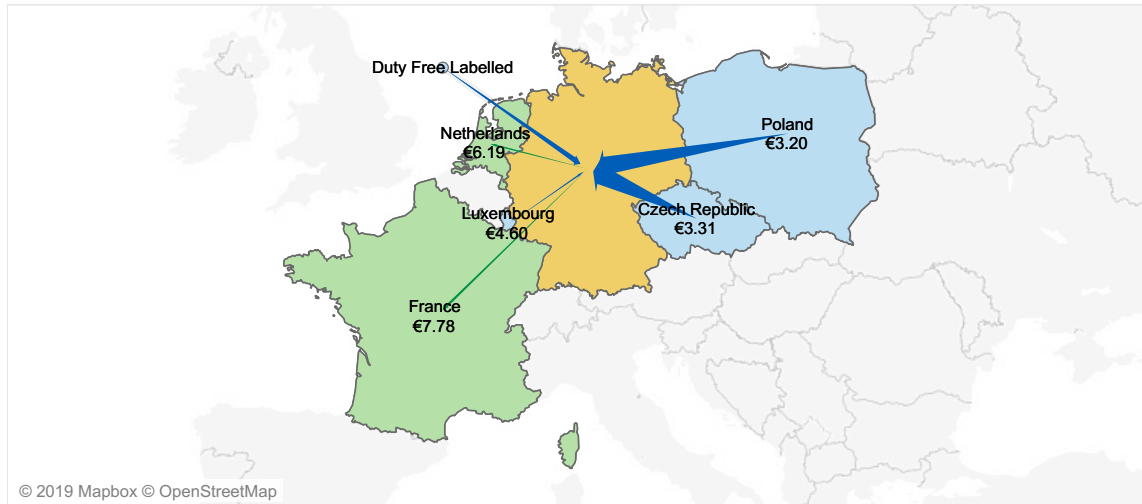
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Country GERMANY

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

Weighted average price in GERMANY: €5.83 (3.30% change from 2017)



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
- Source
- Destination

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)	80.35	80.04	78.13	76.74	74.76
Outflows	-1.49	-1.42	-1.27	-1.20	-1.75
Legal Domestic Consumption (LDC)	78.86	78.62	76.86	75.54	73.01
Non-Domestic Legal (ND(L))	10.32	11.26	11.42	11.00	11.61
Counterfeit & Contraband (C&C)	8.15	5.70	4.80	4.20	2.78
Total Non-Domestic	18.47	16.96	16.22	15.19	14.39
Total Consumption	97.33	95.58	93.08	90.73	87.40

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

	2014	2015	2016	2017	2018
Czech Republic	5.45	5.24	5.45	5.00	4.68
Poland	5.67	4.79	4.57	4.46	4.20
Duty Free Labelled	1.84	1.81	1.71	1.22	1.29
Counterfeit	0.59	0.58	0.47	0.79	0.58
Luxembourg	0.48	0.31	0.48	0.34	0.33
Other	4.45	4.23	3.55	3.39	3.30
Total Inflows	18.47	16.96	16.22	15.19	14.39

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

	2014	2015	2016	2017	2018
France	-0.47	-0.45	-0.45	-0.34	-0.67
Netherlands	-0.36	-0.27	-0.20	-0.26	-0.35
Switzerland	-0.17	-0.26	-0.22	-0.21	-0.19
Italy	-0.05	-0.09	-0.05	-0.04	-0.10
Austria	-0.14	-0.06	-0.06	-0.05	-0.07
Other	-0.30	-0.30	-0.29	-0.31	-0.37
Total Outflows	-1.49	-1.42	-1.27	-1.20	-1.75



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



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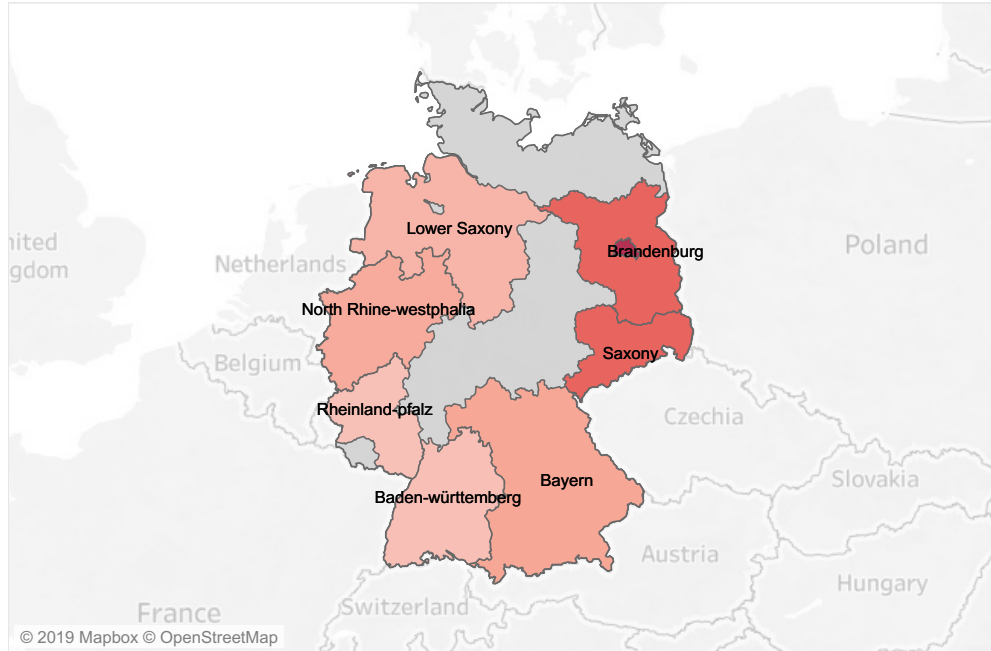
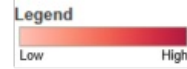
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Select country and type to customise view

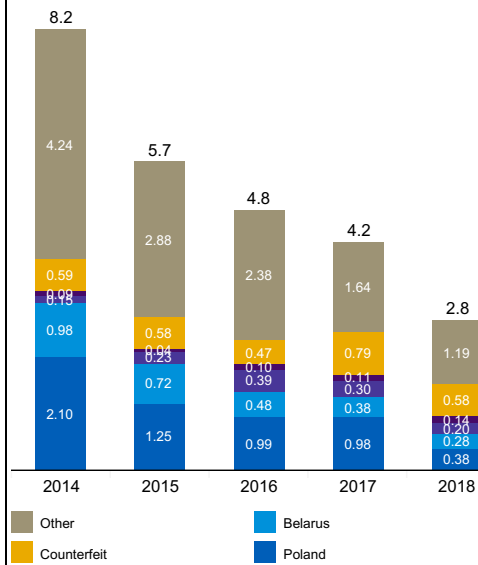
Country
GERMANY

Type
C&C

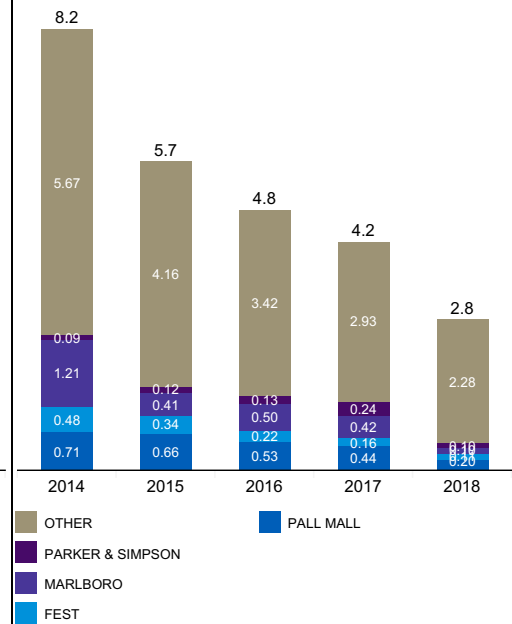
C&C% by region



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



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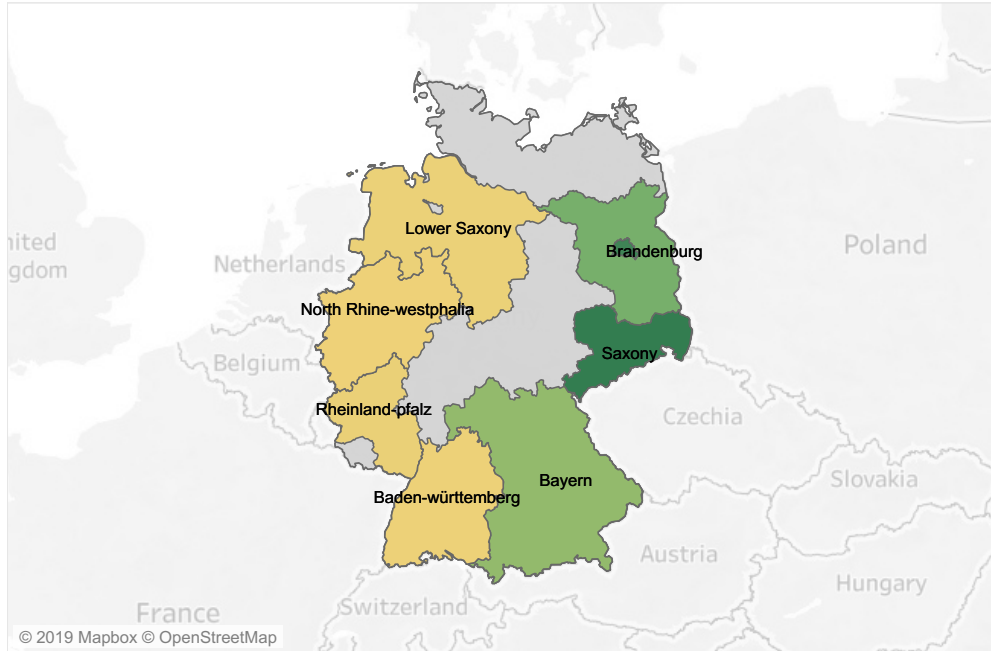
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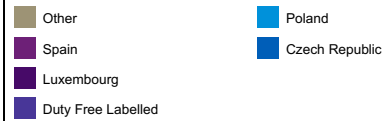
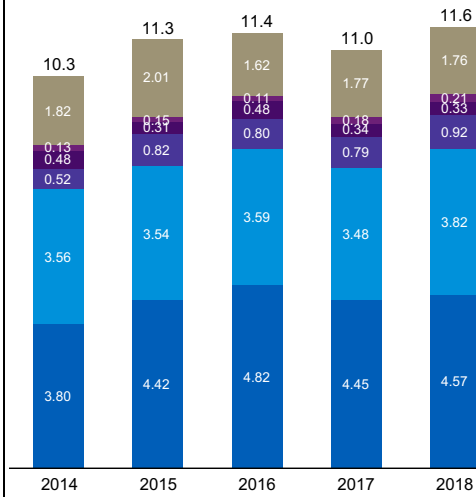
Country
GERMANY

Type
ND(L)

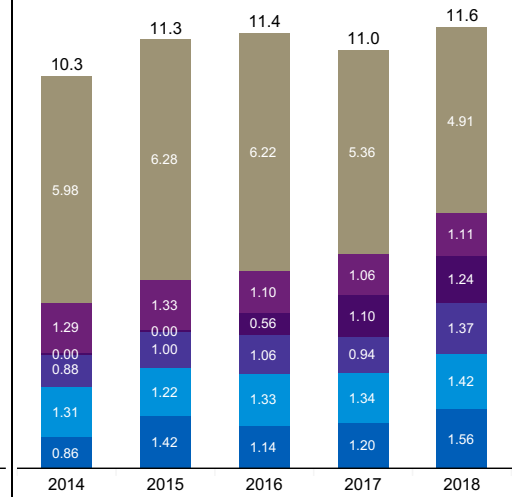
ND(L)% by region



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