



Choose country from the dropdown list to customise view

Country POLAND

40.9bn



cigarettes consumed

0.4bn on 2017

4.1bn



C&C cigarettes consumed

-0.8bn on 2017

9.9%



of total consumption was C&C

-2.2%pts on 2017

€520m



total tax revenue lost from C&C

-107m on 2017

C&C continued to fall in Poland to almost half the levels estimated in 2015.

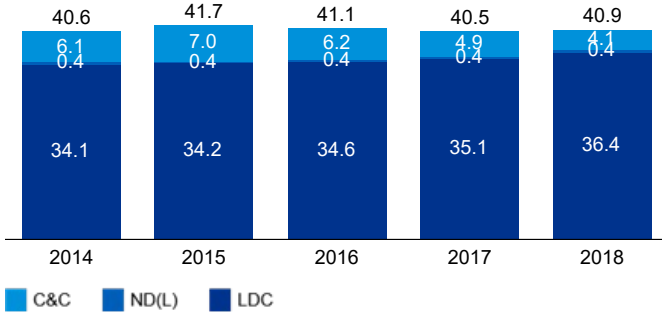
C&C fell in 2018 whilst legal domestic sales increased and cigarette consumption remained stable, buoyed by a large Ukrainian working population since the introduction of visa-free travel in 2017.

Illicit cigarettes mainly originated from neighbouring Belarus and Ukraine, with a growing trend of counterfeit cigarettes, which may have been produced in Poland and other EU countries (as evidenced by seizure data).

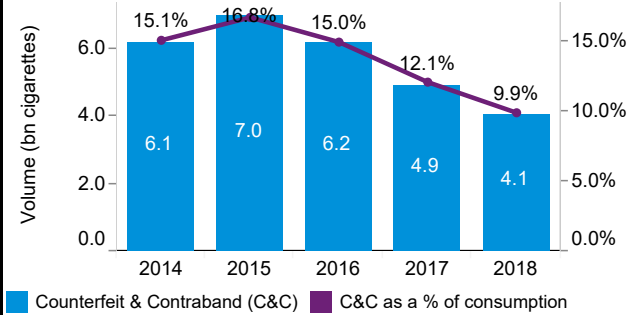
The vast majority of these flows were identified as C&C because consumers travelling from Ukraine and Belarus are limited to 40 cigarettes when crossing the border.

The highest percentage of C&C was identified in the northeast of the country, near the Belarus, Kaliningrad and Lithuanian borders.

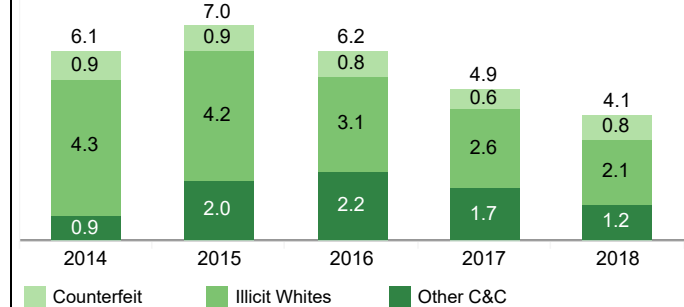
Total consumption, 2014-18 (bn cigarettes)



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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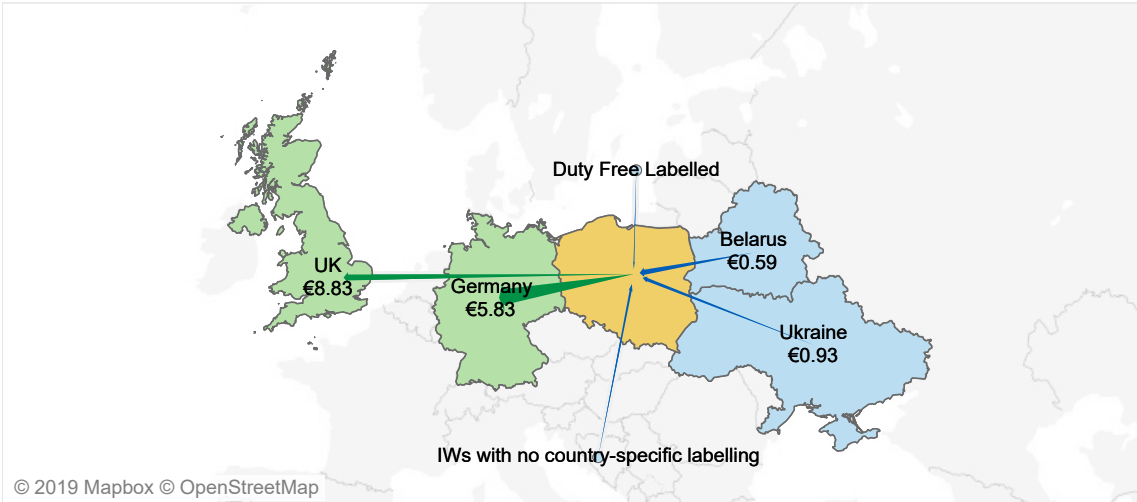
Hover here to view any country-specific adjustments

Choose country and flow type from the dropdown list to customise view

Country POLAND

## Key Inflows and Outflows from POLAND, 2018 (bn cigarettes)

Weighted average price in POLAND: €3.20 (0.41% 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)	42.00	41.20	41.33	41.59	42.85
Outflows	-7.95	-6.97	-6.78	-6.44	-6.46
Legal Domestic Consumption (LDC)	34.05	34.23	34.56	35.14	36.39
Non-Domestic Legal (ND(L))	0.42	0.44	0.37	0.45	0.44
Counterfeit & Contraband (C&C)	6.14	6.98	6.16	4.91	4.06
Total Non-Domestic	6.56	7.42	6.53	5.35	4.50
<b>Total Consumption</b>	<b>40.62</b>	<b>41.65</b>	<b>41.08</b>	<b>40.50</b>	<b>40.89</b>

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

	2014	2015	2016	2017	2018
Belarus	3.15	2.68	2.09	1.83	1.30
IWs with no country-specific labelling	1.25	1.46	0.94	0.78	0.86
Ukraine	0.14	1.34	2.10	1.51	0.86
Counterfeit	0.95	0.85	0.85	0.62	0.78
Duty Free Labelled	0.26	0.35	0.23	0.28	0.35
Other	0.82	0.74	0.32	0.32	0.35
<b>Total Inflows</b>	<b>6.56</b>	<b>7.42</b>	<b>6.53</b>	<b>5.35</b>	<b>4.50</b>

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

	2014	2015	2016	2017	2018
Germany	-5.67	-4.79	-4.57	-4.46	-4.20
UK	-1.23	-1.38	-1.51	-1.39	-1.51
Ireland	-0.11	-0.12	-0.11	-0.10	-0.10
France	-0.24	-0.19	-0.14	-0.10	-0.09
Norway	-0.31	-0.09	-0.07	-0.09	-0.09
Other	-0.40	-0.39	-0.37	-0.31	-0.47
<b>Total Outflows</b>	<b>-7.95</b>	<b>-6.97</b>	<b>-6.78</b>	<b>-6.44</b>	<b>-6.46</b>



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



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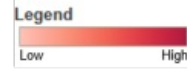
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Select country and type to customise view

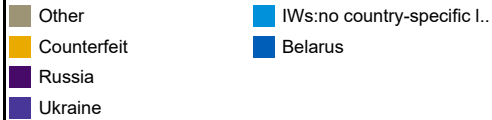
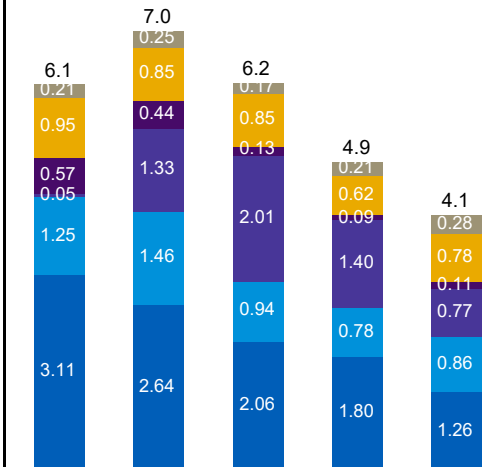
Country  
POLAND

Type  
C&C

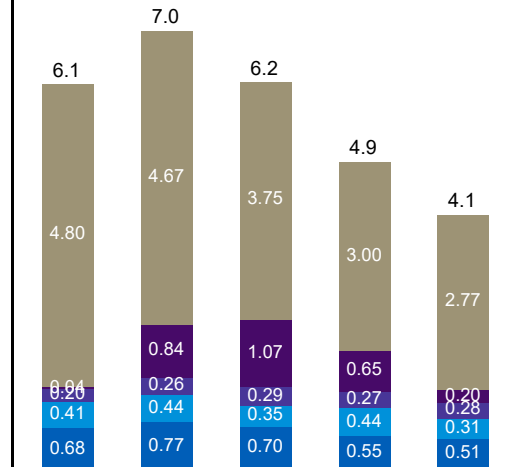
## C&C% by region



## 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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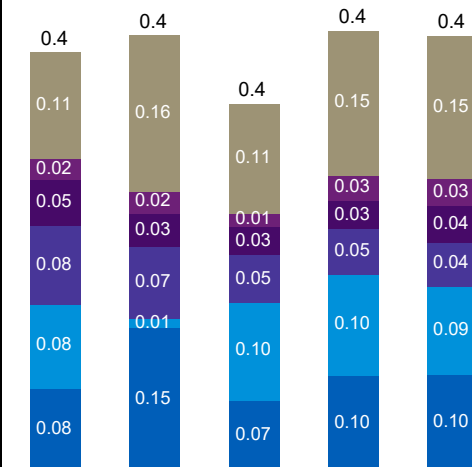
Country  
POLAND

Type  
ND(L)

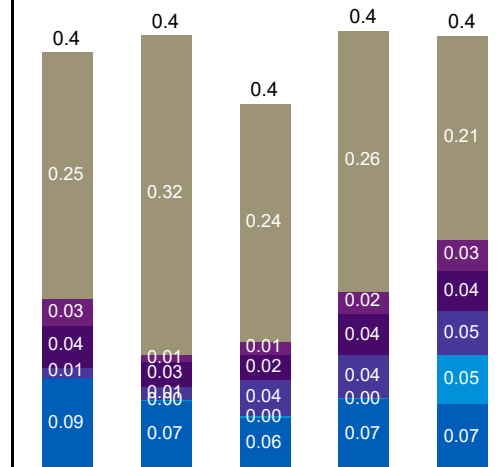
## ND(L)% by region



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



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



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