



WSPM GROUP

EMPTY PACKS SURVEY

NORWAY Q2 2025

September 2025

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EMPTY PACK SURVEY RESULTS Q2 2025:
NORWAY



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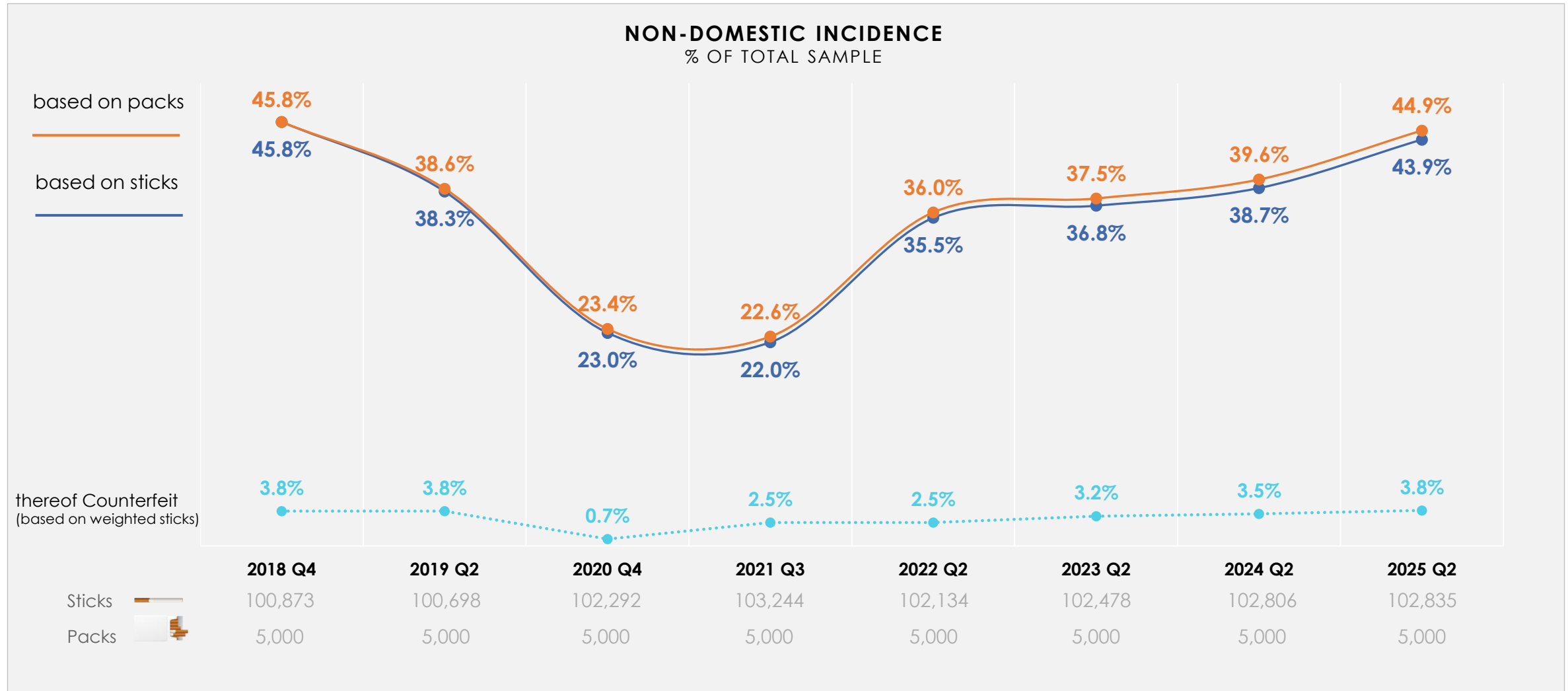


01.

EXECUTIVE SUMMARY

QUARTER 2, 2025

EXECUTIVE SUMMARY: NON-DOMESTIC TREND



EXECUTIVE SUMMARY: KEY MESSAGES

Industry overview

- **Non-domestic incidence** increased to **43.9%** (vs 38.7% in Q2 2024, 36.8% in Q2 2023).
- **Counterfeit incidence** increased to **3.8%** (3.5%, 3.2%).
- **Main non-domestic brands** found were (excl. counterfeit):
 - **MARLBORO** (PMI) with **13.4%** of all packs collected (12.1%, 10.8%).
 - **WINSTON** (JTI) with **5.7%** (5.0%, 3.4%).
 - **PRINCE** (BAT) with **5.4%** (5.3%, 5.4%).
- **Main non-domestic market variants** found were (excl. counterfeit):
 - **SWEDEN** with **16.4%** of all packs collected (13.2%, 10.7%).
 - **DUTY FREE** with **8.5%** (6.6%, 8.1%).
 - **POLAND** with **3.0%** (3.9%, 5.0%).
- **At city level**, the highest non-domestic incidence was found in **FREDRIKSTAD** at **64.5%** (38.5%, 37.0%), in **KRISTIANSAND** at **53.2%** (30.1%, 21.2%), and **OSLO** at **45.5%** (40.0%, 37.8%).

EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks

— Total: 102,835 sticks (5,000 packs).

	Q2 2025	Q2 2024	Q2 2023
NON-DOMESTIC INCIDENCE	43.9%	38.7%	36.8%
MAIN MARKET VARIANTS (excl. counterfeit)			
SWEDEN	16.4%	13.2%	10.7%
DUTY FREE	8.5%	6.6%	8.1%
POLAND	3.0%	3.9%	5.0%
MAIN BRAND FAMILIES (excl. counterfeit)			
MARLBORO (PMI)	13.4%	12.1%	10.8%
WINSTON (JTI)	5.7%	5.0%	3.4%
PRINCE (BAT)	5.4%	5.3%	5.4%
MAIN CITIES (excl. counterfeit)			
FREDRIKSTAD	64.5%	38.5%	37.0%
KRISTIANSAND	53.2%	30.1%	21.2%
OSLO	45.5%	40.0%	37.8%
COUNTERFEIT INCIDENCE			
TOTAL COUNTERFEIT INCIDENCE	3.8%	3.5%	3.2%
PMI	2.0%	1.1%	1.1%
JTI	0.9%	1.0%	0.5%
BAT	0.8%	1.3%	1.6%
IMPERIAL TOBACCO	n/a (didn't participate)	0.1%	0.0%

EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks

— Total: 102,835 sticks (5,000 packs).

	COUNTERFEIT	SWEDEN	DUTY FREE	POLAND	ROMANIA	DENMARK	OTHERS	Total	2024 Q2	2023 Q2
MARLBORO (PMI)	2.0%	6.1%	3.3%	0.7%	0.2%	0.1%	3.0%	15.4%	13.1%	11.9%
WINSTON (JTI)	0.9%	2.5%	0.8%	0.8%	0.1%	0.2%	1.3%	6.6%	5.9%	3.9%
PRINCE (BAT)	0.8%	2.9%	1.9%	—	—	0.7%	0.0%	6.2%	6.4%	6.9%
CAMEL (JTI)	—	0.9%	0.3%	0.2%	0.0%	0.2%	0.5%	2.1%	1.7%	1.6%
KENT (BAT)	0.0%	0.5%	0.5%	—	0.9%	—	0.2%	2.1%	1.3%	1.9%
L&M (PMI)	—	0.8%	0.5%	0.4%	—	—	0.2%	1.9%	1.5%	1.7%
OTHERS	0.0%	2.8%	1.3%	0.8%	1.0%	0.3%	3.2%	9.5%	8.7%	8.8%
Total	3.8%	16.4%	8.5%	3.0%	2.2%	1.4%	8.5%	43.9%	38.7%	36.8%

2024 Q2	3.5%	13.2%	6.6%	3.9%	1.8%	2.6%	7.1%	38.7%
2023 Q2	3.2%	10.7%	8.1%	5.0%	2.3%	0.3%	7.0%	36.8%

02.

METHODOLOGY

QUARTER 2, 2025

OBJECTIVES, PROVISIONS, LIMITATIONS

OBJECTIVES

Provide an indication on the incidence of non-domestic or illicit cigarettes consumed in NORWAY:

- 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), 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

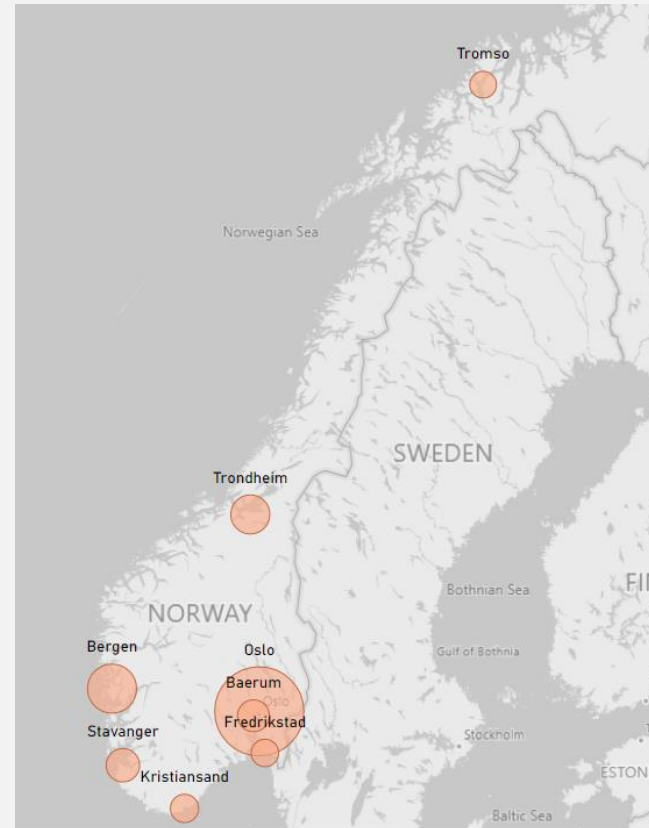
Fieldwork:
12 May - 05 Jun, 2025

REPORTING

The results are calculated based on number of sticks equivalent to the number of packs collected.

GEOGRAPHY

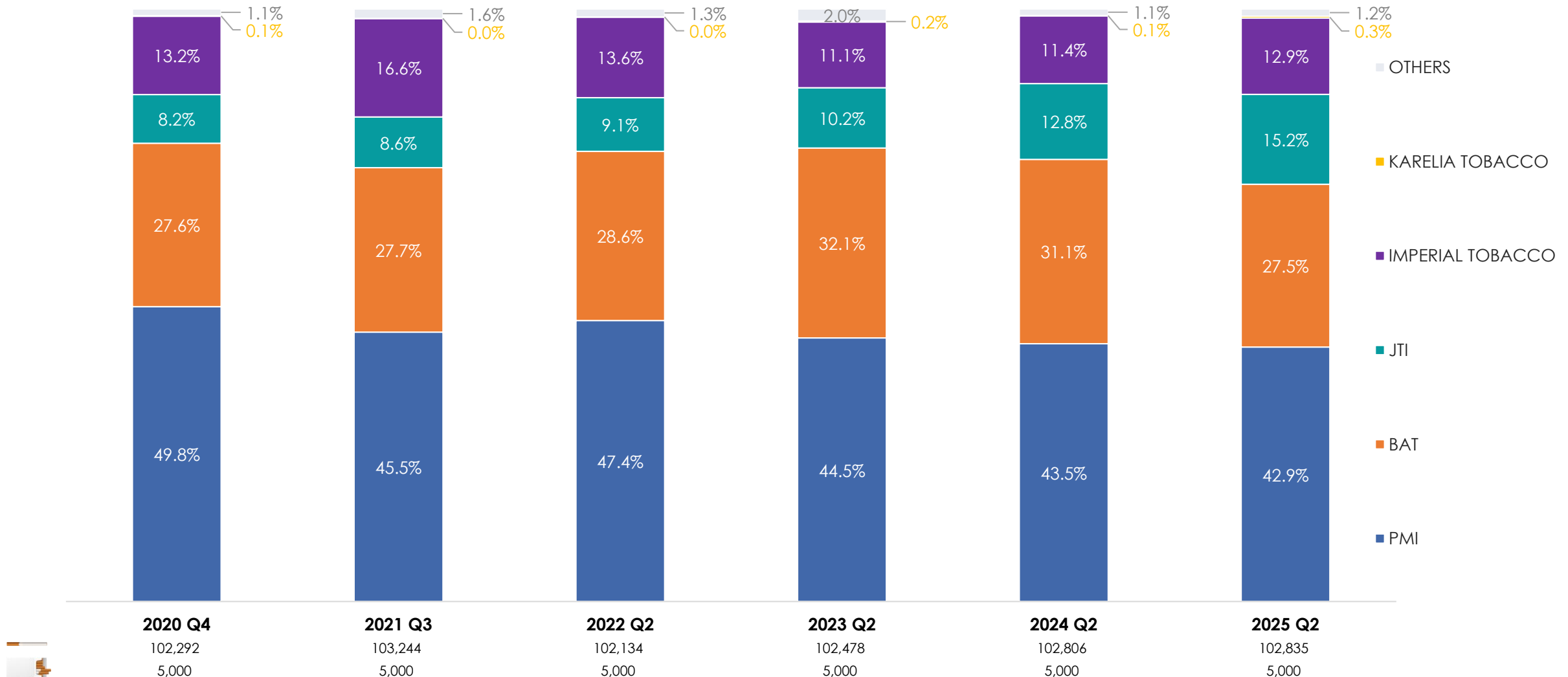
- The largest 8 cities
- 30.8% coverage of population



Region	Population Covered	Sample	Weighted Sample
Oslo	634,463	2,012	2,004
Bergen	271,949	866	822
Trondheim	182,035	579	603
Stavanger	130,754	419	414
Baerum	118,588	376	369
Kristiansand	85,983	273	326
Fredrikstad	77,591	248	240
Tromsø	71,590	227	222
Total Sample	1,572,953	5,000	5,000

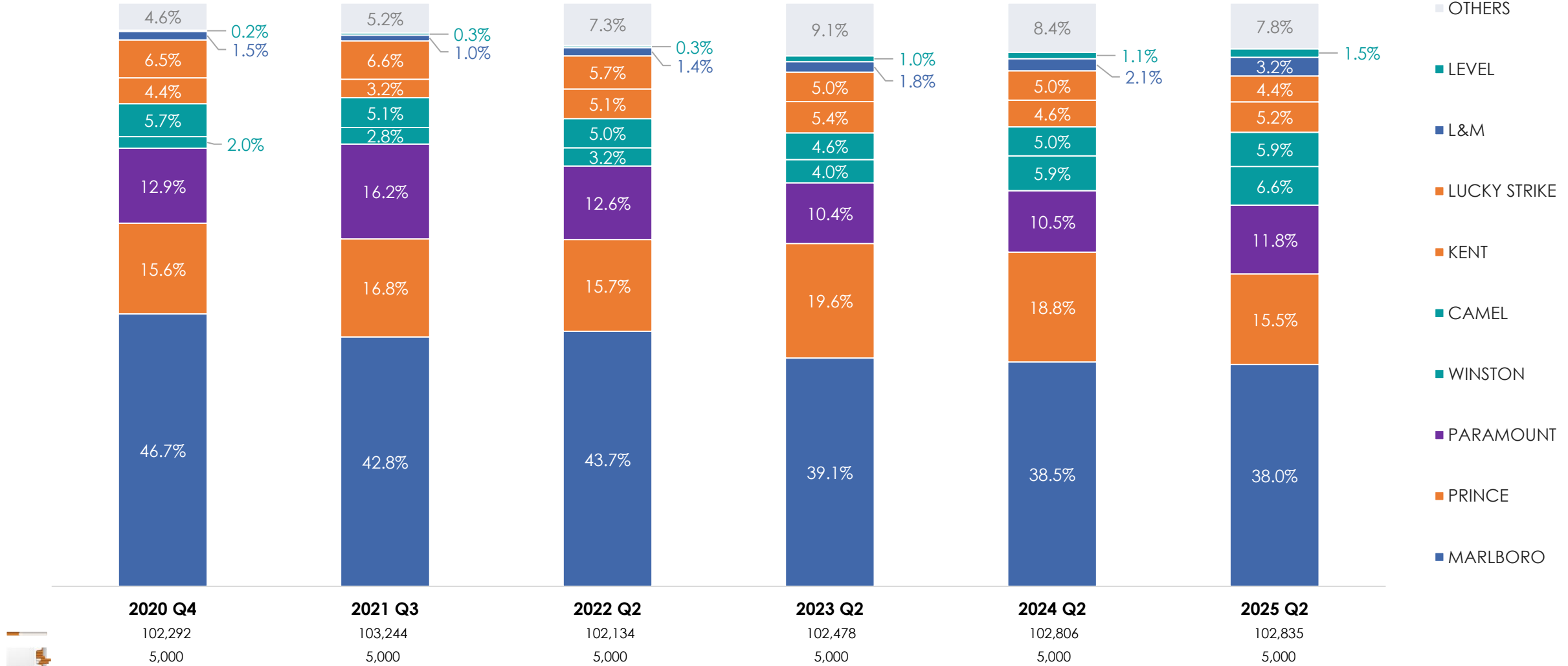
SAMPLE COMPOSITION: SHARE BY COMPANY

% OF TOTAL SAMPLE Based on number of sticks



SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks





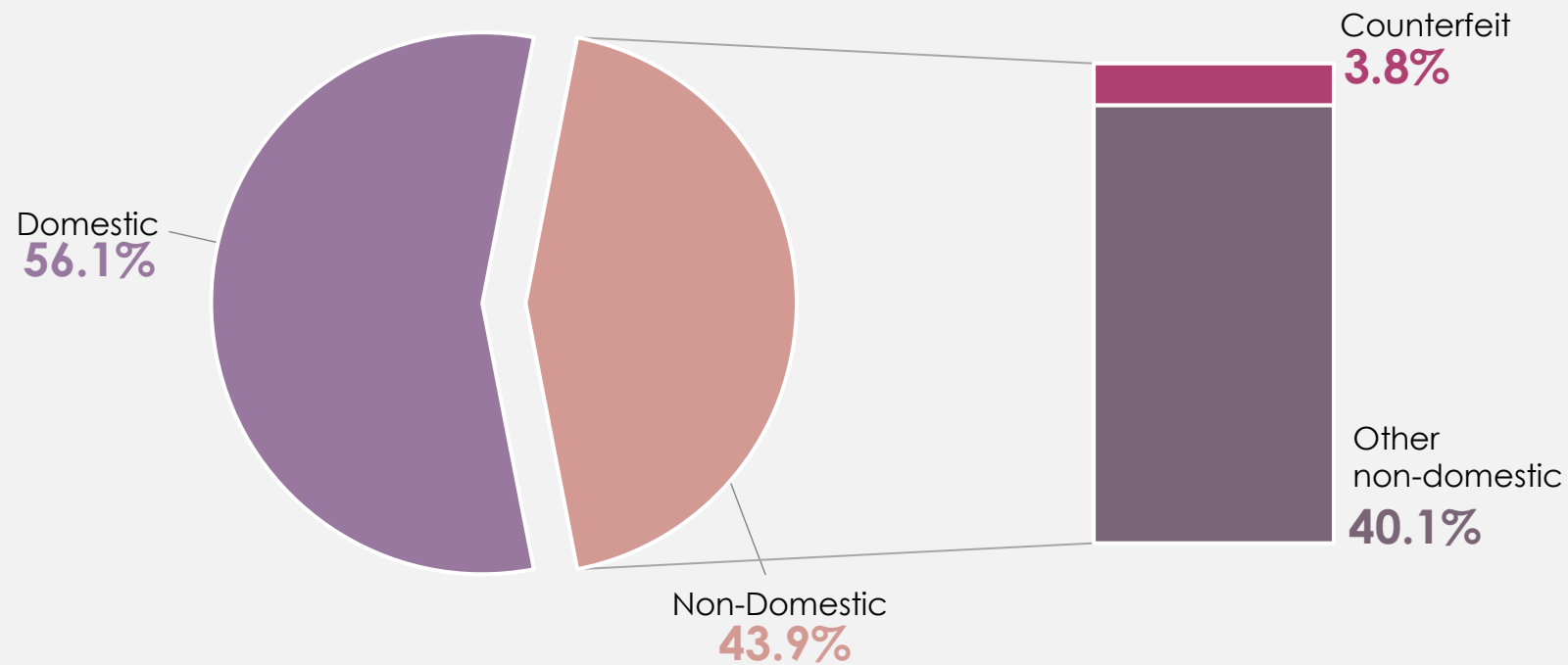
03.

KEY RESULTS

QUARTER 2, 2025

NON-DOMESTIC: CATEGORIES

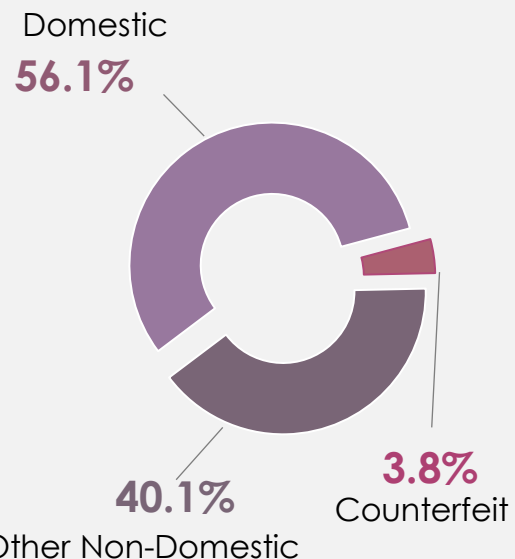
NON-DOMESTIC INCIDENCE CATEGORIES
% OF TOTAL SAMPLE



Total: 102,835 sticks (5,000 packs).

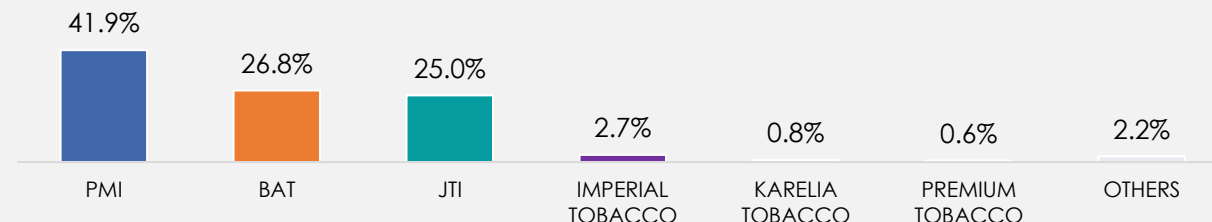
OTHER NON-DOMESTIC: BREAKDOWN

NON-DOMESTIC INCIDENCE % OF TOTAL SAMPLE



Total: 41,195 sticks (2,047 packs)

SPLIT BY COMPANY % OF OTHER NON-DOMESTIC SAMPLE



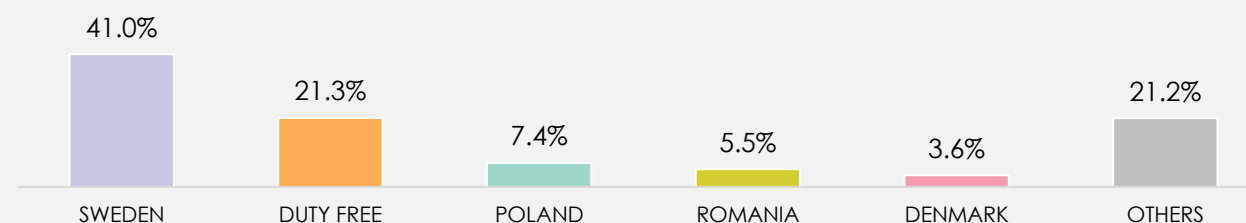
Main Others ▼ e.g.

PM USA	0.2%
HEUPINK & BLOEMEN	0.2%
HONGTA	0.2%
KING'S TOBACCO	0.2%
GRODNO TOBACCO FACTORY	0.2%
CHINA TOBACCO HUNAN INDUSTRIAL	0.1%
SHANGHAI TOBACCO	0.1%

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

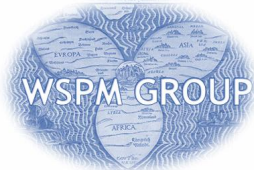
MARLBORO	33.4%	PRINCE	13.5%	WINSTON	14.2%	DAVIDOFF	0.9%	KARELIA	0.6%	PLATINUM	0.6%
L&M	4.8%	KENT	5.1%	CAMEL	5.3%	RICHMOND	0.7%	OME	0.1%		
PARLIAMENT	1.9%	PALL MALL	3.1%	LEVEL	2.6%	GAULOISES	0.2%	AMERICAN LEGEND	0.1%		
CHESTERFIELD	0.8%	LUCKY STRIKE	2.6%	LD	0.8%	P&S	0.2%				
PETTEROE'S	0.4%	VOGUE	0.8%	BLEND	0.7%	WEST	0.2%				

SPLIT BY MARKET VARIANT % OF OTHER NON-DOMESTIC SAMPLE

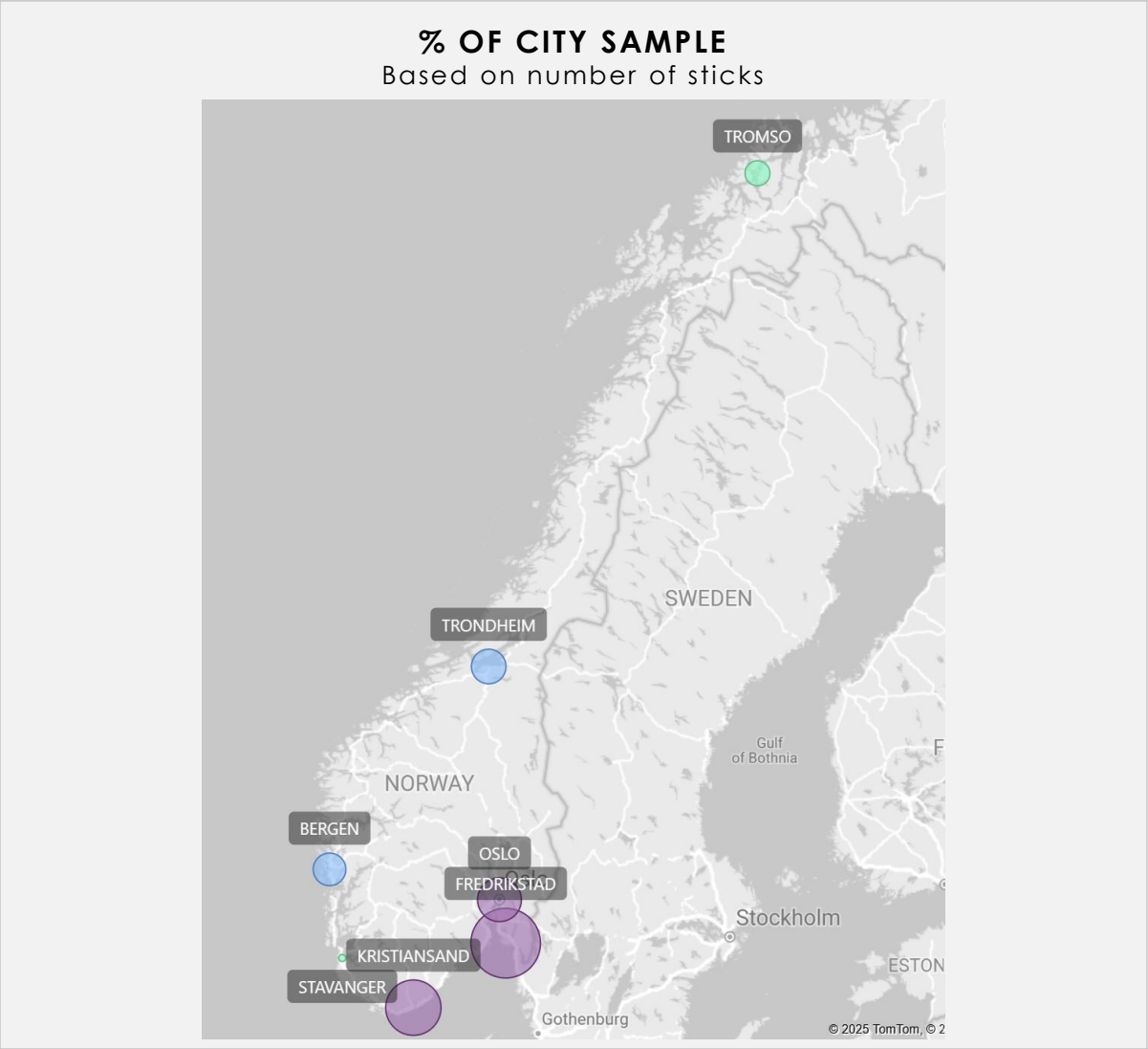
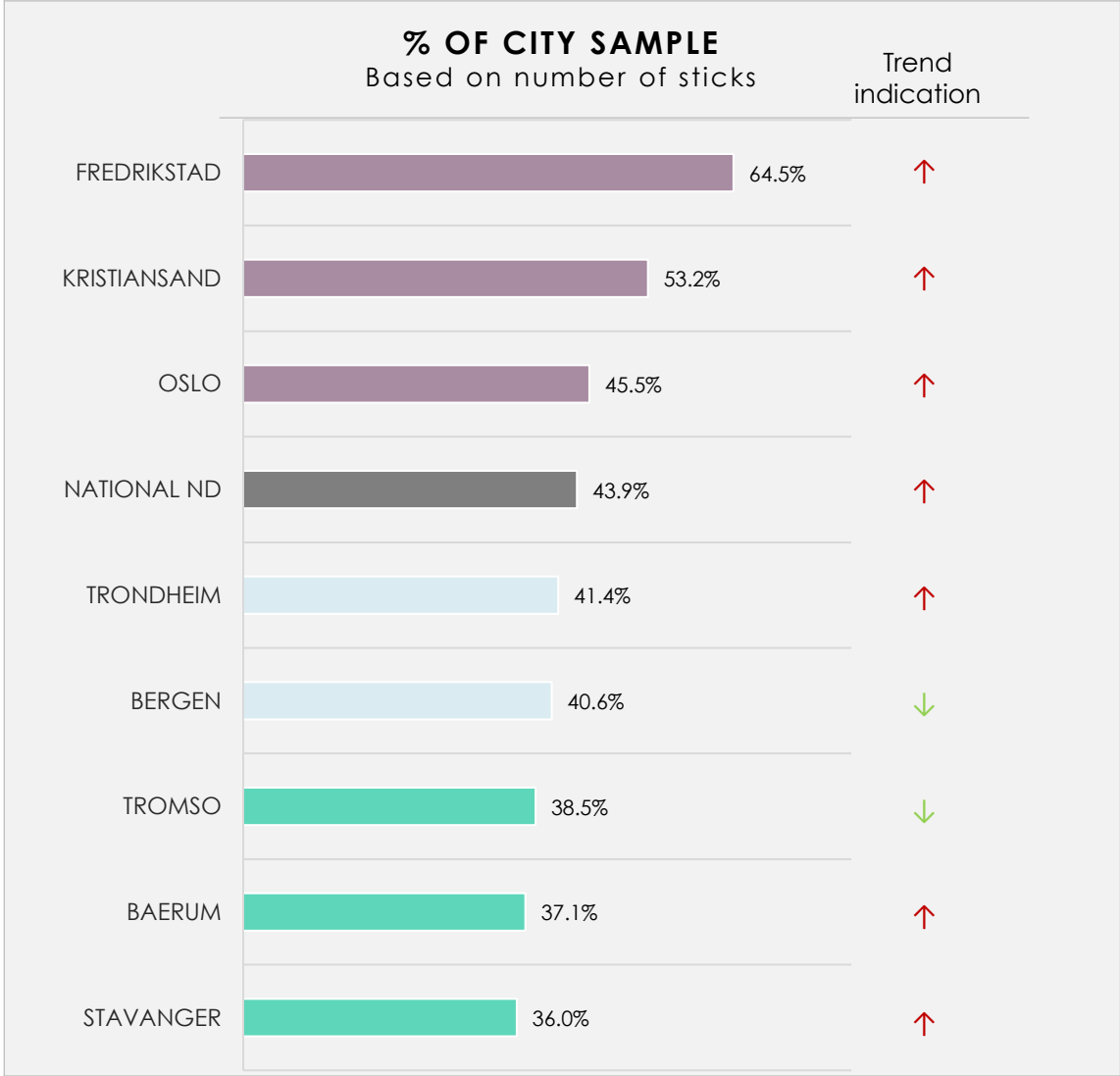


Main Others ▼ e.g.

TURKEY	2.2%
GERMANY	1.9%
BELARUS	1.3%
SPAIN	1.3%
ITALY	1.3%
BULGARIA	1.1%
LITHUANIA	0.9%



NON-DOMESTIC: BY CITY



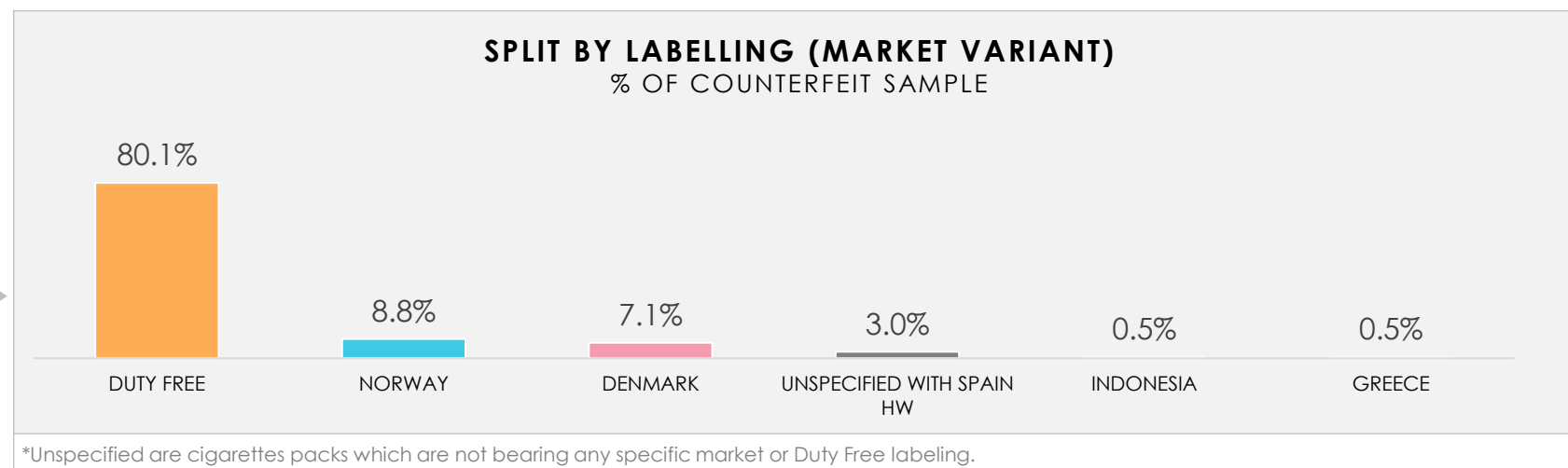
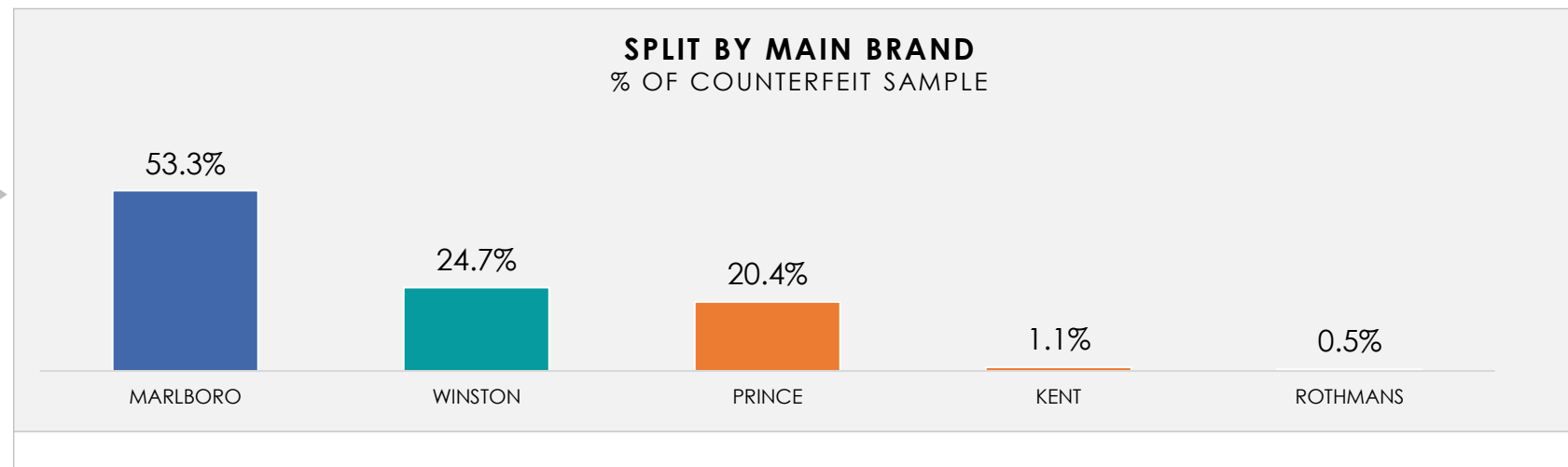
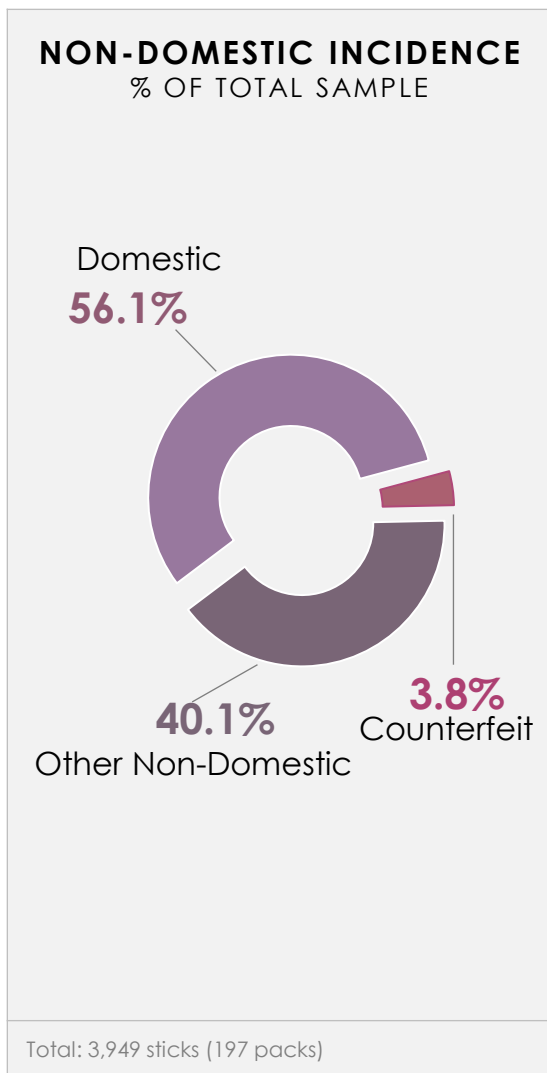
NON-DOMESTIC: BY MAIN BRAND FAMILY & CITY

% OF TOTAL SAMPLE Based on number of sticks

— Total: 102,835 sticks (5,000 packs).

	COUNTERFEIT	MARLBORO (PMI)	WINSTON (JTI)	PRINCE (BAT)	CAMEL (JTI)	OTHERS	TOTAL	2024 Q2	2023 Q2
OSLO	1.6%	6.1%	2.4%	2.0%	0.9%	5.4%	18.3%	16.0%	15.1%
BERGEN	0.5%	2.1%	0.8%	0.9%	0.2%	2.2%	6.7%	7.0%	6.4%
TRONDHEIM	0.4%	1.6%	0.6%	0.5%	0.2%	1.7%	5.0%	4.5%	5.0%
KRISTIANSAND	0.5%	0.9%	0.4%	0.4%	0.2%	1.1%	3.5%	2.0%	1.4%
FREDRIKSTAD	0.1%	0.8%	0.6%	0.3%	0.3%	1.0%	3.1%	1.8%	1.8%
STAVANGER	0.3%	0.8%	0.4%	0.4%	0.1%	0.9%	3.0%	2.7%	3.0%
BAERUM	0.2%	0.6%	0.4%	0.4%	0.2%	1.0%	2.8%	2.3%	2.2%
TROMSO	0.2%	0.5%	0.1%	0.6%	0.0%	0.3%	1.7%	2.3%	1.7%
TOTAL	3.8%	13.4%	5.7%	5.4%	2.1%	13.5%	43.9%	38.7%	36.8%
2024 Q2	3.5%	12.1%	5.0%	5.3%	1.7%	11.2%	38.7%		
2023 Q2	3.2%	10.8%	3.4%	5.4%	1.6%	12.4%	36.8%		

COUNTERFEIT: BREAKDOWN



COUNTERFEIT: BY MAIN BRAND FAMILY & CITY

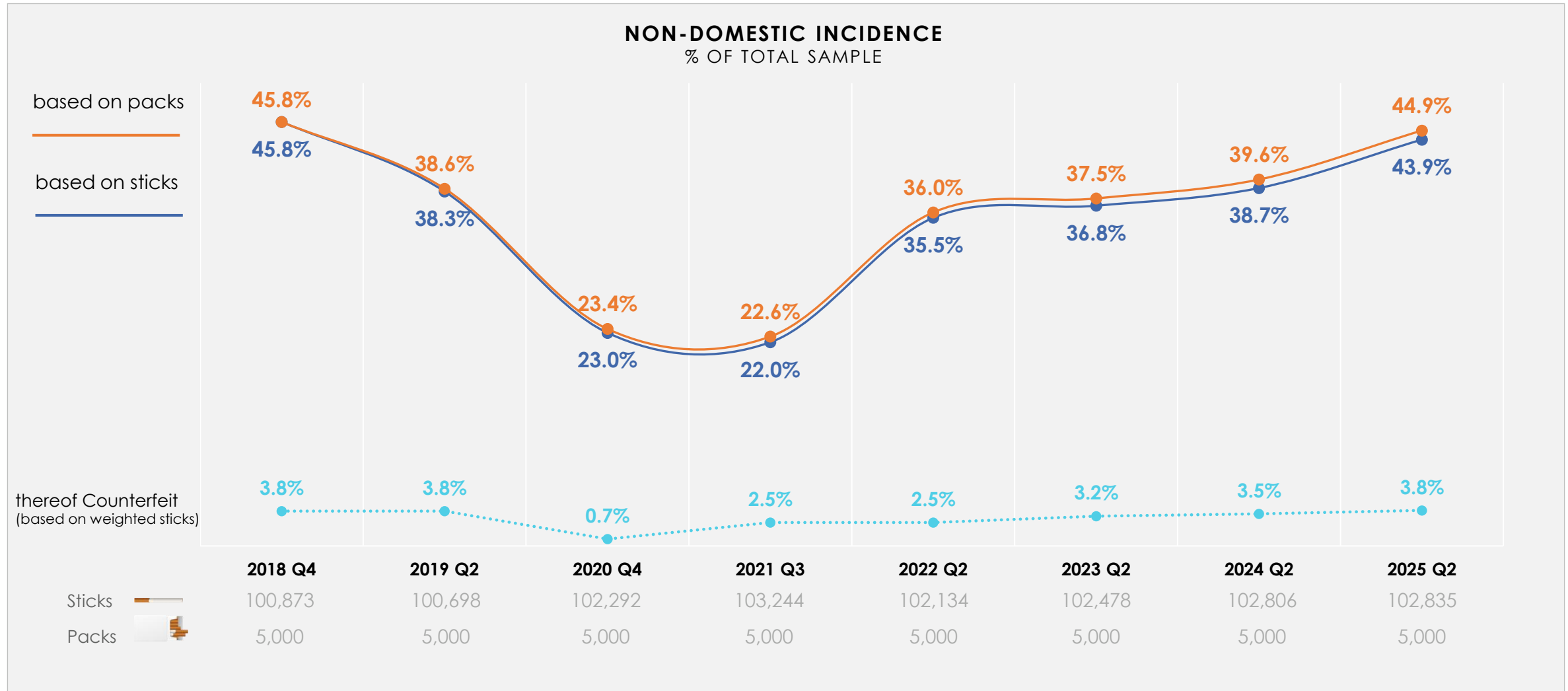
% OF TOTAL SAMPLE Based on number of sticks

— Total: 102,835 sticks (5,000 packs).

COUNTERFEIT

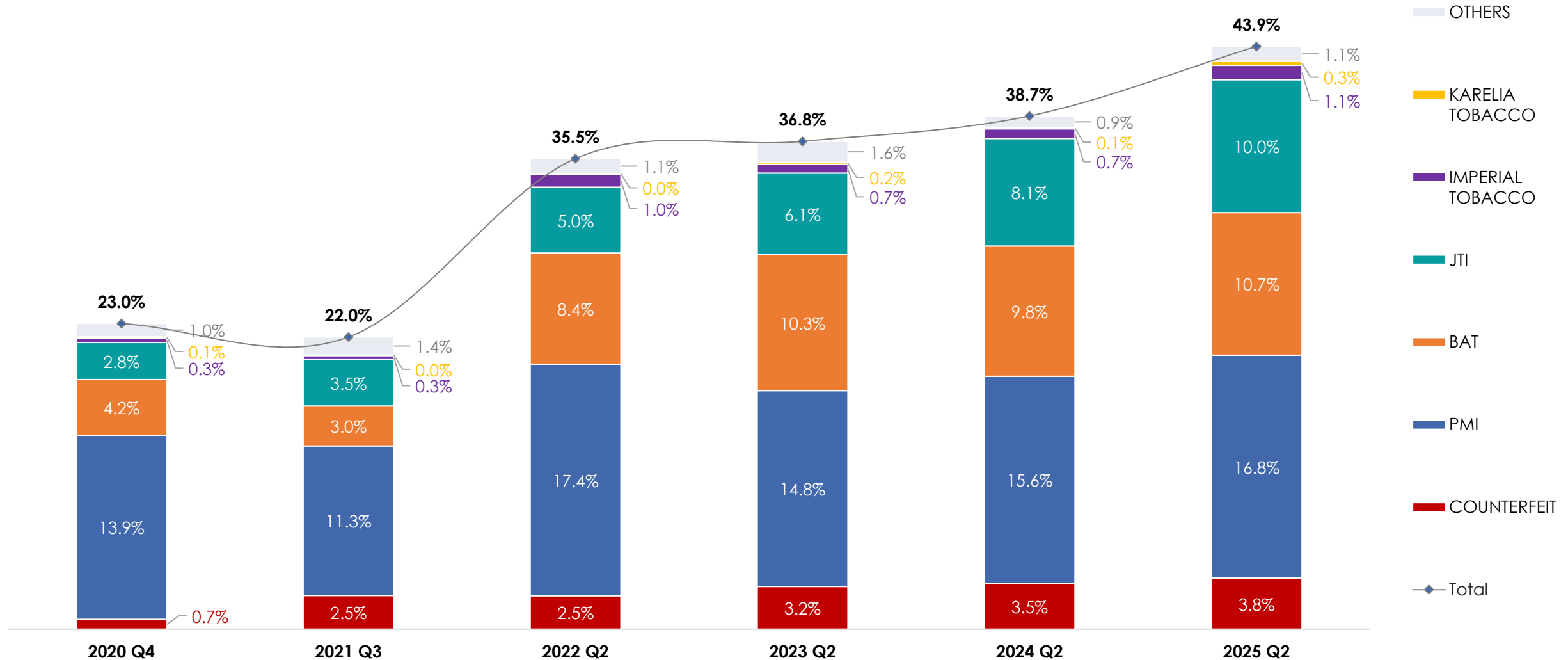
	MARLBORO (PMI)	WINSTON (JTI)	PRINCE (BAT)	KENT (BAT)	OTHERS	TOTAL	2024 Q2	2023 Q2
OSLO	0.9%	0.4%	0.3%	0.0%	—	1.6%	1.5%	1.2%
KRISTIANSAND	0.3%	0.1%	0.1%	0.0%	—	0.5%	0.2%	0.1%
BERGEN	0.3%	0.1%	0.1%	—	—	0.5%	0.5%	0.7%
TRONDHEIM	0.2%	0.1%	0.1%	—	—	0.4%	0.4%	0.5%
STAVANGER	0.1%	0.1%	0.1%	—	0.0%	0.3%	0.3%	0.3%
BAERUM	0.1%	0.1%	0.1%	—	—	0.2%	0.3%	0.1%
TROMSO	0.1%	—	0.1%	—	—	0.2%	0.1%	0.1%
FREDRIKSTAD	0.1%	—	0.1%	—	—	0.1%	0.1%	0.1%
TOTAL	2.0%	0.9%	0.8%	0.0%	0.0%	3.8%	3.5%	3.2%
2024 Q2	1.0%	1.0%	1.1%	—	0.3%	3.5%		
2023 Q2	1.1%	0.5%	1.6%	—	0.0%	3.2%		

NON-DOMESTIC: INCIDENCE TREND



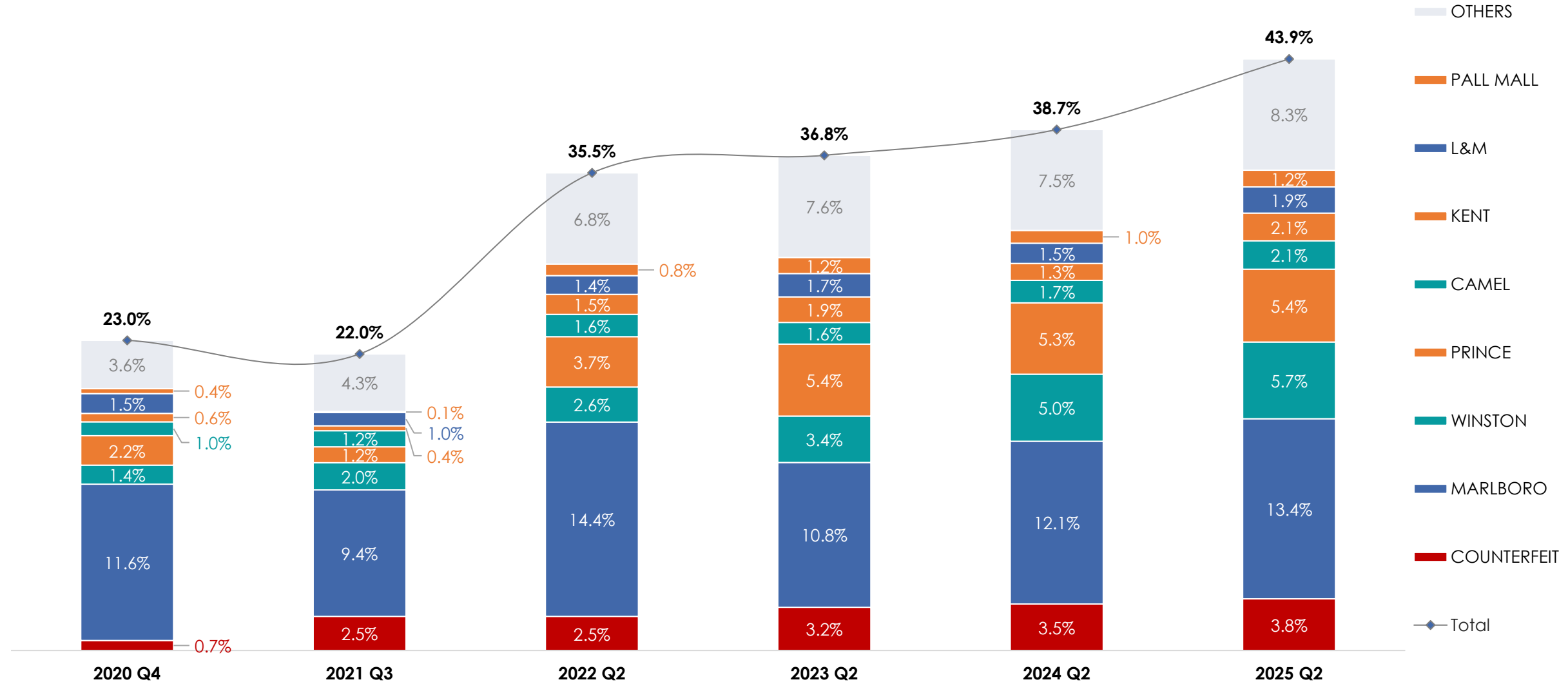
NON-DOMESTIC: COMPANY TREND

% OF TOTAL SAMPLE
Based on number of sticks



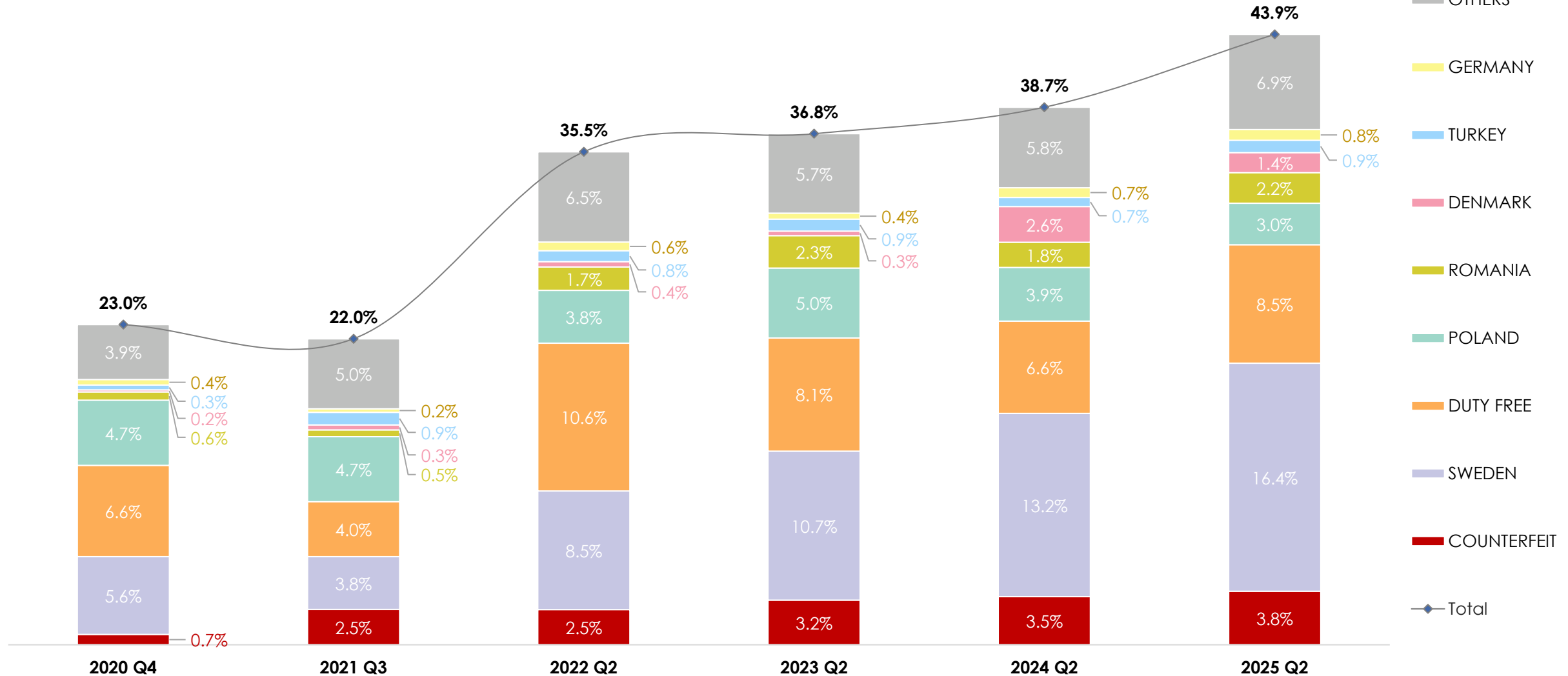
NON-DOMESTIC: BRAND FAMILY TREND

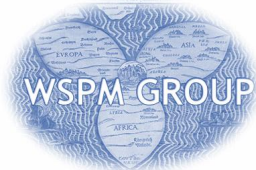
% OF TOTAL SAMPLE
Based on number of sticks



NON-DOMESTIC: MARKET VARIANT TREND

% OF TOTAL SAMPLE
Based on number of sticks





NON-DOMESTIC: CITY TREND

SAMPLE			NON-DOMESTIC INCIDENCE PER CITY						
CITY	PACKS	STICKS	2019 Q2	2020 Q4	2021 Q3	2022 Q2	2023 Q2	2024 Q2	2025 Q2
FREDRIKSTAD	240	4,874	38.8%	23.8%	23.1%	35.8%	37.0%	38.5%	64.5%
KRISTIANSAND	326	6,677	35.7%	16.2%	15.8%	39.3%	21.2%	30.1%	53.2%
OSLO	2,004	41,288	39.6%	27.2%	29.3%	34.7%	37.8%	40.0%	45.5%
TRONDHEIM	603	12,312	42.2%	20.5%	20.1%	35.7%	41.6%	37.0%	41.4%
BERGEN	822	16,947	38.0%	22.9%	13.9%	36.2%	39.0%	42.9%	40.6%
TROMSO	222	4,578	39.8%	15.6%	8.1%	34.8%	39.5%	52.4%	38.5%
BAERUM	369	7,675	33.2%	20.1%	19.8%	34.2%	30.5%	31.3%	37.1%
STAVANGER	414	8,485	32.2%	17.4%	19.5%	35.8%	36.5%	32.6%	36.0%
TOTAL	5,000	102,835	38.3%	23.0%	22.0%	35.5%	36.8%	38.7%	43.9%



04.

APPENDIX

QUARTER 2, 2025

TOTAL SAMPLE: DETAILS PER COMPANY

NUMBER OF STICKS PER CATEGORY AND COMPANY

IN % OF COMPANY TOTAL

					Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit
	24,776	17,275	2,105	44,156	56.1%	39.1%	—	4.8%
	16,331	11,049	870	28,249	57.8%	39.1%	—	3.1%
	4,355	10,296	974	15,626	27.9%	65.9%	—	6.2%
	12,107	1,116		13,223	91.6%	—	8.4%	—
	318			318	—	—	100.0%	—
OTHERS	121	1,141		1,262	9.6%	—	90.4%	—

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)	23,248	13,746	2,105	39,099	59.5%	35.2%	-	5.4%
PRINCE (BAT)	9,625	5,559	806	15,990	60.2%	34.8%	-	5.0%
PARAMOUNT (ITL)	12,107			12,107	100.0%	-	-	-
WINSTON (JTI)	5,844		974	6,818	-	85.7%	-	14.3%
CAMEL (JTI)	3,872	2,174		6,046	64.0%	36.0%	-	-
KENT (BAT)	3,207	2,114	44	5,365	59.8%	39.4%	-	0.8%
LUCKY STRIKE (BAT)	3,499	1,055		4,554	76.8%	23.2%	-	-
L&M (PMI)	1,308	1,993		3,301	39.6%	60.4%	-	-
LEVEL (JTI)	405	1,091		1,496	27.1%	72.9%	-	-
OTHERS	420	5,043	2,575	8,058	5.2%	62.6%	32.0%	0.2%

NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

NON-DOMESTIC INCIDENCE BY COMPANY – TREND

% OF TOTAL COMPANY SAMPLE

		PMI	BAT	JTI	IMPERIAL TOBACCO	OTHERS
Q2 2025	N (Sticks) 	44,156	28,249	15,626	13,223	1,580
	Packs 	2,178	1,393	773	577	79
	Non-Domestic	—	—	—	8.4%	92.3%
	Counterfeit	4.8%	3.1%	6.2%	—	—
	Genuine Non-Domestic	39.1%	39.1%	65.9%	—	—
	Non-Domestic	—	—	—	—	83.2%
	Counterfeit	2.5%	4.1%	7.5%	1.2%	—
	Genuine Non-Domestic	35.8%	31.6%	63.2%	6.5%	—
	Non-Domestic	—	—	—	—	78.9%
Q2 2023	Counterfeit	2.5%	4.9%	4.9%	0.2%	—
	Genuine Non-Domestic	33.2%	32.0%	60.3%	6.0%	—

OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	KARELIA	PLATINUM	APACHE
Company	KARELIA TOBACCO	PREMIUM TOBACCO	HEUPINK & BLOEMEN
Market variant	BULGARIA	UNSPECIFIED*	SWEDEN
			

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

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WSPM GROUP

THANK YOU