

WSPM GROUP

EMPTY PACKS SURVEY

BELGIUM Q2 2026

September 2026

CONTENTS

EMPTY PACK SURVEY RESULTS Q2 2026: BELGIUM



01. EXECUTIVE SUMMARY



02. METHODOLOGY



03. KEY RESULTS



04. APPENDIX

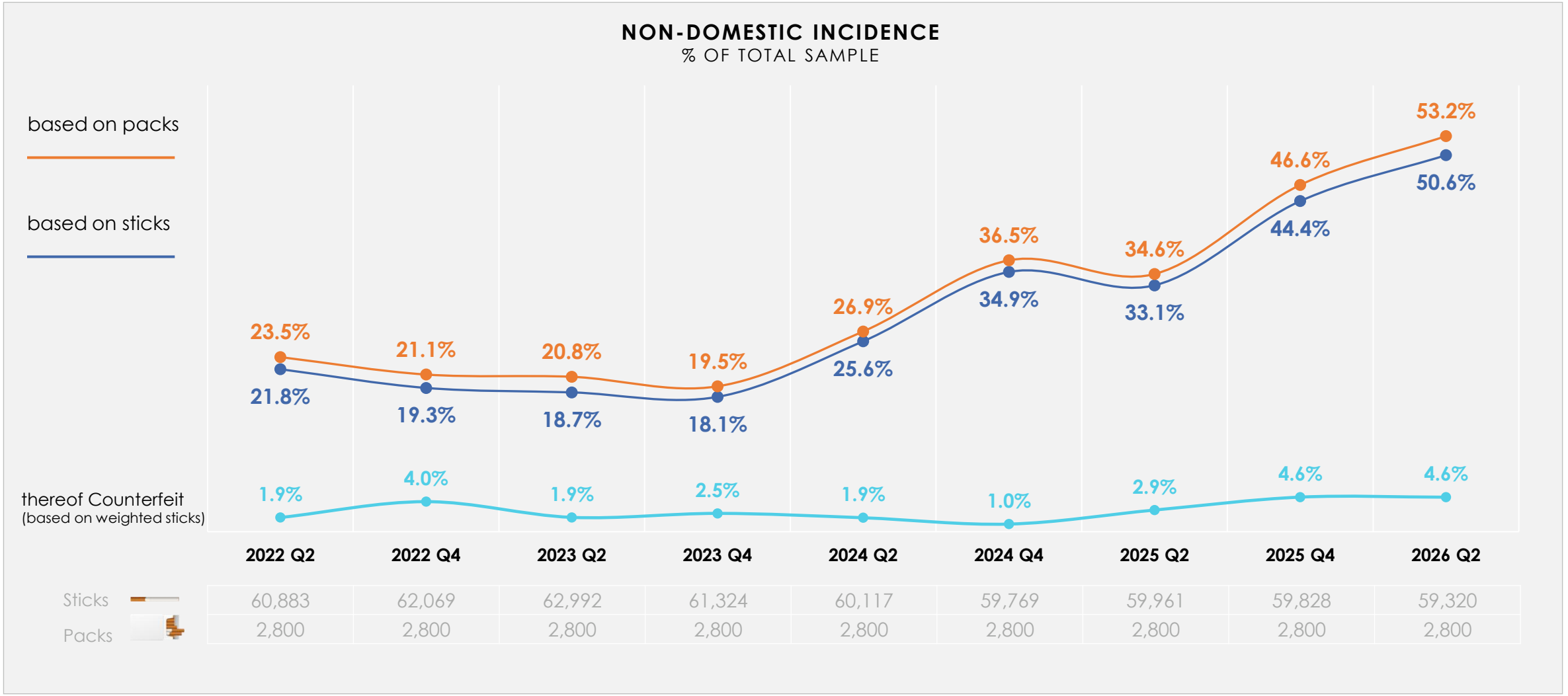


01.

EXECUTIVE SUMMARY

QUARTER 2, 2026

EXECUTIVE SUMMARY: NON-DOMESTIC TREND



	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4	2026 Q2
Sticks	60,883	62,069	62,992	61,324	60,117	59,769	59,961	59,828	59,320
Packs	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800

TOTAL SAMPLE = DOMESTIC AND NON-DOMESTIC PACKS

EXECUTIVE SUMMARY: KEY MESSAGES

Industry overview

- **Non-domestic incidence** increased to **50.6%** (vs 44.4% in Q4 2025, 33.1% in Q2 2025).
- **Counterfeit incidence** stable at **4.6%** (4.6%, 2.9%).
- **Main non-domestic brands** found were (excl. counterfeit):
  - **MARLBORO** (PMI) with **14.5%** of all packs collected (14.3%, 11.1%).
  - **OME** (KARELIA TOBACCO) with **10.7%** (4.8%, 4.4%).
  - **DAVIDOFF** (IMPERIAL TOBACCO) with **5.9%** (4.3%, 3.7%).
- **Main non-domestic market variants** found were (excl. counterfeit):
  - **BULGARIA** with **30.0%** of all packs collected (21.1%, 15.7%).
  - **LUXEMBOURG** with **5.3%** (6.3%, 5.1%).
  - **DUTY FREE** with **2.7%** (3.4%, 2.2%).
- **At city level**, the highest non-domestic incidence was found in **LEUVEN** at **61.7%** (52.7%, 35.8%), in **GENK** at **57.3%** (41.1%, 28.5%), and **CHARLEROI** at **54.8%** (42.1%, 38.7%).

EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks — Total: 59,320 sticks (2,800 packs).

	Q2 2026	Q4 2025	Q2 2025
NON-DOMESTIC INCIDENCE	**50.6%**	44.4%	33.1%
MAIN MARKET VARIANTS (excl. counterfeit)			
BULGARIA	**30.0%**	21.1%	15.7%
LUXEMBOURG	**5.3%**	6.3%	5.1%
DUTY FREE	**2.7%**	3.4%	2.2%
MAIN BRAND FAMILIES (excl. counterfeit)			
MARLBORO (PMI)	**14.5%**	14.3%	11.1%
OME (KARELIA TOBACCO)	**10.7%**	4.8%	4.4%
DAVIDOFF (IMPERIAL TOBACCO)	**5.9%**	4.3%	3.7%
MAIN CITIES (excl. counterfeit)			
LEUVEN	**61.7%**	52.7%	35.8%
GENK	**57.3%**	41.1%	28.5%
CHARLEROI	**54.8%**	42.1%	38.7%
COUNTERFEIT INCIDENCE			
TOTAL COUNTERFEIT INCIDENCE	**4.6%**	4.6%	2.9%
PMI	**2.4%**	3.8%	2.1%
JTI	**1.8%**	0.6%	0.6%
BAT	**0.2%**	0.1%	0.1%
IMPERIAL TOBACCO	**0.2%**	0.1%	0.1%

EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks — Total: 59,320 sticks (2,800 packs).

MAIN INFLOWS

	COUNTERFEIT	BULGARIA	LUXEMBOURG	DUTY FREE	TURKEY	ALBANIA	OTHERS	**Total**	2025 Q4	2025 Q2
MARLBORO (PMI)	2.3%	7.6%	1.6%	1.4%	0.8%	0.6%	2.4%	**16.8%**	16.8%	12.9%
OME (KARELIA TOBACCO)	—	10.1%	0.4%	0.2%	—	—	—	**10.7%**	4.8%	4.4%
DAVIDOFF (IMPERIAL TOBACCO)	0.0%	5.7%	—	0.1%	0.0%	—	0.1%	**6.0%**	4.3%	3.7%
WINSTON (JTI)	1.7%	0.1%	0.7%	0.1%	0.1%	0.3%	0.7%	**3.7%**	2.9%	1.9%
DUNHILL (BAT)	—	2.1%	—	0.0%	—	—	0.0%	**2.2%**	5.0%	1.3%
PARLIAMENT (PMI)	—	1.0%	—	0.0%	0.9%	—	0.1%	**2.1%**	2.0%	1.8%
OTHERS	0.6%	3.3%	2.5%	0.9%	0.1%	0.0%	1.6%	**9.2%**	8.7%	7.2%
Total	**4.6%**	**30.0%**	**5.3%**	**2.7%**	**2.1%**	**1.0%**	**5.0%**	**50.6%**	**44.4%**	**33.1%**

2025 Q4	4.6%	21.1%	6.3%	3.4%	3.5%	0.6%	4.8%	**44.4%**
2025 Q2	2.9%	15.7%	5.1%	2.2%	2.7%	0.4%	4.2%	**33.1%**



02.

METHODOLOGY

QUARTER 2, 2026

OBJECTIVES, PROVISIONS, LIMITATIONS

OBJECTIVES

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

- 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), Imperial Tobacco (ITL), 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

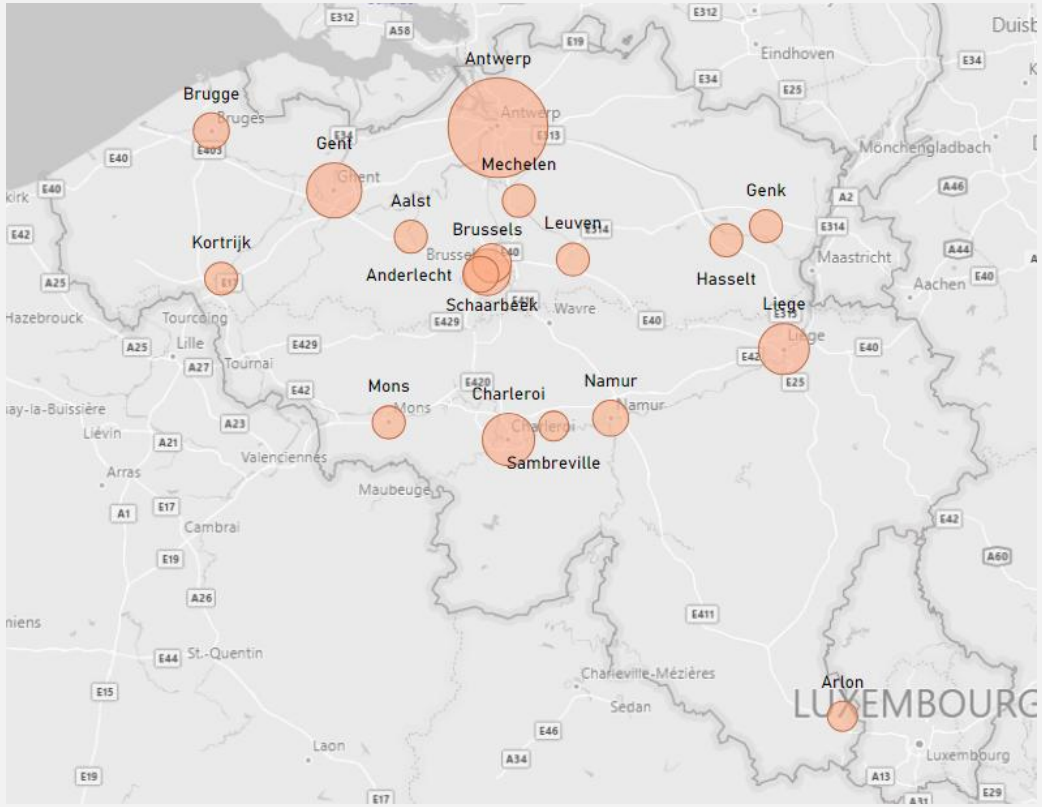
Fieldwork:
22 Apr – 19 May, 2026

REPORTING

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

GEOGRAPHY

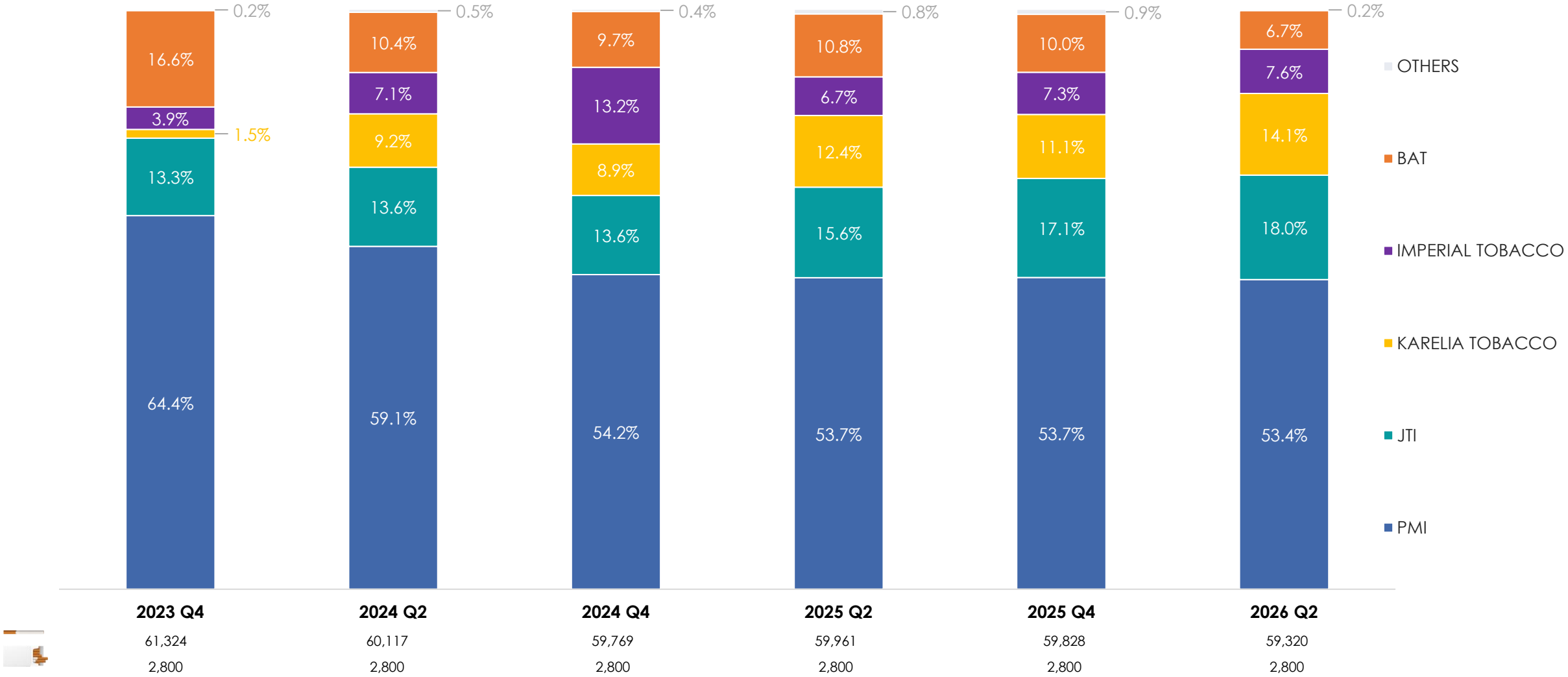
- The largest 18 cities
- 21.9% coverage of population



Region	Population Covered	Sample	Weighted Sample
Antwerp	507,911	550	586
Gent	248,813	250	287
Charleroi	203,753	230	235
Liege	195,931	220	226
Brussels	168,576	190	195
Schaarbeek	130,587	140	151
Brugge	117,577	120	136
Anderlecht	113,462	120	131
Namur	110,500	120	128
Leuven	97,692	100	113
Mons	93,941	100	108
Mechelen	82,602	100	95
Aalst	82,587	100	95
Kortrijk	75,120	100	87
Hasselt	75,579	100	87
Genk	65,224	100	75
Arlon	28,520	80	33
Sambreville	27,526	80	32
Total Sample	**2,425,901**	**2,800**	**2,800**

SAMPLE COMPOSITION: SHARE BY COMPANY

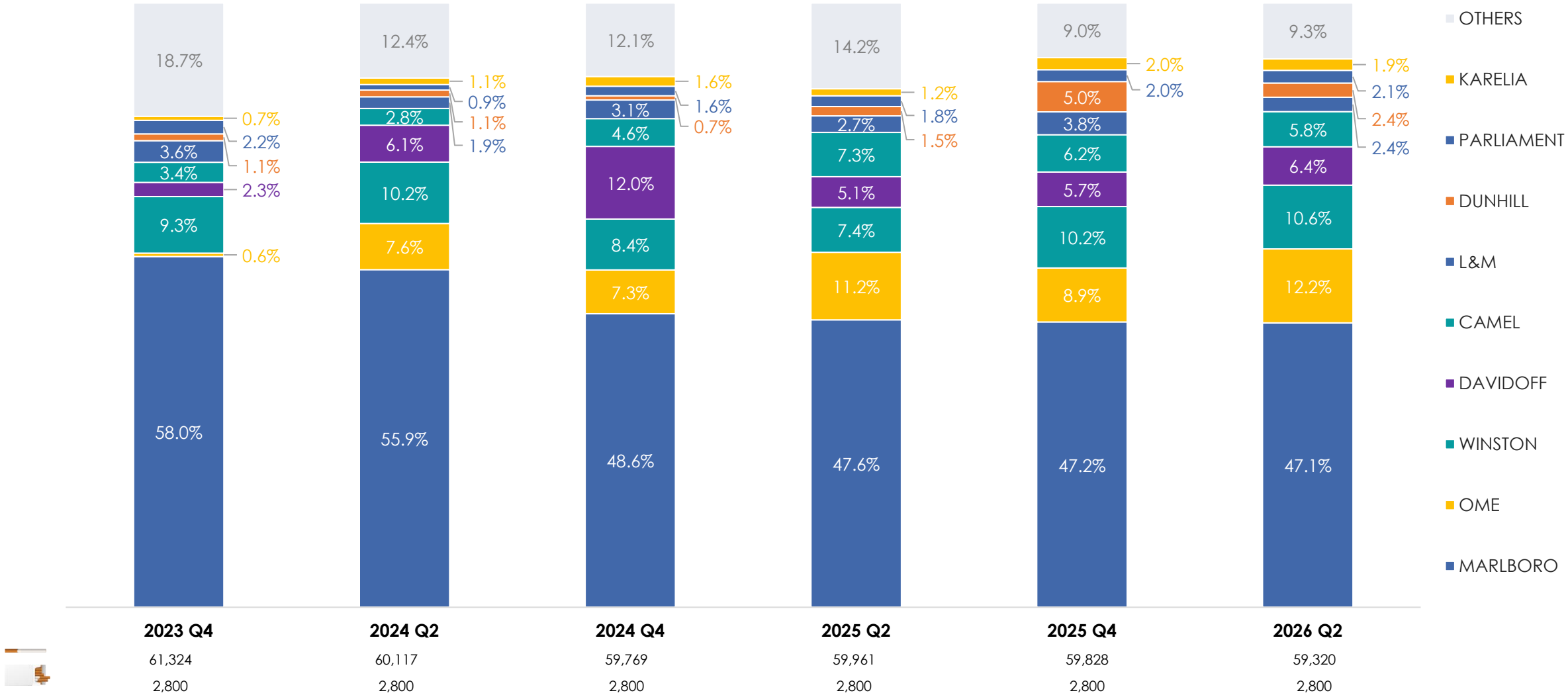
% OF TOTAL SAMPLE Based on number of sticks



	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4	2026 Q2
	61,324	60,117	59,769	59,961	59,828	59,320
	2,800	2,800	2,800	2,800	2,800	2,800

SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks



	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4	2026 Q2
	61,324	60,117	59,769	59,961	59,828	59,320
	2,800	2,800	2,800	2,800	2,800	2,800

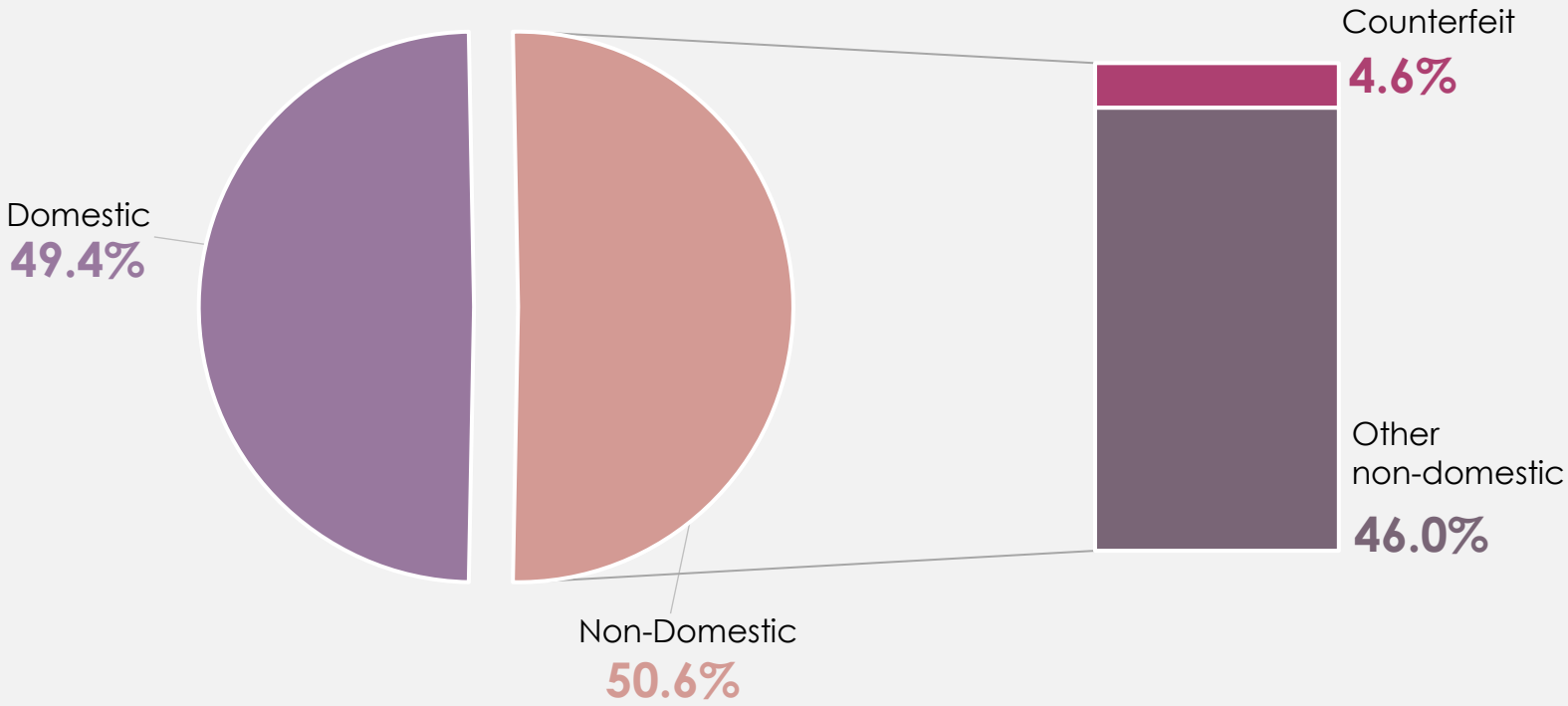


03.

KEY RESULTS

QUARTER 2, 2026

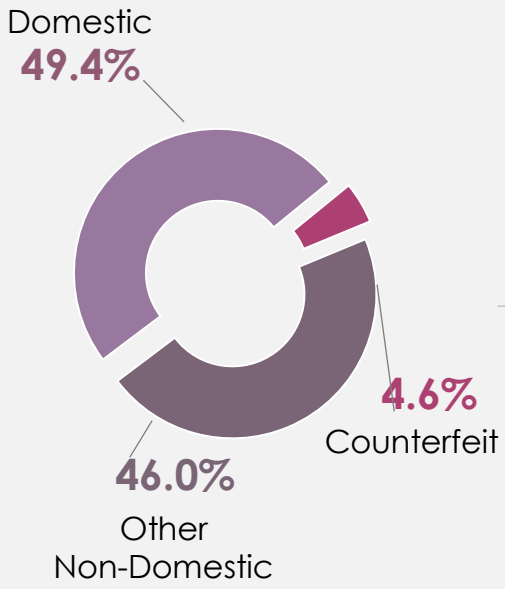
NON-DOMESTIC: CATEGORIES



Total: 59,320 sticks (2,800 packs).

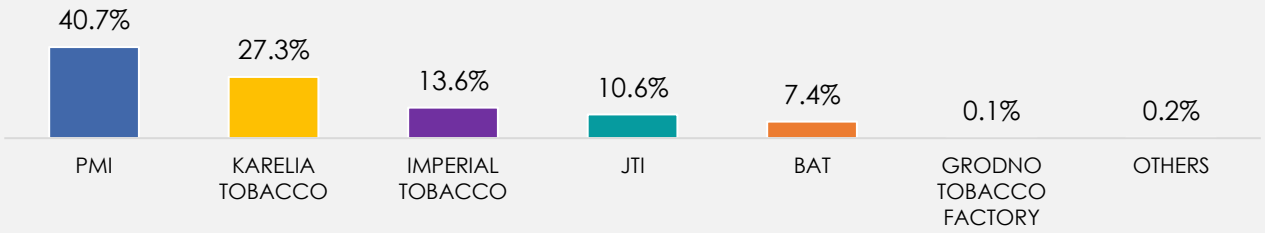
OTHER NON-DOMESTIC: BREAKDOWN

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE



Total: 27,269 sticks (1,351 packs)

SPLIT BY COMPANY % OF OTHER NON-DOMESTIC



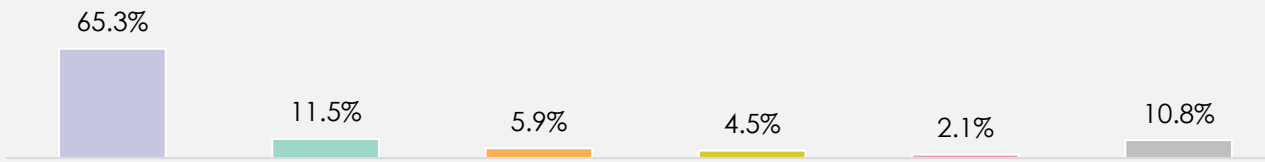
Others ▼ e.g.

LVIV TOBACCO FACTORY	0.1%
UNSPECIFIED TMOS	0.1%
KING'S TOBACCO	0.0%

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

MARLBORO	31.5%	OME	23.3%	DAVIDOFF	12.9%	WINSTON	4.4%	DUNHILL	4.7%	MINSK	0.1%
PARLIAMENT	4.6%	KARELIA	4.1%	GAULOISES	0.3%	SOBRANIE	3.2%	KENT	0.7%		
PHILIP MORRIS	3.3%			NEWS	0.2%	CAMEL	2.7%	VOGUE	0.6%		
L&M	1.0%			FORTUNA	0.1%	SILK CUT	0.1%	ROTHMANS	0.5%		
MERIT	0.1%			JOHN PLAYER SPECIAL	0.1%	STERLING	0.1%	PALL MALL	0.5%		

SPLIT BY MARKET VARIANT % OF OTHER NON-DOMESTIC SAMPLE



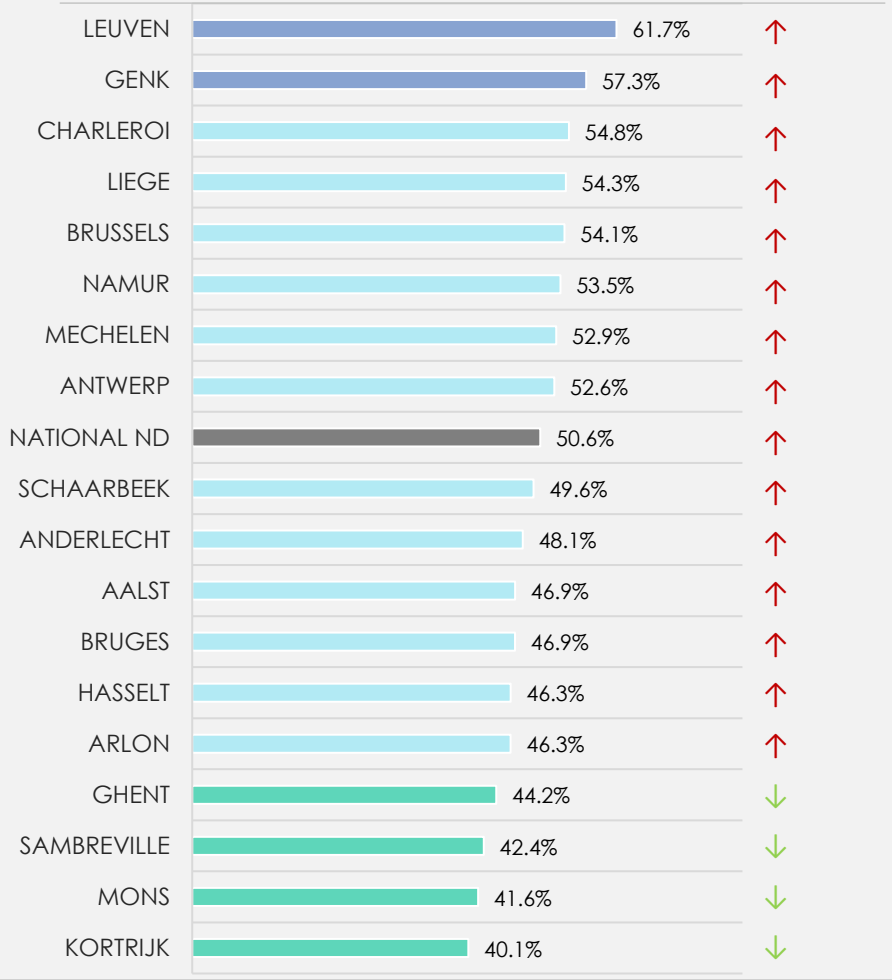
Main Others ▼ e.g.

MOROCCO	2.0%
CROATIA	1.1%
ROMANIA	0.9%
GERMANY	0.9%
ITALY	0.9%
GREECE	0.7%
POLAND	0.6%

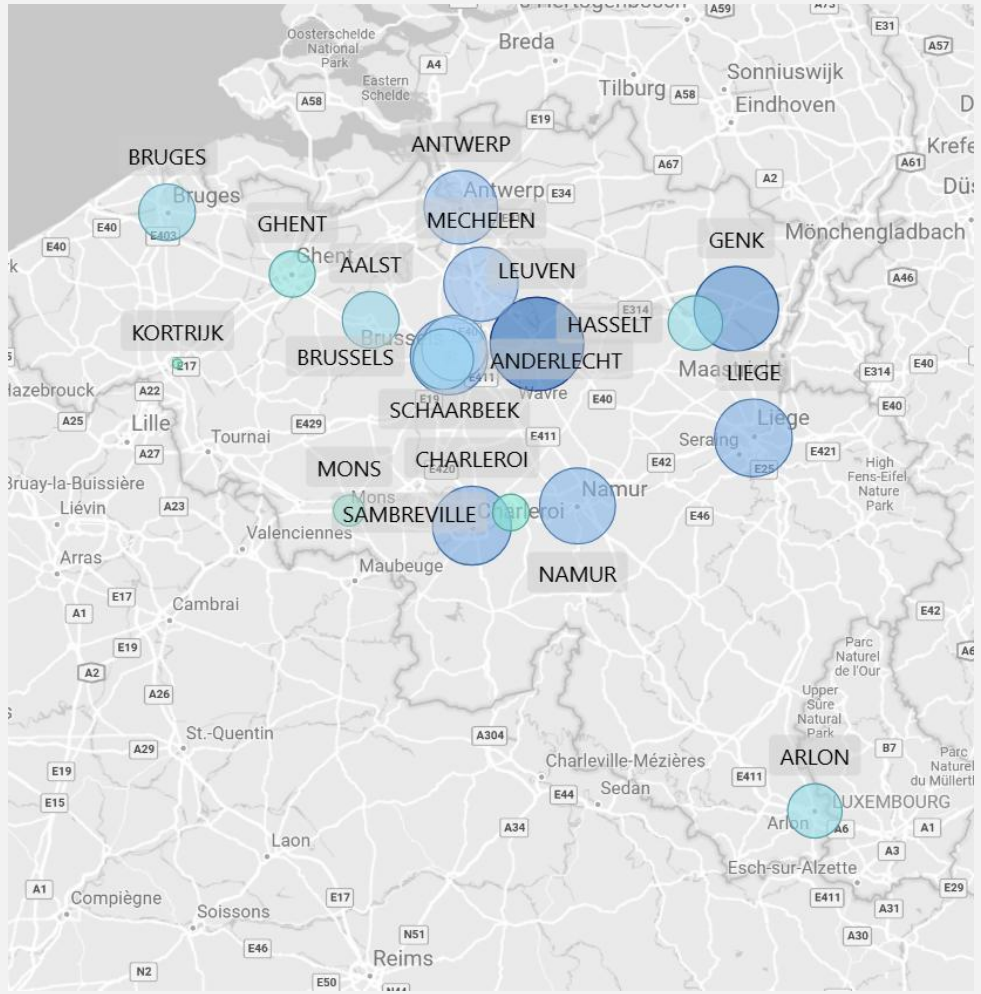
*Unspecified are cigarettes packs which are not bearing any specific market or Duty Free labeling.

NON-DOMESTIC: BY CITY

% OF CITY SAMPLE
Based on number of sticks



% OF CITY SAMPLE
Based on number of sticks



NON-DOMESTIC: BY MAIN BRAND FAMILY & CITY (TOP 10)

% OF TOTAL SAMPLE Based on number of sticks

Total: 59,320 sticks (2,800 packs).

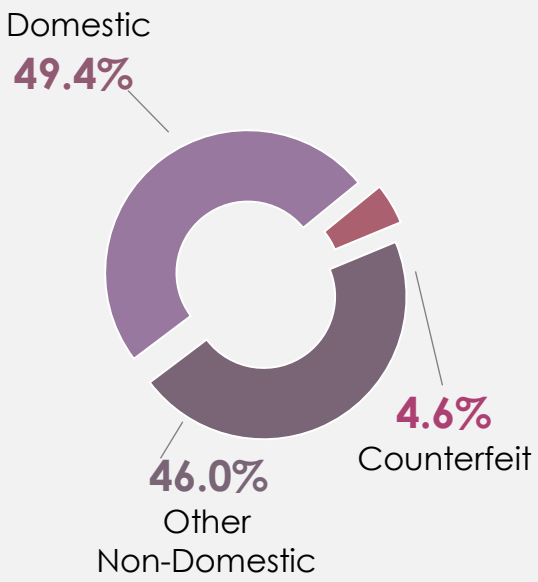
NON-DOMESTIC (TOP 10 CITIES)

	COUNTERFEIT	MARLBORO (PMI)	OME (KARELIA TOBACCO)	DAVIDOFF (IMPERIAL TOBACCO)	DUNHILL (BAT)	OTHERS	**TOTAL**	2025 Q4	2025 Q2
ANTWERP	1.0%	2.6%	2.1%	1.7%	0.9%	2.9%	**11.1%**	9.8%	6.5%
GHENT	0.3%	1.4%	1.6%	0.3%	0.1%	1.0%	**4.7%**	4.7%	3.3%
CHARLEROI	0.6%	1.2%	0.5%	0.6%	0.3%	1.1%	**4.3%**	3.4%	3.1%
LIEGE	0.3%	1.2%	0.5%	0.7%	0.1%	1.5%	**4.2%**	3.4%	2.2%
BRUSSELS	0.4%	1.5%	0.7%	0.3%	0.1%	1.0%	**4.0%**	3.5%	1.8%
SCHAARBEEK	0.1%	0.8%	0.8%	0.3%	0.1%	0.5%	**2.6%**	2.4%	2.2%
LEUVEN	0.5%	0.6%	0.0%	0.4%	—	0.9%	**2.5%**	2.0%	1.5%
NAMUR	0.1%	0.7%	0.7%	0.1%	0.1%	0.6%	**2.4%**	2.0%	1.5%
ANDERLECHT	0.4%	0.4%	1.0%	0.2%	0.0%	0.3%	**2.4%**	1.8%	1.8%
BRUGES	0.1%	0.7%	0.6%	0.1%	0.2%	0.4%	**2.2%**	2.1%	1.4%
OTHERS	0.9%	3.4%	2.2%	1.1%	0.3%	2.5%	**10.3%**	9.3%	7.9%
TOTAL	**4.6%**	**14.5%**	**10.7%**	**5.9%**	**2.2%**	**12.7%**	**50.6%**	**44.4%**	**33.1%**

2025 Q4	4.6%	14.3%	4.8%	4.3%	5.0%	11.4%	**44.4%**
2025 Q2	2.9%	11.1%	4.4%	3.7%	1.3%	9.8%	**33.1%**

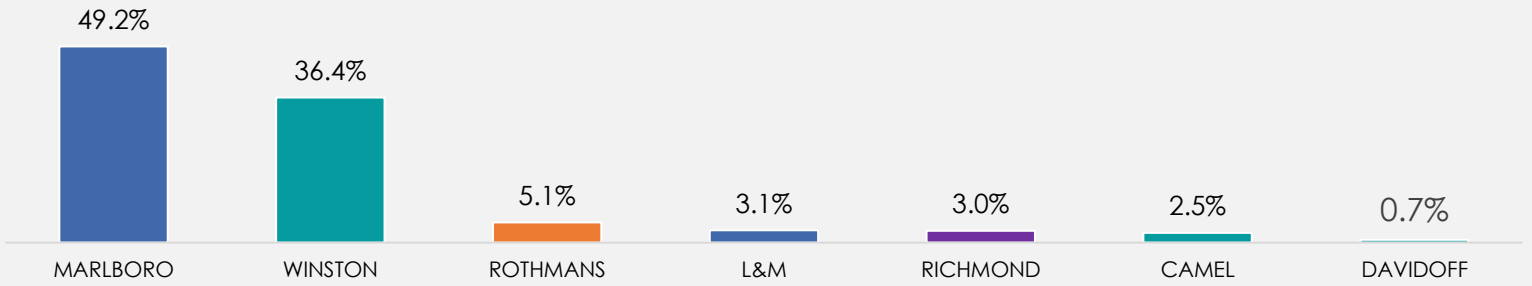
COUNTERFEIT: BREAKDOWN

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE

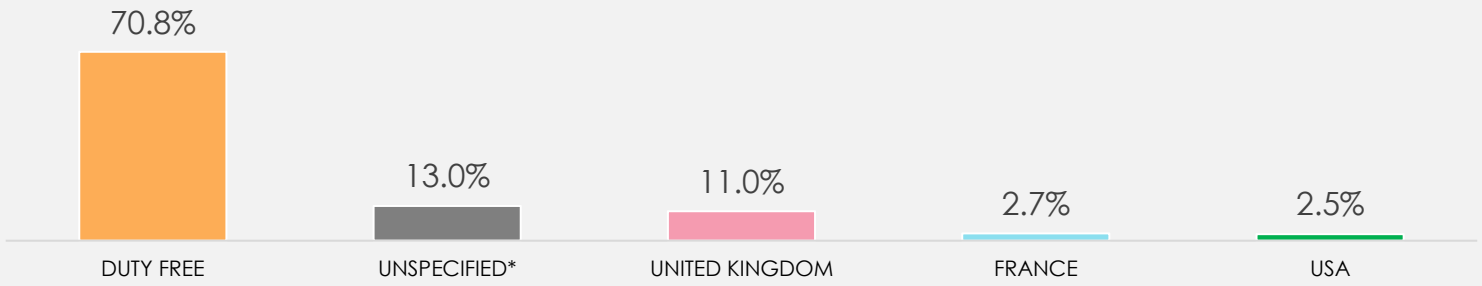


Total: 2,751 sticks (138 packs)

SPLIT BY MAIN BRAND
% OF COUNTERFEIT SAMPLE



SPLIT BY LABELLING (MARKET VARIANT)
% OF COUNTERFEIT SAMPLE



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

COUNTERFEIT: BY MAIN BRAND FAMILY & CITY (TOP 10)

% OF TOTAL SAMPLE Based on number of sticks

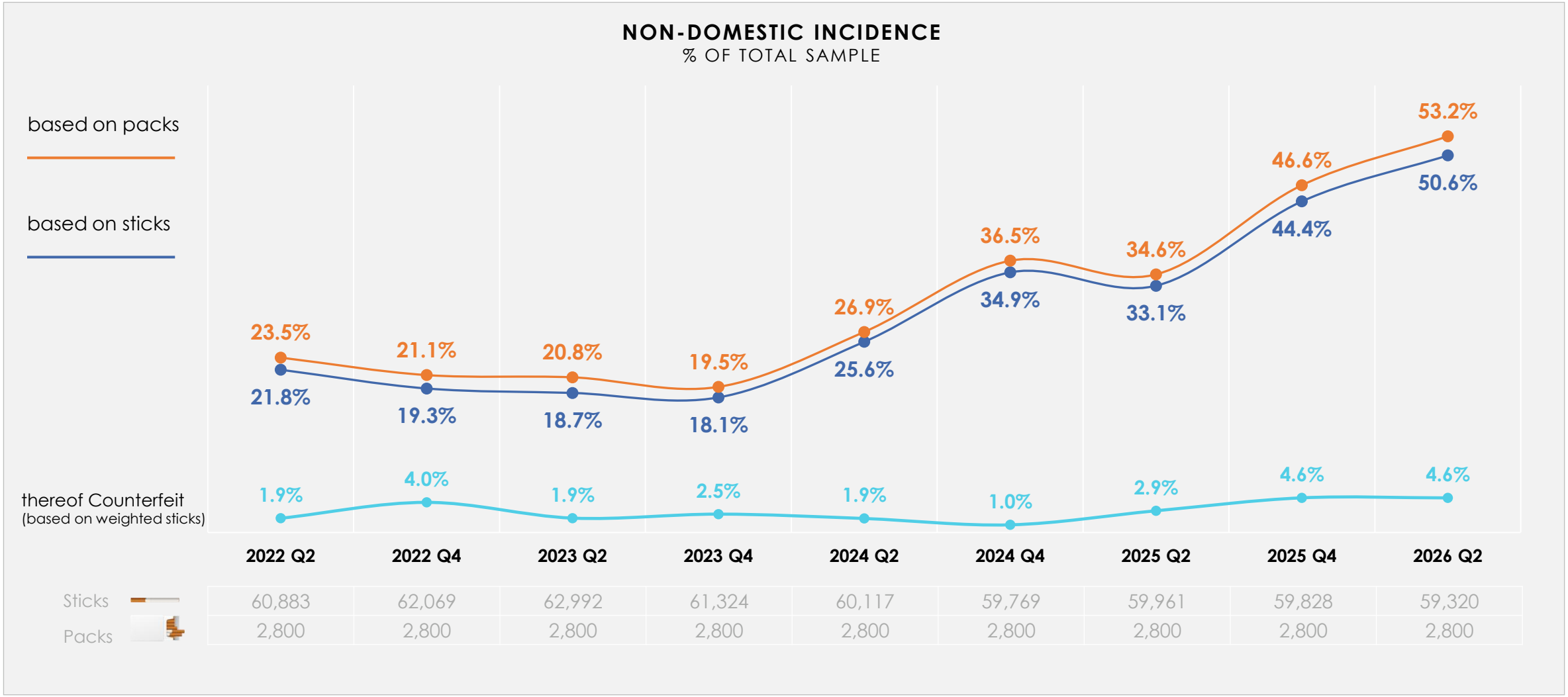
Total: 59,320 sticks (2,800 packs).

COUNTERFEIT (TOP 10 CITIES)

	MARLBORO (PMI)	WINSTON (JTI)	ROTHMANS (BAT)	L&M (PMI)	OTHERS	**TOTAL**	2025 Q4	2025 Q2
ANTWERP	0.4%	0.4%	0.0%	—	0.1%	**1.0%**	1.2%	0.4%
CHARLEROI	0.2%	0.3%	0.1%	0.0%	—	**0.6%**	0.3%	0.3%
LEUVEN	0.3%	0.2%	—	—	—	**0.5%**	0.3%	0.0%
ANDERLECHT	0.1%	0.2%	0.0%	0.0%	0.0%	**0.4%**	0.2%	0.2%
BRUSSELS	0.2%	0.1%	0.0%	—	—	**0.4%**	0.3%	0.1%
LIEGE	0.1%	0.1%	0.0%	0.0%	0.1%	**0.3%**	0.3%	0.1%
GHENT	0.2%	0.1%	—	0.0%	0.0%	**0.3%**	0.4%	0.4%
GENK	0.2%	0.0%	0.0%	—	—	**0.2%**	0.2%	0.1%
MECHELEN	0.1%	0.1%	—	—	0.0%	**0.2%**	0.1%	—
NAMUR	0.1%	0.1%	—	—	—	**0.1%**	0.3%	0.2%
OTHERS	0.5%	0.1%	0.0%	-0	-0	**0.6%**	1.0%	1.2%
TOTAL	**2.3%**	**1.7%**	**0.2%**	**0.1%**	**0.3%**	**4.6%**	**4.6%**	**2.9%**

2025 Q4	2.5%	0.6%	0.1%	1.3%	0.1%	**4.6%**
2025 Q2	1.9%	0.6%	0.1%	0.3%	0.1%	**2.9%**

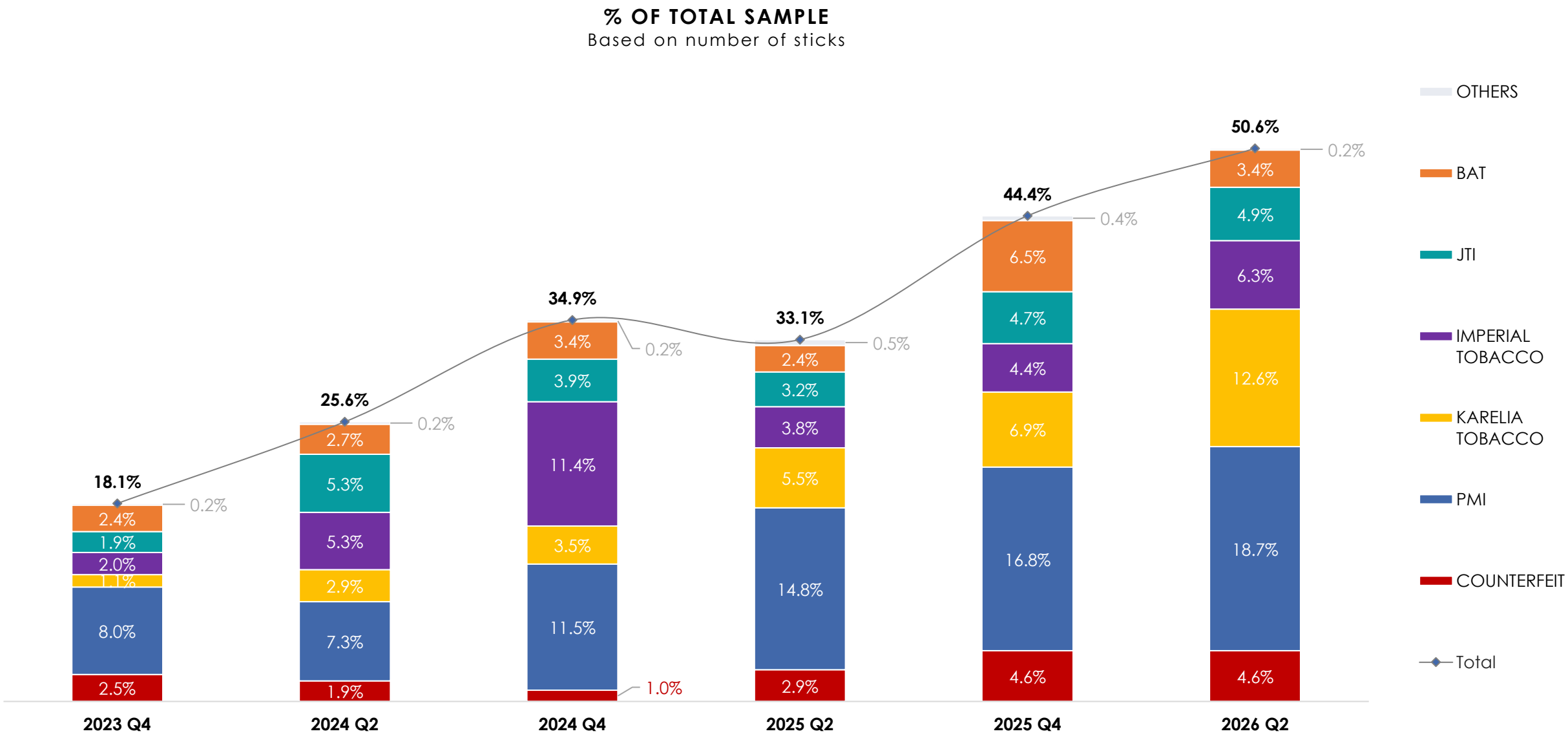
NON-DOMESTIC: INCIDENCE TREND



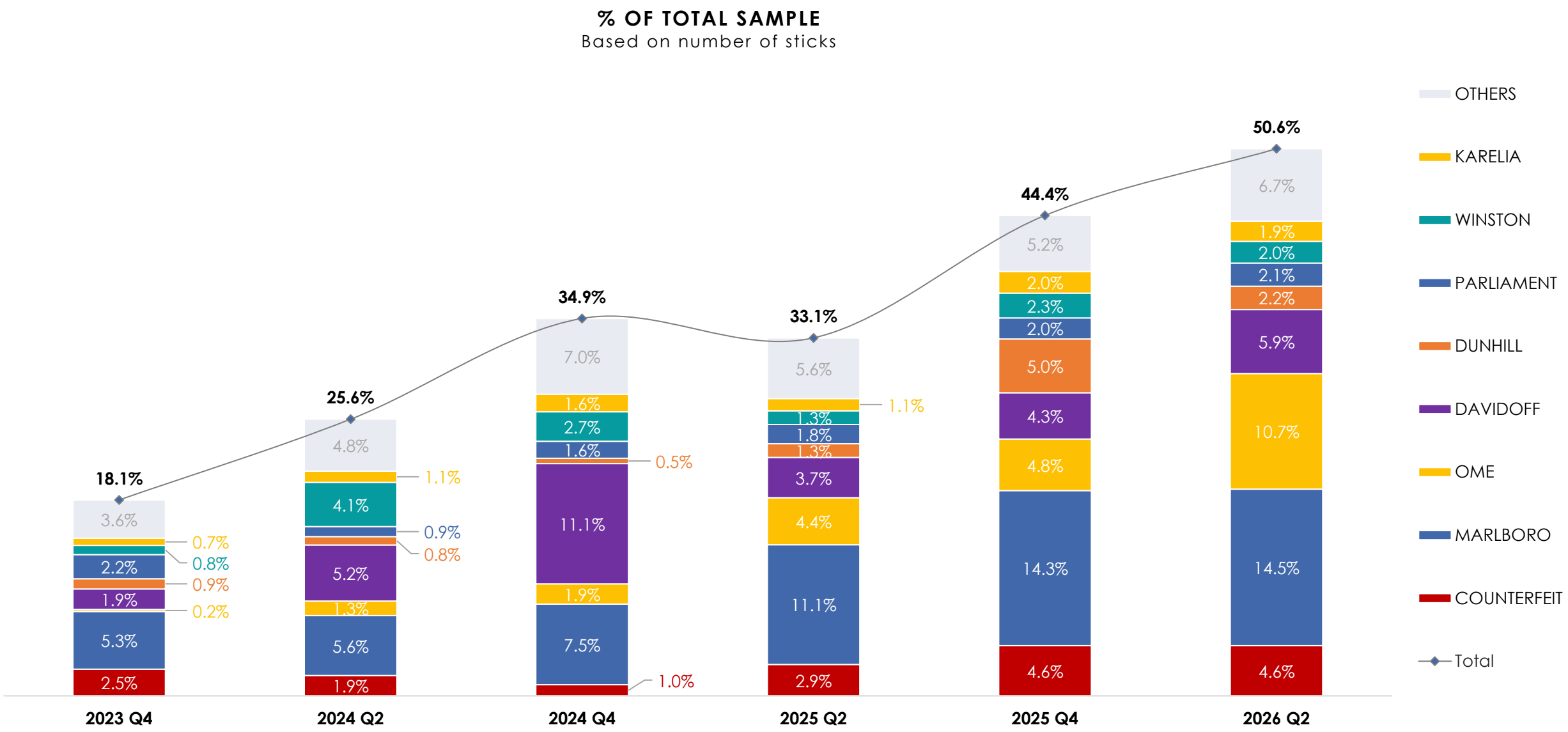
	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4	2026 Q2
Sticks	60,883	62,069	62,992	61,324	60,117	59,769	59,961	59,828	59,320
Packs	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800

TOTAL SAMPLE = DOMESTIC AND NON-DOMESTIC PACKS

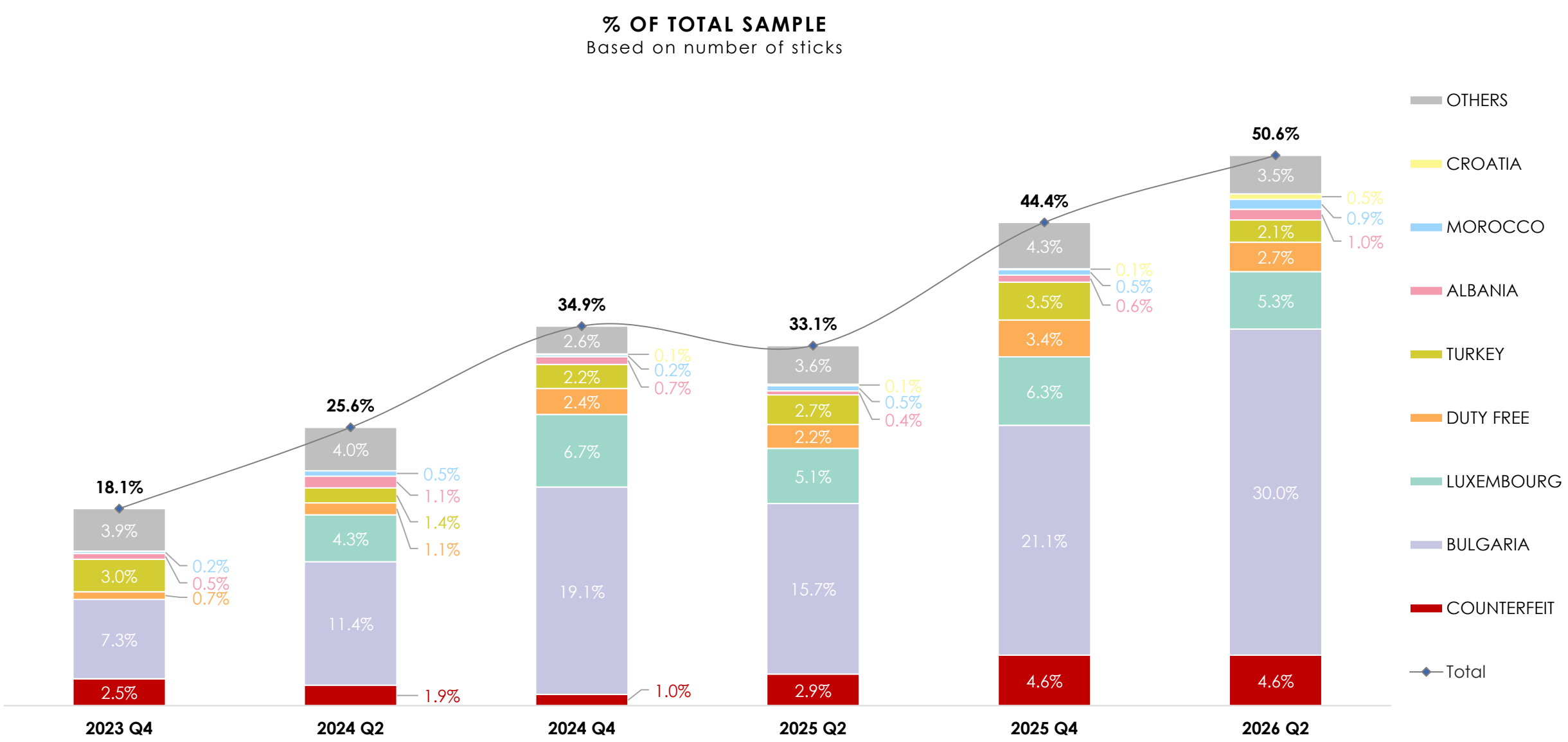
NON-DOMESTIC: COMPANY TREND



NON-DOMESTIC: BRAND FAMILY TREND



NON-DOMESTIC: MARKET VARIANT TREND



NON-DOMESTIC: CITY TREND

CITY	PACKS	STICKS	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4	2026 Q2
LEUVEN	113	2,368	26.3%	24.7%	25.2%	35.9%	35.8%	52.7%	**61.7%**
GENK	74	1,505	18.1%	5.5%	22.2%	43.4%	28.5%	41.1%	**57.3%**
CHARLEROI	225	4,652	23.6%	10.8%	27.5%	32.2%	38.7%	42.1%	**54.8%**
LIEGE	217	4,592	19.6%	22.5%	26.1%	39.1%	28.1%	44.2%	**54.3%**
BRUSSELS	209	4,395	20.6%	11.4%	28.2%	31.1%	22.7%	47.6%	**54.1%**
NAMUR	125	2,643	20.8%	19.8%	34.2%	44.4%	34.8%	43.2%	**53.5%**
MECHELEN	96	2,060	18.0%	21.7%	25.2%	48.9%	31.7%	41.3%	**52.9%**
ANTWERP	589	12,463	17.8%	17.6%	22.0%	30.2%	31.2%	46.9%	**52.6%**
SCHAARBEEK	145	3,052	24.8%	24.6%	25.9%	28.6%	43.4%	46.1%	**49.6%**
ANDERLECHT	136	2,922	11.6%	18.6%	21.3%	40.3%	37.8%	37.3%	**48.1%**
AALST	99	2,099	18.0%	13.3%	25.0%	29.0%	34.7%	38.9%	**46.9%**
BRUGES	131	2,766	15.2%	10.8%	21.7%	27.2%	28.7%	44.3%	**46.9%**
HASSELT	88	1,848	15.9%	21.1%	23.4%	38.2%	41.1%	43.0%	**46.3%**
ARLON	34	720	13.8%	25.9%	29.2%	26.3%	44.5%	44.6%	**46.3%**
GHENT	294	6,345	13.6%	23.9%	26.3%	37.4%	31.6%	44.7%	**44.2%**
SAMBREVILLE	31	721	28.2%	17.9%	34.4%	41.8%	43.1%	42.4%	**42.4%**
MONS	107	2,318	19.1%	20.9%	33.8%	41.9%	42.6%	41.6%	**41.6%**
KORTRIJK	86	1,851	20.6%	18.2%	26.8%	36.6%	29.2%	45.0%	**40.1%**
TOTAL SAMPLE	**2,800**	**59,320**	**18.7%**	**18.1%**	**25.6%**	**34.9%**	**33.1%**	**44.4%**	**50.6%**



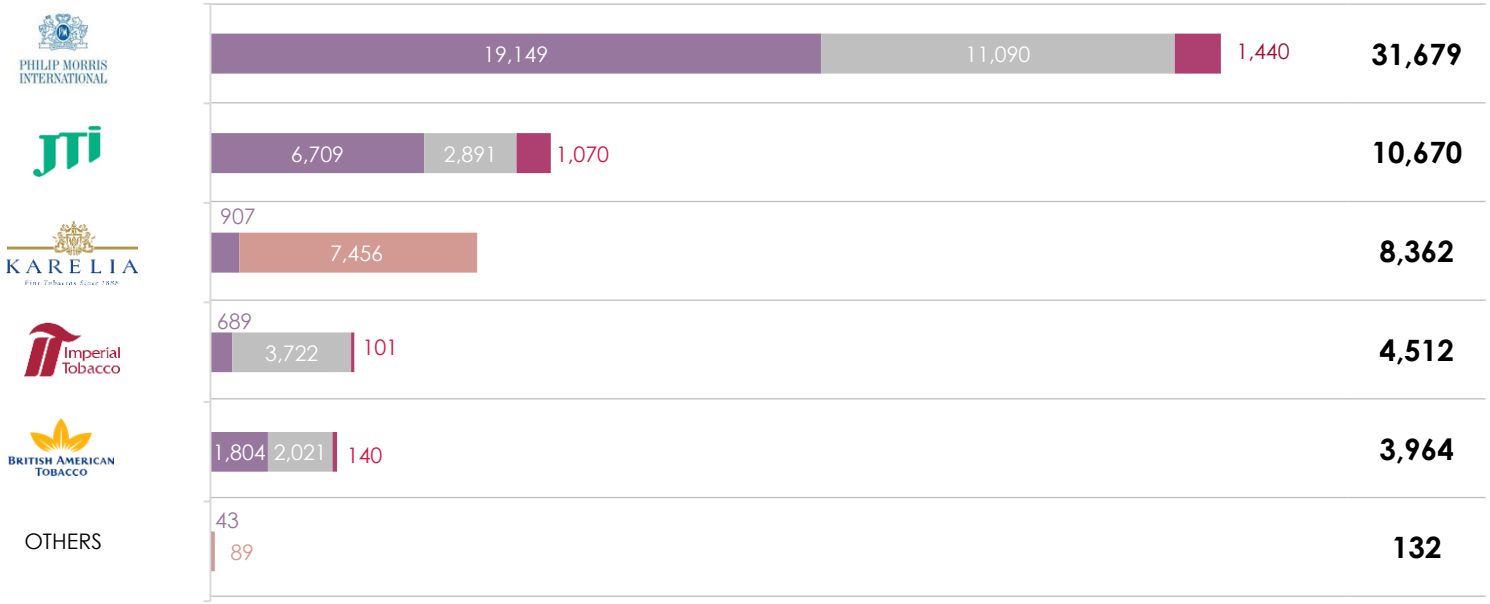
04.

APPENDIX

QUARTER 2, 2026

TOTAL SAMPLE: DETAILS PER COMPANY

NUMBER OF STICKS PER CATEGORY AND COMPANY

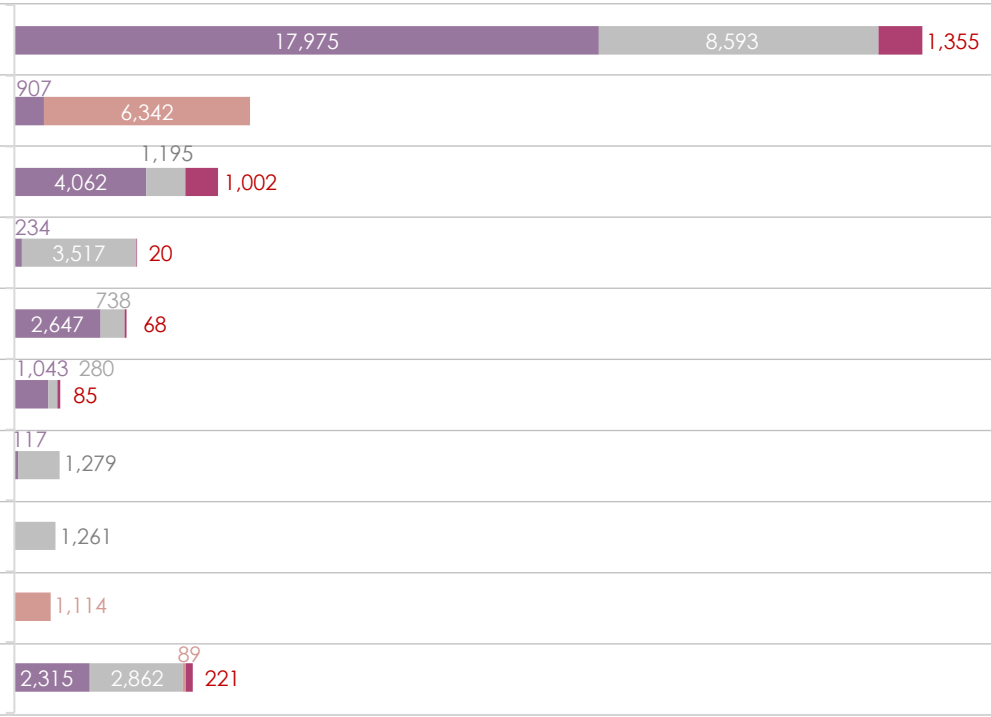


IN % OF COMPANY TOTAL

	Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit
PHILIP MORRIS INTERNATIONAL	60.4%	35.0%	—	4.5%
JTI	62.9%	27.1%	—	10.0%
KARELIA	10.8%	—	89.2%	—
Imperial Tobacco	15.3%	82.5%	—	2.2%
BRITISH AMERICAN TOBACCO	45.5%	51.0%	—	3.5%
OTHERS	32.4%	—	67.6%	—

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)	27,923	64.4%	30.8%	—	4.9%
OME (KARELIA TOBACCO)	7,249	12.5%	—	87.5%	—
WINSTON (JTI)	6,258	64.9%	19.1%	—	16.0%
DAVIDOFF (ITL)	3,771	6.2%	93.3%	—	0.5%
CAMEL (JTI)	3,453	76.7%	21.4%	—	2.0%
L&M (PMI)	1,408	74.1%	19.9%	—	6.1%
DUNHILL (BAT)	1,396	8.4%	91.6%	—	—
PARLIAMENT (PMI)	1,261	—	100.0%	—	—
KARELIA (KARELIA TOBACCO)	1,114	—	—	100.0%	—
OTHERS	5,488	42.2%	52.1%	1.6%	4.0%

NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

NON-DOMESTIC INCIDENCE BY COMPANY – TREND

% OF TOTAL COMPANY SAMPLE

		PMI	JTI	KARELIA TOBACCO	IMPERIAL TOBACCO	OTHERS
	N (Sticks)	31,679	10,670	8,362	4,512	4,096
	Packs	1,484	478	418	221	199
2026 Q2	Non-Domestic	—	—	89.2%	—	2.2%
	Counterfeit	4.5%	10.0%	—	2.2%	3.4%
	Genuine non-domestic	35.0%	27.1%	—	82.5%	49.3%
2025 Q4	Non-Domestic	—	—	62.2%	—	4.0%
	Counterfeit	7.0%	3.7%	—	2.0%	0.7%
	Genuine non-domestic	31.3%	27.8%	—	60.9%	60.0%
2025 Q2	Non-Domestic	—	—	44.4%	—	4.7%
	Counterfeit	4.0%	3.8%	—	1.1%	0.9%
	Genuine non-domestic	27.6%	20.4%	—	56.6%	20.7%

OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	KARELIA	MINSK	MARVEL
Company	KARELIA TOBACCO	GRODNO TOBACCO FACTORY	LVIV TOBACCO FACTORY
Market variant	BULGARIA	BELARUS	UNSPECIFIED*







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

AGENCY CONTACTS



Head of BI

Tomer Touati

Tomer.Touati@wspm.org

+1-917-250-3056



Survey Project Manager

Yaki Hepstein

Yaki.Hepstein@wspm.org

+357-22-030-084



COO

Tami Vansower

Tami.Vansower@wspm.org

+357-22-030-084



CEO

Daniel Touati

Daniel.Touati@wspm.org

+357-22-030-084



WSPM GROUP

THANK YOU