

WSPM GROUP

EMPTY PACKS SURVEY

BELGIUM Q4 2025

February 2026

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EMPTY PACK SURVEY RESULTS Q4 2025: BELGIUM



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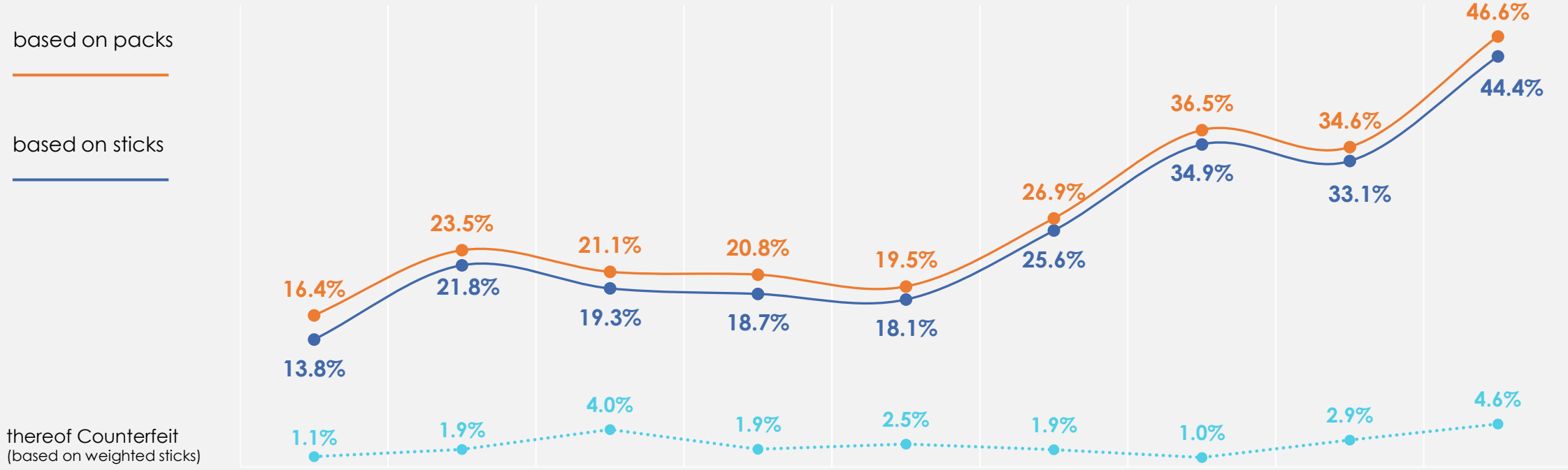


01.

EXECUTIVE SUMMARY

QUARTER 4, 2025

EXECUTIVE SUMMARY: NON-DOMESTIC TREND



	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
Sticks	71,439	60,883	62,069	62,992	61,324	60,117	59,769	59,961	59,828
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 **44.4%** (vs 33.1% in Q2 2025, 34.9% in Q4 2024).
- **Counterfeit incidence** increased to **4.6%** (2.9%, 1.0%).
- **Main non-domestic brands** found were (excl. counterfeit):
  - **MARLBORO** (PMI) with **14.3%** of all packs collected (11.1%, 7.5%).
  - **DUNHILL** (BAT) with **5.0%** (1.3%, 0.5%).
  - **OME** (KARELIA TOBACCO) with **4.8%** (4.4%, 1.9%).
- **Main non-domestic market variants** found were (excl. counterfeit):
  - **BULGARIA** with **21.1%** of all packs collected (15.7%, 19.1%).
  - **LUXEMBOURG** with **6.3%** (5.1%, 6.7%).
  - **TURKEY** with **3.5%** (2.7%, 2.2%).
- **At city level,** the highest non-domestic incidence was found in **LEUVEN** at **52.7%** (35.8%, 35.9%), in **BRUSSELS** at **47.6%** (22.7%, 31.1%), and **ANTWERP** at **46.9%** (31.2%, 30.2%).

EXECUTIVE SUMMARY: KEY VARIANCES

% OF TOTAL SAMPLE Based on number of sticks — Total: 59,828 sticks (2,800 packs).

	Q4 2025	Q2 2025	Q4 2024
NON-DOMESTIC INCIDENCE	**44.4%**	33.1%	34.9%
MAIN MARKET VARIANTS (excl. counterfeit)			
BULGARIA	**21.1%**	15.7%	19.1%
LUXEMBOURG	**6.3%**	5.1%	6.7%
TURKEY	**3.5%**	2.7%	2.2%
MAIN BRAND FAMILIES (excl. counterfeit)			
MARLBORO (PMI)	**14.3%**	11.1%	7.5%
DUNHILL (BAT)	**5.0%**	1.3%	0.5%
OME (KARELIA TOBACCO)	**4.8%**	4.4%	1.9%
MAIN CITIES (excl. counterfeit)			
LEUVEN	**52.7%**	35.8%	35.9%
BRUSSELS	**47.6%**	22.7%	31.1%
ANTWERP	**46.9%**	31.2%	30.2%
COUNTERFEIT INCIDENCE			
TOTAL COUNTERFEIT INCIDENCE	**4.6%**	2.9%	1.0%
PMI	**3.8%**	2.1%	0.7%
JTI	**0.6%**	0.6%	0.0%
IMPERIAL TOBACCO	**0.1%**	0.1%	0.1%
BAT	**0.1%**	0.1%	0.1%

EXECUTIVE SUMMARY: INFLOW MATRIX

% OF TOTAL SAMPLE Based on number of sticks

Total: 59,828 sticks (2,800 packs).

MAIN INFLOWS

	COUNTERFEIT	BULGARIA	LUXEMBOURG	TURKEY	DUTY FREE	POLAND	OTHERS	**Total**	2025 Q2	2024 Q4
MARLBORO (PMI)	2.5%	4.6%	3.6%	1.5%	2.0%	0.0%	2.5%	**16.8%**	12.9%	8.2%
DUNHILL (BAT)	—	5.0%	—	—	—	—	—	**5.0%**	1.3%	0.5%
OME (KARELIA TOBACCO)	—	3.9%	0.6%	—	0.2%	—	0.0%	**4.8%**	4.4%	1.9%
DAVIDOFF (ITL)	—	3.8%	—	—	0.1%	—	0.3%	**4.3%**	3.7%	11.1%
WINSTON (JTI)	0.6%	0.1%	0.7%	0.1%	0.2%	0.7%	0.4%	**2.9%**	1.9%	2.8%
KARELIA (KARELIA TOBACCO)	—	1.6%	0.1%	—	0.3%	—	0.1%	**2.0%**	1.1%	1.6%
OTHERS	1.5%	2.1%	1.3%	1.8%	0.5%	0.1%	1.2%	**8.7%**	7.8%	8.8%
Total	**4.6%**	**21.1%**	**6.3%**	**3.5%**	**3.4%**	**0.9%**	**4.6%**	**44.4%**	**33.1%**	**34.9%**

2025 Q2	2.9%	15.7%	5.1%	2.7%	2.2%	0.3%	4.2%	**33.1%**
2024 Q4	1.0%	19.1%	6.7%	2.2%	2.4%	0.3%	3.2%	**34.9%**



02.

METHODOLOGY

QUARTER 4, 2025

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

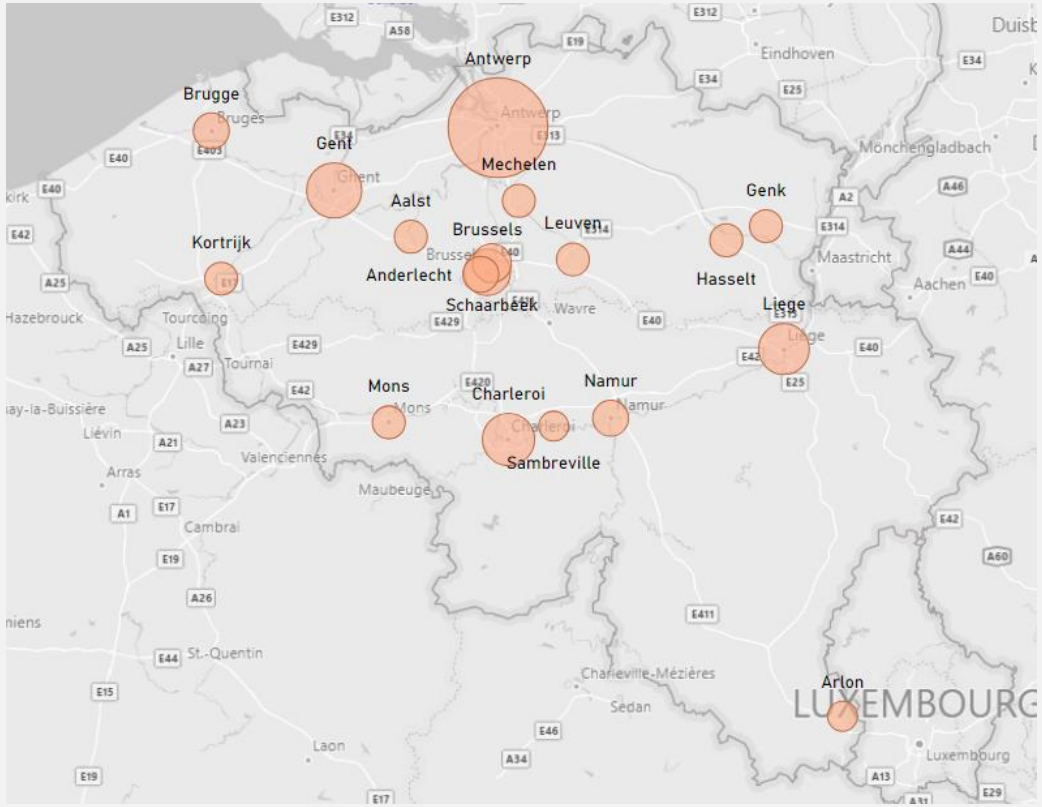
Fieldwork:
28 Oct – 18 Nov, 2025

REPORTING

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

GEOGRAPHY

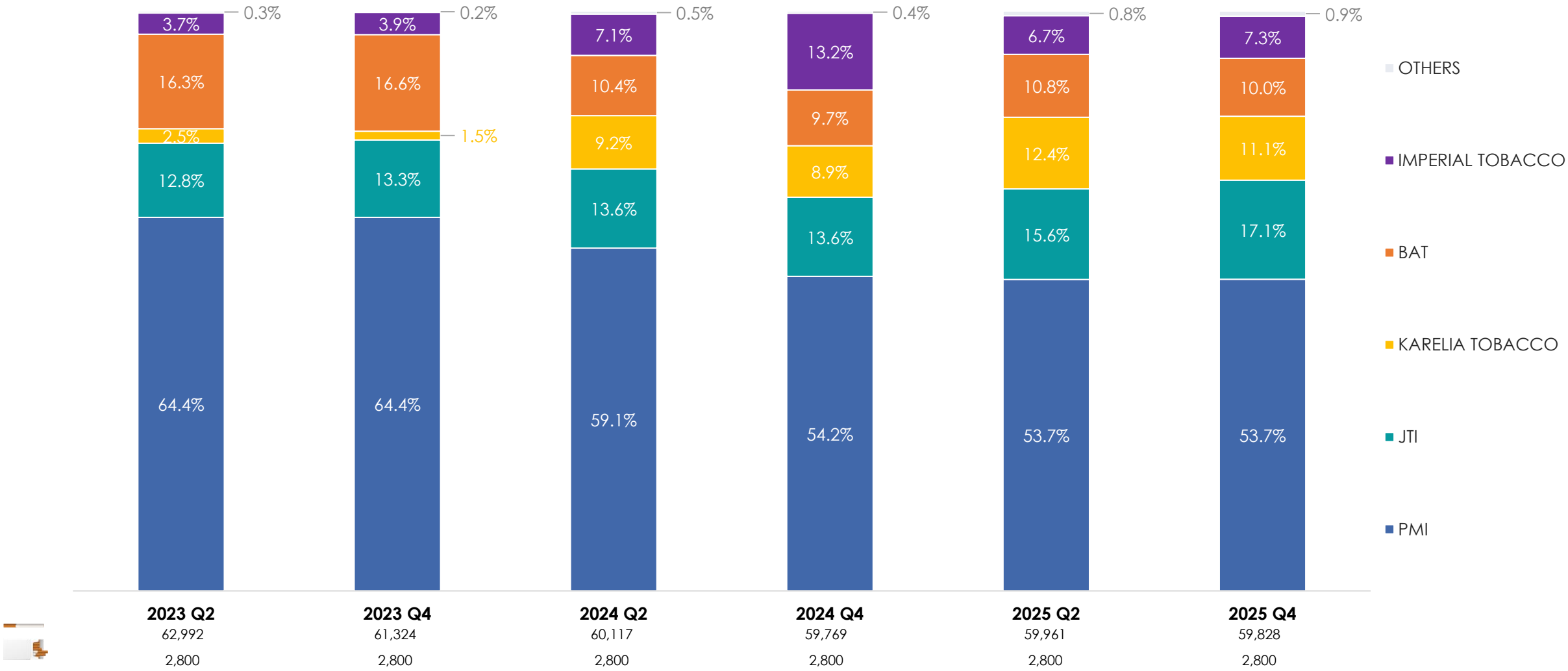
- The largest 18 cities
- 21.9% coverage of population



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**

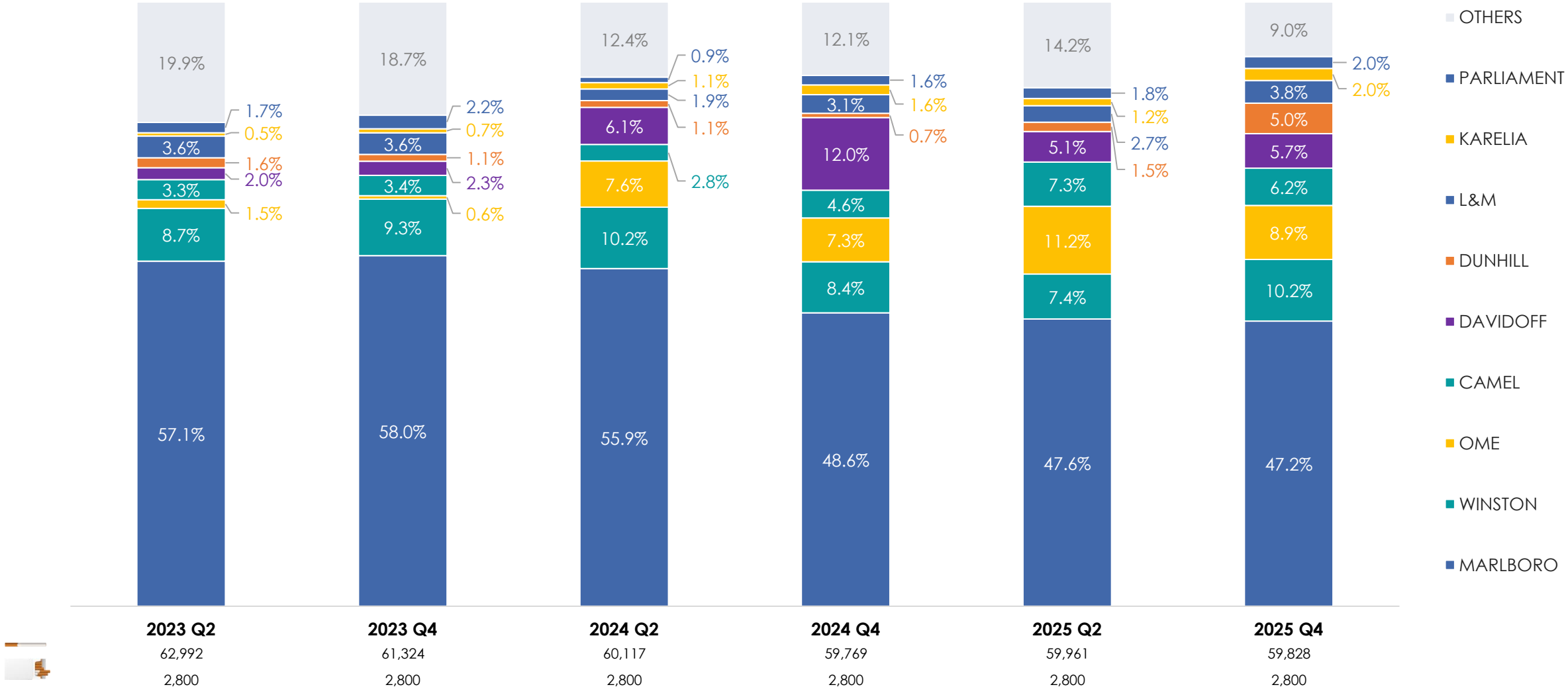
SAMPLE COMPOSITION: SHARE BY COMPANY

% OF TOTAL SAMPLE Based on number of sticks



SAMPLE COMPOSITION: SHARE BY BRAND

% OF TOTAL SAMPLE Based on number of sticks



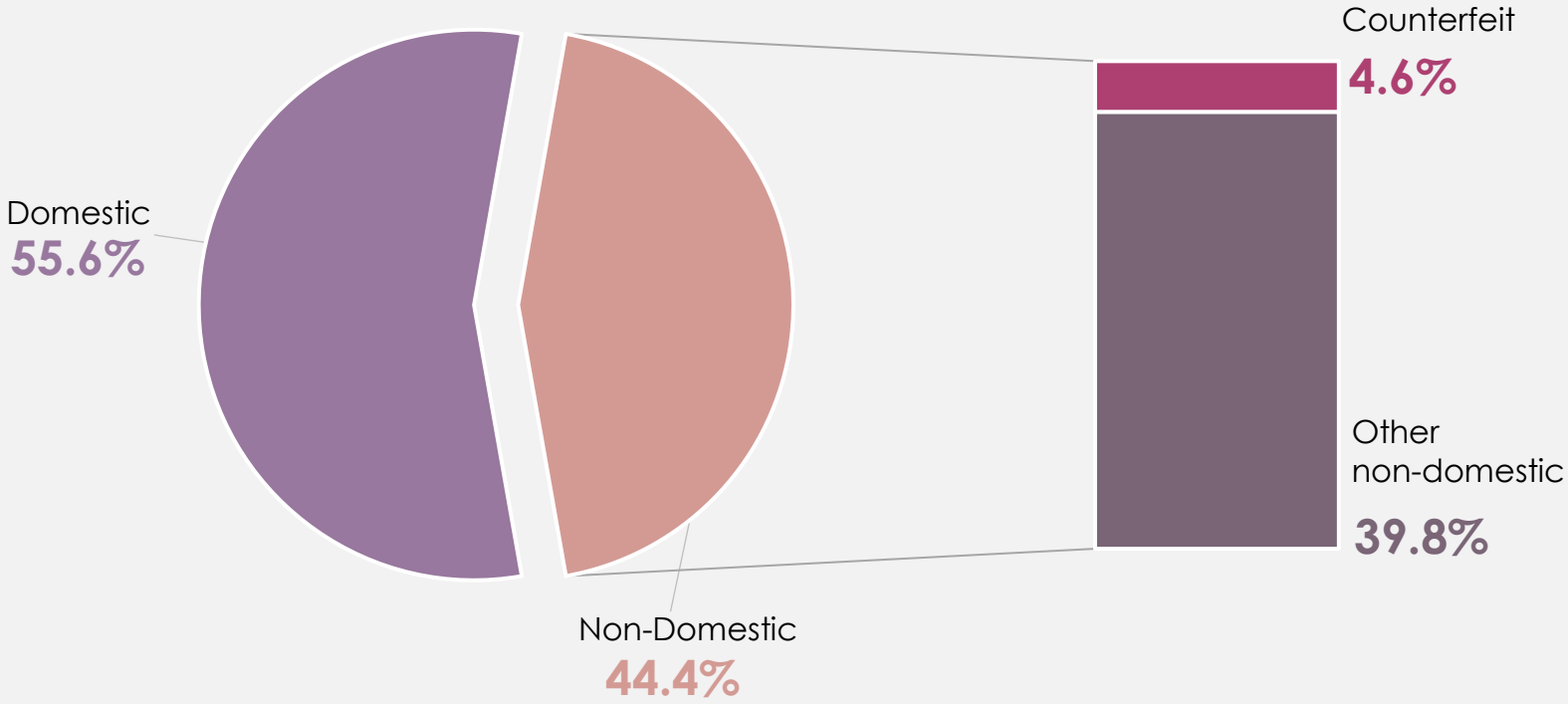


03.

KEY RESULTS

QUARTER 4, 2025

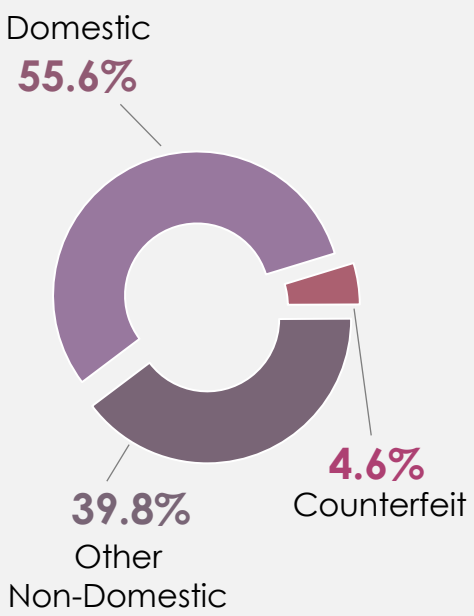
NON-DOMESTIC: CATEGORIES



Total: 59,828 sticks (2,800 packs).

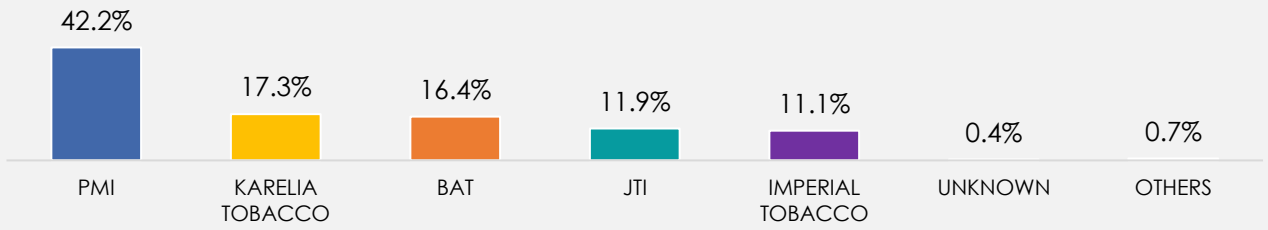
OTHER NON-DOMESTIC: BREAKDOWN

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE



Total: 23,809 sticks (1,166 packs)

SPLIT BY COMPANY % OF OTHER NON-DOMESTIC



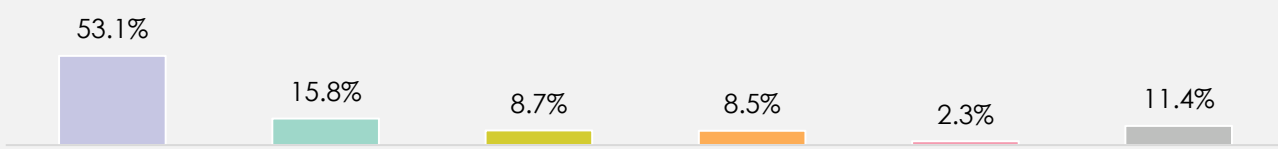
Others ▼ e.g.

R.J. REYNOLDS (BAT)	0.4%
KING TOBACCO	0.2%
INTL. MASIS TABAK	0.1%
SHANGHAI TOBACCO	0.1%
GRODNO TOBACCO FACTORY	0.0%

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

MARLBORO	36.0%	OME	12.0%	DUNHILL	12.5%	WINSTON	5.7%	DAVIDOFF	10.7%	AMERICAN EAGLE	0.4%
PARLIAMENT	4.9%	KARELIA	5.0%	ROTHMANS	1.9%	CAMEL	4.4%	NOBEL	0.1%		
L&M	0.6%	GEORGE KARELIA&SONS	0.3%	PALL MALL	1.1%	SOBRANIE	1.8%	NEWS	0.1%		
PHILIP MORRIS	0.5%			KENT	0.4%			GAULOISES	0.1%		
MURATTI	0.2%			VOGUE	0.3%			JPS	0.1%		

SPLIT BY MARKET VARIANT % OF OTHER NON-DOMESTIC SAMPLE

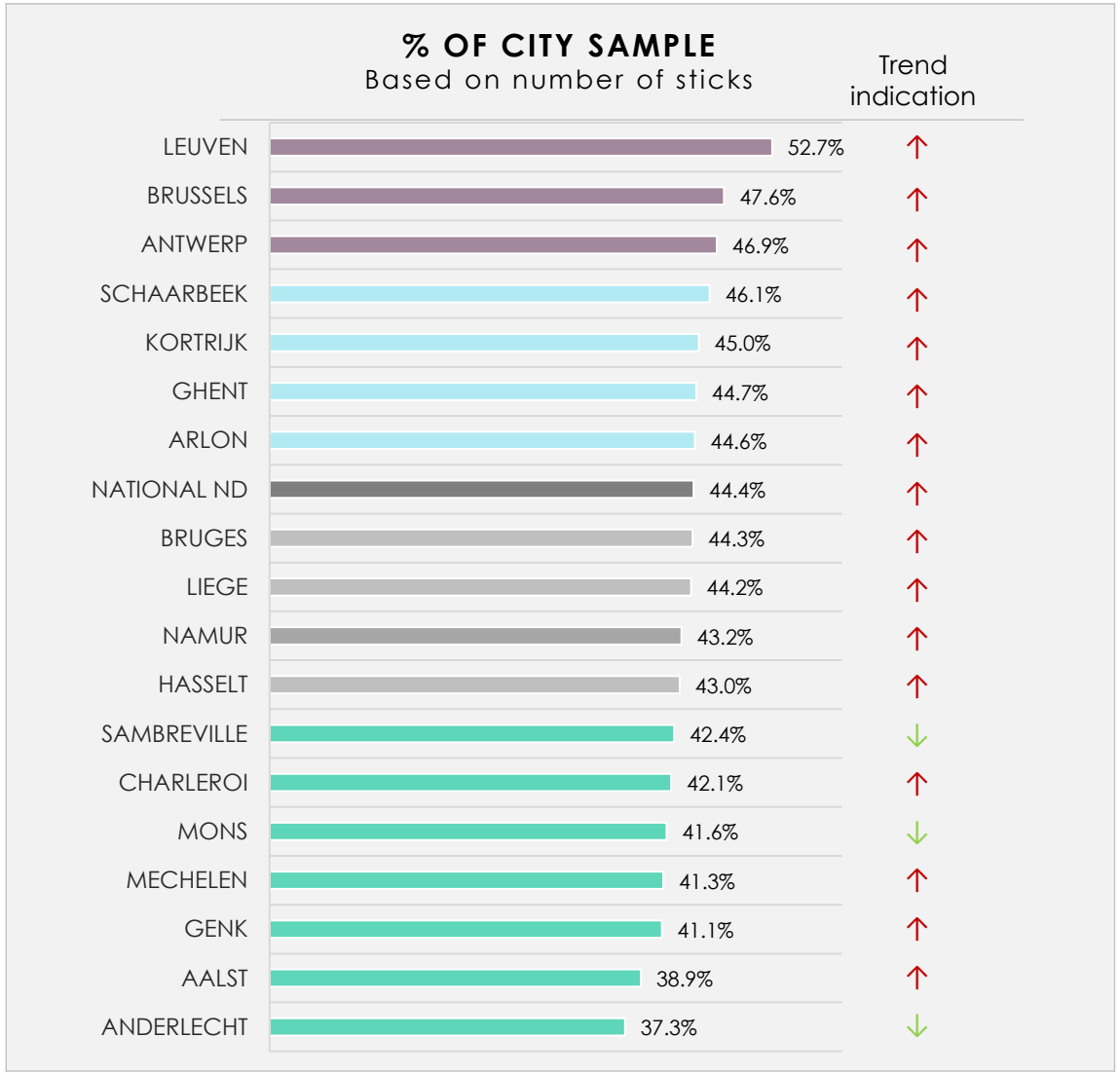


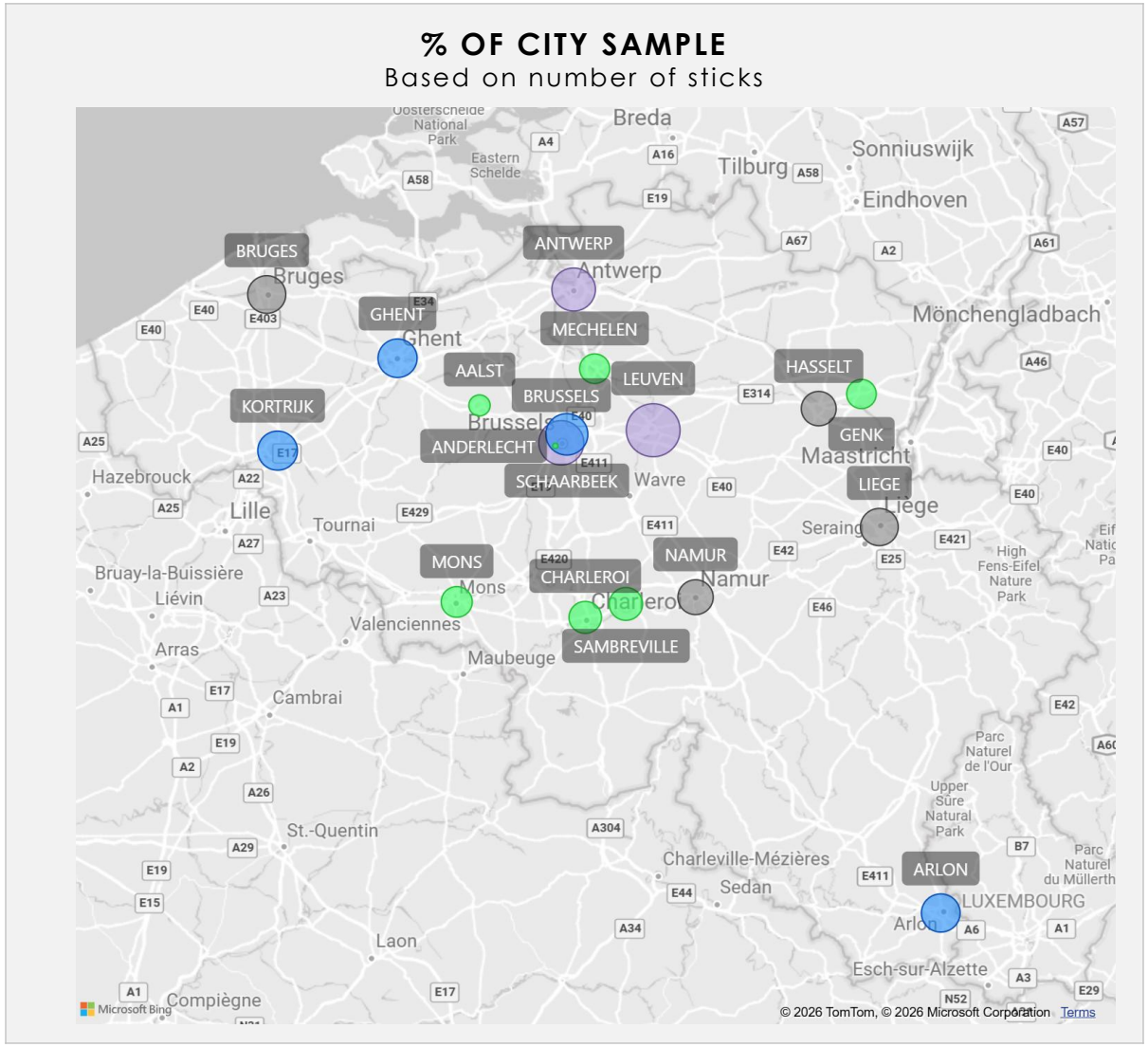
Main Others ▼ e.g.

ROMANIA	1.8%
ALBANIA	1.6%
MOROCCO	1.3%
GREECE	1.3%
MACEDONIA	0.8%
FRANCE	0.8%
SPAIN	0.6%

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

NON-DOMESTIC: BY CITY





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

% OF TOTAL SAMPLE Based on number of sticks

Total: 59,828 sticks (2,800 packs).

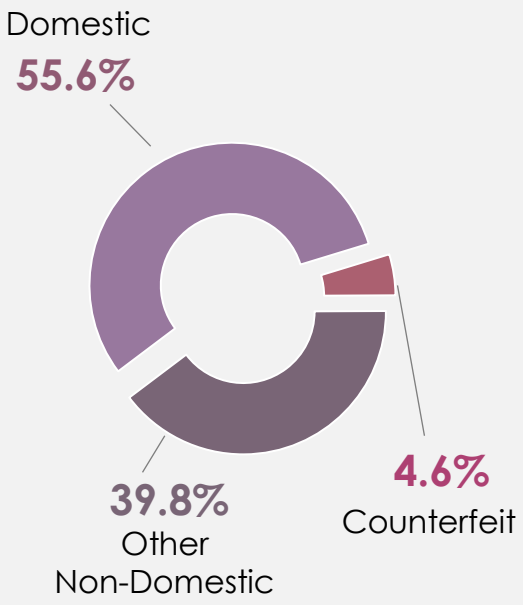
NON-DOMESTIC (TOP 10 CITIES)

	COUNTERFEIT	MARLBORO (PMI)	DUNHILL (BAT)	OME (KARELIA TOBACCO)	DAVIDOFF (ITL)	OTHERS	**TOTAL**	2025 Q2	2024 Q4
ANTWERP	1.2%	3.0%	1.3%	1.3%	0.8%	2.2%	**9.8%**	6.5%	6.3%
GHENT	0.4%	1.8%	0.4%	0.3%	0.8%	1.1%	**4.7%**	3.3%	3.9%
BRUSSELS	0.3%	1.2%	0.1%	0.2%	0.3%	1.3%	**3.5%**	1.8%	2.3%
LIEGE	0.3%	1.2%	0.2%	0.6%	0.2%	1.0%	**3.4%**	2.2%	3.0%
CHARLEROI	0.3%	1.3%	0.2%	0.3%	0.4%	0.9%	**3.4%**	3.1%	2.6%
SCHAARBEEK	0.1%	0.8%	0.3%	0.4%	0.2%	0.6%	**2.4%**	2.2%	1.5%
BRUGES	0.3%	0.5%	0.5%	0.3%	0.1%	0.3%	**2.1%**	1.4%	1.3%
LEUVEN	0.3%	0.5%	0.0%	0.2%	0.3%	0.7%	**2.0%**	1.5%	1.5%
NAMUR	0.3%	0.5%	0.3%	0.3%	0.2%	0.4%	**2.0%**	1.5%	1.9%
ANDERLECHT	0.2%	0.6%	0.2%	0.1%	0.2%	0.5%	**1.8%**	1.8%	2.0%
OTHERS	0.9%	3.0%	1.4%	0.9%	0.9%	2.3%	**9.3%**	7.9%	8.6%
TOTAL	**4.6%**	**14.3%**	**5.0%**	**4.8%**	**4.3%**	**11.4%**	**44.4%**	**33.1%**	**34.9%**

2025 Q2	2.9%	11.1%	1.3%	4.4%	3.7%	9.8%	**33.1%**
2024 Q4	1.0%	7.5%	0.5%	1.9%	11.1%	12.9%	**34.9%**

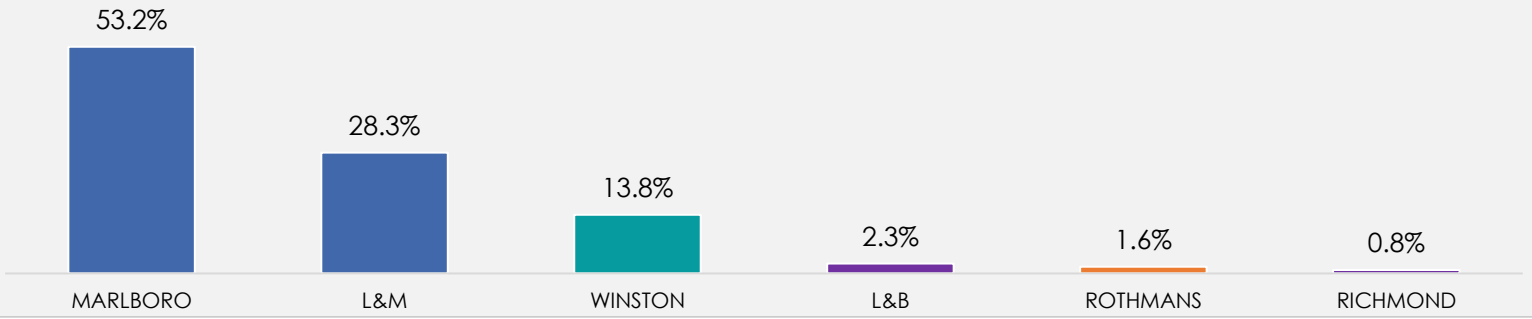
COUNTERFEIT: BREAKDOWN

NON-DOMESTIC INCIDENCE
% OF TOTAL SAMPLE

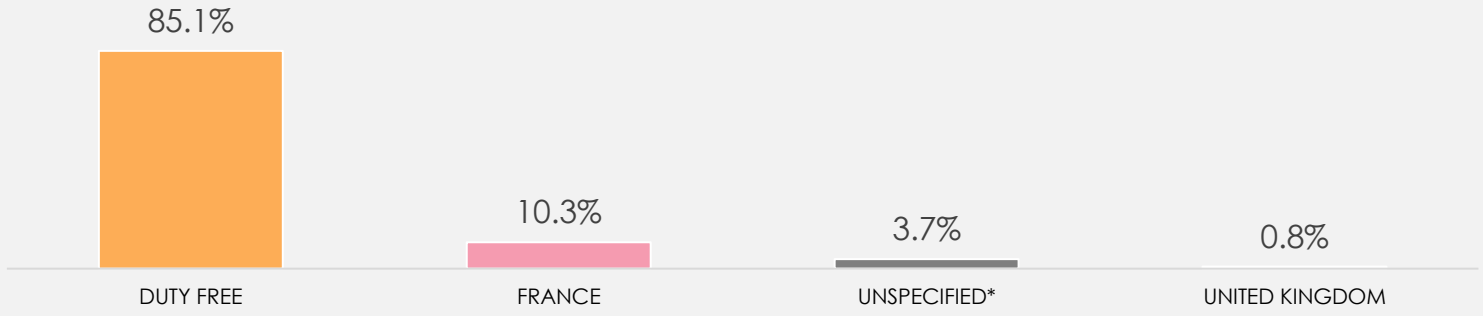


Total: 2,780 sticks (139 packs)

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

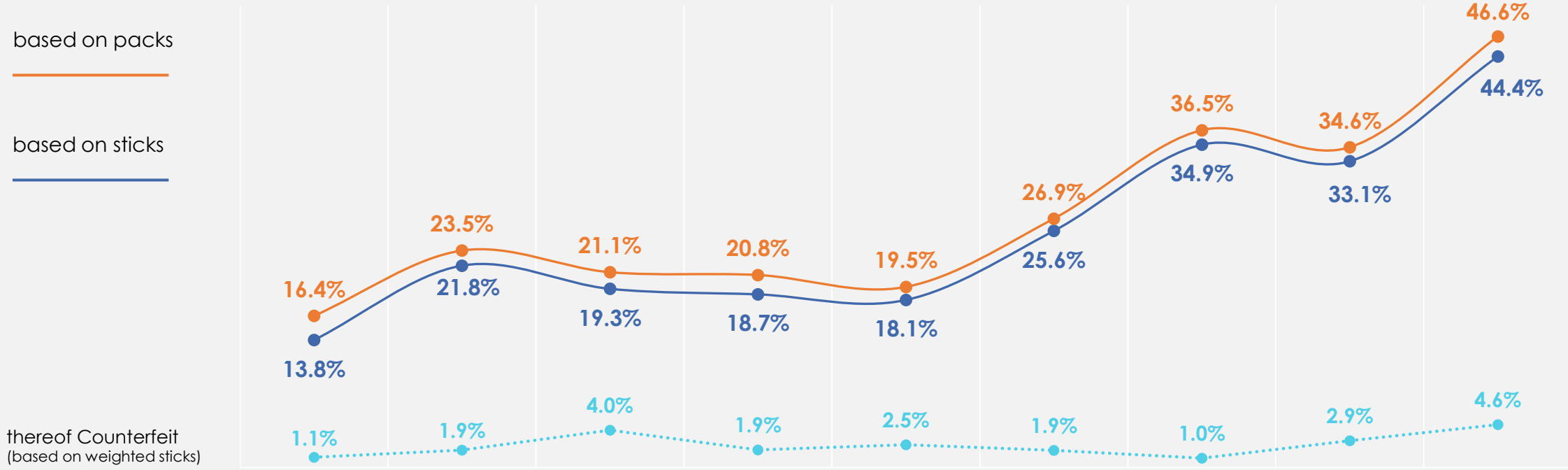
Total: 59,828 sticks (2,800 packs).

COUNTERFEIT (TOP 10 CITIES)

	MARLBORO (PMI)	L&M (PMI)	WINSTON (JTI)	L&B (ITL)	OTHERS	**TOTAL**	2025 Q2	2024 Q4
ANTWERP	0.8%	0.3%	0.1%	0.1%	—	**1.2%**	0.4%	0.4%
GHENT	0.1%	0.2%	0.1%	—	—	**0.4%**	0.4%	0.1%
BRUSSELS	0.1%	0.1%	0.1%	—	0.1%	**0.3%**	0.1%	—
LIEGE	0.1%	0.2%	—	—	—	**0.3%**	0.1%	0.0%
LEUVEN	0.1%	0.1%	0.1%	—	0.0%	**0.3%**	0.0%	0.0%
NAMUR	0.2%	—	0.1%	—	—	**0.3%**	0.2%	0.0%
CHARLEROI	0.2%	—	0.0%	—	—	**0.3%**	0.3%	0.1%
BRUGES	0.2%	0.0%	—	0.0%	—	**0.3%**	0.1%	—
ANDERLECHT	0.1%	0.1%	—	—	—	**0.2%**	0.2%	0.1%
MONS	0.1%	—	0.1%	—	—	**0.2%**	0.2%	—
OTHERS	0.5%	0.3%	0.1%	—	0.0%	**0.9%**	0.9%	0.3%
TOTAL	**2.5%**	**1.3%**	**0.6%**	**0.1%**	**0.1%**	**4.6%**	**2.9%**	**1.0%**

2025 Q2	1.9%	0.3%	0.6%	0.1%	0.1%	**2.9%**
2024 Q4	0.7%	—	0.0%	0.1%	0.1%	**1.0%**

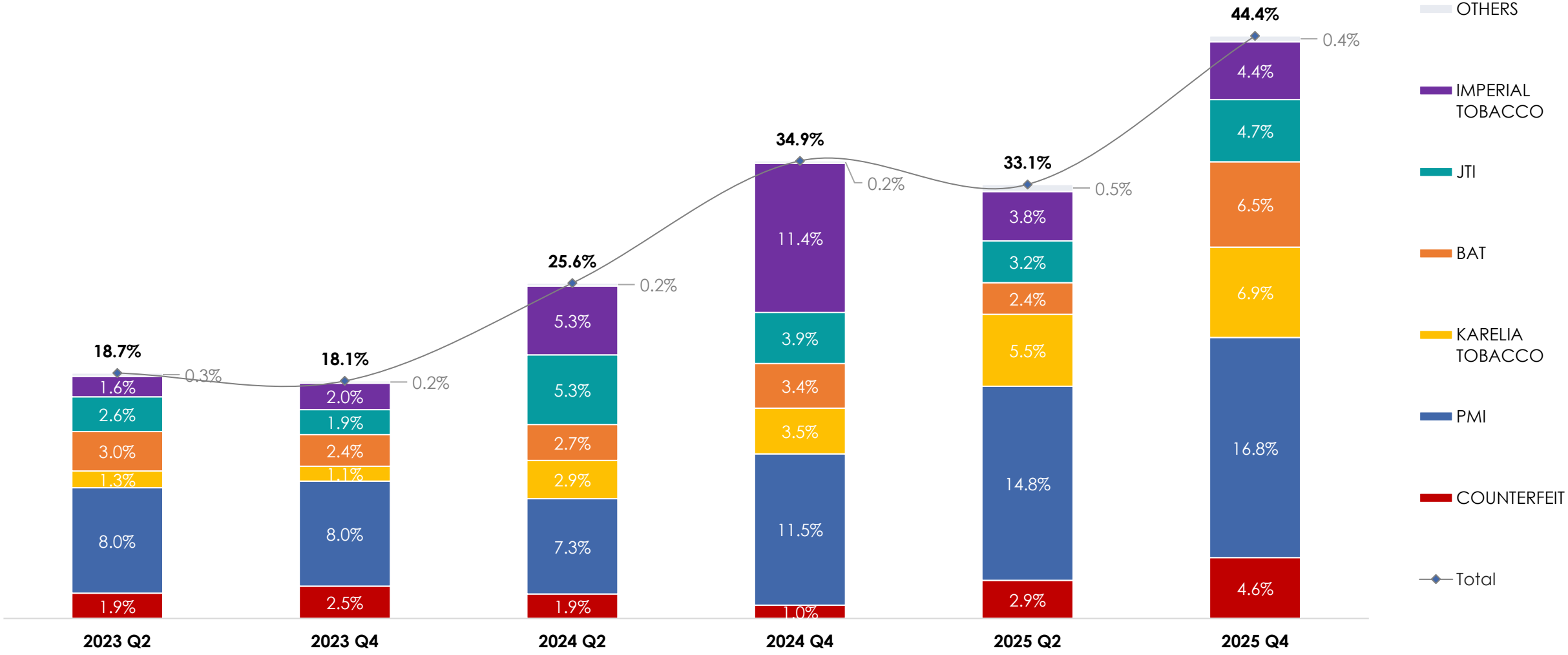
NON-DOMESTIC: INCIDENCE TREND



	2021 Q4	2022 Q2	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
Sticks	71,439	60,883	62,069	62,992	61,324	60,117	59,769	59,961	59,828
Packs	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800

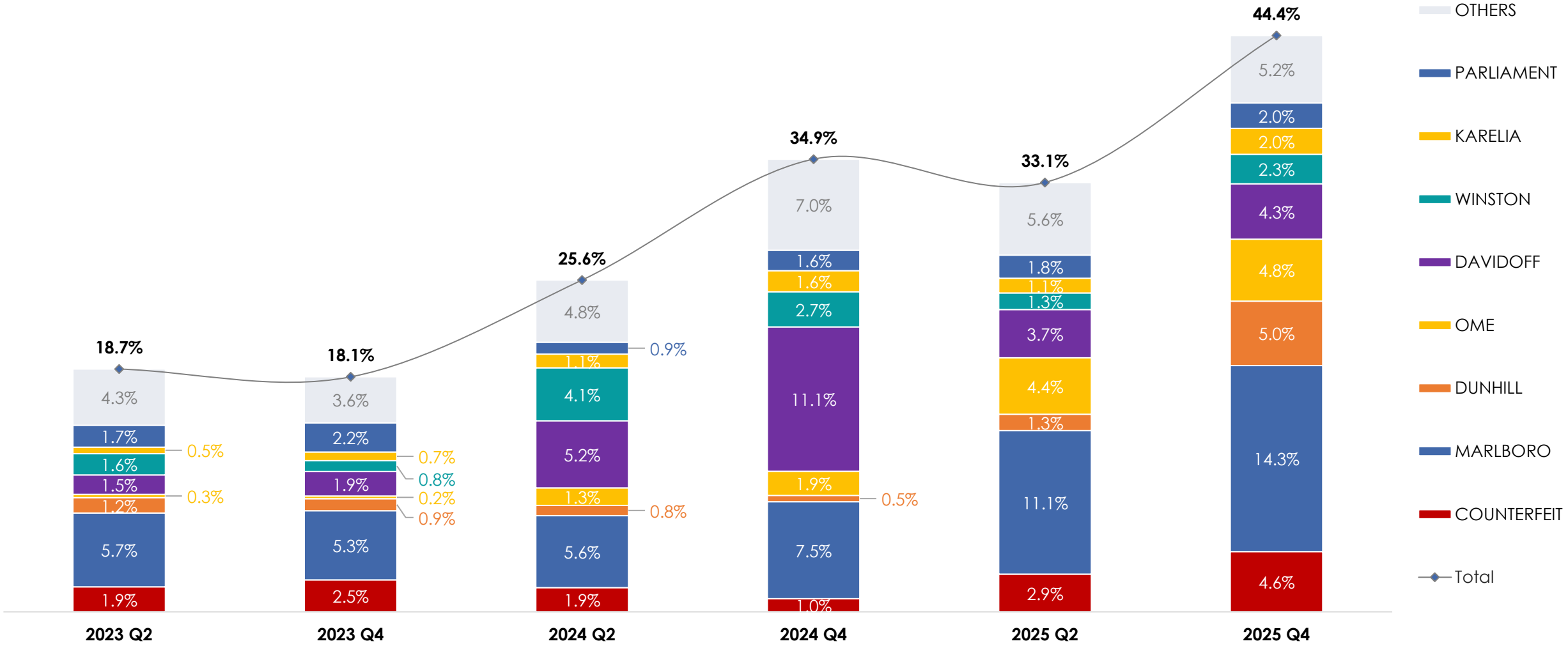
TOTAL SAMPLE = DOMESTIC AND NON-DOMESTIC PACKS

NON-DOMESTIC: COMPANY TREND



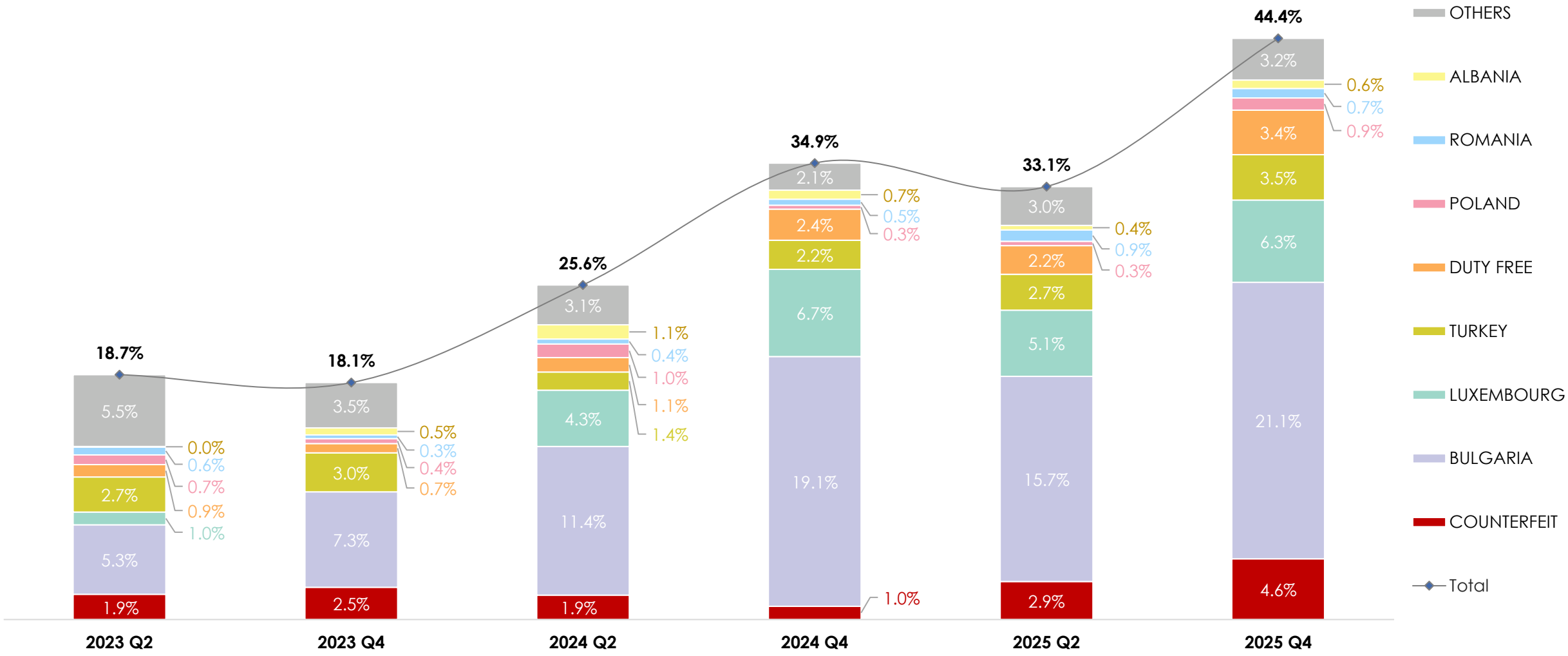
NON-DOMESTIC: BRAND FAMILY TREND

% OF TOTAL SAMPLE
Based on number of sticks



NON-DOMESTIC: MARKET VARIANT TREND

% OF TOTAL SAMPLE
Based on number of sticks



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

NON-DOMESTIC: CITY TREND

CITY	PACKS	STICKS	2022 Q4	2023 Q2	2023 Q4	2024 Q2	2024 Q4	2025 Q2	2025 Q4
LEUVEN	113	2,325	12.5%	26.3%	24.7%	25.2%	35.9%	35.8%	**52.7%**
BRUSSELS	209	4,418	17.4%	20.6%	11.4%	28.2%	31.1%	22.7%	**47.6%**
ANTWERP	589	12,469	26.3%	17.8%	17.6%	22.0%	30.2%	31.2%	**46.9%**
SCHAARBEEK	145	3,142	18.8%	24.8%	24.6%	25.9%	28.6%	43.4%	**46.1%**
KORTRIJK	86	1,897	18.9%	20.6%	18.2%	26.8%	36.6%	29.2%	**45.0%**
GHENT	294	6,310	23.4%	13.6%	23.9%	26.3%	37.4%	31.6%	**44.7%**
ARLON	34	709	22.3%	13.8%	25.9%	29.2%	26.3%	44.5%	**44.6%**
BRUGES	131	2,804	25.7%	15.2%	10.8%	21.7%	27.2%	28.7%	**44.3%**
LIEGE	217	4,612	10.5%	19.6%	22.5%	26.1%	39.1%	28.1%	**44.2%**
NAMUR	125	2,719	12.4%	20.8%	19.8%	34.2%	44.4%	34.8%	**43.2%**
HASSELT	88	1,857	19.7%	15.9%	21.1%	23.4%	38.2%	41.1%	**43.0%**
SAMBREVILLE	31	670	16.4%	28.2%	17.9%	34.4%	41.8%	43.1%	**42.4%**
CHARLEROI	225	4,777	14.5%	23.6%	10.8%	27.5%	32.2%	38.7%	**42.1%**
MONS	107	2,265	9.1%	19.1%	20.9%	33.8%	41.9%	42.6%	**41.6%**
MECHELEN	96	2,128	12.3%	18.0%	21.7%	25.2%	48.9%	31.7%	**41.3%**
GENK	74	1,590	20.0%	18.1%	5.5%	22.2%	43.4%	28.5%	**41.1%**
AALST	99	2,203	21.7%	18.0%	13.3%	25.0%	29.0%	34.7%	**38.9%**
ANDERLECHT	136	2,934	26.2%	11.6%	18.6%	21.3%	40.3%	37.8%	**37.3%**
TOTAL SAMPLE	**2,800**	**59,828**	**19.3%**	**18.7%**	**18.1%**	**25.6%**	**34.9%**	**33.1%**	**44.4%**



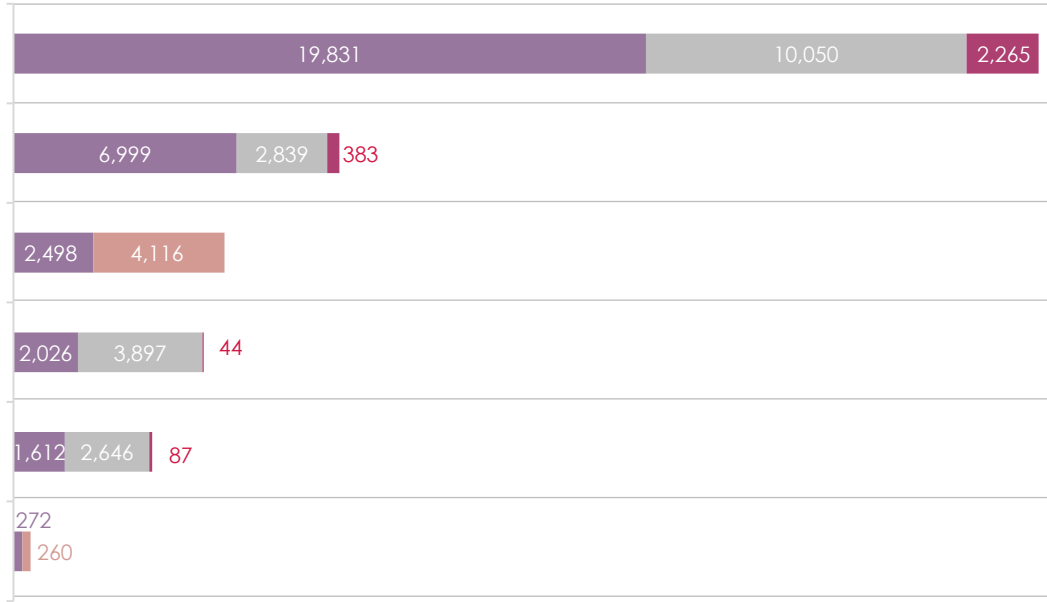
04.

APPENDIX

QUARTER 4, 2025

TOTAL SAMPLE: DETAILS PER COMPANY

NUMBER OF STICKS PER CATEGORY AND COMPANY

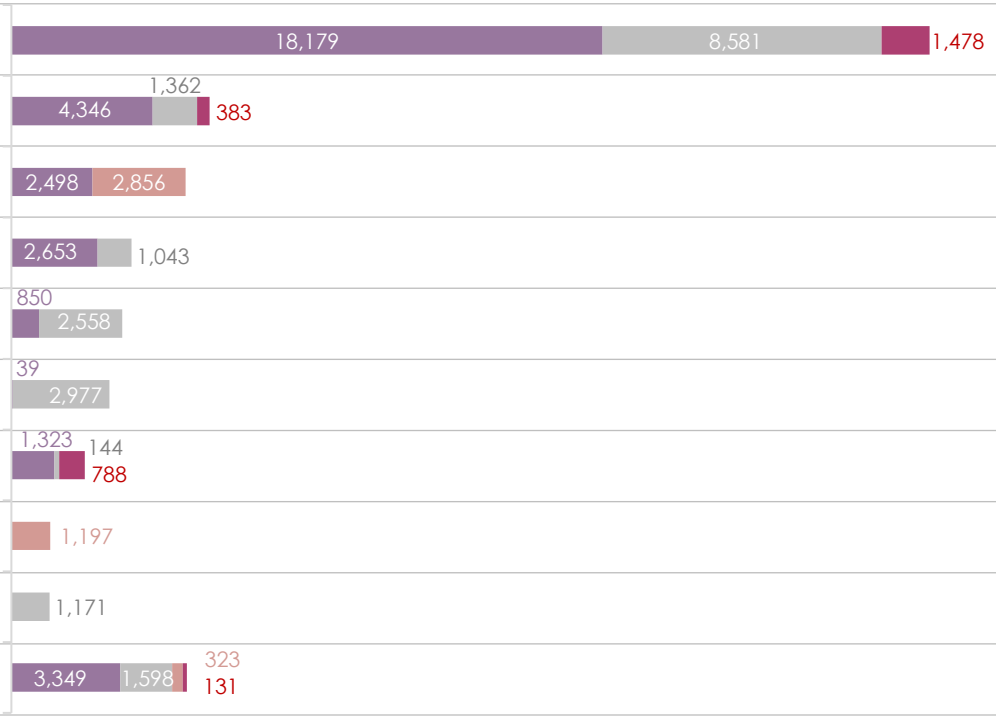


IN % OF COMPANY TOTAL

		Domestic	Genuine Non-Domestic	Non-Domestic	Counterfeit
PHILIP MORRIS INTERNATIONAL	32,147	61.7%	31.3%	—	7.0%
JTI	10,221	68.5%	27.8%	—	3.7%
KARELIA	6,615	37.8%	—	62.2%	—
BRITISH AMERICAN TOBACCO	5,968	34.0%	65.3%	—	0.7%
Imperial Tobacco	4,345	37.1%	60.9%	—	2.0%
OTHERS	532	51.1%	—	48.9%	—

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)	28,238	64.4%	30.4%	—	5.2%
WINSTON (JTI)	6,091	71.4%	22.4%	—	6.3%
OME (KARELIA TOBACCO)	5,355	46.7%	—	53.3%	—
CAMEL (JTI)	3,696	71.8%	28.2%	—	—
DAVIDOFF (ITL)	3,408	24.9%	75.1%	—	—
DUNHILL (BAT)	3,016	1.3%	98.7%	—	—
L&M (PMI)	2,254	58.7%	6.4%	—	34.9%
KARELIA (KARELIA TOBACCO)	1,197	—	—	100.0%	—
PARLIAMENT (PMI)	1,171	—	100.0%	—	—
OTHERS	5,401	62.0%	29.6%	6.0%	2.4%

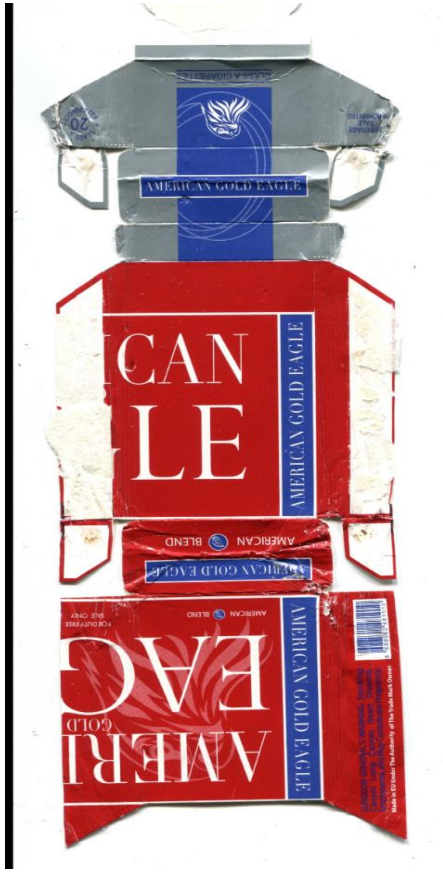
NON-DOMESTIC: TREND TOTAL COMPANY SAMPLE

NON-DOMESTIC INCIDENCE BY COMPANY – TREND

% OF TOTAL COMPANY SAMPLE

		PMI	JTI	KARELIA TOBACCO	BAT	OTHERS
	N (Sticks)	32,147	10,221	6,615	5,968	4,877
	Packs	1,482	460	331	293	233
2025 Q4	Non-Domestic	—	—	62.2%	—	5.3%
	Counterfeit	7.0%	3.7%	—	0.7%	1.8%
	Genuine non-domestic	31.3%	27.8%	—	65.3%	54.3%
2025 Q2	Non-Domestic	—	—	44.4%	—	7.3%
	Counterfeit	4.0%	3.8%	—	1.0%	1.0%
	Genuine non-domestic	27.6%	20.4%	—	22.2%	50.4%
2024 Q4	Non-Domestic	—	—	39.2%	—	1.3%
	Counterfeit	1.4%	0.3%	—	1.4%	0.7%
	Genuine non-domestic	21.3%	28.5%	—	35.3%	83.9%

OTHER NON-DOMESTIC: PACK EXAMPLES

Brand	KARELIA	AMERICAN EAGLE	GEORGE KARELIAS AND SONS
Company	KARELIA TOBACCO	UNKNOWN	KARELIA TOBACCO
Market variant	BULGARIA	DUTY FREE	GREECE
			

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



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THANK YOU