

Press Release

Logista Presents the Second Edition of the Ipsos Study on Illicit Trade in the Tobacco and Inhalation Products Market

- *In 2024 the illegal market for smoking and inhalation products is worth approximately €1.2 billion, equal to 5% of the total market value*
- *The direct losses for the country are estimated at €610 million in revenue, 5,600 jobs, and €660 million in lost tax revenue*
- *E-Cigarettes: €200 million in lost tax revenue; purchases through unofficial online channels account for 62% of the total online market value*
- *Traditional tobacco: illegal purchases cause €460 million in lost tax revenue*

Rome, 7 May 2025

Logista, Europe's leading distributor of products and services for retail outlets, in collaboration with Ipsos—one of the world's largest market research, opinion polling, and strategic consulting firms—presents the results of the second edition of “Smoking and Inhalation Products: A Study on the Phenomenon of Illicit Trade”, based on data referred to 2024.

In Italy, the estimated number of smokers and vapers in 2024 is around **12.4 million**. Traditional cigarettes remain the most purchased product, with **9.8 million consumers**, while e-cigarette and inhalation stick users number around **3 million**, indicating the presence of poly-consumption across product categories.

The smoking and inhalation products market is valued at approximately **€23 billion** (around 1% of GDP), confirming its significant role in the national economy. However, purchases through unauthorized channels continue to have a major impact, as 12% of smokers/vapers—equivalent to about 1.5 million people—use unofficial channels, representing around **€1.2 billion** in value, or 5% of the total market (compared to €1.1 billion and 4.8% in 2023).

The study highlights that illegal purchases of smoking and inhalation products result in an estimated **total loss of €610 million in revenue** (+13% vs. 2023), **€660 million in lost tax revenue** (+6% vs. 2023), **and a loss of 5,600 jobs** (+10% vs. 2023), considering only the direct impact (production, distribution, and sale) on the sector.

Although lost tax revenue is mainly attributable to traditional tobacco (**€460 million**), due to the significant weight of VAT and excise duties on final consumer prices, e-cigarette products still account for a substantial portion in 2024 (**€200 million**). Revenue losses, however, are largely tied to e-cigarettes, with an estimated damage of **€485 million**, compared to **€125 million** attributed to traditional tobacco.

Purchases through illegal channels primarily impact the e-Cig category: **29.7%** of the total value of purchases in this category comes from unofficial channels, while for traditional tobacco the incidence is **3.1%**.

There is still a clear distinction between physical and online illegal channels across the two product categories. While most traditional tobacco users rely on physical channels for illegal purchases (street vendors, friends/acquaintances), e-Cigarettes are mainly bought online: **57% of the volume and 60% of the value come from unauthorized websites or social media platforms**. This trend is reflected in the fact that online purchases through unofficial channels account for 62% of the total online market value.

Among those who buy illegally online, most base their choices on the variety of products offered (31%), site reviews (27%), and by checking the country of origin of the website (24%), while only 27% at least check for the logo of the Customs and Monopolies Agency (ADM). These figures do not yet reflect the impact of the online sales ban that came into effect last January. This impact will be interesting to assess in the 2026 survey.

The study also explores awareness regarding the **disposal of used or faulty e-Cigarettes** and heated tobacco devices, confirming a generally low level of familiarity with the issue of WEEE (Waste Electrical and Electronic Equipment). Regarding Logista's **Recycle-Cig** – the organized network for the collection, recovery, and recycling of used e-Cigarettes, active in 30,000 tobacconists across the country and supported by an awareness campaign launched in summer 2024 – nearly 70% of users of inhalation products report being aware of it, and **over 80% consider it innovative**. The project is considered significant in reducing the dispersion of electronic waste in the environment, and tobacconists' participation is seen as important.

The study also reveals that **in 2024 light cannabis** was smoked or inhaled – in the form of flowers, e-Cigarettes, and inhalation liquids – **by 1.4 million people**. Estimates indicate that the overall value of this market has exceeded **€2.2 billion**.

The survey, available on logista.it, was presented today in Rome in the presence of **Senator Licia Ronzulli**, Vice President of the Senate, **Hon. Giorgio Mulé**, Vice President of the Chamber of Deputies, and **Hon. Federico Freni**, Undersecretary at the Ministry of Economy and Finance.

A discussion panel followed, featuring **Hon. Marco Osnato**, President of the Budget Committee of the Chamber of Deputies, Col. **Aniello De Vita**, Commander of the Investigation Group of the Revenue Guard's Special Unit, **Francesca Torricelli**, Head of the Tobacco Regulation Office at the Customs and Monopolies Agency, **Federico Rella**, Vice President and Director of Corporate Affairs at Logista Italia, as well as representatives of trade associations **Mario Antonelli**, National President of the Italian Federation of Tobacconists, and **Gianfranco Labib**, National President of Assotabaccai.

Senator Licia Ronzulli, Vice President of the Senate, stated: *"The scenario presented by the Ipsos study is alarming and cannot leave us indifferent, as it highlights not only economic harm—represented by €660 million in lost revenue for the state—but also issues concerning legal and social justice. Since the start of the legislative term, the government and majority have been committed to fighting illicit trade, battling all forms of tax evasion, and protecting businesses and state finances. This is a fight we are carrying on with determination, and contributions from experts in each industry are essential to provide the tools for more targeted action to ensure a well-functioning market. The fight against illicit trade and the promotion of sustainability are not partisan battles, but collective responsibilities. In this*

regard, Logista's role is strategic, and I am confident that, thanks to the data emerging from the Ipsos study, we will all be able to identify the necessary countermeasures to support businesses in the sector and at the same time increase state revenues, which will result in more services for citizens."

Federico Rella, Vice President and Director of Corporate Affairs at Logista Italia, commented: *"Thanks to this second edition of the Ipsos study, unique in its kind as it analyzes the phenomenon of illicit trade by sales channel, Logista confirms its role as a point of reference for the entire sector. The survey highlights how illegal activities are depriving the country of vital resources: €660 million in lost tax revenue and over 5,600 job losses. We hope this study can support policies and government efforts to bring a significant share of the market back within the scope of authorized distribution. We also support increasingly targeted inspections to enforce the online sales ban on e-Cigarettes and a review of limits on smuggling through physical channels."* He concluded: *"This study is also an opportunity to assess awareness of our Recycle-Cig project, which reached nearly 70% among users of next-generation products. We are pleased that it is recognized as an innovative solution for proper WEEE disposal: this rewards Logista's commitment to the sustainability of the supply chain."*

Mario Antonelli, National President of the Italian Federation of Tobacconists, said: *"The service that Italian tobacconists provide daily represents a point of reference for citizens and an essential outpost for the state. Our widespread network plays a crucial role in the fight against smuggling and the protection of legality. By complying with regulations and carefully monitoring sales, tobacconists help counter illegal activities that seriously harm the state treasury, as shown by today's Ipsos data, and endanger public health. We therefore renew our commitment to collaborate with institutions to ensure a regular and transparent market, fully aware of our crucial role in supporting the state in fighting underground markets."*

Gianfranco Labib, National President of Assotabaccai, commented: *"Studies like the one conducted by Ipsos, with their ability to provide clear and precise data, are fundamental for identifying the scale of illicit market trade for smoking and inhalation products and for developing effective strategies to fight it. I therefore thank Logista for organizing this important day of reflection: only through joint action can we fight illegal activities and safeguard citizens, public health, and the national economy. We therefore renew our call for active collaboration among all stakeholders to strengthen the protection of legality and safeguard our social and economic fabric."*

Research Methodology

The research was conducted by Ipsos using three samples: 2,000 interviews with a representative sample of the Italian population aged 16–85, 3,000 additional interviews with people who smoked/inhaled/vaped at least one product in the past 12 months, and 1,200 additional interviews with people who vaped an e-cigarette or inhalation stick (with or without tobacco) in the last 12 months. The interviews were conducted using the CAWI (Computer-Assisted Web Interviewing) method in the second half of 2024.

About Logista

Logista is the leading distributor to proximity retailers in Europe. In Italy, it has built one of the largest proximity logistics and trade networks and is recognized as an efficient and neutral partner. With more than 90 depots, it supplies 60,000 points of sale throughout the country, guaranteeing the State a revenue of around 15 billion euros per year. Logista is committed to numerous sustainability initiatives designed to minimize the impact of business by considering environment, community and business in a vision of mutual development.

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About Ipsos

Ipsos is one of the world's largest market research, opinion polling and strategy consulting companies, operating in 90 markets and employing nearly 20,000 people.

Its research professionals have developed unique multispecialist capabilities that can produce timely and relevant information to turn it into concrete business strategies.

Ipsos, with its 75 solutions, works to provide all its partners with a total understanding of markets, society, and people. To do this, it uses a unique mix of professional skills, technology and technical know-how applying the principles of concreteness, security, simplicity and speed to everything.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999.

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