

## Press Release

### **Logista Presents the Third Edition of the Ipsos Doxa Study on the Phenomenon of Illicit Smoking and Non-Smoking Products**

- ***The illicit market for smoking and non-smoking products accounts for 4.8% of the total market value in 2025***
- ***Direct losses for the country: €690 million of lost tax revenues***
- ***The price increases envisaged by the EU Excise Duty Directive could cost over €1 billion in tax revenues and 6,400 jobs***
- ***Light cannabis: the incidence of purchases through parallel markets is increasing***

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Logista, Europe's leading distributor of products and services for points of sale, in collaboration with Ipsos Doxa, presents the results of the third edition of "Smoking and non-smoking products: a study on the phenomenon of illegality", based on 2025 data.

In 2025, smokers, vapers and pouchers in Italy are estimated around 13 million people, equal to 26.5% of the population. Traditional tobacco consumers remain the majority at 80.1% of the total, about 10.5 million people, although down from previous years (87% in 2023 and 85.5% in 2024). The share of inhalation-stick users remains stable (24.1% in 2024 and 23.9% in 2025, around 3.1 million people). Electronic cigarette users, however, continue to grow, rising from 16% in 2023 to 24.1% in 2024 and 27.1% in 2025, equal to about 3.5 million people.

**In 2025, the market for smoking and non-smoking products through official channels is worth approximately €24.5 billion.** Traditional tobacco remains the largest segment at €18.3 billion, inhalation sticks reach €4.4 billion, and the e-cigarette category reaches €1.8 billion, figures that confirm the sector's significant role in the national economy.

Use of unofficial channels shows a steadily increasing trend over the past three years, rising from 11.5% in 2023 to 12.2% in 2024. In 2025, the phenomenon continues to have a significant impact, involving 13.8% of consumers, around 1.8 million people. Despite the growth in recourse to unofficial channels, the value of the illicit market, about €1.2 billion, equal to 4.8% of the total market, remains broadly in line with the previous year (5% in 2024), partly thanks to the partial return of the e-cigarette market within the legal perimeter.

Purchase patterns confirm trends already observed in previous years: for traditional tobacco, about two-thirds of unofficial sales still occur through physical channels, while in the case of electronic cigarettes, illegality is concentrated online, which accounts for about 61% of illicit purchases.

**Purchasing smoking and non-smoking products through unofficial channels generates €690 million loss in tax revenues**, a potential employment impact of 5,900 job positions, and a loss of approximately €630 million in turnover (production, distribution and retail).

The loss of the tax revenues is evenly split between traditional tobacco and e-cigarettes because of the tax increase introduced in 2025, while the loss in turnover is mainly linked to e-cigarette products, whose market is expanding.

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The European Commission's proposed revision of the **Tobacco Excise Directive** (T.E.D.) aims to harmonize tax rules among Member States by increasing taxation on both smoking and non-smoking products and reducing consumers' access to illicit markets. However, the Ipsos Doxa research shows that the increases proposed by the Commission would not achieve the desired results: in fact, 1 in 10 respondents stated they would turn to unofficial channels for their purchases.

Based on the study's findings, Logista estimates that the increases regarding only traditional tobacco would lead to tax losses for the Italian State of over €1 billion and a potential additional employment impact of 500 jobs, for a total of 6,400 jobs at risk.

With the entry into force of the Security Decree in 2025, the so-called "light cannabis", characterized by low THC content, was reclassified as illegal. Ipsos Doxa's analysis shows a reduction in overall volumes, linked to the contraction of physical points of sale, alongside an increase in purchases through parallel markets.

**80% of respondents believe that illegality in this sector is a widespread national issue**, consistent with the previous year. In public opinion, physical purchases remain the main reference point for illegality (38%), but the perception of online risk is also increasing, rising from 15% to 21%. Among those who use unofficial channels, the perception that the problem concerns primarily physical channels rises sharply (46%, compared with 25% in 2024).

The new law banning online sales of cigarettes containing nicotine-, in force since 2025, is still little known: among users of next-generation products, 40% are unaware of it and only 15% consider themselves well informed. The belief that purchasing through unofficial channels carries a low risk of being detected and sanctioned also remains widespread.

**In 2025, the share of users who report to dispose correctly electronic devices rises significantly across all product categories.** The largest increases concern rechargeable electronic cigarettes (57% vs. 45% in 2024) and their refills (43% vs. 35% in 2024), confirming the decisive contribution of collection points in ensuring proper disposal.

In 2025, awareness of Recycle-Cig, the organized collection system for exhausted electronic cigarettes launched by Logista in 2024 has improved compared to the previous year (from 17% to 19%), and 85% of next-generation product users consider it an innovative project.

The presentation of the study, available on [logista.it](https://logista.it), was attended by Senator **Licia Ronzulli**, Vice President of the Senate of the Republic; Hon. **Claudio Durigon**, Undersecretary at the Ministry of Labour and Social Policies; Hon. **Federico Freni**, Undersecretary at the Ministry of Economy and Finance; and **Brigadier General Mario Imparato**, Chief of Staff of the Special Units Command of the Guardia di Finanza.

A panel discussion followed the presentation, featuring Hon. **Giuseppe Mangialavori**, Chair of the Budget Committee of the Chamber of Deputies; Hon. **Marco Osnato**, Chair of the Finance Committee of the Chamber of Deputies; Hon. **Gaetano Pedullà** and Hon. **Marco Falcone**, Members of the Committee on Economic and Monetary Affairs of the European Parliament; **Federico Rella**, Vice President and Corporate Affairs Director of Logista Italia; **Francesca Torricelli**, Head of Excise Controls at the Customs and Monopolies Agency; as well as representatives of trade associations **Mario Antonelli**, President of the Italian Federation of Tobacconists, and **Gianfranco Labib Boughdady**, National President of Assotabaccai.

*"On the revision of the TED Directive, we are working on the basis of three clear principles: less harmful products must benefit from lower tax pressure; effective action against smuggling and illegality; and a common-sense approach that does not penalize the productive and occupational fabric of the tobacco*

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sector,” said Hon. **Marco Falcone**, rapporteur for the EPP Group and deputy head of the Forza Italia delegation in the European Parliament. He concluded: *“Our commitment is to contribute to a balanced proposal capable of harmonizing the Commission’s framework with the market realities of Member States and the concrete needs of local communities and the European production system. Analysis and discussion initiatives such as the one promoted by Logista in collaboration with Ipsos Doxa make a tangible contribution to an informed debate”*.

*“To the increase in illegality and the lower tax revenue highlighted by the new Logista and Ipsos Doxa study, we must add an even more alarming aspect: Europe’s reaction with the excise directive risks distributing economic and fiscal burdens unevenly among the 27 EU countries, leaving Italy with the highest cost compared to other partners. No other State has as many production plants and supply-chain agreements in this sector,”* said Hon. **Gaetano Pedullà**, Member of the Committee on Economic and Monetary Affairs of the European Parliament. He added: *“As the Five Star Movement, we truly defend—rather than merely proclaim—jobs and investments in our national territory, convinced that, just like with the Green Deal, the virtuous goals desired by legislators cannot be achieved without sufficient sustainability and gradual implementation of measures”*.

Senator **Licia Ronzulli**, Vice President of the Senate of the Republic, stated: *“Combating the illegal market is a shared responsibility involving all actors in the supply chain. Defending official channels means protecting consumers from unsafe products and ensuring quality, traceability and reliability, while supporting companies that comply with the rules and contribute to the country’s competitiveness. The fight against illegality is essential for fair competition and institutional credibility, and Parliament has already strengthened the regulatory framework and control tools. Every euro recovered from illegality benefits the community, public services and sustainable development. This is why increasingly close cooperation between public and private sectors, sharing data and expertise, is crucial. Logista demonstrates how commitment and responsibility can translate into concrete results. We must continue investing in innovation, controls and prevention to anticipate new illegal phenomena and build a safer, fairer and more competitive market for the benefit of citizens and the country’s future”*.

Hon. **Marco Osnato**, Chair of the Finance Committee of the Chamber of Deputies, said: *“The Logista and Ipsos research describes a dynamic sector capable of growing and adapting to regulatory, fiscal and consumer-habit changes. Europe is discussing the new Excise Directive: while we share its objectives, it contains provisions that are not always favorable to the Italian market, and we are working with colleagues in Strasbourg to improve them. The sector’s results allow resources to be reinvested in health protection, with attention to safety and legality. However, the research highlights a rise in illegality: further regulatory measures are therefore needed. A starting point could be the fact-finding investigation launched by the Finance Committee, whose conclusions we will present shortly”*.

Hon. **Giuseppe Mangialavori**, Chair of the Budget Committee of the Chamber of Deputies, stated: *“The data presented today by Logista and Ipsos confirm that this sector is a strategic economic and fiscal asset for the country. It generates significant Treasury revenues, qualified employment and widespread investment. For this reason, every regulatory or fiscal intervention must be carefully calibrated, taking into account the specificities of the Italian market and the impact that non-harmonized measures could have on revenue and system stability. As Chair of the Budget Committee, I reaffirm our commitment to ensuring a balanced regulatory framework that protects public revenues, supports the competitiveness of law-abiding companies and strengthens tools to combat illegality. We will continue working in this direction, in dialogue with operators and all stakeholders, to pursue sustainable, coherent and broadly beneficial objectives”*.

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**Francesca Torricelli**, Head of Excise Controls at the Customs and Monopolies Agency, said: *“The market for smoking and non-smoking products is today one of the most sensitive fronts for protecting the Treasury. The illicit activities affecting it are not isolated episodes but organized systems that divert public resources, distort competition and fuel increasingly structured criminal networks. As the Customs and Monopolies Agency, we are strengthening oversight every day through inspections, controls, digitalization of processes, support for regulatory developments and constant monitoring of new trends—from alternative products to digital channels. It is a rapidly evolving market that requires equally rapid and integrated responses. Collaboration among institutions, operators and research organizations such as Ipsos is essential to understanding the real scale of the phenomenon and guiding increasingly effective counter-strategies. Protecting revenue means protecting the country: it is a responsibility we carry out with determination and vision”*.

**Federico Rella**, Vice President and Corporate Affairs Director of Logista Italia, commented: *“With the third edition of the study carried out with Ipsos Doxa, unique in its kind because it analyses the unofficial market for smoking products by distinguishing between different sales channels, we provide the sector with a solid and continuous analytical foundation. The results clearly highlight the impact of illegality on the national system, estimated at €690 million in lost tax revenues, while at the same time showing a level of containment in line with previous years, confirming the effectiveness of institutional action and the work carried out by enforcement bodies. The main new element of the 2026 Study concerns the in-depth analysis of the effects of the new European Excise Directive: based on the collected evidences, Logista’s estimates show that the proposed increases, in the absence of real tax harmonization, could generate significant impacts on the economic system, with a potential loss of over €1 billion in tax revenues and 6.400 jobs.”* He concluded: *“We hope that, under the Cypriot presidency, the discussion on the Directive can be concluded in a balanced and non-ideological manner, listening to the needs of sector operators and the entire supply chain”*.

**Mario Antonelli**, National President of the Italian Federation of Tobacconists, stated: *“The network of Italian tobacconists is an essential pillar of the legal market, a guarantor of rules, attentive to health protection needs and to the interests of consumers and the State. The data presented by Ipsos and Logista should serve as a warning to policymakers and European institutions, which are called upon to make important regulatory decisions for our entire sector. We believe that protecting the industry requires the adoption of balanced fiscal policies and a proportionate regulatory framework that takes into account market evolution and pays attention to innovative products. These elements, together with a controlled distribution network such as the one we represent, are effective tools to prevent demand from shifting toward unofficial circuits, which by their nature escape controls and guarantees”*.

**Gianfranco Labib Boughdady**, National President of Assotabaccai, commented: *“The daily role of Italian tobacconists goes far beyond selling products: we represent an irreplaceable safeguard of legality and a reliable point of reference for the State. The data presented today by Logista confirm the scale of the illegal phenomenon and the urgency of targeted intervention strategies. We hope for regulatory action that aligns the sale of nicotine-free inhalation products with that of nicotine-containing ones, because only by ensuring direct control over the sales channel will it be possible to guarantee a safe market that protects citizens’ health”*.

## **Methodology of the Study**

The research was conducted by Ipsos Doxa on three samples: 2.000 interviews with a representative sample of the Italian population aged 16 to 85, 3.000 oversample interviews with people who smoked/inhaled/vaped at least one product in the

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past 12 months, 1.200 oversample interviews with people who vaped at least one electronic cigarette or inhaled a stick, with or without tobacco, in the past 12 months. The interviews were carried out using the CAWI methodology in the second half of 2025. Additionally, in the first quarter of 2026, an extra 800 interviews were conducted with people aged 18 to 65 to understand the potential effects of further price increases on certain products linked to possible European regulatory developments.

## About Logista

Logista is Europe's leading integrated distributor to points of sale. In Italy, it has built one of the largest proximity logistics and commercial networks and is recognized as an efficient and neutral partner. With over 90 depots, it supplies 60,000 points of sale nationwide, ensuring approximately €15 billion in annual Treasury revenue. Logista is committed to numerous sustainability initiatives aimed at minimizing business impact, considering environment, community and enterprise within a vision of mutual development. Follow Logista on [LinkedIn](#) and learn more at [logista.it](https://www.logista.it)

## About Ipsos Doxa

Ipsos Doxa was born from the merger of two leading market research organizations, united by a pioneering spirit and a constant drive for innovation. Ipsos, founded in France in 1975, is now one of the world's leading market research groups and the only European company in the sector to have maintained financial and managerial independence. Doxa, the first market research company founded in Italy in 1946 and among the first in Europe, is a consolidated reference point in the Italian landscape. Together, they offer cutting-edge solutions, constantly investing in people, technologies and processes to anticipate and respond to clients' needs quickly, accurately and reliably.

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