Logista

FONDAZIONE TOR VERGATA

Press Release

Logista presents the 2025 Report on the Distribution of Smoking and Non-Smoking Products

- ***The sector contributes approximately 15 billion euros to the State through VAT and excise duties***
- ***The market share of combustion-free products is growing: from 4% in 2019 to 18% in 2024, thanks to investments focused on innovation and consumer attention***
- ***The sector expresses concern regarding upcoming European and international regulatory revisions, calling for balanced rules***

Rome, 18 September 2025

Logista, in partnership with **Fondazione Tor Vergata**, presents the *2025 Report on the Distribution of Smoking and Non-Smoking Products*. The document, in addition to providing an analysis of the logistics sector in Italy, highlights the distinctive features of the sales and distribution network, with particular attention given to the evolution of smoking and inhalation products and the dynamics that are transforming the market.

The Report highlights the profound transformation that has involved the smoking and inhalation products sector for years, driven by innovation and investments from companies in the sector. Although traditional products, such as cigarettes, cigars, and cut tobacco, continue to represent the dominant share of the market, **the market share of smoking products has dropped to 80%, mainly due to the growth of combustion-free products, which increased from 4% in 2019 to 18% in 2024**.

Each year, Logista handles over **80 million kilograms** of products and pays **approximately 15 billion euros** to the Treasury. By employing cutting-edge technological solutions throughout the entire distribution chain, Logista strengthens its role as a strategic partner in upholding legality. Advanced control systems, in compliance with "**Tracking and Trace**" directives, ensure traceability, transparency, and security and, together with the widespread network of retailers, make a decisive contribution to the fight against illegal activities.

The sector is currently in a crucial phase of *transformation*, driven by company investments and new needs for sustainability and technological innovation. However, significant challenges remain, such as the revision of European and international regulations, which require balanced rules.

Today, *Italian regulations are at the forefront* for their ability to control consumption, attract high-value-added investments, and generate increasing revenue. At the European level, the Taxation Directives (TED) and the so-called "Product" Directive (TPD) have proven effective, helping to control the use of tobacco and nicotine products, with the aim of protecting citizens' health and attracting significant investments.

In addition to updating the Italian framework, the phase of *reviewing EU sector regulations* has begun, and in November 2025, the eleventh Conference of the Parties (COP) of the WHO Framework Convention on Tobacco Control (FCTC) will take place, updating regulatory recommendations for member countries. It will be essential to adopt a balanced approach that ensures the pursuit of various objectives without succumbing to ideological or instrumental drifts.

The Italian market for smoking and inhalation products stands out for its high level of regulation and the widespread presence of **tobacconists** – **one for every 1,150 inhabitants** – which are much more than simple retail outlets: they are **local hubs, deeply integrated into the social fabric**. Of the 60,000 points of sale reached by Logista, even in the smallest towns, tobacconists are visited daily by millions of people, confirming their role as a direct and daily point of contact with citizens.

In this ever-changing context, **Logista** plays a **strategic role** in the adoption and implementation of European directives, acting as a **bridge between industry, network, retail, and institutions**. Thanks to its consolidated experience in regulated distribution, the company facilitates dialogue among stakeholders, contributing to the effective and balanced implementation of new regulations. One of the central aspects of Logista's work is its ability to address the challenges posed by regulatory complexity.

The event opened with a message from **Sen. Adolfo Urso**, Minister for Enterprises and Made in Italy: "*Italy, with the regulations introduced in 2015 that clearly differentiate between traditional and innovative products, is at the forefront in Europe. Our goal is to continue promoting a balanced regulatory framework that equally considers health, the economy, and innovation, even in future interventions for the regulation and taxation of tobacco products in the EU. I am convinced that, by working together, we can successfully face the challenges of a sector that, in addition to generating economic value and employment, wishes to continue operating in compliance with the law. I thank Logista for its valuable contribution and renew the Ministry's commitment to collaboration for a future of sustainable growth.*"

The presentation of the Study was introduced by **Federico Rella**, Vice President and Director of Corporate Affairs at Logista Italia, who also delivered the closing remarks and stated: "*Logista confirms itself as a central interlocutor for dialogue between institutions, associations, and companies. The 2025 Report highlights its strategic role in promoting an efficient and sustainable distribution model which, especially in regulated markets, is capable of combining innovation, attention to consumer needs and the safeguarding of legality. In a context marked by profound sector transformation, Italy has demonstrated how a clear, proportionate, and differentiated regulatory and fiscal framework can be a driver of stability, investment attraction, and employment growth. We hope that future fiscal interventions will maintain a balanced and non-ideological approach that, in addition to protecting consumers, can maintain the sector's sustainability and preserve tax revenue, which today stands at 15 billion euros per year.*"

Prof. Pasquale Lucio Scandizzo, Academic at the University of Tor Vergata, in presenting the study stated: "*The Report highlights the strategic value of logistics in Italy, with 95 billion euros of added value in 2024 and a significant impact on employment, capital, and exports. Despite the challenges, the sector offers strong growth opportunities. Logista, which reaches all municipalities and 60,000 points of sale weekly, is a leader in proximity distribution, generating, directly and indirectly, over 7 billion in added value and 7,400 jobs, with a central role in upholding legality and protecting consumers.*"

The topics emerging from the Report were addressed in the institutional speeches of **Hon. Tommaso Foti**, Minister for European Affairs, Cohesion Policies and the NRRP; **Hon. Federico Freni**, Undersecretary at the Ministry of Economy and Finance; and **Hon. Maurizio Leo**, Deputy Minister of Economy and Finance.

Following this, the first round table dedicated to the sector featured: **Mario Antonelli**, National President of the Italian Tobacconists' Federation; **Dario Crisci**, Managing Director of Logista; **Fabio de Petris**, President and CEO of BAT Italia; **Didier Ellena**, General Manager of JTI Italia; **Pasquale Frega**, President and CEO of Philip Morris Italia; **Stefano Mariotti**, CEO of Manifatture Sigaro Toscano; **Jacob Wahnon Bunan**, Country Manager of Imperial Brands Italia.

The second round table, of a political-institutional nature, explored political perspectives and proposals with contributions from **Hon. Alessandro Giglio Vigna**, President of the European Union Policy Committee of the Chamber of Deputies; **Luigi Liberatore**, Director of Excise at the Customs and Monopoly Agency; **Hon. Giuseppe Mangialavori**, President of the Budget Committee of the Chamber of Deputies; **Hon. Marco Osnato**, President of the Finance Committee of the Chamber of Deputies.

The event was moderated by **Susanna Petruni**, Deputy Director of Rai Parlamento.

Hon. Maurizio Leo, Deputy Minister of Economy and Finance, in a video message stated: "*The fiscal calendar for the tobacco sector is coming to an end and, with the next budget law, we are preparing for the definition of a new multi-year framework. It will be a crucial step, which we will approach with a spirit of listening and with attention to the needs of a sector that is strategic for the country. At the same time, we are closely monitoring the developments of the TED directive, to avoid negative repercussions on a sector that is very important both for employment levels and for investments in our country. With everyone's contribution, we can build effective and sustainable solutions for the country system. I thank Logista and all the event organizers.*"

Hon. Marco Osnato, President of the Finance Committee of the Chamber of Deputies, stated: "*The tobacco distribution sector is undergoing profound transformations and deserves the attention of lawmakers, as demonstrated by the fact-finding investigation carried out by the committee I chair. The challenges ahead are many: harmonizing tax collection at EU level, applying clear rules to different product types, strengthening the fight against illegal channels, protecting retailers' income and citizens' health, and ensuring the sustainability of the National Health Service. The greater regulatory stability introduced by the Meloni Government is an important first step.*"

Luigi Liberatore, Director of Excise at the Customs and Monopoly Agency, stated: "*The synergy between ADM and sector operators, including Logista, guarantees legality, protection of public health, and fiscal fairness, and so serves to support the economic development of companies. The Agency's commitment, with the 'virtuous supply chain', is focused on the fight against illicit trade, on controlling production and distribution, and on the regulatory evolution of a growing sector which has a strong impact on the economy.*"

Mario Antonelli, National President of the Italian Tobacconists' Federation, stated: "*In a constantly evolving market, we tobacconists remain a crucial pillar as the watchmen of legality and safety. The Italian regulatory and fiscal model has managed to balance innovation, public health, and economic* *stability. By contrast, the EU proposal on taxation risks compromising the market, operators, and the State. A different approach is needed: distinct product categories, favorable taxation for innovation, progressive and balanced excise duties, controlled distribution through state licenses. This way, investments, sustainability, and the protection of the legal market are promoted, reconciling both health and the Treasury."*

Dario Crisci, Managing Director of Logista, stated: "*Logista, a leader in proximity distribution, generates directly and indirectly in our country over 7 billion euros of added value and supports about 7,400 jobs, making a decisive contribution to legality and consumer protection at a time when the sector is undergoing a profound evolution which requires constructive dialogue and close collaboration between institutions and operators. Logista guarantees transparency, efficiency, and responsibility, even in addressing the sector's regulatory and fiscal challenges."*

Fabio de Petris, President and CEO of BAT Italia, stated: "*We consider Italy a model for Europe: a balanced regulatory and fiscal framework facilitates foreign investment and encourages predictable revenues for the State, also thanks to the control of the illegal market. Added to this is a system of authorized retailers and efficient distribution through tax warehouses managed by Logista. These factors have made our country central to BAT's transformation journey, as shown by the expansion of the Innovation Hub in Trieste. Looking at Europe, we hope that the Italian Government will firmly express its position in a fiscal and regulatory debate that recognizes the role of reduced-risk products in supporting the transition to less harmful alternatives."*

Didier Ellena, General Manager of JTI Italia, stated: "*The three-year fiscal calendar for tobacco excise duties in Italy has become a best practice at European level, offering stability and predictability to the system, ensuring certain revenues for the State and at the same time encouraging greater investment. For this reason, JTI emphasizes the importance of adopting the same pragmatic approach at EU level in order to make the recent proposals of the European Commission on tobacco taxation more balanced and sustainable."*

Pasquale Frega, President and CEO of Philip Morris Italia, stated: "*Our country has shown that a clear, proportionate, and differentiated regulatory and fiscal framework guarantees stability, supports the constant growth of revenue, stimulates investment, and generates employment. With the start of a new season of reforms at European and international level, there is a risk of adopting ideological and restrictive approaches, which would set us back decades. Italy's role is essential in helping to define international policies that recognize the value of innovation, strengthening the competitiveness of strategic and excellent supply chains such as the national one: an ecosystem of 8,000 companies, employing about 44,000 people and exporting about 2 billion euros every year in Europe and worldwide."*

Stefano Mariotti, CEO of Manifatture Sigaro Toscano: "*Toscano cigars represent a unique reality within the market, drawing their strength from tradition, from an Italian agricultural supply chain, and from artisanal manufacturing that has kept a heritage of knowledge and employment alive for over two centuries. It is important that regulatory and fiscal choices recognize the specificities of this segment,* *avoiding approaches that could penalize a product that is valuable above all for its cultural identity and its role as an ambassador of Italian excellence in the world.*"

Jacob Wahnon Bunan, Country Manager of Imperial Brands Italia: "*We are proud to have taken part at this important event, which gave us the opportunity to reaffirm our commitment to maintaining an open and constructive dialogue with all supply chain stakeholders. As a company, we strongly believe in the importance of transparent collaboration with all institutions, aimed at building a stable and sustainable future for the market of tobacco and next-generation products in Italy, and starting always by listening to the requests and desires of consumers.*"

About Logista
Logista is the leading integrated distribution operator to points of sale in Europe. 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 warehouses, it supplies 60,000 points of sale in our country, ensuring the State approximately 15 billion euros in tax revenue per year. Logista is engaged in numerous sustainability initiatives aimed at minimizing the business's impact by considering the environment, community, and enterprise in a vision of mutual development. Over the past year, Logista has given new momentum to two key projects: **Logista Green Box** for reusing the packaging used in deliveries; and **RECYCLE-CIG**, the collection and disposal circuit for spent electronic cigarettes, thanks to which consumers can deposit devices in the boxes present in over 30,000 participating tobacconists, regardless of purchasing new products.
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About Fondazione Tor Vergata
Fondazione Tor Vergata is an instrumental body of the University of Rome "Tor Vergata," of which it is the sole member and founder, and it is one of the entities that helps carry out the University's Third Mission activities. It aims to foster cooperation among universities, businesses, and public institutions. The University's Third Mission refers to the commitment to support the application, enhancement, dissemination, and transfer of knowledge, expertise, and innovations to contribute to the social, cultural, and economic development of the region in a collaborative and inclusive spirit. Fondazione Tor Vergata is one of the 23 University Foundations recognized by the Italian Ministry of University and Research (MUR). For more information, visit fondazionetorvergata.it

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