

240 
YEARS
OF ENTREPRENEURIAL
INCLUSION.

240 YEARS OF THE AUSTRIAN TOBACCO MONOPOLY

german version



THE PLATFORM



THE TOBACCO MONOPOLY
is an analog, three-part trading platform

1 TOBACCONISTS

- **THE CONCESSION.** The right to sell tobacco products is granted by the MVG in the form of Concessions to tobacconists. They operate as independent entrepreneurs.
- **THE SMOKE RING.** The common signage (Smoke Ring) must be prominently displayed at every tobacconist's shop.
- **THE MARGIN.** Tobacconists are entitled to a legally fixed trade margin.
- **THE PROTECTION.** The monopoly provides territorial protection, offering tobacconists regional security.
- **THE SOCIAL SYSTEM.** The unique allocation model for people with disabilities and the exclusive right of transfer to assisting relatives has resulted in Austria's largest inclusive network of entrepreneurs.

2 CUSTOMERS

- Every day, 1 million customers visit local tobacconists.
- 20.6% of adult Austrians smoke daily (23.7% of men and 17.9% of women).
- On average, male smokers consume 17.1 cigarettes daily, while women smoke 13.3 cigarettes.
- 5.6% of the population smokes occasionally, but not daily.
- Following the current health trend, the percentage of the smoking population is declining.

2 CUSTOMERS

- The platform is here for the customers! They need to be able to rely on the fulfillment of the service promise – the responsible sale of sensitive consumer goods. Customers expect to be able to purchase high-quality products in a modern environment. Adhering to youth protection regulations in the tobacconists is the promise to the Austrian population.

3 PARTNERS

- The third part of the monopoly platform consists of the partners. These include the Chamber of Commerce and, within the tobacco value chain, the industry, wholesalers, as well as suppliers, equipment providers, associations and federations.



According to §3 of the Tobacco Monopoly Act, the administration of the tobacco monopoly is the responsibility of the "Monopolverwaltung" (MVG).

3 PARTNERS

CHAMBER OF COMMERCE

THE TOBACCONISTS use the structures of the Chamber of Commerce (WKO) to organize themselves. The federal and regional committees of Austrian tobacconists, including elected officials, advocate for effective representation of their interests. The WKO provides extensive service offerings.

INDUSTRY

THE INDUSTRY produces tobacco products according to current regulations (tar, nicotine, and carbon monoxide content, warning labels) outlined in the Tobacco and Non-Smokers Protection Act (TNRSG) and distributes its products exclusively through wholesalers approved by the Ministry of Finance. Advertising for tobacco products is prohibited.

The four major providers and their most significant products:

- PMI – Philip Morris International (Marlboro, Chesterfield, IQOS...)
- JTI – Japan Tobacco Industries (Winston, Benson & Hedges, Camel...)
- IMP – Imperial Brands (Gauloises, JPS, West...)
- BAT – British American Tobacco (Lucky Strike, Pall Mall, Parisienne...)

WHOLESALE

THE WHOLESALE sector supplies all tobacconists with tobacco products under the same conditions. Prices are set by wholesalers in coordination with the industry and are publicly announced by the MVG after being reported to the Federal Ministry of Finance. All tobacconists are required to sell their tobacco products at these set prices. The commercial wholesale distribution of tobacco products within the monopoly area is reserved for wholesalers authorized by the Ministry of Finance.

Currently, there are 14 wholesalers, with the three largest being:

- Tabaccoland (for JTI & IMP among others)
- Philip Morris Austria (for PMI)
- Moosmayr (for BAT among others)

SUPPLIERS

Other suppliers use Austrian tobacconists as a central and responsible distribution channel to sell their products.

THE AUSTRIAN LOTTERIES use tobacconists as a central distribution channel to sell their products. In addition, sports betting is also offered. Tobacconists implement youth protection regulations for the lotteries.

NEWSPAPERS AND MAGAZINE PUBLISHERS distribute their print products through the Austrian tobacconists network. The PGV (Press Wholesale Distribution) delivers press products to nearly all tobacconists daily. Other suppliers use Austrian tobacconists as a central and responsible distribution channel to sell their products.

ASSOCIATIONS & CLUBS

The Austrian Disability Council (umbrella organization of all disability associations), the KOBV (largest disability association), the ÖZIV (Austrian Civil Disability Association), and other initiatives such as AED, myAbility, WienWork, and Zero Project, work together with the MVG to promote a fair working environment for people with disabilities. The Wohlfahrtseinrichtung (WE) is a private association and service provider for tobacconists. The Association of Cigar and Pipe Specialists (VCPO) supports Austrian tobacco retailers in their efforts to serve their customers.

STORE OUTFITTERS

Specialists in tobacconist stores construction—from carpenters to interior designers, cash register manufacturers, tobacco vending machine providers, and other shop outfitters—ensure smooth operations in tobacco outlets and provide the necessary infrastructure.

MEDIA

Both analog and digital media are used for communicating innovations and current topics (trade media: allestabak.net, Filterlos, Trafik Aktuell, Trafikantenzeitung).

Founding

AN IDEA FOR THE AGES
The Austrian tobacco monopoly was established by Emperor Josef II as a full monopoly, with the state reserving the rights to tobacco cultivation, extraction, processing, production, and trade. The „Tobacco Administration“ became part of the sovereign administration. War victims, their families and civil servants who had fallen into poverty through no fault of their own were given preference when tobacco retailer concessions were issued.



MONOPOLY LEGALLY SECURED

On July 11, Emperor Ferdinand I issued the Customs and State Monopoly Order, which established restrictions on state monopoly goods.

1918

THE GREAT CRISIS
After World War I, the Tobacco Administration lost most of its tobacco cultivation areas and factories.

1939

TURBULENT WAR TIMES
After annexation to the German Reich, the Austrian Tobacco Administration was transformed into Austria Tabak AG, with the German Reich as the sole shareholder. After World War II, the shares were returned to the Republic of Austria.

1913

PRODUCTION IN FULL SWING

The Tobacco Administration operated 36 factories, nine of which were in present-day Austria, with the others in the crown regions of the monarchy.

1911

LEGAL BASIS

This year saw the issuance of a regulation concerning the staffing, establishment, and closure of tobacco retail outlets. This regulation served as the foundation of the full tobacco monopoly until 1949.

1899

THE FIRST CIGARETTE VENDING MACHINE

On April 19, the first public cigarette vending machine, labeled „K. K. Tabakverschleißautomat“, was installed in Vienna. It featured twelve different products, each with its own coin slot.

1949

RESTRUCTURING

Austria Tabakwerke AG is entrusted with the administration of the tobacco monopoly.

1968

NEW RULES

Amendment to the Tobacco Monopoly Act.

1979

INCLUSION IN MODERN TIMES

Civilians with disabilities are included among those with preferential rights.

Milestone!

MVG

The MVG is appointed by the legislature to manage the Austrian tobacco monopoly. In strategic matters, it works closely with the Federal Ministry of Finance, the owner of the MVG. Its operational tasks include recruiting and selection of new tobacconists, professionalization of selected recruits, further developing the rules of collaboration and ensuring compliance – all in coordination with the federal and state concessions of tobacconists.

The MVG acts as a mediator among the participants of the platform. To ensure the efficient handling of trade processes, it gathers and shares important information regarding core and market data.

KEY SUCCESS FACTORS OF THE PLATFORM ARE:

- Shared goals and values
- Clear rules and defined roles
- Balanced distribution of revenues
- Trust among participants

MINISTRY OF FINANCE

The Federal Ministry of Finance holds 100% of the shares in Monopolverwaltung GmbH (MVG) and assumes the role of owner.

The Ministry of Finance is responsible for the legal framework of the tobacco monopoly and issues wholesale licenses. Additionally, the Ministry is entrusted with the enforcement of the Tobacco Tax Act (TabStG), as well as parts of the Tobacco Monopoly Act (TabMG) and the Tobacco and Non-Smokers Protection Act (TNRSG).

EU – MORE NEW RULES

With Austria's accession to the EU, a large part of the tobacco monopoly and the state-owned Austria Tabak are privatised. There is no longer a production monopoly. Wholesalers are subject to a licensing system – the Federal Ministry of Finance is the licensor. The retail monopoly remains in place.

1995

1996

FOUNDING OF MVG
Monopolverwaltung GesmbH (MVG), with the Republic of Austria as its sole owner, is established and begins its operations across the entire country.



2021

NEW ALLOCATION
Switch to the allocation of tobacconist Concessions: Allocation based on the Federal Procurement Act for Concessions 2018 (BVerGKonZ).

2023

THE NEW LAW
The amendment to the Tobacco Monopoly Act secures the inclusive allocation model. The allocation of concessions and the structural policy goals are incorporated into the TabMG.

SOCIAL RESPONSIBILITY
Family members of people with disabilities are granted the right to take over tobacconist shops.

2019

YOUTH PROTECTION – AGE 18
Consumption, purchase, possession and distribution of tobacco products are prohibited for individuals under 18 years of age.

SMOKING BAN IN RESTAURANTS AND BARS
As of November 1, a nationwide smoking ban is in effect in all hospitality establishments.

2018

CLEAR GOALS
The goals of the MVG (social, health, and fiscal objectives) are enshrined in the Tobacco Monopoly Act.

240 YEARS OF ENTREPRENEURIAL INCLUSION.

2024

HANNES HOFER

Managing Director of MVG



FOR 240 YEARS, THE MONOPOLY HAS STOOD FOR THE RESPONSIBLE RETAIL OF SENSITIVE CONSUMER GOODS, WITH A SPECIAL FOCUS ON INCLUSION AND ENTREPRENEURSHIP.

THIS GLOBALLY UNIQUE AND SUCCESSFUL MODEL WELCOMES PEOPLE WITH DISABILITIES INTO THE PRIMARY LABOR MARKET. IT'S A SYSTEM WE CAN TRULY BE PROUD OF!

MAGNUS BRUNNER

Federal Minister of Finance



THE ANNIVERSARY OF OUR TOBACCO MONOPOLY REMINDS US OF THE DEEPLY ROOTED VALUES OF INCLUSION AND SOCIAL COMMITMENT.

AS WE CELEBRATE 240 YEARS, WE RENEW OUR COMMITMENT TO THE RESPONSIBLE HANDLING OF SENSITIVE GOODS AND THE PROMOTION OF INCLUSIVE BUSINESS MODELS.

WOLFGANG STREISSNIG

Federal Chairman of the Tobacconists' Committee

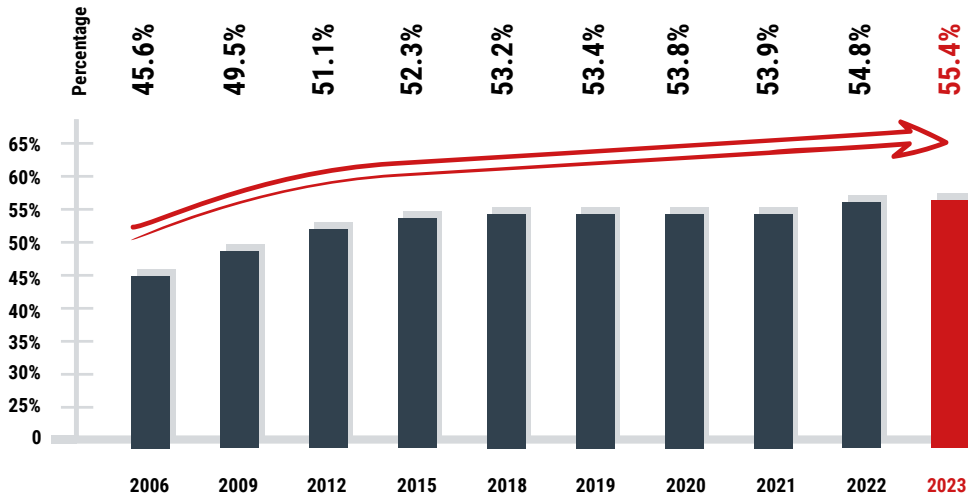


FOR 240 YEARS, THE AUSTRIAN TOBACCO MONOPOLY HAS EMBODIED NOT ONLY ECONOMIC SUCCESS BUT ALSO SOCIAL INCLUSION.

IT PROVIDES SMALL FAMILY BUSINESSES WITH A SECURE FUTURE AND OFFERS PEOPLE WITH DISABILITIES A UNIQUE EMPLOYMENT OPPORTUNITY.

INCLUSIVE TOBACCO BUSINESS NETWORK

In Austria, 1,218 tobacco retailers operate as entrepreneurs with disabilities. Overall, tobacconists create and secure 12,000 jobs as employers at 4,684 locations.*



*© Economica Institut/Helmenstein 2018

365 DAYS OF INCLUSION

EVERY FIFTH DAY, ON AVERAGE, THE MVG SUPPORTS ANOTHER PERSON WITH DISABILITIES IN STARTING A BUSINESS AND TAKING A RESPONSIBLE ROLE IN THE PRIMARY LABOR SECTOR.

240 Years of inclusive business practices

Livelihood for PEOPLE WITH DISABILITIES

100% of concessions of tobacco retailers are rewarded to people with disabilities. This tradition dates to the establishment of the Austrian tobacco monopoly in 1784.

Currently, 55.4% of tobacconists in Austria are individuals with a disability degree of at least fifty percent. The Austrian state tobacco monopoly has created the largest inclusive business network in the country.

FRANZ GROSCHAN

President of the War Victims and Disabled Persons Association (KOBV)

THROUGH TARGETED INFORMATION AND COUNSELING, THE MVG SUCCESSFULLY IMPLEMENTS LONG-TERM, PROFESSIONAL INTEGRATION OF PEOPLE WITH DISABILITIES—THIS IS INCLUSION IN PRACTICE.



CHRISTINE STEGER

Disability Advocate



THE SERVICES OFFERED BY THE MVG PROVIDE FUNDAMENTAL SUPPORT FOR TRANSITIONING INTO NEW SELF-EMPLOYMENT OPPORTUNITIES TO MANY PEOPLE WITH DISABILITIES. THIS OPENS NEW DOORS FOR PARTICIPATION AND SELF-DETERMINATION.

SUSTAINABILITY

Social Responsibility

#PEOPLEWITHDISABILITIES

- MVG actively advocates for the self-determination of people with disabilities as entrepreneurs.
- MVG enhances the image of the inclusive platform and raises awareness of its social objectives.
- MVG promotes health policy goals by increasing tobacconist awareness of youth protection by decisively steering them toward less harmful products.

MVG has developed a sustainability strategy based on the Global Reporting Initiative and the United Nations Sustainable Development Goals.



10 REDUCED INEQUALITIES



here we are world champions!

3 GOOD HEALTH AND WELL-BEING



4 QUALITY EDUCATION



5 GENDER EQUALITY



8 DECENT WORK AND ECONOMIC GROWTH



this concerns all of us

ECOLOGY

#VALUECHAIN

- MVG strengthens ecological awareness regarding sensitive consumer goods along the value chain and demands ecological responsibility from all partners of the monopoly platform.

12 RESPONSIBLE CONSUMPTION AND PRODUCTION



13 CLIMATE ACTION



16 PEACE, JUSTICE AND STRONG INSTITUTIONS



17 PARTNERSHIPS FOR THE GOALS



Economy

#SUSTAINABLEFUTURE

- MVG ensures a balanced distribution of monopoly revenues among the platform's participants, with a particular focus on a sustainable future for tobacconists.

www.mvg.at

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READY FOR THE FUTURE



MVG modern

In recent years, MVG has optimized business processes, expanded communication channels, digitized workflows and supported a legislative amendment.

2017

TOBACCONIST BAROMETER

Every quarter, around 500 tobacconists are asked brief questions about the industry mood and their satisfaction with the work of MVG.

YOUTH PROTECTION CHECKS

To ensure responsible retailing of sensitive goods by tobacconists, MVG has been conducting mystery shopping since 2017 to monitor compliance with youth protection regulations.

MARKET ANALYSIS

Ongoing analyses of the market for the Austrian monopoly's goods are conducted in terms of both sales volumes and revenue values. This allows MVG to assess the economic development of the monopoly.

COMPANY VALUATION

Buyout-Payment: Since 2018, vacant tobacconist businesses have been uniformly evaluated. A unique model, tailored to the specifics of the monopoly, has been developed to calculate the buyout amount, ensuring that succession is fair and transparent.

2018

2019

TRACK & TRACE

Based on the EU directive, a system for the seamless traceability of tobacco products within the EU has existed since May 2019. MVG serves as the central ID-issuing authority in Austria, handling 600 million pack codes annually.

finally

2020

E-INVOICING

Goodbye to paper invoices – MVG has transitioned all suppliers to a digital invoicing workflow.

2021

BARRIER-FREE OFFICE

In March 2021, the team from the Vienna Tobacco Monopoly Administration moved to an office complex at the main train station. The MVG office is fully accessible and easily reachable by public transport.

SOCIAL MEDIA AND HOMEPAGE

Since June 2021, MVG has been active on Facebook and Instagram. In February 2022, the new MVG website went live and was certified as accessible by WACA.

DIGITAL FILES & DIGITAL WORKFLOW

Over 6,014 tobacconist files have been digitized, with more than one million pages scanned. The entire allocation process has been converted to a digital workflow.

2022

2023

AMENDMENT TO THE TOBACCO MONOPOLY ACT (TABMG)

In July 2023, a legislative amendment came into effect. The allocation of concessions is now carried out in accordance with the Federal Procurement Act for Concessions. Our inclusive allocation model is legally secured.

100% SOCIAL RESPONSIBILITY

Relatives acquire a personal and unique right to take over the concession from people with disabilities as long as they were employed full-time there. Youth protection checks can now be completed even after the purchase process is finalized.

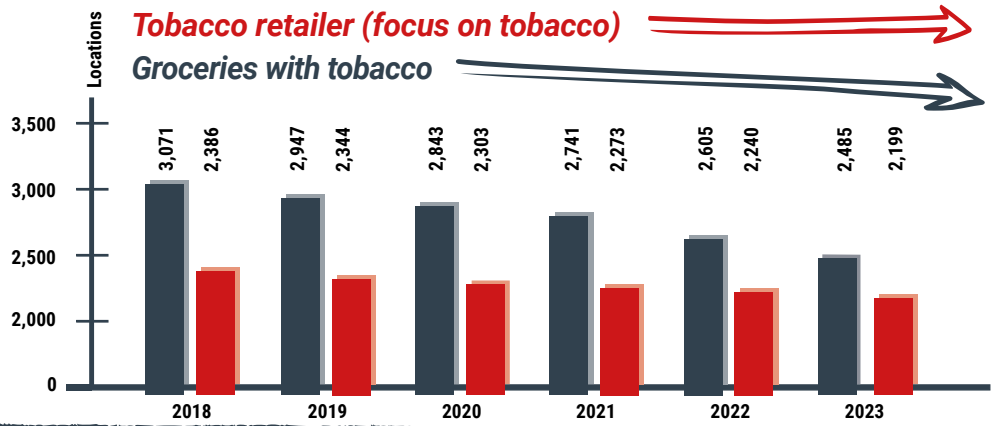
STRATEGIES & GOALS OF THE MVG

This is how inclusion works

	HEALTH-POLICY GOAL	SOCIAL-POLICY GOAL	STRUCTURAL-POLICY GOAL	FISCAL-POLICY GOAL
GOALS	<p>2,854</p> <p>In 2023, the MVG conducted 2,854 inspections to ensure compliance with youth protection regulations in tobacco stores.</p> <p>Ensure the responsible trade of sensitive consumer goods.</p>	<p>1,218</p> <p>55.4% of tobacconists have a disability degree of at least 50%. A total of 1,218 people with disabilities operate tobacco retails.</p> <p>Enable people with disabilities to establish an entrepreneurial livelihood.</p>	<p>4,684</p> <p>At the end of 2023, there were 2,199 tobacco retailers and 2,485 Groceries with tobacco in Austria.</p> <p>Ensure regional supply of sensitive consumer goods.</p>	<p>2.7 Bn.</p> <p>In 2023, a total of 2.7 billion euros in taxes (tobacco tax and value-added tax) were collected through tobacco stores.</p> <p>Maintain an efficient tax system. Offset the external costs of smoking with tax revenues.</p>
CORE STRATEGY	MODERATELY INCREASING PRICES	MODERATELY INCREASING PRICES	MODERATELY INCREASING PRICES	MODERATELY INCREASING PRICES
EFFECT OF THE CORE STRATEGY	REDUCE TOBACCO CONSUMPTION.	INCREASE PROFIT MARGINS FOR TOBACCONISTS.	SECURE LOCATIONS FOR TOBACCO RETAILERS.	ENABLE STABLE TAX REVENUE.
UNIQUE SELLING PROPOSITION (USP)	The state monopoly is THE distribution platform for sensitive consumer goods.	The state monopoly, via tobacco retailer, has created the largest inclusive business network in Austria.	The state monopoly, together with tobacco retailers, forms the largest regional, owner-operated retail system in Austria.	The monopoly platform (wholesale, tobacco outlets) is one of the largest taxpayers in the Republic of Austria.
STRENGTHENING STRENGTHS STRATEGY	<p>Preserve</p> <p>THE UNIQUE SELLING PROPOSITION</p> <ul style="list-style-type: none"> Strengthen youth inclusion and continuously improve outcomes Offer Next Generation products (NGP) with high product quality and aim for their inclusion in the state monopoly. Inform about harm-reduction products as alternatives 	<p>Increase</p> <p>AWARENESS FOR THE SOCIAL OBJECTIVE</p> <ul style="list-style-type: none"> Increase awareness of the social objectives of the state monopoly platform Create greater public awareness through targeted information and recruit suitable tobacco retailer applicants Secure the livelihoods of tobacconists in a sustainable manner 	<p>Provide</p> <p>ONGOING GUIDANCE</p> <ul style="list-style-type: none"> Maintain a strong focus on tobacco retailers and a healthy tobacco store structure Realign and further develop the Austrian tobacco distribution system according to trade benchmarks. Leverage the opportunities of digitalization, and social media Support the transformation of tobacconists into modern retailers via networking synergies 	<p>Expand</p> <p>EXCISE TAX TO NGPs</p> <ul style="list-style-type: none"> Expand the tax base to include innovations around Next Generation products Actively combat the trade of illegal and untaxed goods. Continue active coordination among platform partners during tobacco tax revisions

STRUCTURE: FOCUS ON TOBACCO RETAILER

In 2023, the share of Tobacco retailer (TFG) reached 47% of the total number of tobacconists. This is a significant increase compared to 43.8% in 2018. We are working towards a leaner and more stable structure with a clear focus on specialized tobacco retailer.



“TABAK TRAFIK” IN NUMBERS

31.12.2023 ©MVG

Tobacco retailer

Grocery with tobacco *

	VORARLBERG	TYROL	SALZBURG	UPPER AUSTRIA	CARINTHIA	STYRIA	BURGENLAND	LOWER AUSTRIA	VIENNA	AUSTRIA OVERALL
Total number of tobacco outlets	205	480	306	811	355	701	203	1,039	584	4,684
Tobacco retailer	76	150	138	327	149	330	76	400	553	2,199
Grocery with tobacco*	129	330	168	484	206	371	127	639	31	2,485
People with disabilities	41	67	82	201	57	171	41	224	334	1,218
Percentage of tobacconists with disabilities <small>tobacco retailer</small>	53.9%	44.7%	59.4%	61.5%	38.3%	51.8%	53.9%	56.0%	60.4%	55.4%
Percentage of women <small>tobacco retailer</small>	37.8%	43.2%	41.6%	36.3%	46.9%	45.7%	52.6%	44.6%	38.6%	42.0%
Sales area <small>in m²</small>	35 m ²	31 m ²	28 m ²	35 m ²	32 m ²	30 m ²	24 m ²	33 m ²	28 m ²	31 m²

*Average value of the tobacco retailer (TFG) awarded in 2023

The oldest tobacconist is **90 years** old and lives in Vienna

On average, tobacconists are **37 years** old when they take over a shop

The average age of tobacconists is **53 years**.

The youngest tobacconist is **23 years** old and runs his shop in Upper Austria

70% of a tobacco retailer's revenue comes from the sale of tobacco products

The average tobacco trade margin per tobacco shop in 2023 is **€192,378** – equivalent to **13.9%** of the gross tobacco sales

The average purchase price of a tobacco shop is **€131,557**

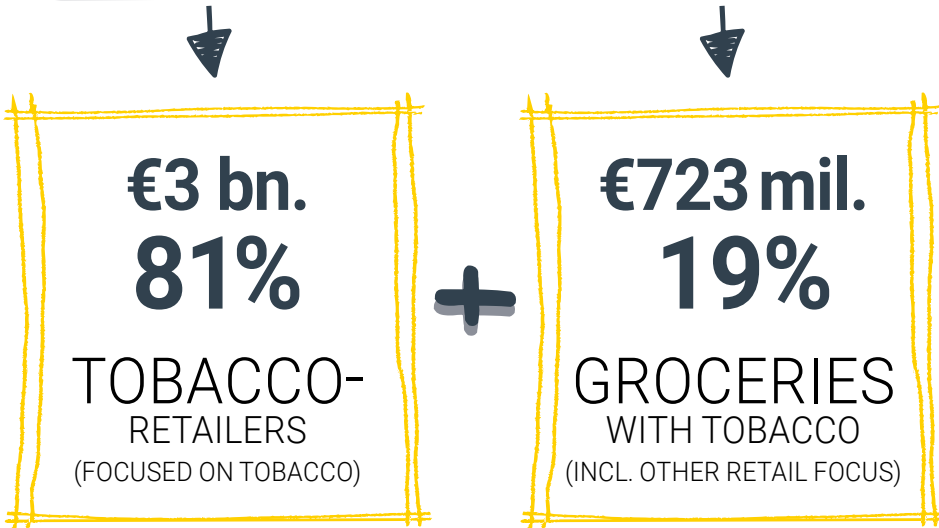
not bad!

The average pre-tax profit per tobacco shop is **€62,817**

ANNUAL REPORT

In 2023, the monopoly market remained stable. The moderate tobacco tax measures proved to be a brake on inflation. Trade margin revenues increased, and heated tobacco and other New Generation products gained market share.

TOBACCO PRODUCTS REVENUE ²⁰²³ **€3,761,355,692**
 +3,2% INCREASE IN TOTAL REVENUE €116 MILLION MORE THAN IN 2022

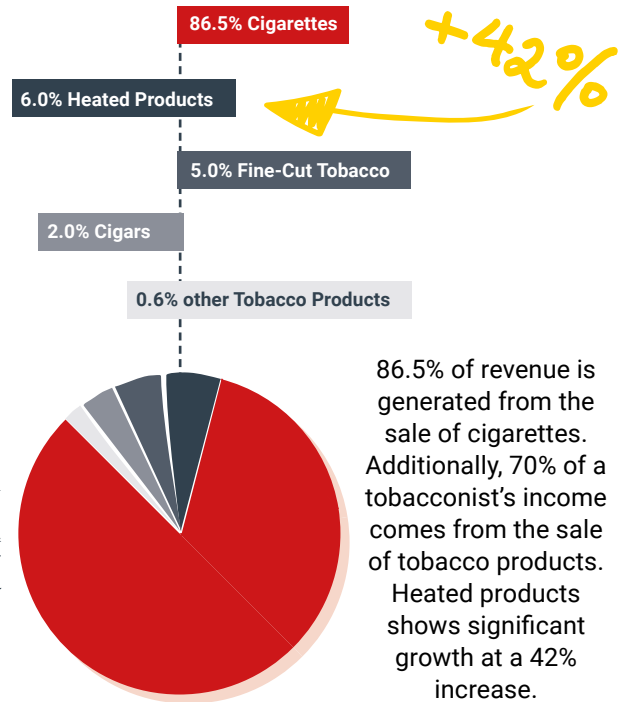


REVENUE FROM TAXES

2.1 BN. IN TOBACCO TAX REVENUE +
 €627 MIL. IN VALUE ADDED TAX

= €2.73 bn.

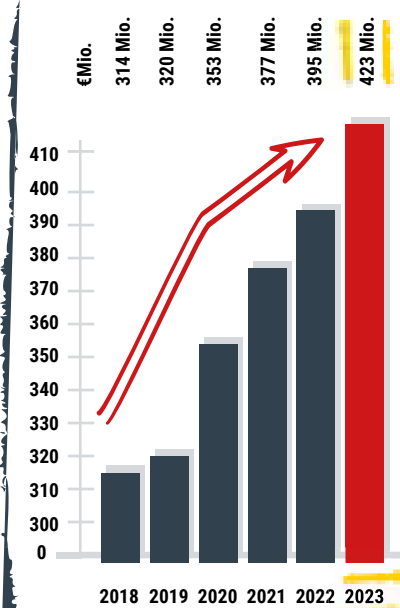
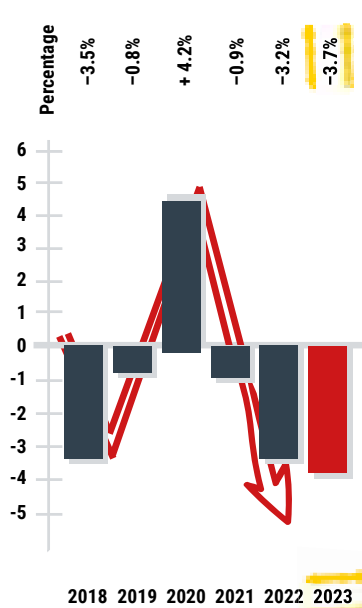
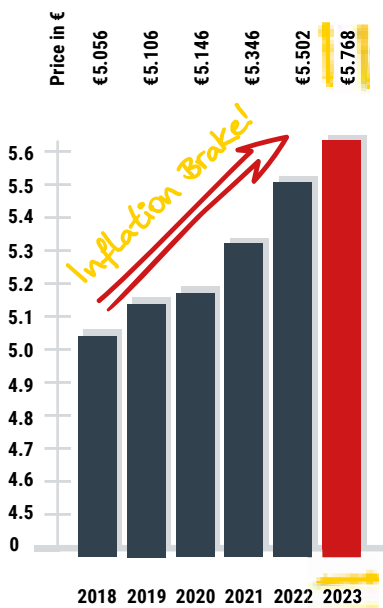
REVENUE FROM ALL AUSTRIAN TOBACCO MONOPOLY PRODUCTS



CIGARETTE PRICE

SALES VOLUME

MARGIN REVENUES



The average price for a pack of cigarettes (20 pieces) is €5.768. In 2023, prices increased by 27 cents (+4.8%).

In 2023, a total of 11.3 billion cigarettes were sold. This represents a decrease of 392 million cigarettes (-3.7%) compared to the previous year.

In 2023, tobacco retailer recorded a 7% increase in margin revenues, while the industry and wholesalers saw a simultaneous increase of 12%.

NEW GENERATION PRODUCTS

Heated Products
 (Austrian tobacco monopoly products)
 Revenue: approx. €235 Million
 Growth 2023: 42%

E-Cigarettes
 (additional items)
 Revenue in tobacco stores: €59 Million*
 Growth 2023: 60%

Nicotine Pouches
 (additional items)
 Revenue in tobacco stores: €118 Million*
 Growth 2023: 34%

* Daten: E-Load AG