

Tobacco in Malaysia

June 2023

Table of Contents

Tobacco in Malaysia

EXECUTIVE SUMMARY

Tobacco in 2022: The big picture 2022 key trends Competitive landscape Retailing developments What next for tobacco?

OPERATING ENVIRONMENT

Legislation Legislative overview Summary 1 - Legislation Summary at a Glance Minimum legal smoking age Smoking prevalence Plain packaging Point-of-sale display bans Smoking in public places Flavoured tobacco product ban Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

Table 1 - Number of Adult Smokers by Gender 2017-2022

MARKET DATA

- Table 2 Sales of Tobacco by Category: Volume 2017-2022
- Table 3 Sales of Tobacco by Category: Value 2017-2022
- Table 4 Sales of Tobacco by Category: % Volume Growth 2017-2022
- Table 5 Sales of Tobacco by Category: % Value Growth 2017-2022
- Table 6 Forecast Sales of Tobacco by Category: Volume 2022-2027
- Table 7 Forecast Sales of Tobacco by Category: Value 2022-2027
- Table 8 Forecast Sales of Tobacco by Category: % Volume Growth 2022-2027
- Table 9 Forecast Sales of Tobacco by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Cigarettes in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Polarisation in demand in 2022 Growing competition from e-vapour products and heated tobacco in 2022 Illicit trade volumes rise in 2022

PROSPECTS AND OPPORTUNITIES

Newly proposed regulations may foster illicit trade over the forecast period Players are set to reformulate strategies as demand swings between segments over the forecast period Players likely to increase focus on e-vapour products and heated tobacco

TAXATION AND PRICING

Taxation rates Table 10 - Taxation and Duty Levies 2017-2022 Average cigarette pack price breakdown Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 11 - Sales of Cigarettes: Volume 2017-2022 Table 12 - Sales of Cigarettes by Category: Value 2017-2022 Table 13 - Sales of Cigarettes: % Volume Growth 2017-2022 Table 14 - Sales of Cigarettes by Category: % Value Growth 2017-2022 Table 15 - Sales of Cigarettes by Blend: % Volume 2017-2022 Table 16 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2017-2022 Table 17 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2017-2022 Table 18 - Sales of Cigarettes by Pack Size: % Volume 2017-2022 Table 19 - Sales of Cigarettes by Price Band: % Volume 2017-2022 Table 20 - NBO Company Shares of Cigarettes: % Volume 2018-2022 Table 21 - LBN Brand Shares of Cigarettes: % Volume 2019-2022 Table 22 - Sales of Cigarettes by Distribution Format: % Volume 2017-2022 Table 23 - Illicit Trade Estimate of Cigarettes: Volume 2017-2022 Table 24 - Forecast Sales of Cigarettes: Volume 2022-2027 Table 25 - Forecast Sales of Cigarettes by Category: Value 2022-2027 Table 26 - Forecast Sales of Cigarettes: % Volume Growth 2022-2027 Table 27 - Forecast Sales of Cigarettes by Category: % Value Growth 2022-2027 Table 28 - Forecast Sales of Cigarettes by Blend: % Volume 2022-2027 Table 29 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2022-2027 Table 30 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2022-2027 Table 31 - Forecast Sales of Cigarettes by Pack Size: % Volume 2022-2027 Table 32 - Forecast Sales of Cigarettes by Price Band: % Volume 2022-2027

Cigars, Cigarillos and Smoking Tobacco in Malaysia.

KEY DATA FINDINGS

2022 DEVELOPMENTS

Retail volume sales of cigars and cigarillos rise slowly in 2022 as obstacles to consumption remain Fine cut tobacco leverages wide array and price benefits to post the fastest retail volume growth in 2022 International players lead cigars and cigarillos in 2022

PROSPECTS AND OPPORTUNITIES

Price advantage, wide choice and stronger distribution to push fine cut tobacco sales Economic improvement and channel expansion are key factors for an upturn in cigars Players to look to off-centre marketing initiatives

CATEGORY DATA

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2017-2022
Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2017-2022
Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2017-2022
Table 36 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2017-2022
Table 37 - Sales of Cigars by Size: % Volume 2017-2022
Table 38 - Sales of Cigarillos by Price Platform 2017-2022
Table 39 - NBO Company Shares of Cigars and Cigarillos: % Volume 2018-2022
Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2019-2022

Table 41 - NBO Company Shares of Cigars: % Volume 2018-2022 Table 42 - LBN Brand Shares of Cigars: % Volume 2019-2022 Table 43 - NBO Company Shares of Cigarillos: % Volume 2018-2022 Table 44 - LBN Brand Shares of Cigarillos: % Volume 2019-2022 Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2018-2022 Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2019-2022 Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2018-2022 Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2019-2022 Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2018-2022 Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2019-2022 Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2017-2022 Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2017-2022 Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2022-2027 Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2022-2027 Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2022-2027 Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2022-2027

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Malaysia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Heated tobacco continues to gain traction among young adults Fragmented and competitive characterises e-vapour products landscape Innovation, affordability and accessibility boost e-vapour products

PROSPECTS AND OPPORTUNITIES

New legislation is likely to impact the performance of e-vapour products in the forecast period Significant new product development is anticipated in e-vapour products Major players to add dynamism to heated tobacco products

CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2017-2022

CATEGORY DATA

Table 58 - Sales of Tobacco Heating Devices: Volume 2017-2022 Table 59 - Sales of Tobacco Heating Devices: % Volume Growth 2017-2022 Table 60 - Sales of Heated Tobacco: Volume 2017-2022 Table 61 - Sales of Heated Tobacco: % Volume Growth 2017-2022 Table 62 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022 Table 63 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022 Table 64 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2022 Table 65 - NBO Company Shares of E-Vapour Products: % Value 2018-2022 Table 66 - LBN Brand Shares of E-Vapour Products: % Value 2019-2022 Table 67 - NBO Company Shares of Tobacco Heating Devices: % Volume 2018-2022 Table 68 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2019-2022 Table 69 - NBO Company Shares of Heated Tobacco: % Volume 2018-2022 Table 70 - LBN Brand Shares of Heated Tobacco: % Volume 2019-2022 Table 71 - Distribution of E-Vapour Products by Format: % Value 2017-2022 Table 72 - Distribution of Tobacco Heating Devices by Format: % Volume 2017-2022 Table 73 - Distribution of Heated Tobacco by Format: % Volume 2017-2022 Table 74 - Forecast Sales of Heated Tobacco: Volume 2022-2027 Table 75 - Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027 Table 76 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027

Table 77 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/tobacco-in-malaysia/report.