

# Tobacco in the Czech Republic

June 2023

Table of Contents

## Tobacco in the Czech Republic

### 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

Health warnings

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 the Czech Republic

### KEY DATA FINDINGS

### 2022 DEVELOPMENTS

Declining volume sales due to price rises and health concerns

Tobacco companies reduce their portfolios to focus on most profitable brands

Menthol ban leads some to switch to e-vapour products, heated tobacco or cigarillos

### PROSPECTS AND OPPORTUNITIES

Excise tax increases and rising health awareness will impact future demand

Down trading expected with tax increases and a difficult economic environment

Tax rises to benefit illicit trade

## 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 the Czech Republic

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Sales of cigarillos supported by wide variety of flavours

Excise duty hike encourages migration to cheaper alternative tobacco products

Pipe tobacco records further decline, being mainly consumed by older consumers

### PROSPECTS AND OPPORTUNITIES

Further migration from fine cut tobacco to cheaper tobacco alternatives expected

Flavour variety will support future growth of cigarillos

Pipe tobacco and cigars will continue to underperform

## 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 the Czech Republic

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Price, flavour variety and perceived health benefits drive sales of closed system single use products

Closed rechargeable systems continue to gain over open vaping systems

Innovation drives further dynamic growth of heated tobacco

#### PROSPECTS AND OPPORTUNITIES

Strong potential of closed system single use products, with innovation attracting consumers

Nicotine pouches appeal as they can be consumed discretely

Rising health concerns and cigarette prices will encourage migration to heated tobacco

### CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2017-2022

### CATEGORY DATA

Table 58 - Sales of Smokeless Tobacco by Category: Volume 2017-2022

Table 59 - Sales of Smokeless Tobacco by Category: % Volume Growth 2017-2022

Table 60 - Sales of Tobacco Heating Devices: Volume 2017-2022

Table 61 - Sales of Tobacco Heating Devices: % Volume Growth 2017-2022

Table 62 - Sales of Heated Tobacco: Volume 2017-2022

Table 63 - Sales of Heated Tobacco: % Volume Growth 2017-2022

Table 64 - Sales of Tobacco Free Oral Nicotine: Volume 2017-2022

Table 65 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2017-2022

Table 66 - Sales of Tobacco Free Oral Nicotine by Category: Value 2017-2022

Table 67 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2017-2022

Table 68 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022

Table 69 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022

Table 70 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2022

Table 71 - NBO Company Shares of Smokeless Tobacco: % Volume 2018-2022

Table 72 - LBN Brand Shares of Smokeless Tobacco: % Volume 2019-2022

Table 73 - NBO Company Shares of E-Vapour Products: % Value 2018-2022

Table 74 - LBN Brand Shares of E-Vapour Products: % Value 2019-2022

Table 75 - NBO Company Shares of Tobacco Heating Devices: % Volume 2018-2022

Table 76 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2019-2022

Table 77 - NBO Company Shares of Heated Tobacco: % Volume 2018-2022

Table 78 - LBN Brand Shares of Heated Tobacco: % Volume 2019-2022

Table 79 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2018-2022

Table 80 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2019-2022

Table 81 - Distribution of Smokeless Tobacco by Format: % Volume 2017-2022

Table 82 - Distribution of E-Vapour Products by Format: % Value 2017-2022

Table 83 - Forecast Sales of Smokeless Tobacco by Category: Volume 2022-2027

Table 84 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2022-2027

Table 85 - Forecast Sales of Tobacco Heating Devices: Volume 2022-2027

Table 86 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2022-2027

Table 87 - Forecast Sales of Heated Tobacco: Volume 2022-2027

Table 88 - Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027

Table 89 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2022-2027

Table 90 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2022-2027

Table 91 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2022-2027

Table 92 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2022-2027

Table 93 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027

Table 94 - 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-the-czech-republic/report](http://www.euromonitor.com/tobacco-in-the-czech-republic/report).