

Cigarettes in Latin America

August 2020

Table of Contents

INTRODUCTION

Scope Key findings

REGIONAL OVERVIEW

The illicit market snuffs out growth in Latin America Regulation and high prices limit Latin America cigarettes consumption Brazil sees rapid spike in volume as consumers look for affordable options Region is divided among value-seeking and price-sensitive consumers (1) Region is divided among value-seeking and price-sensitive consumers (2) Mexico leads flavour innovations with triple capsules Traditional channels will play a key role in distribution of cigarettes COVID-19 crisis will affect distribution and occasion consumptions

LEADING COMPANIES AND BRANDS

Local companies erode the share of multinationals Brand unification is the main strategy across the region

FORECAST PROJECTIONS

COVID-19 impact will accelerate ongoing trends (1) COVID-19 impact will accelerate ongoing trends (2)

COUNTRY SNAPSHOTS

Argentina: market context Argentina: competitive and retail landscape Bolivia: market context Bolivia: competitive and retail landscape Brazil: market context Brazil: competitive and retail landscape Chile: market context Chile: competitive and retail landscape Colombia: market context Colombia: competitive and retail landscape Costa Rica: market context Costa Rica: competitive and retail landscape Dominican Republic: market context Dominican Republic: competitive and retail landscape Ecuador: market context Ecuador: competitive and retail landscape Guatemala: market context Guatemala: competitive and retail landscape Peru: market context Peru: competitive and retail landscape Uruguay: market context Uruguay: competitive and retail landscape

APPENDIX: COMPETITOR ANALYTICS

Competitor Analytics tool Overview Competitors Market overlap Treemap Overlap matrices

APPENDIX: INDUSTRY FORECAST MODEL

About Euromonitor International's Industry Forecast Model Soft drivers and the Industry Forecast Model Growth decomposition explained Significance and applications for growth decomposition Key applications for Industry Forecast Models

APPENDIX: VIA PRICING

About Via Pricing from Euromonitor International

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/cigarettes-in-latin-america/report.