

Tobacco in the Netherlands

July 2023

Table of Contents

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

Tar levels

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Low ignition propensity (LIP) cigarette regulation

Flavoured tobacco product ban

Reduced harm

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

KEY DATA FINDINGS

2022 DEVELOPMENTS

Downtrading puts pressure on value growth

Competitive landscape led by Philip Morris and its Marlboro brand

Cigarette smokers are not switching to smoking tobacco

PROSPECTS AND OPPORTUNITIES

Government policy likely to affect smoking prevalence and cigarette sales
Fewer younger smokers likely to depress growth
Continued pressure from government, society and interest groups to curb tobacco use

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 Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Smoking tobacco suffering from excise tax increases
Imperial Tobacco continues to dominate in fine cut tobacco
Cigar smoking population shrinking

PROSPECTS AND OPPORTUNITIES

Fine cut tobacco performance will be affected by falling smoking prevalence and a switch to cigarettes
Tobacconists and tobacco specialists to see strong growth
Future excise tax increases will put downward pressure on smoking tobacco growth

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 Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Tobacco heating devices facing more regulatory pressure

E-vapour user population still very small

Increasing regulatory pressure on e-vapour products

PROSPECTS AND OPPORTUNITIES

Ban on retail e-commerce sales likely to impact the performances of next-generation products

Disposable vaping products will be hit by the flavours ban

Full ban on nicotine pouches likely

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

Table 72 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2019-2022

Table 73 - Distribution of E-Vapour Products by Format: % Value 2017-2022

Table 74 - Forecast Sales of Tobacco Heating Devices: Volume 2022-2027

Table 75 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2022-2027

Table 76 - Forecast Sales of Heated Tobacco: Volume 2022-2027

Table 77 - Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027

Table 78 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2022-2027

Table 79 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2022-2027

Table 80 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2022-2027

Table 81 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2022-2027

Table 82 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027

Table 83 - 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-netherlands/report.