Tobacco in Australia

June 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
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 Australia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Volume sales of cigarettes maintain their persistent decline in 2022
Increasing illegal trade persists due to stricter regulations in the legal market and relaxed pandemic restrictions
Menthol and other flavoured cigarettes set to be banned

PROSPECTS AND OPPORTUNITIES
The decline of traditional tobacco is poised to continue
Cannabis as a potential substitute for nicotine sources
Anticipated implementation of more stringent regulations to combat 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 Australia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Sales are dampened by tightened regulations, a shrinking consumer base, and economic pressure
Demand for fine cut tobacco falls
Boutique stores offer a novel and luxurious shopping experience for cigar enthusiasts

PROSPECTS AND OPPORTUNITIES
With a dwindling consumer base, sales are expected to continue to decline, with a focus on niche differentiation
E-commerce set to become more important for the distribution of cigars and cigarillos

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
KEY DATA FINDINGS

2022 DEVELOPMENTS
Illicit trade experiences a surge in the face of rigorous restrictions on vaping products
The increase in younger vapers boosts sales
Chinese e-vapour products are popular in Australia

PROSPECTS AND OPPORTUNITIES
Closed system/disposable products set to be banned, while heated tobacco will remain prohibited in Australia
Anticipated stringent regulations on vaping products, particularly targeting the younger demographic
Making nicotine-containing vaping products illegal has altered the trading landscape for e-vapour products in Australia

CATEGORY INDICATORS
Table 57 - Number of Adult Vapers 2017-2022

CATEGORY DATA
Table 58 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022
Table 59 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022
Table 60 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2022
Table 61 - Distribution of E-Vapour Products by Format: % Value 2017-2022
Table 62 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027
Table 63 - 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-australia/report](http://www.euromonitor.com/tobacco-in-australia/report).