



**Euromonitor
International**

Cigars, Cigarillos and Smoking Tobacco in Estonia

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Cigars, Cigarillos and Smoking Tobacco in Estonia - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigars, Cigarillos and Smoking Tobacco Summary

INDUSTRY PERFORMANCE

Volume Declines as Excise Rises Erode Value Strategies

Al Capone Leverages Premium Positioning as Value Brands Lose Ground

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Volume Sees Continued Decline, Accelerated by Alternatives

Excise Tax Increases Undermine Value Strategies and Shift Demand

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Japan Tobacco International Widens Lead as Rivals Stagnate

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Tobacco Specialists Lead Sales as E-Commerce Remains Absent

ECONOMIC CONTEXT

Chart 7 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 10 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 11 - Population 2020-2030

Chart 12 - Population by Generation 2025

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[Nicotine in Estonia - Industry Overview](#)

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Tax Increases Drive Value up as Volume Declines

Heated Tobacco and E-Vapour Gain Ground as Cigarettes Lose Share

Illicit Trade Rebounds as Tax Hikes Shift Consumer Choices

Chart 13 - Volume Sales 2020-2030

Chart 14 - Volume Sales by Category 2025

WHAT'S NEXT?

Flavour Bans and New Rivals Shift Consumer Choices in Alternatives

New Companies Fuel Rivalry as Traditional Products Retreat

Chart 15 - Forecast Volume Sales 2020-2030

Chart 16 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Top Players Intensify Rivalry as Alternative Products Gain Traction

Chart 17 - Company Shares 2025

Chart 18 - Brand Shares 2025

CHANNELS

Grocery Retailers Capture Nearly All Sales as Online Faces Legal Barriers

OPERATING ENVIRONMENT

Legislation

Chart 19 - 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

ECONOMIC CONTEXT

Chart 20 - Economic Context for Nicotine

Chart 21 - Real Gdp Growth 2020-2030

Chart 22 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 23 - Consumer Context for Nicotine

Chart 24 - Population 2020-2030

Chart 25 - Population by Generation 2025

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