



Cigarettes in Western Europe

September 2022

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Illicit tobacco set to stabilise over forecast period

Illicit tobacco linked to excise tax increases

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Retail volume decline in Western Europe

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Pandemic triggers divergent value growth in some nations with most showing negative development

Some of the largest cigarette markets see strong declines in all price bands

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Rising prices prompt consumers to purchase larger pack sizes

All price bands suffer in Germany, Italy and the UK

Price rises underpin price band success

Decline in sales concentrated in regular cigarettes

Slim/ superslim show greatest potential

20s dominate Western European sales

Larger pack sizes grow in face of cost of living crisis and price rises

Convenience and non-grocery specialists drive growth in sales distribution (1)

Convenience and non-grocery specialists drive growth in sales distribution (2)

LEADING COMPANIES AND BRANDS

Top players monopolise Western European cigarettes

PMI enjoys greatest share of Western Europe's competitive landscape

Chesterfield climbs to fourth position in Western Europe

Major players have widest reach in region

FORECAST PROJECTIONS

Tax increases quell retail value declines in a few nations (1)

Tax increases quell retail value declines in a few nations (2)

Volume sales to see declines given economic malaise, rising prices and health concerns

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Heated tobacco sales in Germany

The Netherlands stiffens crackdown on cigarette consumption

Innovation in response to declining volume sales in Greece

Austria: Market context

Austria: Competitive and retail landscape

Belgium: Market context

Belgium: Competitive and retail landscape

Denmark: Market context

Denmark: Competitive and retail landscape

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UK: Competitive and retail landscape

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