

Cigarettes in Eastern Europe

July 2021

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Key findings

REGIONAL OVERVIEW

Eastern Europe has the highest per capita consumption

Annual sales declines to continue in Eastern Europe over 2020-2025

Health concerns, tax hikes and illicit trade hit Russian sales

All price bands declining in most countries in 2020

Regular remains the dominant format across all markets

20-stick packs the dominant format

EU ban on flavoured cigarettes comes into force

Declines across the board in all price bands in Ukraine and Russia

Consumers want best value for money amidst pandemic and tax hikes

Superslim makes major gains in Poland over 2015-2020

Slim format accounting for almost half of retail volume in Russia

After Hungary moves away from small pack sizes in the historic period...

...North Macedonia becomes the next country to outlaw smaller packs

EU ban on flavoured cigarettes comes into force...

...but flavoured cigarettes gaining popularity in Russia and Ukraine

Convenience is an important factor in the distribution of cigarettes...

...but supermarkets channel picks up share during the pandemic in 2020

LEADING COMPANIES AND BRANDS

Highly concentrated competitive landscape in Eastern Europe

Japan Tobacco holds on to its recently acquired leading position

Russia still the main market for Eastern Europe's leading players

Philip Morris and Pall Mall move up the rankings in 2020

FORECAST PROJECTIONS

Volumes to decline across all Eastern European markets

Eastern Europe to lose more sales than any other region in 2020-2025

Ukraine to see positive value growth over 2020-2025...

...albeit driven, in part, by strong annual tax rises

COUNTRY SNAPSHOTS

Belarus: Market Context

Belarus: Competitive and Retail Landscape

Bosnia and Herzegovina: Market Context

Bosnia and Herzegovina: Competitive and Retail Landscape

Bulgaria: Market Context

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