

# Tobacco in Latvia

September 2022

Table of Contents

## Tobacco in Latvia

### EXECUTIVE SUMMARY

Tobacco in 2021: The big picture

2021 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

Plain packaging

Advertising and sponsorship

Advertising through media (television, radio, billboards, consumer press, trade press, cinema etc)

Advertising through retail point of sale

Sponsorship of sporting/music events

Distribution of tobacco-branded gifts (cigarette-branded lighters, pens etc)

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 2016-2021

### MARKET DATA

Table 2 - Sales of Tobacco by Category: Volume 2016-2021

Table 3 - Sales of Tobacco by Category: Value 2016-2021

Table 4 - Sales of Tobacco by Category: % Volume Growth 2016-2021

Table 5 - Sales of Tobacco by Category: % Value Growth 2016-2021

Table 6 - Forecast Sales of Tobacco by Category: Volume 2021-2026

Table 7 - Forecast Sales of Tobacco by Category: Value 2021-2026

Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2021-2026

Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2021-2026

### DISCLAIMER

### SOURCES

Summary 2 - Research Sources

## Cigarettes in Latvia

### KEY DATA FINDINGS

### 2021 DEVELOPMENTS

Decline in illicit trade benefits retail sales of cigarettes

Challenges remain, including escalating prices and rising health consciousness

Philip Morris maintains its lead in 2021

## PROSPECTS AND OPPORTUNITIES

Health and financial worries to impact future sales

Cross-border trade to resume again

Restrictive regulations

## TAXATION AND PRICING

Taxation rates

Summary 3 - Taxation and Duty Levies 2016-2021

Average cigarette pack price breakdown

Summary 4 - Average Cigarette Pack Price Breakdown: Brand Examples

## CATEGORY DATA

Table 10 - Sales of Cigarettes: Volume 2016-2021

Table 11 - Sales of Cigarettes by Category: Value 2016-2021

Table 12 - Sales of Cigarettes: % Volume Growth 2016-2021

Table 13 - Sales of Cigarettes by Category: % Value Growth 2016-2021

Table 14 - Sales of Cigarettes by Blend: % Volume 2016-2021

Table 15 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2016-2021

Table 16 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2016-2021

Table 17 - Sales of Cigarettes by Pack Size: % Volume 2016-2021

Table 18 - Sales of Cigarettes by Price Band: % Volume 2016-2021

Table 19 - NBO Company Shares of Cigarettes: % Volume 2017-2021

Table 20 - LBN Brand Shares of Cigarettes: % Volume 2018-2021

Table 21 - Sales of Cigarettes by Distribution Format: % Volume 2016-2021

Table 22 - Illicit Trade Estimate of Cigarettes: Volume 2016-2021

Table 23 - Forecast Sales of Cigarettes: Volume 2021-2026

Table 24 - Forecast Sales of Cigarettes by Category: Value 2021-2026

Table 25 - Forecast Sales of Cigarettes: % Volume Growth 2021-2026

Table 26 - Forecast Sales of Cigarettes by Category: % Value Growth 2021-2026

Table 27 - Forecast Sales of Cigarettes by Blend: % Volume 2021-2026

Table 28 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2021-2026

Table 29 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2021-2026

Table 30 - Forecast Sales of Cigarettes by Pack Size: % Volume 2021-2026

Table 31 - Forecast Sales of Cigarettes by Price Band: % Volume 2021-2026

## Cigars, Cigarillos and Smoking Tobacco in Latvia

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Growth of fine cut tobacco as a cheaper alternative to cigarettes

Reduced availability and high prices impact cigars and cigarillos

Philip Morris Latvia SIA leads cigarillos, while Cuban offerings continue to dominate cigars due to their heritage appeal

### PROSPECTS AND OPPORTUNITIES

Health and wellness trend set to impact future sales

Fine cut tobacco to benefit from increased price-conscious behaviour

Players in pipe tobacco will have to invest in products to attract younger consumers

### CATEGORY DATA

Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2016-2021

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2016-2021  
 Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2016-2021  
 Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2016-2021  
 Table 36 - Sales of Cigars by Size: % Volume 2016-2021  
 Table 37 - Sales of Cigarillos by Price Platform 2016-2021  
 Table 38 - NBO Company Shares of Cigars and Cigarillos: % Volume 2017-2021  
 Table 39 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2018-2021  
 Table 40 - NBO Company Shares of Cigars: % Volume 2017-2021  
 Table 41 - LBN Brand Shares of Cigars: % Volume 2018-2021  
 Table 42 - NBO Company Shares of Cigarillos: % Volume 2017-2021  
 Table 43 - LBN Brand Shares of Cigarillos: % Volume 2018-2021  
 Table 44 - NBO Company Shares of Smoking Tobacco: % Volume 2017-2021  
 Table 45 - LBN Brand Shares of Smoking Tobacco: % Volume 2018-2021  
 Table 46 - NBO Company Shares of Pipe Tobacco: % Volume 2017-2021  
 Table 47 - LBN Brand Shares of Pipe Tobacco: % Volume 2018-2021  
 Table 48 - NBO Company Shares of Fine Cut Tobacco: % Volume 2017-2021  
 Table 49 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2018-2021  
 Table 50 - Distribution of Cigars and Cigarillos by Format: % Volume 2016-2021  
 Table 51 - Distribution of Smoking Tobacco by Format: % Volume 2016-2021  
 Table 52 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2021-2026  
 Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2021-2026  
 Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2021-2026  
 Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2021-2026

## Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Latvia

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Sales growth in heated tobacco slows down in 2021

Switch from menthol cigarettes to e-vapour and heated tobacco products ensures growth

Philip Morris dominates heated tobacco, being the entry player onto the landscape

#### PROSPECTS AND OPPORTUNITIES

Adapted consumer buying habits, health concerns and innovation to fuel growth

Positive prospects for new disposable e-vapour sticks

Competition set to grow in the heated tobacco category

#### CATEGORY INDICATORS

Table 56 - Number of Adult Vapers 2016-2021

#### CATEGORY DATA

Table 57 - Sales of Tobacco Heating Devices: Volume 2016-2021

Table 58 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2021

Table 59 - Sales of Heated Tobacco: Volume 2016-2021

Table 60 - Sales of Heated Tobacco: % Volume Growth 2019-2021

Table 61 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2016-2021

Table 62 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2016-2021

Table 63 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2021

Table 64 - NBO Company Shares of E-Vapour Products: % Value 2017-2021

Table 65 - LBN Brand Shares of E-Vapour Products: % Value 2018-2021

Table 66 - NBO Company Shares of Tobacco Heating Devices: % Volume 2017-2021

Table 67 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2018-2021

Table 68 - NBO Company Shares of Heated Tobacco: % Volume 2017-2021

Table 69 - LBN Brand Shares of Heated Tobacco: % Volume 2018-2021

Table 70 - Distribution of E-Vapour Products by Format: % Value 2016-2021

Table 71 - Distribution of Tobacco Heating Devices by Format: % Volume 2016-2021

Table 72 - Distribution of Heated Tobacco by Format: % Volume 2016-2021

Table 73 - Forecast Sales of Tobacco Heating Devices: Volume 2021-2026

Table 74 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2021-2026

Table 75 - Forecast Sales of Heated Tobacco: Volume 2021-2026

Table 76 - Forecast Sales of Heated Tobacco: % Volume Growth 2021-2026

Table 77 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2021-2026

Table 78 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2021-2026

## 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-latvia/report](http://www.euromonitor.com/tobacco-in-latvia/report).