Tobacco in Mexico

July 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 Mexico

KEY DATA FINDINGS

2022 DEVELOPMENTS

Trend towards health and wellbeing drives decline in smoking prevalence
Multinationals continue to dominate cigarettes in Mexico
Flavour capsule cigarettes continue to gain ground

PROSPECTS AND OPPORTUNITIES

Changes in regulation set to alter dynamics within cigarettes
Illicit trade expected to gain ground from dominant category players
Changes to legislation for alternative devices may alter the dynamics of cigarettes

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 Mexico

KEY DATA FINDINGS

2022 DEVELOPMENTS
Cigars and cigarillos show resilience amid economic uncertainty
Supply chain issues impact product availability
Tobacco specialists and warehouse clubs remain dominant distribution channels

PROSPECTS AND OPPORTUNITIES
Changes to legislation likely to impact category dynamics
Young adults as a new target audience
Healthy living and wellness trends to remain on the agenda

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
Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2019-2022
Table 41 - NBO Company Shares of Cigars: % Volume 2018-2022
Table 42 - LBN Brand Shares of Cigars: % Volume 2019-2022
Table 43 - NBO Company Shares of Cigarillos: % Volume 2018-2022
Table 44 - LBN Brand Shares of Cigarillos: % Volume 2019-2022
Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2018-2022
Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2019-2022
Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2018-2022
Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2019-2022
Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2018-2022
Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2019-2022
Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2017-2022
Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2017-2022
Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2022-2027
Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2022-2027
Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2022-2027
Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2022-2027

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Mexico

2022 DEVELOPMENTS

CATEGORY DATA

Table 57 - Sales of Smokeless Tobacco by Category: Volume 2017-2022
Table 58 - Sales of Smokeless Tobacco by Category: % Volume Growth 2017-2022
Table 59 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Volume 2017-2022
Table 60 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022
Table 61 - NBO Company Shares of Smokeless Tobacco: % Volume 2018-2022
Table 62 - LBN Brand Shares of Smokeless Tobacco: % Volume 2019-2022
Table 63 - Distribution of Smokeless Tobacco by Format: % Volume 2017-2022
Table 64 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027
Table 65 - 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-mexico/report](http://www.euromonitor.com/tobacco-in-mexico/report).