

# Tobacco in the United Kingdom

July 2022

Table of Contents

## Tobacco in the United Kingdom

### 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

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

### 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 the United Kingdom

### KEY DATA FINDINGS

### 2021 DEVELOPMENTS

Volume growth for cigarettes for the first time since 2009

Disparate recovery for distribution channels in cigarettes

Value brands continue to benefit from economic uncertainty

## PROSPECTS AND OPPORTUNITIES

Worsening constant value and volume declines for cigarettes in the forecast period

Illicit trade anticipated to grow, given fiscal concern

Major regulation postponed, delaying the government's "Smoke-free 2030" target

## TAXATION AND PRICING

Taxation rates

Table 10 - Taxation and Duty Levies 2016-2021

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

## CATEGORY DATA

Table 11 - Sales of Cigarettes: Volume 2016-2021

Table 12 - Sales of Cigarettes by Category: Value 2016-2021

Table 13 - Sales of Cigarettes: % Volume Growth 2016-2021

Table 14 - Sales of Cigarettes by Category: % Value Growth 2016-2021

Table 15 - Sales of Cigarettes by Blend: % Volume 2016-2021

Table 16 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2016-2021

Table 17 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2016-2021

Table 18 - Sales of Cigarettes by Pack Size: % Volume 2016-2021

Table 19 - Sales of Cigarettes by Price Band: % Volume 2016-2021

Table 20 - NBO Company Shares of Cigarettes: % Volume 2017-2021

Table 21 - LBN Brand Shares of Cigarettes: % Volume 2018-2021

Table 22 - Sales of Cigarettes by Distribution Format: % Volume 2016-2021

Table 23 - Illicit Trade Estimate of Cigarettes: Volume 2016-2021

Table 24 - Forecast Sales of Cigarettes: Volume 2021-2026

Table 25 - Forecast Sales of Cigarettes by Category: Value 2021-2026

Table 26 - Forecast Sales of Cigarettes: % Volume Growth 2021-2026

Table 27 - Forecast Sales of Cigarettes by Category: % Value Growth 2021-2026

Table 28 - Forecast Sales of Cigarettes by Blend: % Volume 2021-2026

Table 29 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2021-2026

Table 30 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2021-2026

Table 31 - Forecast Sales of Cigarettes by Pack Size: % Volume 2021-2026

Table 32 - Forecast Sales of Cigarettes by Price Band: % Volume 2021-2026

## Cigars, Cigarillos and Smoking Tobacco in the United Kingdom

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Fine cut tobacco sees double-digit value and volume growth for a second year

Cigars enjoys unprecedented current value growth

Cigarillos continue to convince cigarette smokers to shift

### PROSPECTS AND OPPORTUNITIES

Fine cut tobacco set to fall from its heights of 2020 and 2021 in the forecast period

Cigars to return to value decline, whilst cigarillos will see volume and value growth slow in a context of economic uncertainty

E-commerce and convenience stores set to dominate distribution

### CATEGORY DATA

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2016-2021

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2016-2021

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2016-2021

Table 36 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2016-2021  
 Table 37 - Sales of Cigars by Size: % Volume 2016-2021  
 Table 38 - Sales of Cigarillos by Price Platform 2016-2021  
 Table 39 - NBO Company Shares of Cigars and Cigarillos: % Volume 2017-2021  
 Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2018-2021  
 Table 41 - NBO Company Shares of Cigars: % Volume 2017-2021  
 Table 42 - LBN Brand Shares of Cigars: % Volume 2018-2021  
 Table 43 - NBO Company Shares of Cigarillos: % Volume 2017-2021  
 Table 44 - LBN Brand Shares of Cigarillos: % Volume 2018-2021  
 Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2017-2021  
 Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2018-2021  
 Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2017-2021  
 Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2018-2021  
 Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2017-2021  
 Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2018-2021  
 Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2016-2021  
 Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2016-2021  
 Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2021-2026  
 Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2021-2026  
 Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2021-2026  
 Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2021-2026

## Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the United Kingdom

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Surge in demand for closed system single-use vapour products causes for concern for the wider industry  
 Dominance of open system vaping questioned with continued rise in popularity of closed system products  
 Distribution channels inexorably tied to open and closed system battle

#### PROSPECTS AND OPPORTUNITIES

Perception of vaping improves, and government stands resolute in encouraging usage  
 Bright but mercurial future for tobacco heating devices  
 Nicotine pouches to attract regulation

#### CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2016-2021

#### CATEGORY DATA

Table 58 - Sales of Tobacco Heating Devices: Volume 2016-2021  
 Table 59 - Sales of Tobacco Heating Devices: % Volume Growth 2016-2021  
 Table 60 - Sales of Heated Tobacco: Volume 2016-2021  
 Table 61 - Sales of Heated Tobacco: % Volume Growth 2016-2021  
 Table 62 - Sales of Tobacco Free Oral Nicotine: Volume 2016-2021  
 Table 63 - Sales of Tobacco Free Oral Nicotine by Category: Value 2016-2021  
 Table 64 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2016-2021  
 Table 65 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2016-2021  
 Table 66 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2021  
 Table 67 - NBO Company Shares of E-Vapour Products: % Value 2017-2021  
 Table 68 - LBN Brand Shares of E-Vapour Products: % Value 2018-2021  
 Table 69 - NBO Company Shares of Tobacco Heating Devices: % Volume 2017-2021  
 Table 70 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2018-2021  
 Table 71 - NBO Company Shares of Heated Tobacco: % Volume 2017-2021

Table 72 - LBN Brand Shares of Heated Tobacco: % Volume 2018-2021  
Table 73 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2017-2021  
Table 74 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2018-2021  
Table 75 - Distribution of E-Vapour Products by Format: % Value 2016-2021  
Table 76 - Distribution of Tobacco Heating Devices by Format: % Volume 2016-2021  
Table 77 - Distribution of Heated Tobacco by Format: % Volume 2016-2021  
Table 78 - Forecast Sales of Tobacco Heating Devices: Volume 2021-2026  
Table 79 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2021-2026  
Table 80 - Forecast Sales of Heated Tobacco: Volume 2021-2026  
Table 81 - Forecast Sales of Heated Tobacco: % Volume Growth 2021-2026  
Table 82 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2021-2026  
Table 83 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2021-2026  
Table 84 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2021-2026  
Table 85 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2021-2026  
Table 86 - 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-the-united-kingdom/report](http://www.euromonitor.com/tobacco-in-the-united-kingdom/report).