



Euromonitor
International

Cigarettes in South Africa

June 2024

Table of Contents

Cigarettes in South Africa - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

Despite growth of e-vapour products, cigarettes retains higher value share

Leading players slow production of combustibles

Declining demand driven by limited regulations for e-vapour products

PROSPECTS AND OPPORTUNITIES

Cigarette sales set to further decline due to pending legislation and cannabis popularity

Excise tax rises will adversely impact cigarette volumes, while e-vapour products will benefit from affordability

Diplomats limited in duty-free cigarette purchases

TAXATION AND PRICING

Taxation rates

Table 1 - Taxation and Duty Levies 2018-2023

Average cigarette pack price breakdown

Summary 1 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 2 - Sales of Cigarettes: Volume 2018-2023

Table 3 - Sales of Cigarettes by Category: Value 2018-2023

Table 4 - Sales of Cigarettes: % Volume Growth 2018-2023

Table 5 - Sales of Cigarettes by Category: % Value Growth 2018-2023

Table 6 - Sales of Cigarettes by Blend: % Volume 2018-2023

Table 7 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023

Table 8 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023

Table 9 - Sales of Cigarettes by Pack Size: % Volume 2018-2023

Table 10 - Sales of Cigarettes by Price Band: % Volume 2018-2023

Table 11 - NBO Company Shares of Cigarettes: % Volume 2019-2023

Table 12 - LBN Brand Shares of Cigarettes: % Volume 2020-2023

Table 13 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023

Table 14 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023

Table 15 - Forecast Sales of Cigarettes: Volume 2023-2028

Table 16 - Forecast Sales of Cigarettes by Category: Value 2023-2028

Table 17 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028

Table 18 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028

Table 19 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028

Table 20 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028

Table 21 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028

Table 22 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028

Table 23 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

Tobacco in South Africa - Industry Overview

EXECUTIVE SUMMARY

Tobacco in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for tobacco?

OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 2 - 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 24 - Number of Adult Smokers by Gender 2018-2023

MARKET DATA

Table 25 - Sales of Tobacco by Category: Volume 2018-2023

Table 26 - Sales of Tobacco by Category: Value 2018-2023

Table 27 - Sales of Tobacco by Category: % Volume Growth 2018-2023

Table 28 - Sales of Tobacco by Category: % Value Growth 2018-2023

Table 29 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 30 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 31 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 3 - Research Sources

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/cigarettes-in-south-africa/report.