



# Tobacco in Austria

May 2024

Table of Contents

## Tobacco in Austria

### 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 1 - Legislation Summary at a Glance

Minimum legal smoking age

Smoking prevalence

Tar levels

Health warnings

Plain packaging

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 2018-2023

### MARKET DATA

Table 2 - Sales of Tobacco by Category: Volume 2018-2023

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

Table 4 - Sales of Tobacco by Category: % Volume Growth 2018-2023

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

Table 6 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 7 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 2 - Research Sources

## Cigarettes in Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Tobacco alternatives contribute to decline in cigarette sales

Cross-border trade on the decline

Landewyck's acquisition of M Tabak's brands

### PROSPECTS AND OPPORTUNITIES

Decline in cigarette smoking expected to accelerate

Government measures insufficient to discourage smoking

Impact of legislation on new product categories

## TAXATION AND PRICING

Taxation rates

Table 10 - Taxation and Duty Levies 2018-2023

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

## CATEGORY DATA

Table 11 - Sales of Cigarettes: Volume 2018-2023

Table 12 - Sales of Cigarettes by Category: Value 2018-2023

Table 13 - Sales of Cigarettes: % Volume Growth 2018-2023

Table 14 - Sales of Cigarettes by Category: % Value Growth 2018-2023

Table 15 - Sales of Cigarettes by Blend: % Volume 2018-2023

Table 16 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023

Table 17 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023

Table 18 - Sales of Cigarettes by Pack Size: % Volume 2018-2023

Table 19 - Sales of Cigarettes by Price Band: % Volume 2018-2023

Table 20 - NBO Company Shares of Cigarettes: % Volume 2019-2023

Table 21 - LBN Brand Shares of Cigarettes: % Volume 2020-2023

Table 22 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023

Table 23 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023

Table 24 - Forecast Sales of Cigarettes: Volume 2023-2028

Table 25 - Forecast Sales of Cigarettes by Category: Value 2023-2028

Table 26 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028

Table 27 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028

Table 28 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028

Table 29 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028

Table 30 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028

Table 31 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028

Table 32 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

## Cigars, Cigarillos and Smoking Tobacco in Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Demand for cigars and cigarillos remains above pre-COVID-19 levels

Habanos faces strong price increases and delivery challenges

JTI confirms its newly acquired leadership in fine cut tobacco

#### PROSPECTS AND OPPORTUNITIES

Cigars expected to perform comparatively well in forecast period

Upcoming taxation expected to mainly impact fine cut tobacco demand

Track & Trace likely to impact brand diversity in cigars, cigarillos, and water pipe tobacco

#### CATEGORY DATA

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2018-2023

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2018-2023

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2018-2023

Table 36 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2018-2023

Table 37 - Sales of Cigars by Size: % Volume 2018-2023

Table 38 - Sales of Cigarillos by Price Platform 2018-2023

Table 39 - NBO Company Shares of Cigars and Cigarillos: % Volume 2019-2023

Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2020-2023  
 Table 41 - NBO Company Shares of Cigars: % Volume 2019-2023  
 Table 42 - LBN Brand Shares of Cigars: % Volume 2020-2023  
 Table 43 - NBO Company Shares of Cigarillos: % Volume 2019-2023  
 Table 44 - LBN Brand Shares of Cigarillos: % Volume 2020-2023  
 Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2019-2023  
 Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2020-2023  
 Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2019-2023  
 Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2020-2023  
 Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2019-2023  
 Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2020-2023  
 Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2018-2023  
 Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2018-2023  
 Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2023-2028  
 Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2023-2028  
 Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2023-2028  
 Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2023-2028

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

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Heated tobacco remains the top choice for smokers seeking to quit  
 Closed System Single Use continues to trend  
 Rising demand for nicotine pouches amidst public concern

#### PROSPECTS AND OPPORTUNITIES

Rechargeable closed systems aim to build on the success of single use closed systems  
 Open Systems expected to lose ground  
 Philip Morris targets growth in nicotine pouches

#### CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2018-2023

#### CATEGORY DATA

Table 58 - Sales of Smokeless Tobacco by Category: Volume 2018-2023  
 Table 59 - Sales of Smokeless Tobacco by Category: % Volume Growth 2018-2023  
 Table 60 - Sales of E-Vapour Products by Category: Volume 2018-2023  
 Table 61 - Sales of E-Vapour Products by Category: % Volume Growth 2018-2023  
 Table 62 - Sales of Tobacco Heating Devices: Volume 2018-2023  
 Table 63 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2023  
 Table 64 - Sales of Heated Tobacco: Volume 2018-2023  
 Table 65 - Sales of Heated Tobacco: % Volume Growth 2018-2023  
 Table 66 - Sales of Tobacco Free Oral Nicotine: Volume 2018-2023  
 Table 67 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023  
 Table 68 - Sales of Tobacco Free Oral Nicotine by Category: Value 2018-2023  
 Table 69 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2018-2023  
 Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2018-2023  
 Table 71 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2018-2023  
 Table 72 - Sales of E-Liquids by Nicotine Strength: % Value 2020-2023  
 Table 73 - NBO Company Shares of Smokeless Tobacco: % Volume 2019-2023  
 Table 74 - LBN Brand Shares of Smokeless Tobacco: % Volume 2020-2023  
 Table 75 - NBO Company Shares of E-Vapour Products: % Value 2019-2023

Table 76 - LBN Brand Shares of E-Vapour Products: % Value 2020-2023

Table 77 - NBO Company Shares of Tobacco Heating Devices: % Volume 2019-2023

Table 78 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2020-2023

Table 79 - NBO Company Shares of Heated Tobacco: % Volume 2019-2023

Table 80 - LBN Brand Shares of Heated Tobacco: % Volume 2020-2023

Table 81 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2019-2023

Table 82 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2020-2023

Table 83 - Distribution of Smokeless Tobacco by Format: % Volume 2018-2023

Table 84 - Distribution of E-Vapour Products by Format: % Value 2018-2023

Table 85 - Distribution of Tobacco Heating Devices by Format: % Volume 2018-2023

Table 86 - Distribution of Heated Tobacco by Format: % Volume 2018-2023

Table 87 - Forecast Sales of Smokeless Tobacco by Category: Volume 2023-2028

Table 88 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2023-2028

Table 89 - Forecast Sales of E-Vapour Products by Category: Volume 2023-2028

Table 90 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2023-2028

Table 91 - Forecast Sales of Tobacco Heating Devices: Volume 2023-2028

Table 92 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2023-2028

Table 93 - Forecast Sales of Heated Tobacco: Volume 2023-2028

Table 94 - Forecast Sales of Heated Tobacco: % Volume Growth 2023-2028

Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2023-2028

Table 96 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2023-2028

Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2023-2028

Table 98 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2023-2028

Table 100 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2023-2028

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