



Tobacco in Finland

June 2025

Table of Contents

Tobacco in Finland

EXECUTIVE SUMMARY

Tobacco in 2024: The big picture

2024 key trends

Competitive landscape

Retail 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 2019-2024

MARKET DATA

Table 2 - Sales of Tobacco by Category: Volume 2019-2024

Table 3 - Sales of Tobacco by Category: Value 2019-2024

Table 4 - Sales of Tobacco by Category: % Volume Growth 2019-2024

Table 5 - Sales of Tobacco by Category: % Value Growth 2019-2024

Table 6 - Forecast Sales of Tobacco by Category: Volume 2024-2029

Table 7 - Forecast Sales of Tobacco by Category: Value 2024-2029

Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029

Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Cigarettes in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cigarette sales continue to decline as fewer Finns take up or maintain the habit

Philip Morris Finland maintains strong leadership with widely available brands

Grocery retailers, especially hypermarkets, remain dominant distribution channels

PROSPECTS AND OPPORTUNITIES

Retail volume sales expected to continue sharp decline amid social and regulatory pressures

Cross-border trade likely to persist as consumers seek cost savings
Market consolidation expected as regulatory burden discourages innovation

TAXATION AND PRICING

Taxation rates

Summary 3 - Taxation and Duty Levies 2019-2024

Average cigarette pack price breakdown

Summary 4 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 10 - Sales of Cigarettes: Volume 2019-2024

Table 11 - Sales of Cigarettes by Category: Value 2019-2024

Table 12 - Sales of Cigarettes: % Volume Growth 2019-2024

Table 13 - Sales of Cigarettes by Category: % Value Growth 2019-2024

Table 14 - Sales of Cigarettes by Blend: % Volume 2019-2024

Table 15 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2019-2024

Table 16 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2019-2024

Table 17 - Sales of Cigarettes by Pack Size: % Volume 2019-2024

Table 18 - Sales of Cigarettes by Price Band: % Volume 2019-2024

Table 19 - NBO Company Shares of Cigarettes: % Volume 2020-2024

Table 20 - LBN Brand Shares of Cigarettes: % Volume 2021-2024

Table 21 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024

Table 22 - Illicit Trade Estimate of Cigarettes: Volume 2019-2024

Table 23 - Forecast Sales of Cigarettes: Volume 2024-2029

Table 24 - Forecast Sales of Cigarettes by Category: Value 2024-2029

Table 25 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029

Table 26 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029

Table 27 - Forecast Sales of Cigarettes by Blend: % Volume 2024-2029

Table 28 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2024-2029

Table 29 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2024-2029

Table 30 - Forecast Sales of Cigarettes by Pack Size: % Volume 2024-2029

Table 31 - Forecast Sales of Cigarettes by Price Band: % Volume 2024-2029

Cigars, Cigarillos and Smoking Tobacco in Finland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Steep decline in cigarillos drives category contraction

Leading players consolidate positions as smaller brands exit

Grocery retailers dominate distribution across categories

PROSPECTS AND OPPORTUNITIES

Steady volume decline expected across categories

Premium cigars retain niche potential while bulk formats fade

Innovation limited to premium positioning and sustainability

CATEGORY DATA

Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024

Table 36 - Sales of Cigars by Size: % Volume 2019-2024

Table 37 - Sales of Cigarillos by Price Platform 2019-2024

| |
|--|
| Table 38 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024 |
| Table 39 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2021-2024 |
| Table 40 - NBO Company Shares of Cigars: % Volume 2020-2024 |
| Table 41 - LBN Brand Shares of Cigars: % Volume 2021-2024 |
| Table 42 - NBO Company Shares of Cigarillos: % Volume 2020-2024 |
| Table 43 - LBN Brand Shares of Cigarillos: % Volume 2021-2024 |
| Table 44 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024 |
| Table 45 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024 |
| Table 46 - NBO Company Shares of Pipe Tobacco: % Volume 2020-2024 |
| Table 47 - LBN Brand Shares of Pipe Tobacco: % Volume 2021-2024 |
| Table 48 - NBO Company Shares of Fine Cut Tobacco: % Volume 2020-2024 |
| Table 49 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2021-2024 |
| Table 50 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024 |
| Table 51 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024 |
| Table 52 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029 |
| Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029 |
| Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029 |
| Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2024-2029 |

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Strong growth in e-vapour and nicotine pouch sales as user base expands
Philip Morris leads e-vapour segment while nicotine pouch competition intensifies
Grocery retailing emerges as dominant distribution channel

PROSPECTS AND OPPORTUNITIES

Slower growth ahead amid tightening regulation and rising taxes
Tobacco-free alternatives maintain growth advantage over traditional products
Closed-system vapes to lead innovation as other areas stagnate

CATEGORY INDICATORS

Table 56 - Number of Adult Vapers 2019-2024

CATEGORY DATA

| |
|---|
| Table 57 - Sales of Smokeless Tobacco by Category: Volume 2019-2024 |
| Table 58 - Sales of Smokeless Tobacco by Category: % Volume Growth 2019-2024 |
| Table 59 - Sales of E-Vapour Products by Category: Volume 2019-2024 |
| Table 60 - Sales of E-Vapour Products by Category: % Volume Growth 2019-2024 |
| Table 61 - Sales of Tobacco Heating Devices: Volume 2019-2024 |
| Table 62 - Sales of Tobacco Heating Devices: % Volume Growth 2019-2024 |
| Table 63 - Sales of Heated Tobacco: Volume 2019-2024 |
| Table 64 - Sales of Heated Tobacco: % Volume Growth 2019-2024 |
| Table 65 - Sales of Tobacco Free Oral Nicotine: Volume 2019-2024 |
| Table 66 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2019-2024 |
| Table 67 - Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024 |
| Table 68 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2019-2024 |
| Table 69 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024 |
| Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024 |
| Table 71 - Sales of E-Liquids by Nicotine Strength: % Value 2021-2024 |
| Table 72 - NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024 |
| Table 73 - LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024 |

| |
|--|
| Table 74 - NBO Company Shares of E-Vapour Products: % Value 2020-2024 |
| Table 75 - LBN Brand Shares of E-Vapour Products: % Value 2021-2024 |
| Table 76 - NBO Company Shares of Tobacco Heating Devices: % Volume 2020-2024 |
| Table 77 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2021-2024 |
| Table 78 - NBO Company Shares of Heated Tobacco: % Volume 2020-2024 |
| Table 79 - LBN Brand Shares of Heated Tobacco: % Volume 2021-2024 |
| Table 80 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2020-2024 |
| Table 81 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2021-2024 |
| Table 82 - Distribution of Smokeless Tobacco by Format: % Volume 2019-2024 |
| Table 83 - Distribution of E-Vapour Products by Format: % Value 2019-2024 |
| Table 84 - Distribution of Tobacco Heating Devices by Format: % Volume 2019-2024 |
| Table 85 - Distribution of Heated Tobacco by Format: % Volume 2019-2024 |
| Table 86 - Forecast Sales of Smokeless Tobacco by Category: Volume 2024-2029 |
| Table 87 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2024-2029 |
| Table 88 - Forecast Sales of E-Vapour Products by Category: Volume 2024-2029 |
| Table 89 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2024-2029 |
| Table 90 - Forecast Sales of Tobacco Heating Devices: Volume 2024-2029 |
| Table 91 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2024-2029 |
| Table 92 - Forecast Sales of Heated Tobacco: Volume 2024-2029 |
| Table 93 - Forecast Sales of Heated Tobacco: % Volume Growth 2024-2029 |
| Table 94 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2024-2029 |
| Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2024-2029 |
| Table 96 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2024-2029 |
| Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2024-2029 |
| Table 98 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029 |
| Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2024-2029 |

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-finland/report.