

# Tobacco in Guatemala

June 2025

Table of Contents

# Tobacco in Guatemala

# 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 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 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 Guatemala

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Volume sales continue to decline, with illicit trade on the rise Tabacalera Centroamericana SA leads with its flagship Marlboro brand Small local independent grocers continue to drive sales in the category

# PROSPECTS AND OPPORTUNITIES

Smoking prevalence on a steady decline New narrative could drive a faster transition to smoke-free products Wider variety of economy flavoured cigarettes expected

# 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 Guatemala

# KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Modest growth of cigars in 2024 Tabacos y Puros Finos SA maintains its lead in 2024 Tobacco specialists and cigar shops meet the expectations of more discerning cigar smokers

## PROSPECTS AND OPPORTUNITIES

Cigars poised to outperform cigarillos Emerging consumer interest in water pipe tobacco Potential to grow cigars and cigarillos via online sales

# CATEGORY DATA

Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024Table 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 Guatemala

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Rising demand for e-vapour products in 2024 E-vapour space is diverse and remains fragmented Consumers appreciate the expertise offered by vape shops

#### PROSPECTS AND OPPORTUNITIES

Ongoing strong demand for single use vapes Initiatives to restrict e-cigarettes sales not expected to advance More product launches in the e-vapour space

## 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 Growth 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 63 - Sales of Heated Tobacco: % Volume Growth 2019-2024 Table 64 - Sales of Tobacco Free Oral Nicotine: Volume 2019-2024 Table 65 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2019-2024 Table 66 - Sales of Tobacco Free Oral Nicotine by Category: Value 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 Tobacco Free Oral Nicotine: % Value Growth 2019-2024 Table 67 - Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024 Table 68 - Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024 Table 69 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024 Table 69 - 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-guatemala/report.