



# Cigarettes in India

July 2024

Table of Contents

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Increased office occupancy, moderate price hikes, and focus on premiumisation aids the growth of cigarettes in India  
ITC Ltd leads the oligopolistic cigarettes category in the country, on the back of a robust portfolio and vast distribution  
Marlboro brand grows significantly on the back of the use of Flue-Cured Virginia (FCV) tobacco, affordability, and availability

#### PROSPECTS AND OPPORTUNITIES

Inflation for Flue-Cured Virginia (FCV) tobacco could impede the momentum of the category  
India likely to remain a single-stick consumption market, owing to macroeconomic factors  
High illicit consumption continues to pose a threat to legal sales

#### TAXATION AND PRICING

Taxation rates

Summary 1 - Taxation and Duty Levies as of 2023

Average cigarette pack price breakdown

Summary 2 - Average Cigarette Pack Price Breakdown: Brand Examples

#### CATEGORY DATA

Table 1 - Sales of Cigarettes: Volume 2018-2023

Table 2 - Sales of Cigarettes by Category: Value 2018-2023

Table 3 - Sales of Cigarettes: % Volume Growth 2018-2023

Table 4 - Sales of Cigarettes by Category: % Value Growth 2018-2023

Table 5 - Sales of Cigarettes by Blend: % Volume 2018-2023

Table 6 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023

Table 7 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023

Table 8 - Sales of Cigarettes by Pack Size: % Volume 2018-2023

Table 9 - Sales of Cigarettes by Price Band: % Volume 2018-2023

Table 10 - NBO Company Shares of Cigarettes: % Volume 2019-2023

Table 11 - LBN Brand Shares of Cigarettes: % Volume 2020-2023

Table 12 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023

Table 13 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023

Table 14 - Forecast Sales of Cigarettes: Volume 2023-2028

Table 15 - Forecast Sales of Cigarettes by Category: Value 2023-2028

Table 16 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028

Table 17 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028

Table 18 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028

Table 19 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028

Table 20 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028

Table 21 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028

Table 22 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

## Tobacco in India - 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 3 - Legislation Summary at a Glance

Minimum legal smoking age

Smoking prevalence

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 23 - Number of Adult Smokers by Gender 2018-2023

## MARKET DATA

Table 24 - Sales of Tobacco by Category: Volume 2018-2023

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

Table 26 - Sales of Tobacco by Category: % Volume Growth 2018-2023

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

Table 28 - Forecast Sales of Tobacco by Category: Volume 2023-2028

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

Table 30 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

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

## DISCLAIMER

## SOURCES

Summary 4 - 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-india/report](http://www.euromonitor.com/cigarettes-in-india/report).