



Cigars, Cigarillos and Smoking Tobacco in Germany

July 2024

Table of Contents

Cigars, Cigarillos and Smoking Tobacco in Germany - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premiumisation helps maintain value growth for cigars and cigarillos

Fine cut tobacco shows resilience, while declines for pipe tobacco ease following strong drop in 2022

Diverse brand positioning creates fragmented competitive landscape

PROSPECTS AND OPPORTUNITIES

More positive outlook for pipe tobacco due to reversal of pack size legislation

Cigars and cigarillos set to continue appealing to narrow consumer base

Fine cut tobacco to benefit from low prices and premiumisation but may face challenges from cannabis

CATEGORY DATA

Table 1 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2018-2023

Table 2 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2018-2023

Table 3 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2018-2023

Table 4 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2018-2023

Table 5 - Sales of Cigars by Size: % Volume 2018-2023

Table 6 - Sales of Cigarillos by Price Platform 2018-2023

Table 7 - NBO Company Shares of Cigars and Cigarillos: % Volume 2019-2023

Table 8 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2020-2023

Table 9 - NBO Company Shares of Cigars: % Volume 2019-2023

Table 10 - LBN Brand Shares of Cigars: % Volume 2020-2023

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

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

Table 13 - NBO Company Shares of Smoking Tobacco: % Volume 2019-2023

Table 14 - LBN Brand Shares of Smoking Tobacco: % Volume 2020-2023

Table 15 - NBO Company Shares of Pipe Tobacco: % Volume 2019-2023

Table 16 - LBN Brand Shares of Pipe Tobacco: % Volume 2020-2023

Table 17 - NBO Company Shares of Fine Cut Tobacco: % Volume 2019-2023

Table 18 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2020-2023

Table 19 - Distribution of Cigars and Cigarillos by Format: % Volume 2018-2023

Table 20 - Distribution of Smoking Tobacco by Format: % Volume 2018-2023

Table 21 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2023-2028

Table 22 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2023-2028

Table 23 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2023-2028

Tobacco in Germany - 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 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 25 - Number of Adult Smokers by Gender 2018-2023

MARKET DATA

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

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

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

Table 29 - Sales of Tobacco by Category: % Value Growth 2018-2023

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

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

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

Table 33 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - 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/cigars-cigarillos-and-smoking-tobacco-in-germany/report.