



# Cigarettes and Alternative Nicotine Products in Middle East and Africa

August 2024

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Middle East and Africa has further potential in cigarettes

Alternatives to cigarettes to offer more opportunities with wider distribution

2024 is expected to start an acceleration in cigarettes growth after resolving import issues

After growing rapidly from a small base, vapes and heated tobacco will stabilise at 15% growth

Countries with strong smoking cultures require stable imports to maintain cigarette volumes

The landscape of alternative tobacco products is shaped by local regulations

Shift to e-vapour products and illicit trade pose a threat to cigarettes volume

E-vapour products in the Middle East and Africa are benefiting from flexible regulations

Diverse products and strong distribution contribute to cigarettes' success in the region

The pandemic and new regulations slowed down cigarettes' growth in certain markets

E-vapour products are benefiting from their variety and consumers shifting from cigarettes

Changing regulations impact the growth of e-vapour products and heated tobacco

Channels dominated by illicit cigarettes offer limited opportunities for legal cigarette

Traditional channels dominates the scene while few countries venture into new channels

E-vapour products specialist stores are sprouting across the region

E-commerce comes into focus as a channel for great potential growth for alternative tobacco

## LEADING COMPANIES AND BRANDS

Cigarettes market in each country is dominated by a few companies, mostly international

An Egyptian company Eastern Co is successfully playing along with four global giants

Most of top companies found their niche in few markets with the right offering

Cleopatra by Eastern Co is holding top position while international brands are more volatile

Philip Morris is leading heated tobacco while BAT is dominating within e-vapour products

## FORECAST PROJECTIONS

Egypt will continue to grow in cigarettes due to strong smoking tradition

High-tar cigarettes in Algeria and premium cigarettes in the UAE will be on demand

Saudi Arabia will continue witnessing active shift from cigarettes to alternatives

Egypt and South Africa are set to grow in tobacco alternatives, if future regulations allow it

## COUNTRY SNAPSHOTS

Algeria: Market Context

Algeria: Competitive and Retail Landscape

Egypt: Market Context

Egypt: Competitive and Retail Landscape

Israel: Market Context

Israel: Competitive and Retail Landscape

Morocco: Market Context

Morocco: Competitive and Retail Landscape

Nigeria: Market Context

Nigeria: Competitive and Retail Landscape

Saudi Arabia: Market Context

Saudi Arabia: Competitive and Retail Landscape

South Africa: Market Context

South Africa: Competitive and Retail Landscape

Tunisia: Market Context

Tunisia: Competitive and Retail Landscape

United Arab Emirates: Market Context

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