



Cigarettes and Alternative Nicotine Products in Western Europe

August 2024

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Cigarette sales declining in 2018-2023 in Western Europe

Western Europe has a high per capita rate for next-generation products

Declining sales expected in Western Europe in the coming years

Growth will slow but remain relatively dynamic for next-generation products

Sales declining everywhere but Turkey in Western Europe in 2018-2023

Italy drives heated tobacco growth, while the UK experiences a disposable vaping boom

Inflation, tax rises, illicit trade and new products depress UK demand for cigarettes in 2023

Strong growth for Swedish-style snus in Norway, but regulation on its way

Dynamic growth recorded by fine cut cigarettes in Turkey over 2018-2023

Strong growth in cigarette sales in Turkey in 2023

Dutch authorities gradually restricting cigarette sales to specialist outlets

Heated tobacco products add the bulk of new sales in Western Europe over 2018-2023

Italy leads heated tobacco and the UK e-vaping, but disposable vape ban looms in the latter

Food/drink/tobacco specialists and small local grocers the two biggest channels

Convenience retail leads distribution of cigarettes in Germany

Vape shops, e-commerce and convenience retail lead e-vapour products sales in the UK

Food/drink/tobacco specialists the key channel for sales of heated tobacco products

LEADING COMPANIES AND BRANDS

The competitive landscapes for cigarettes remain extremely concentrated across the region

Major players' foray into fine cut tobacco not a great success in Turkey

PMI, JTI, BAT and Imperial Brands present across the region

Parliament moving up the rankings over 2018-2023

PMI dominates heated tobacco, while Shenzhen Imiracle Technology leads e-vaping

FORECAST PROJECTIONS

Only Turkey will record unit volume growth in cigarette sales over the forecast period

Cigarette sales to decline by 54 billion units in Western Europe over the forecast period

Continued growth expected for next-generation tobacco products

Heated tobacco will drive actual sales growth in the overall category

Nicotine pouches to see dynamic growth in Finland over 2023-2208

COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

Finland: Competitive and Retail Landscape

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

Greece: Market Context

Greece: Competitive and Retail Landscape

Ireland: Market Context

Ireland: Competitive and Retail Landscape
Italy: Market Context
Italy: Competitive and Retail Landscape
Netherlands: Market Context
Netherlands: Competitive and Retail Landscape
Portugal: Market Context
Portugal: Competitive and Retail Landscape
Spain: Market Context
Spain: Competitive and Retail Landscape
Sweden: Market Context
Sweden: Competitive and Retail Landscape
Switzerland: Market Context
Switzerland: Competitive and Retail Landscape
Turkey: Market Context
Turkey: Competitive and Retail Landscape
UK: Market Context
UK: Competitive and Retail Landscape

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