



# Passport

## Cigars, Cigarillos and Smoking Tobacco in Indonesia

Euromonitor International

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purposes only.

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# CIGARS, CIGARILLOS AND SMOKING TOBACCO IN INDONESIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2023 DEVELOPMENTS

Cigars and cigarillos remain niche

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Small local grocers channel remains dominant in cigars and cigarillos

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Fine cut tobacco sees dynamic growth, benefitting from trading down

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## PROSPECTS AND OPPORTUNITIES

Cigars and cigarillos expected to see stable volume growth over the forecast period, driven by niche consumer group

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Cigars and cigarillos players to maintain engagement with current customers

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## Affordability and wider distribution set to influence market demand

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## CATEGORY DATA

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

	2018	2019	2020	2021	2022	2023
Cigars, Cigarillos and Smoking Tobacco (Not calculable)	Data removed from sample					
Cigars and Cigarillos (million units)						
- Cigars (million units)						
- Cigarillos (million units)						
Smoking Tobacco (Tonne)						
- Pipe Tobacco (Tonne)						
- Fine Cut Tobacco (Tonne)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

IDR billion	2018	2019	2020	2021	2022	2023
Cigars, Cigarillos and Smoking Tobacco	Data removed from sample					
Cigars and Cigarillos						
- Cigars						
- Cigarillos						
Smoking Tobacco						
- Pipe Tobacco						
- Fine Cut Tobacco						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

	2022/23	2018-23 CAGR	2018/23 Total
Cigars, Cigarillos and Smoking Tobacco (Not calculable)	Data removed from sample		
Cigars and Cigarillos (% volume growth)			
- Cigars (% volume growth)			
- Cigarillos (% volume growth)			
Smoking Tobacco (% volume growth)			
- Pipe Tobacco (% volume growth)			
- Fine Cut Tobacco (% volume growth)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Cigars, Cigarillos and Smoking Tobacco	Data removed from sample		
Cigars and Cigarillos			
- Cigars			
- Cigarillos			
Smoking Tobacco			
- Pipe Tobacco			
- Fine Cut Tobacco			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume

	2018	2019	2020	2021	2022	2023
Large Cigars	Data removed from sample					
Standard Cigars						
Small Cigars						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume

	2018	2019	2020	2021	2022	2023
Price Fighter	Data removed from sample					
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
--------------------------------	---------------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources



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

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
--------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
--------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
--------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail volume Brand (GBO)	Company (NBO)	2020	2021	2022	2023
--------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Distribution of Cigars and Cigarillos by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
-----------------	------	------	------	------	------	------

Retail Channels

- Retail Offline
- Grocery Retailers
- Convenience Retail
- Convenience Stores
- Forecourt Retailers
- Supermarkets
- Hypermarkets
- Discounters
- Warehouse Clubs
- Food/drink/tobacco specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hospitality (on-trade)
- Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Distribution of Smoking Tobacco by Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Non-retail channels						
- Hospitality (on-trade)						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2023-2028

	2023	2024	2025	2026	2027	2028
Cigars, Cigarillos and Smoking Tobacco (Not calculable)	Data removed from sample					
Cigars and Cigarillos (million units)						
- Cigars (million units)						
- Cigarillos (million units)						

Smoking Tobacco (Tonne)  
 - Pipe Tobacco (Tonne)  
 - Fine Cut Tobacco  
 (Tonne)

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 20 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2023-2028**

IDR billion	2023	2024	2025	2026	2027	2028
Cigars, Cigarillos and Smoking Tobacco Cigars and Cigarillos - Cigars - Cigarillos Smoking Tobacco - Pipe Tobacco - Fine Cut Tobacco	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

	2023/24	2023-28 CAGR	2023/28 Total
Cigars, Cigarillos and Smoking Tobacco (Not calculable) Cigars and Cigarillos (% volume growth) - Cigars (% volume growth) - Cigarillos (% volume growth) Smoking Tobacco (% volume growth) - Pipe Tobacco (% volume growth) - Fine Cut Tobacco (% volume growth)	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Cigars, Cigarillos and Smoking Tobacco Cigars and Cigarillos - Cigars - Cigarillos Smoking Tobacco - Pipe Tobacco - Fine Cut Tobacco	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# TOBACCO IN INDONESIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Tobacco in 2023: The big picture

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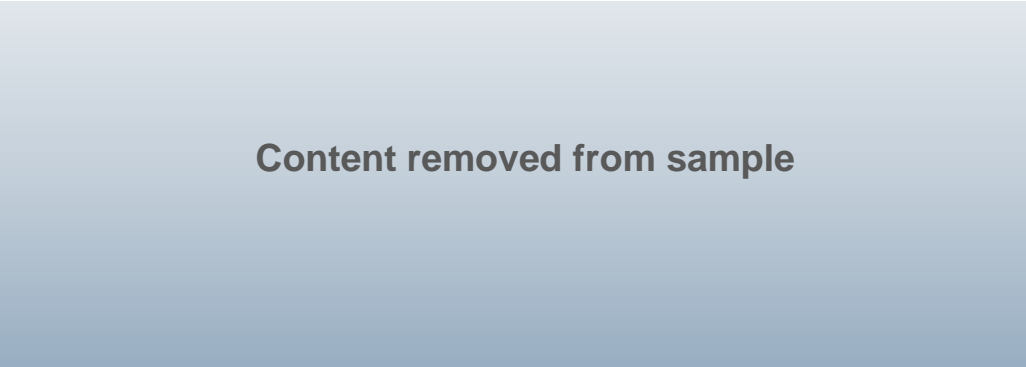
### 2023 key trends

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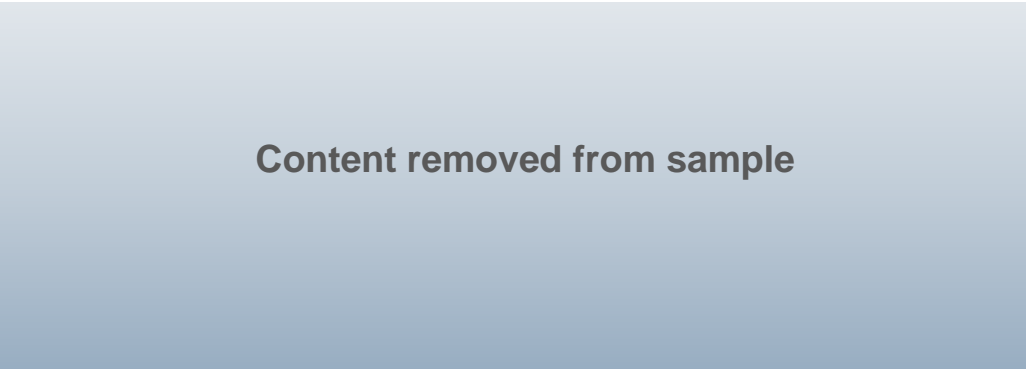
### Competitive landscape

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Retailing developments

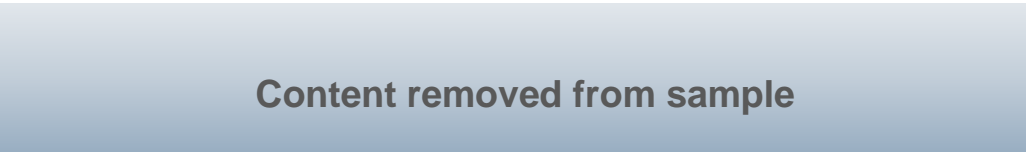


What next for tobacco?



OPERATING ENVIRONMENT

Legislation



Legislative overview

Summary 1      Legislation Summary at a Glance

A	B	C	D	E	F	G	H	I
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Source:    Euromonitor International

### Minimum legal smoking age

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### Smoking prevalence

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### Tar levels

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### Health warnings

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### Plain packaging

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### Advertising and sponsorship

**Content removed from sample**



### Point-of-sale display bans

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### Smoking in public places

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### Flavoured tobacco product ban

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### Vapour products

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## MARKET INDICATORS

Table 23 Number of Adult Smokers by Gender 2018-2023

	2018	2019	2020	2021	2022	2023
Male Number of Smokers ('000)	Data removed from sample					
Female Number of Smokers ('000)						
Total Number of Smokers ('000)						
Male Number of Smokers (%)						
Female Number of Smokers (%)						
Total Number of Smokers (%)						

Source: Euromonitor International from official statistics

## MARKET DATA

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

	2018	2019	2020	2021	2022	2023
Cigarettes (million sticks)	Data removed from sample					
Cigarettes (Illicit+Legal) (million sticks)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						
Cigars and Cigarillos (million units)						
Smoking Tobacco (Tonne)						
Smokeless Tobacco (Tonne)						
E-Vapour Products (million units)						
Tobacco Free Oral Nicotine (million units)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

IDR billion	2018	2019	2020	2021	2022	2023
Tobacco						
Cigarettes						
Cigarettes Including Fine Cut Stick Equivalent						

Cigars, Cigarillos and Smoking Tobacco  
Cigars and Cigarillos Smoking Tobacco  
Smokeless Tobacco, E-Vapour Products and Heated Tobacco  
Smokeless Tobacco E-Vapour Products  
Heated Tobacco Products  
Tobacco Free Oral Nicotine

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

Cigarettes  
Cigarettes (Illicit+Legal)  
Cigars, Cigarillos and Smoking Tobacco  
Cigars and Cigarillos Smoking Tobacco  
Smokeless Tobacco  
E-Vapour Products  
Tobacco Free Oral Nicotine

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Tobacco  
Cigarettes  
Cigarettes Including Fine Cut Stick Equivalent  
Cigars, Cigarillos and Smoking Tobacco  
Cigars and Cigarillos Smoking Tobacco  
Smokeless Tobacco, E-Vapour Products and Heated Tobacco  
Smokeless Tobacco  
E-Vapour Products  
Heated Tobacco Products  
Tobacco Free Oral Nicotine

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

2023 2024 2025 2026 2027 2028

Cigarettes (million sticks)  
 Cigarettes (Illicit+Legal) (million sticks)  
 Cigars, Cigarillos and Smoking Tobacco (Not calculable)  
 Cigars and Cigarillos (million units)  
 Smoking Tobacco (Tonne)  
 Smokeless Tobacco (Tonne)  
 E-Vapour Products (million units)  
 Tobacco Free Oral Nicotine (million units)

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

IDR billion	2023	2024	2025	2026	2027	2028
Tobacco Cigarettes Cigarettes Including Fine Cut Stick Equivalent Cigars, Cigarillos and Smoking Tobacco Cigars and Cigarillos Smoking Tobacco Smokeless Tobacco, E-Vapour Products and Heated Tobacco Smokeless Tobacco E-Vapour Products Heated Tobacco Products Tobacco Free Oral Nicotine	<b>Data removed from sample</b>					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Cigarettes Cigarettes (Illicit+Legal) Cigars, Cigarillos and Smoking Tobacco Cigars and Cigarillos Smoking Tobacco Smokeless Tobacco E-Vapour Products Tobacco Free Oral Nicotine	<b>Data removed from sample</b>		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Tobacco	Data removed from sample		
Cigarettes			
Cigarettes Including Fine Cut Stick Equivalent			
Cigars, Cigarillos and Smoking Tobacco			
Cigars and Cigarillos			
Smoking Tobacco			
Smokeless Tobacco, E-Vapour Products and Heated Tobacco			
Smokeless Tobacco			
E-Vapour Products			
Heated Tobacco Products			
Tobacco Free Oral Nicotine			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

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SOURCES

Sources used during research include the following:

Summary 2 Research Sources

Official Sources	Content removed from sample
Trade Associations	

Trade Press

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