

Tobacco in Spain

June 2024

Table of Contents

Tobacco in Spain

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 1 - Number of Adult Smokers by Gender 2018-2023

MARKET DATA

Table 2 - Sales of Tobacco by Category: Volume 2018-2023

Table 3 - Sales of Tobacco by Category: Value 2018-2023

Table 4 - Sales of Tobacco by Category: % Volume Growth 2018-2023

Table 5 - Sales of Tobacco by Category: % Value Growth 2018-2023

Table 6 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 7 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Cigarettes in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cigarette value sales surpass pre-pandemic levels, but volume sales decline

Surges in prices and the decline in consumers' purchasing power strongly impact demand for cigarettes, as smokers shift to other products

JT International takes the lead

PROSPECTS AND OPPORTUNITIES

Cigarette consumption is expected to decline over the forecast period due to increased concerns over health and wellness. More price increases are expected to further impact cigarette consumption
Influence from neighbouring countries could lead Spain to extreme measures to prevent tobacco consumption

TAXATION AND PRICING

Taxation rates

No changes were made to taxation rates in 2023

Table 10 - Taxation and Duty Levies 2018-2023

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 11 - Sales of Cigarettes: Volume 2018-2023

Table 12 - Sales of Cigarettes by Category: Value 2018-2023

Table 13 - Sales of Cigarettes: % Volume Growth 2018-2023

Table 14 - Sales of Cigarettes by Category: % Value Growth 2018-2023

Table 15 - Sales of Cigarettes by Blend: % Volume 2018-2023

Table 16 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023

Table 17 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023

Table 18 - Sales of Cigarettes by Pack Size: % Volume 2018-2023

Table 19 - Sales of Cigarettes by Price Band: % Volume 2018-2023

Table 20 - NBO Company Shares of Cigarettes: % Volume 2019-2023

Table 21 - LBN Brand Shares of Cigarettes: % Volume 2020-2023

Table 22 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023

Table 23 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023

Table 24 - Forecast Sales of Cigarettes: Volume 2023-2028

Table 25 - Forecast Sales of Cigarettes by Category: Value 2023-2028

Table 26 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028

Table 27 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028

Table 28 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028

Table 29 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028

Table 30 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028

Table 31 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028

Table 32 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

Cigars, Cigarillos and Smoking Tobacco in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fine cut tobacco continues to benefit from inflation and a decrease in consumer purchasing power

Cigars experience a positive performance in 2023

Pipe tobacco and cigarillos volume sales continue to drop in 2023

PROSPECTS AND OPPORTUNITIES

Health and wellness trends and changing demographics will negatively impact traditional ways of smoking

Further measures and increases in taxes on tobacco will have a negative impact on the sales of these categories

Competition from alternatives to traditional tobacco could continue to pose competition if no further restrictions are taken

CATEGORY DATA

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2018-2023

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2018-2023

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2018-2023

Table 36 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2018-2023

Table 37 - Sales of Cigars by Size: % Volume 2018-2023

Table 38 - Sales of Cigarillos by Price Platform 2018-2023

Table 39 - NBO Company Shares of Cigars and Cigarillos: % Volume 2019-2023

Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2020-2023

Table 41 - NBO Company Shares of Cigars: % Volume 2019-2023

Table 42 - LBN Brand Shares of Cigars: % Volume 2020-2023

Table 43 - NBO Company Shares of Cigarillos: % Volume 2019-2023

Table 44 - LBN Brand Shares of Cigarillos: % Volume 2020-2023

Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2019-2023

Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2020-2023

Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2019-2023

Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2020-2023

Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2019-2023

Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2020-2023

Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2018-2023

Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2018-2023

Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2023-2028

Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2023-2028

Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2023-2028

Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2023-2028

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Smokeless tobacco, e-vapour products and heated tobacco benefit from a general shift in behaviour amongst traditional tobacco smokers

Strong growth for closed system single use products

Heated tobacco continues to show a positive performance

PROSPECTS AND OPPORTUNITIES

Increased measures and regulations could pose challenges to expansion

The future of nicotine pouches remains uncertain

Concerns around climate change and the appeal to underage and young adults could lead to further measures and a potential ban against closed system single use e-vapour products

CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2018-2023

CATEGORY DATA

Table 58 - Sales of Smokeless Tobacco by Category: Volume 2018-2023

Table 59 - Sales of Smokeless Tobacco by Category: % Volume Growth 2018-2023

Table 60 - Sales of E-Vapour Products by Category: Volume 2018-2023

Table 61 - Sales of E-Vapour Products by Category: % Volume Growth 2018-2023

Table 62 - Sales of Tobacco Heating Devices: Volume 2018-2023

Table 63 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2023

Table 64 - Sales of Heated Tobacco: Volume 2018-2023

Table 65 - Sales of Heated Tobacco: % Volume Growth 2018-2023

Table 66 - Sales of Tobacco Free Oral Nicotine: Volume 2018-2023

Table 67 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023

Table 68 - Sales of Tobacco Free Oral Nicotine by Category: Value 2018-2023

Table 69 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2018-2023

Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2018-2023

Table 71 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2018-2023

Table 72 - Sales of E-Liquids by Nicotine Strength: % Value 2020-2023

Table 73 - NBO Company Shares of Smokeless Tobacco: % Volume 2019-2023

Table 74 - LBN Brand Shares of Smokeless Tobacco: % Volume 2020-2023

Table 75 - NBO Company Shares of E-Vapour Products: % Value 2019-2023

Table 76 - LBN Brand Shares of E-Vapour Products: % Value 2020-2023

Table 77 - NBO Company Shares of Tobacco Heating Devices: % Volume 2019-2023

Table 78 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2020-2023

Table 79 - NBO Company Shares of Heated Tobacco: % Volume 2019-2023

Table 80 - LBN Brand Shares of Heated Tobacco: % Volume 2020-2023

Table 81 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2019-2023

Table 82 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2020-2023

Table 83 - Distribution of Smokeless Tobacco by Format: % Volume 2018-2023

Table 84 - Distribution of E-Vapour Products by Format: % Value 2018-2023

Table 85 - Distribution of Tobacco Heating Devices by Format: % Volume 2018-2023

Table 86 - Distribution of Heated Tobacco by Format: % Volume 2018-2023

Table 87 - Forecast Sales of Smokeless Tobacco by Category: Volume 2023-2028

Table 88 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2023-2028

Table 89 - Forecast Sales of E-Vapour Products by Category: Volume 2023-2028

Table 90 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2023-2028

Table 91 - Forecast Sales of Tobacco Heating Devices: Volume 2023-2028

Table 92 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2023-2028

Table 93 - Forecast Sales of Heated Tobacco: Volume 2023-2028

Table 94 - Forecast Sales of Heated Tobacco: % Volume Growth 2023-2028

Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2023-2028

Table 96 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2023-2028

Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2023-2028

Table 98 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2023-2028

Table 100 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2023-2028

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/tobacco-in-spain/report.