

# Tobacco in Georgia

June 2024

**Table of Contents** 

## Tobacco in Georgia

## **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

Health warnings

Plain packaging

Point-of-sale display bans

Smoking in public places

Low ignition propensity (LIP) cigarette regulation

Flavoured tobacco product ban

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 Georgia

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Significant increase in volume sales in 2023

Smoking prevalence falls slightly

Philip Morris cements leadership position

## PROSPECTS AND OPPORTUNITIES

Plain packaging regulations leads to fall in volume sales

Gradual change in retail landscape

Heightened health awareness negatively impacts demand for cigarettes

#### TAXATION AND PRICING

Taxation rates

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 Georgia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Significant volume increase in 2023

Import fluctuations in 2023

Tobacco specialists gain further volume share

## PROSPECTS AND OPPORTUNITIES

Positive outlook for cigars and cigarillos

Foodservice drives consumption of water pipe tobacco

Further growth for fine cut tobacco

## **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 Georgia.

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Increase in excise duty for e-liquids

Fragmented landscape in e-vaping

Heated tobacco registers double-digit percentage volume growth

## PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period

Philip Morris continues to dominate heated tobacco

Further variety of products boost sales of e-vapour products and heated tobacco

#### 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-georgia/report.