

Cigarettes and Alternative Nicotine Products in Asia Pacific

February 2024

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INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Asia Pacific the biggest regional market for sales of cigarettes

Asia Pacific the biggest regional market for heated tobacco

Decline in 2020, positive growth from 2021, but modest forecast period increases expected

Bar 2023, growth expected for smokeless tobacco, e-vapour products and heated tobacco

Major losses in Japan, but sales increase in China

Losses for e-vaping in China, gains for heated tobacco in Japan and South Korea

Slim and superslim cigarettes seeing strong growth in China

Tobacco free oral nicotine products seeing strong growth in Pakistan

Vietnam adds nearly 10 billion new cigarette sales over 2017-2022

Heated tobacco products the best-developed category

State Tobacco Monopoly Administration with a clear focus on high-end cigarettes in China

Sales of cigarettes declining in Japan as smokers switch to heated tobacco

Heated tobacco continues to dominate sales in next-generation products

Sales of e-vapour products devastated by the raft of new regulations in China

E-vapour products banned in a number of markets

E-vapour products performing strongly in Indonesia

Small local grocers the main distribution channel for cigarettes in Asia Pacific

Convenience stores lead sales in Japan and South Korea

Convenience stores the main distribution channel in Japan and South Korea

Vaping specialists a key channel in Indonesia

LEADING COMPANIES AND BRANDS

Concentrated competitive landscapes nationally for cigarettes

Indonesian players launch smaller pack sizes at lower price points after tax hike

PMI, JTI and BAT present across much of the region

China National Tobacco Corp's brands dominate the top 10 rankings

RELX Technology manages to gain share in Chinese e-vapour products in 2022

Philip Morris International the leading player in heated tobacco products in Asia Pacific

FORECAST PROJECTIONS

Positive growth expected for unit volume sales of cigarettes over the forecast period

Chinese market will drive the overall regional performance in the coming years

Positive outlook for heated tobacco, negative outlook for e-vapour products

Heated tobacco will drive growth in the overall category

Bans and stricter regulations will stymie the e-vaping performance

COUNTRY SNAPSHOTS

China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

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