



Cigarettes and Alternative Nicotine Products in Western Europe

February 2024

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Key findings

REGIONAL OVERVIEW

Cigarette sales in decline in Western Europe

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

Declining sales expected in Western Europe over the forecast period

Growth will slow but remain dynamic for next-generation products

Sales declining in most Western European markets over 2017-2022

Italy and Germany drive heated tobacco growth as disposable vaping booms in the UK

Strong performance in Norway in 2020 as smokers buy at home instead of in Sweden

Boom in disposable vapes in Germany, but other vaping products are in decline

Fine cut cigarettes seeing dynamic growth in Turkey

Inflation, higher taxes and switch to fine cut tobacco hits demand for cigarettes in Turkey

Higher taxes and pressure on household budgets see Germans opting for larger pack sizes

Heated tobacco products become the major category in Western Europe over 2017-2022

Italy the leading heated tobacco market in Western Europe

The UK leads sales of e-vapour products in Western Europe

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

Modern grocery retailers also important, but e-commerce share remains limited

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 continues to move up the rankings in 2022

Shenzhen Imiracle Technology takes e-vapour top spot from British American Tobacco

British American Tobacco with its "fastest speed to market launch yet" for Vuse Go in the UK

Philip Morris takes over Swedish Match

FORECAST PROJECTIONS

Only Turkey will record positive unit volume sales of cigarettes over the forecast period

Cigarette sales to decline by 57 billion units in Western Europe over the forecast period

Continued growth expected for next-generation tobacco products

Heated tobacco will drive growth in the overall category

Nicotine pouches expected to grow over 2022-2027

COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

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