

# **Tobacco in Greece**

Market Direction | 2022-07-14 | 59 pages | Euromonitor

## **AVAILABLE LICENSES:**

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

# Report description:

In terms of cigarettes, smoking prevalence decreased in Greece in 2021, in line with an increase in health awareness, which resulted in more people quitting smoking or switching to alternatives that are positioned as reduced harm options, such as e-vapour products and heated tobacco.

Euromonitor International's Tobacco in Greece report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2017-2021, allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be the new legislative, distribution or pricing issues. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Cigarettes, Cigars, Cigarillos and Smoking Tobacco, Smokeless Tobacco, E-Vapour Products and Heated Tobacco.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Tobacco market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Tobacco in Greece Euromonitor International July 2022

List Of Contents And Tables

TOBACCO IN GREECE

**EXECUTIVE SUMMARY** 

Tobacco in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

What next for tobacco?

**OPERATING ENVIRONMENT** 

Legislation

Legislative overview

Summary 1 Legislation Summary at a Glance

Smoking prevalence

Plain packaging

Point-of-sale display bans

Smoking in public places

Flavoured tobacco product ban

Reduced harm

Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

Table 1 Number of Adult Smokers by Gender 2016-2021

MARKET DATA

Table 2 Sales of Tobacco by Category: Volume 2016-2021

Table 3 Sales of Tobacco by Category: Value 2016-2021

Table 4 Sales of Tobacco by Category: % Volume Growth 2016-2021

Table 5 Sales of Tobacco by Category: % Value Growth 2016-2021

Table 6 Forecast Sales of Tobacco by Category: Volume 2021-2026

Table 7 Forecast Sales of Tobacco by Category: Value 2021-2026

Table 8 Forecast Sales of Tobacco by Category: % Volume Growth 2021-2026 Table 9 Forecast Sales of Tobacco by Category: % Value Growth 2021-2026

**DISCLAIMER** 

**SOURCES** 

Summary 2 Research Sources

CIGARETTES IN GREECE

**KEY DATA FINDINGS** 

2021 DEVELOPMENTS

Inbound tourist flows help to stabilise downward trend in volume sales, but health concerns continue to take their toll

The economic impact of the pandemic maintains migration trend away from cigarettes

Economic pressures favour shift to larger pack sizes and economy brands

PROSPECTS AND OPPORTUNITIES

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Forecast remains gloomy as migration trend continues

The competitive landscape is set to remain fragmented as players compete for a slice of a shrinking pie

Only tax hikes are likely to push up prices

TAXATION AND PRICING

Taxation rates

Summary 3 Taxation and Duty Levies 2016-2021

Average cigarette pack price breakdown

Summary 4 Average Cigarette Pack Price Breakdown: Brand Examples

**CATEGORY DATA** 

Table 10 Sales of Cigarettes: Volume 2016-2021

Table 11 Sales of Cigarettes by Category: Value 2016-2021

Table 12 Sales of Cigarettes: % Volume Growth 2016-2021

Table 13 Sales of Cigarettes by Category: % Value Growth 2016-2021

Table 14 Sales of Cigarettes by Blend: % Volume 2016-2021

Table 15 Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2016-2021

Table 16 Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2016-2021

Table 17 Sales of Cigarettes by Pack Size: % Volume 2016-2021

Table 18 Sales of Cigarettes by Price Band: % Volume 2016-2021

Table 19 [NBO Company Shares of Cigarettes: % Volume 2017-2021

Table 20 ∏LBN Brand Shares of Cigarettes: % Volume 2018-2021

Table 21 [Sales of Cigarettes by Distribution Format: % Volume 2016-2021

Table 22 [Illicit Trade Estimate of Cigarettes: Volume 2016-2021

Table 23 ☐Forecast Sales of Cigarettes: Volume 2021-2026

Table 24 ☐Forecast Sales of Cigarettes by Category: Value 2021-2026

Table 25 [Forecast Sales of Cigarettes: % Volume Growth 2021-2026

Table 26 | Forecast Sales of Cigarettes by Category: % Value Growth 2021-2026

Table 27 [Forecast Sales of Cigarettes by Blend: % Volume 2021-2026

Table 28 | Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2021-2026

Table 29 [Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2021-2026

Table 30 ∏Forecast Sales of Cigarettes by Pack Size: % Volume 2021-2026

Table 31 ☐Forecast Sales of Cigarettes by Price Band: % Volume 2021-2026

CIGARS, CIGARILLOS AND SMOKING TOBACCO IN GREECE

**KEY DATA FINDINGS** 

2021 DEVELOPMENTS

Karelia Tobacco widens its portfolio in cigars and cigarillos, but a larger pack size for Old Holborn slows the company's advance in fine cut tobacco.

Heavier tourist flows boost cigars sales and contribute to the recovery of duty-free sales

Price fighters leverage low prices to drive the performance of cigarillos

PROSPECTS AND OPPORTUNITIES

Fine cut tobacco is less at risk from the migration trend due to low prices and a unique smoking experience

Price fighter cigarillos to increase their penetration at the expense of cigarettes

Recovery of global tourism offers growth opportunities for large cigars

CATEGORY DATA

Table 32 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2016-2021

Table 33 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2016-2021

Table 34 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2016-2021

Table 35 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2016-2021

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 36 Sales of Cigars by Size: % Volume 2016-2021

Table 37 Sales of Cigarillos by Price Platform 2016-2021

Table 38 NBO Company Shares of Cigars and Cigarillos: % Volume 2017-2021

Table 39 LBN Brand Shares of Cigars and Cigarillos: % Volume 2018-2021

Table 40 NBO Company Shares of Cigars: % Volume 2017-2021

Table 41 [LBN Brand Shares of Cigars: % Volume 2018-2021

Table 42 

☐NBO Company Shares of Cigarillos: % Volume 2017-2021

Table 43 [LBN Brand Shares of Cigarillos: % Volume 2018-2021

Table 44 □NBO Company Shares of Smoking Tobacco: % Volume 2017-2021

Table 45 ∏LBN Brand Shares of Smoking Tobacco: % Volume 2018-2021

Table 47 ∏LBN Brand Shares of Pipe Tobacco: % Volume 2018-2021

Table 48 ☐NBO Company Shares of Fine Cut Tobacco: % Volume 2017-2021

Table 49 ☐LBN Brand Shares of Fine Cut Tobacco: % Volume 2018-2021

Table 50 □Distribution of Cigars and Cigarillos by Format: % Volume 2016-2021

Table 51 ☐ Distribution of Smoking Tobacco by Format: % Volume 2016-2021

Table 52 ∏Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2021-2026

Table 53 | Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2021-2026

Table 54 [Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2021-2026

Table 55 ∏Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2021-2026

SMOKELESS TOBACCO, E-VAPOUR PRODUCTS AND HEATED TOBACCO IN GREECE

#### **KEY DATA FINDINGS**

#### 2021 DEVELOPMENTS

Imperial Tobacco Hellas grows importance through Myblu in closed vaping systems and the introduction of Pulze and ID in heated tobacco products

Papastratos Cigarette Mfg expands heated tobacco products portfolio with the launch of Philip Morris International's lil SOLID and

British American Tobacco Hellas boosts its performance with rebranding in e-vapour products and a competitive offer in dynamic heated tobacco

#### PROSPECTS AND OPPORTUNITIES

Strong investment to help heated tobacco remain the best performer

Trends in flavours more favourable to tobacco alternatives

Distribution to become more fragmented as tobacco products manufacturers continue their investments in e-vapour products and heated tobacco

#### **CATEGORY INDICATORS**

Table 56 Number of Adult Vapers 2016-2021

## CATEGORY DATA

Table 57 Sales of Tobacco Heating Devices: Volume 2016-2021

Table 58 Sales of Tobacco Heating Devices: % Volume Growth 2016-2021

Table 59 Sales of Heated Tobacco: Volume 2016-2021

Table 60 Sales of Heated Tobacco: % Volume Growth 2016-2021

Table 61 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2016-2021

Table 62 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2016-2021

Table 63 Sales of E-Liquids by Nicotine Strength: % Value 2019-2021

Table 64 NBO Company Shares of E-Vapour Products: % Value 2017-2021

Table 65 [LBN Brand Shares of E-Vapour Products: % Value 2018-2021

Table 66 ☐NBO Company Shares of Tobacco Heating Devices: % Volume 2017-2021

## Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 67 [LBN Brand Shares of Tobacco Heating Devices: % Volume 2018-2021

Table 68 ☐NBO Company Shares of Heated Tobacco: % Volume 2017-2021

Table 69 [LBN Brand Shares of Heated Tobacco: % Volume 2018-2021

Table 70 Distribution of E-Vapour Products by Format: % Value 2016-2021

Table 71 Distribution of Tobacco Heating Devices by Format: % Volume 2016-2021

Table 72 Distribution of Heated Tobacco by Format: % Volume 2016-2021

Table 73 [Forecast Sales of Tobacco Heating Devices: Volume 2021-2026

Table 74 [Forecast Sales of Tobacco Heating Devices: % Volume Growth 2021-2026

Table 75 [Forecast Sales of Heated Tobacco: Volume 2021-2026

Table 76 ☐ Forecast Sales of Heated Tobacco: % Volume Growth 2021-2026

Table 77 [Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2021-2026

Table 78 [Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2021-2026

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$  - Complete the relevant blank fields and sign

# **Tobacco in Greece**

Market Direction | 2022-07-14 | 59 pages | Euromonitor

License			Price
Single User Licence			€1750.00
Multiple User License (1 Site)		€3500.00	
Multiple User License (Global)			€5250.00
			VAT
		-	Total
	Pnone*		
	l ast Name*		
	EU Vat / Tax ID	/ NIP number*	
	EU Vat / Tax ID City*	/ NIP number*	
		/ NIP number*	
	City*	/ NIP number*	
	Multiple User License (1 S  Multiple User License (Glo	Multiple User License (1 Site)  Multiple User License (Global)  evant license option. For any questions please contact supporto	Multiple User License (1 Site)  Multiple User License (Global)  evant license option. For any questions please contact support@scotts-international.com or 0048 of at 23% for Polish based companies, individuals and EU based companies who are unable to provide the companies of th

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com