

## **Tobacco in the United Kingdom**

Market Direction | 2023-06-19 | 62 pages | Euromonitor

### **AVAILABLE LICENSES:**

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

### **Report description:**

After two years of recording positive growth thanks to favourable pandemic-induced conditions, 2022 saw tobacco returning to declining sales in the UK, as it had been registering prior to the pandemic. Volume sales of cigarettes posted a double-digit decline in 2022, although smoking prevalence has experienced only limited downturns since the start of the pandemic. The declining sales was mainly driven by consumers returning to international travel and a strong rebound in illicit sales following...

Euromonitor International's Tobacco in United Kingdom report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2018-2022, 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 2027 illustrate how the market is set to change.

Product coverage: Cigarettes, Cigarettes (Illicit+Legal), 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.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scott-international.com](mailto:support@scott-international.com)

[www.scott-international.com](http://www.scott-international.com)

## **Table of Contents:**

Tobacco in the United Kingdom  
Euromonitor International  
June 2023

List Of Contents And Tables

### **TOBACCO IN THE UNITED KINGDOM**

#### **EXECUTIVE SUMMARY**

Tobacco in 2022: The big picture

2022 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 2017-2022

#### **MARKET DATA**

Table 2 Sales of Tobacco by Category: Volume 2017-2022

Table 3 Sales of Tobacco by Category: Value 2017-2022

Table 4 Sales of Tobacco by Category: % Volume Growth 2017-2022

Table 5 Sales of Tobacco by Category: % Value Growth 2017-2022

Table 6 Forecast Sales of Tobacco by Category: Volume 2022-2027

Table 7 Forecast Sales of Tobacco by Category: Value 2022-2027

Table 8 Forecast Sales of Tobacco by Category: % Volume Growth 2022-2027

Table 9 Forecast Sales of Tobacco by Category: % Value Growth 2022-2027

#### **DISCLAIMER**

#### **SOURCES**

Summary 2 Research Sources

### **CIGARETTES IN THE UNITED KINGDOM**

#### **KEY DATA FINDINGS**

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 2022 DEVELOPMENTS

Cigarettes return to decline in volume terms as COVID-19-related effects unwind

Economy brands grow as consumers trade down due to the cost-of-living crisis

The Khan Review outlines policies to be implemented for the new Tobacco Control Plan

## PROSPECTS AND OPPORTUNITIES

Cigarettes to decline in both volume and real value terms over the forecast period

Illicit trade to grow as money-squeezed consumers look to save money

Big tobacco brands increasingly focus on the economy segment or alternative options

## TAXATION AND PRICING

Taxation rates

Table 10 Taxation and Duty Levies 2017-2022

Average cigarette pack price breakdown

Summary 3 Average Cigarette Pack Price Breakdown: Brand Examples

## CATEGORY DATA

Table 11 Sales of Cigarettes: Volume 2017-2022

Table 12 Sales of Cigarettes by Category: Value 2017-2022

Table 13 Sales of Cigarettes: % Volume Growth 2017-2022

Table 14 Sales of Cigarettes by Category: % Value Growth 2017-2022

Table 15 Sales of Cigarettes by Blend: % Volume 2017-2022

Table 16 Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2017-2022

Table 17 Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2017-2022

Table 18 Sales of Cigarettes by Pack Size: % Volume 2017-2022

Table 19 Sales of Cigarettes by Price Band: % Volume 2017-2022

Table 20 NBO Company Shares of Cigarettes: % Volume 2018-2022

Table 21 LBN Brand Shares of Cigarettes: % Volume 2019-2022

Table 22 Sales of Cigarettes by Distribution Format: % Volume 2017-2022

Table 23 Illicit Trade Estimate of Cigarettes: Volume 2017-2022

Table 24 Forecast Sales of Cigarettes: Volume 2022-2027

Table 25 Forecast Sales of Cigarettes by Category: Value 2022-2027

Table 26 Forecast Sales of Cigarettes: % Volume Growth 2022-2027

Table 27 Forecast Sales of Cigarettes by Category: % Value Growth 2022-2027

Table 28 Forecast Sales of Cigarettes by Blend: % Volume 2022-2027

Table 29 Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2022-2027

Table 30 Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2022-2027

Table 31 Forecast Sales of Cigarettes by Pack Size: % Volume 2022-2027

Table 32 Forecast Sales of Cigarettes by Price Band: % Volume 2022-2027

## CIGARS, CIGARILLOS AND SMOKING TOBACCO IN THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Fine cut tobacco growth slips into decline as consumers return to travel and favour other tobacco alternatives

Cigarillos outperform the wider tobacco category as consumers favour more affordable options

Cigar sales declining again as price-sensitive consumers avoid the category

#### PROSPECTS AND OPPORTUNITIES

Fine cut tobacco growth to slow in the forecast period as the price gap to cigarettes narrows

Cigarillos to grow at the expense of cigars in a challenging economic environment

Tobacco companies to compete on lower-priced offerings focusing on value-for-money

#### CATEGORY DATA

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

Table 33 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2017-2022

Table 34 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2017-2022

Table 35 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2017-2022

Table 36 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2017-2022

Table 37 Sales of Cigars by Size: % Volume 2017-2022

Table 38 Sales of Cigarillos by Price Platform 2017-2022

Table 39 NBO Company Shares of Cigars and Cigarillos: % Volume 2018-2022

Table 40 LBN Brand Shares of Cigars and Cigarillos: % Volume 2019-2022

Table 41 NBO Company Shares of Cigars: % Volume 2018-2022

Table 42 □LBN Brand Shares of Cigars: % Volume 2019-2022

Table 43 □NBO Company Shares of Cigarillos: % Volume 2018-2022

Table 44 □LBN Brand Shares of Cigarillos: % Volume 2019-2022

Table 45 □NBO Company Shares of Smoking Tobacco: % Volume 2018-2022

Table 46 □LBN Brand Shares of Smoking Tobacco: % Volume 2019-2022

Table 47 □NBO Company Shares of Pipe Tobacco: % Volume 2018-2022

Table 48 □LBN Brand Shares of Pipe Tobacco: % Volume 2019-2022

Table 49 □NBO Company Shares of Fine Cut Tobacco: % Volume 2018-2022

Table 50 □LBN Brand Shares of Fine Cut Tobacco: % Volume 2019-2022

Table 51 □Distribution of Cigars and Cigarillos by Format: % Volume 2017-2022

Table 52 □Distribution of Smoking Tobacco by Format: % Volume 2017-2022

Table 53 □Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2022-2027

Table 54 □Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2022-2027

Table 55 □Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2022-2027

Table 56 □Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2022-2027

**SMOKELESS TOBACCO, E-VAPOUR PRODUCTS AND HEATED TOBACCO IN THE UNITED KINGDOM**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Closed single-use vapour products experience stellar growth at the expense of other vaping categories

Big tobacco companies enter the closed single-use systems race

Grocery retailers continue to gain share in the tobacco-alternative categories

**PROSPECTS AND OPPORTUNITIES**

Vaping to grow as consumers look for less unhealthy and more affordable options

Growth expected in nicotine pouches in spite of rising popularity of single-use systems

Heated tobacco to grow as an alternative to vaping for smokers

**CATEGORY INDICATORS**

Table 57 Number of Adult Vapers 2017-2022

**CATEGORY DATA**

Table 58 Sales of Tobacco Heating Devices: Volume 2017-2022

Table 59 Sales of Tobacco Heating Devices: % Volume Growth 2017-2022

Table 60 Sales of Heated Tobacco: Volume 2017-2022

Table 61 Sales of Heated Tobacco: % Volume Growth 2017-2022

Table 62 Sales of Tobacco Free Oral Nicotine: Volume 2017-2022

Table 63 Sales of Tobacco Free Oral Nicotine: % Volume Growth 2017-2022

Table 64 Sales of Tobacco Free Oral Nicotine by Category: Value 2017-2022

Table 65 Sales of Tobacco Free Oral Nicotine: % Value Growth 2017-2022

Table 66 □Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022

Table 67 □Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- Table 68 □Sales of E-Liquids by Nicotine Strength: % Value 2019-2022
- Table 69 □NBO Company Shares of Smokeless Tobacco: % Volume 2018-2022
- Table 70 □LBN Brand Shares of Smokeless Tobacco: % Volume 2019-2022
- Table 71 □NBO Company Shares of E-Vapour Products: % Value 2018-2022
- Table 72 □LBN Brand Shares of E-Vapour Products: % Value 2019-2022
- Table 73 □NBO Company Shares of Tobacco Heating Devices: % Volume 2018-2022
- Table 74 □LBN Brand Shares of Tobacco Heating Devices: % Volume 2019-2022
- Table 75 □NBO Company Shares of Heated Tobacco: % Volume 2018-2022
- Table 76 □LBN Brand Shares of Heated Tobacco: % Volume 2019-2022
- Table 77 □NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2018-2022
- Table 78 □LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2019-2022
- Table 79 □Distribution of E-Vapour Products by Format: % Value 2017-2022
- Table 80 □Forecast Sales of Tobacco Heating Devices: Volume 2022-2027
- Table 81 □Forecast Sales of Tobacco Heating Devices: % Volume Growth 2022-2027
- Table 82 □Forecast Sales of Heated Tobacco: Volume 2022-2027
- Table 83 □Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027
- Table 84 □Forecast Sales of Tobacco Free Oral Nicotine: Volume 2022-2027
- Table 85 □Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2022-2027
- Table 86 □Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2022-2027
- Table 87 □Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2022-2027
- Table 88 □Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027
- Table 89 □Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2022-2027

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Tobacco in the United Kingdom**

Market Direction | 2023-06-19 | 62 pages | Euromonitor

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-09"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com