

### **Tobacco in Guatemala**

Market Direction | 2024-06-12 | 47 pages | Euromonitor

#### **AVAILABLE LICENSES:**

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

### Report description:

Tobacco products contracted slightly in Guatemala in retail volume and current value terms, as cigarette consumption continued its steady downward trend in Guatemala. The consistent fall in smoking prevalence is due primarily to health concerns and consumer awareness about the potential risks and harm of smoking traditional cigarettes. Illicit trade in cigarettes is still a concern in the country, with estimates placing it at around 28% of cigarette sales in the country. It is possible that unde...

Euromonitor International's Tobacco in Guatemala report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023, 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 2028 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@scotts-international.com www.scotts-international.com

#### **Table of Contents:**

Tobacco in Guatemala Euromonitor International June 2024

List Of Contents And Tables

TOBACCO IN GUATEMALA

**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

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 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 GUATEMALA

**KEY DATA FINDINGS** 

Scotts International, EU Vat number: PL 6772247784

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

www.scotts-international.com

#### 2022 DEVELOPMENTS

Smoking prevalence on a slow and steady decline

#GuateSinHumo campaign from Philip Morris International

PMI continues to dominate the category

PROSPECTS AND OPPORTUNITIES

Illicit cigarette sales could rise over the forecast period

Younger adults stay away from traditional cigarettes

Use of capsule technology to become more dominant

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 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 GUATEMALA

**KEY DATA FINDINGS** 

2022 DEVELOPMENTS

Cigars receive boost from tourist arrivals

Cigarillos underperform in overall category

E-commerce sales of cigars remain limited

PROSPECTS AND OPPORTUNITIES

Wider variety of cigars anticipated in the upcoming years

Presence of cigar boutiques and other establishments will add dynamism to sales

Opportunities for pipe tobacco and fine cut tobacco

**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 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 GUATEMALA

#### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

E-vapour products remain a popular option in Guatemala

PMI introduces Iluma line of heated tobacco devices

New flavours and colours drive consumer interest

# PROSPECTS AND OPPORTUNITIES

E-liquids is to fuel greater use of open-vaping systems

Narrow price difference between heated tobacco sticks and traditional cigarettes facilitates the switch

PMI is expected to lead heated tobacco over the forecast period

#### **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 67 Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023

#### 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 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 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



☐ - Print this form

To place an Order with Scotts International:

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

# **Tobacco in Guatemala**

Market Direction | 2024-06-12 | 47 pages | Euromonitor

RDER FORM:						
elect license	License					Price
	Single User I	_icence				€1750.00
	Multiple Use	Multiple User License (1 Site)				
	Multiple Use	Multiple User License (Global)				
		VAT				
					Total	
** VAT will be added			ns please contact support( individuals and EU based			
** VAT will be added						
** VAT will be added mail*			individuals and EU based			
** VAT will be added mail* irst Name*			individuals and EU based  Phone*			
** VAT will be added mail* irst Name* ob title*			individuals and EU based  Phone*	companies who are		
			Phone*  Last Name*	companies who are		
** VAT will be added mail* irst Name* bb title* company Name*			Phone*  Last Name*  EU Vat / Tax ID	companies who are		
* VAT will be added mail* rst Name* b title* ompany Name* ddress*			Phone*  Last Name*  EU Vat / Tax ID  City*	companies who are		

Scotts International. EU Vat number: PL 6772247784

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