



# Tobacco in Italy

June 2024

Table of Contents

## Tobacco in Italy

### 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

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Flavoured tobacco product ban

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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Declining volumes for cigarettes, while value is supported by tax hikes

Players seek ways to keep cigarettes accessible to consumers

Growing competition from next generation products continues, while players adapt their strategies

#### PROSPECTS AND OPPORTUNITIES

Cigarettes volumes will continue to slump, with value sales also set to fall into negative figures

Competition from next generation products will become even greater

Sustainability trends to impact cigarettes and tobacco

## TAXATION AND PRICING

Taxation rates

Summary 3 - Taxation and Duty Levies 2018-2023

Average cigarette pack price breakdown

Summary 4 - Average Cigarette Pack Price Breakdown: Brand Examples

## CATEGORY DATA

Table 10 - Sales of Cigarettes: Volume 2018-2023

Table 11 - Sales of Cigarettes by Category: Value 2018-2023

Table 12 - Sales of Cigarettes: % Volume Growth 2018-2023

Table 13 - Sales of Cigarettes by Category: % Value Growth 2018-2023

Table 14 - Sales of Cigarettes by Blend: % Volume 2018-2023

Table 15 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023

Table 16 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023

Table 17 - Sales of Cigarettes by Pack Size: % Volume 2018-2023

Table 18 - Sales of Cigarettes by Price Band: % Volume 2018-2023

Table 19 - NBO Company Shares of Cigarettes: % Volume 2019-2023

Table 20 - LBN Brand Shares of Cigarettes: % Volume 2020-2023

Table 21 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023

Table 22 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023

Table 23 - Forecast Sales of Cigarettes: Volume 2023-2028

Table 24 - Forecast Sales of Cigarettes by Category: Value 2023-2028

Table 25 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028

Table 26 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028

Table 27 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028

Table 28 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028

Table 29 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028

Table 30 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028

Table 31 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

## Cigars, Cigarillos and Smoking Tobacco in Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Smoking tobacco achieves positive volume sales, thanks to offering a cheaper alternative to cigarettes

MST and MASAF deal helps to support local cigar production

Innovation in cigars attracts the attention of collectors

#### PROSPECTS AND OPPORTUNITIES

An overall positive performance expected over the forecast period

Fine cut smoking tobacco sees ongoing opportunities thanks to a switch away from cigarettes

Competitive status quo unlikely to change over the forecast period

## CATEGORY DATA

Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2018-2023

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2018-2023

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2018-2023

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2018-2023

Table 36 - Sales of Cigars by Size: % Volume 2018-2023

Table 37 - Sales of Cigarillos by Price Platform 2018-2023

Table 38 - NBO Company Shares of Cigars and Cigarillos: % Volume 2019-2023

Table 39 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2020-2023

Table 40 - NBO Company Shares of Cigars: % Volume 2019-2023  
 Table 41 - LBN Brand Shares of Cigars: % Volume 2020-2023  
 Table 42 - NBO Company Shares of Cigarillos: % Volume 2019-2023  
 Table 43 - LBN Brand Shares of Cigarillos: % Volume 2020-2023  
 Table 44 - NBO Company Shares of Smoking Tobacco: % Volume 2019-2023  
 Table 45 - LBN Brand Shares of Smoking Tobacco: % Volume 2020-2023  
 Table 46 - NBO Company Shares of Pipe Tobacco: % Volume 2019-2023  
 Table 47 - LBN Brand Shares of Pipe Tobacco: % Volume 2020-2023  
 Table 48 - NBO Company Shares of Fine Cut Tobacco: % Volume 2019-2023  
 Table 49 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2020-2023  
 Table 50 - Distribution of Cigars and Cigarillos by Format: % Volume 2018-2023  
 Table 51 - Distribution of Smoking Tobacco by Format: % Volume 2018-2023  
 Table 52 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2023-2028  
 Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2023-2028  
 Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2023-2028  
 Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2023-2028

## Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

A positive performance supported by the rise of next generation products  
 Closed vaping systems see exceptional growth in both value and volume terms  
 Sustainability is a key factor to consider when considering next generation products

#### PROSPECTS AND OPPORTUNITIES

Next generation products set to drive positive sales over the forecast period  
 Sustainability set to remain a key consideration, with players needing to make adaptive changes  
 Switch away from traditional tobacco will continue, ultimately supporting sales of modern products

### CATEGORY INDICATORS

Table 56 - Number of Adult Vapers 2018-2023

### CATEGORY DATA

Table 57 - Sales of Smokeless Tobacco by Category: Volume 2018-2023  
 Table 58 - Sales of Smokeless Tobacco by Category: % Volume Growth 2018-2023  
 Table 59 - Sales of E-Vapour Products by Category: Volume 2018-2023  
 Table 60 - Sales of E-Vapour Products by Category: % Volume Growth 2018-2023  
 Table 61 - Sales of Tobacco Heating Devices: Volume 2018-2023  
 Table 62 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2023  
 Table 63 - Sales of Heated Tobacco: Volume 2018-2023  
 Table 64 - Sales of Heated Tobacco: % Volume Growth 2018-2023  
 Table 65 - Sales of Tobacco Free Oral Nicotine: Volume 2018-2023  
 Table 66 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023  
 Table 67 - Sales of Tobacco Free Oral Nicotine by Category: Value 2018-2023  
 Table 68 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2018-2023  
 Table 69 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2018-2023  
 Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2018-2023  
 Table 71 - Sales of E-Liquids by Nicotine Strength: % Value 2020-2023  
 Table 72 - NBO Company Shares of Smokeless Tobacco: % Volume 2019-2023  
 Table 73 - LBN Brand Shares of Smokeless Tobacco: % Volume 2020-2023  
 Table 74 - NBO Company Shares of E-Vapour Products: % Value 2019-2023  
 Table 75 - LBN Brand Shares of E-Vapour Products: % Value 2020-2023

Table 76 - NBO Company Shares of Tobacco Heating Devices: % Volume 2019-2023

Table 77 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2020-2023

Table 78 - NBO Company Shares of Heated Tobacco: % Volume 2019-2023

Table 79 - LBN Brand Shares of Heated Tobacco: % Volume 2020-2023

Table 80 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2019-2023

Table 81 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2020-2023

Table 82 - Distribution of Smokeless Tobacco by Format: % Volume 2018-2023

Table 83 - Distribution of E-Vapour Products by Format: % Value 2018-2023

Table 84 - Distribution of Tobacco Heating Devices by Format: % Volume 2018-2023

Table 85 - Distribution of Heated Tobacco by Format: % Volume 2018-2023

Table 86 - Forecast Sales of Smokeless Tobacco by Category: Volume 2023-2028

Table 87 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2023-2028

Table 88 - Forecast Sales of E-Vapour Products by Category: Volume 2023-2028

Table 89 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2023-2028

Table 90 - Forecast Sales of Tobacco Heating Devices: Volume 2023-2028

Table 91 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2023-2028

Table 92 - Forecast Sales of Heated Tobacco: Volume 2023-2028

Table 93 - Forecast Sales of Heated Tobacco: % Volume Growth 2023-2028

Table 94 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2023-2028

Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2023-2028

Table 96 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2023-2028

Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2023-2028

Table 98 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2023-2028

Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/tobacco-in-italy/report](http://www.euromonitor.com/tobacco-in-italy/report).