



Euromonitor
International

Tobacco in Turkey

June 2025

Table of Contents

EXECUTIVE SUMMARY

- Tobacco in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retail 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
- 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 2019-2024

MARKET DATA

- Table 2 - Sales of Tobacco by Category: Volume 2019-2024
- Table 3 - Sales of Tobacco by Category: Value 2019-2024
- Table 4 - Sales of Tobacco by Category: % Volume Growth 2019-2024
- Table 5 - Sales of Tobacco by Category: % Value Growth 2019-2024
- Table 6 - Forecast Sales of Tobacco by Category: Volume 2024-2029
- Table 7 - Forecast Sales of Tobacco by Category: Value 2024-2029
- Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029
- Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 2 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Premium brands and immigration flows drive volume recovery
- British American Tobacco gains momentum with Kent portfolio
- Discounters outperform in a shifting retail landscape

PROSPECTS AND OPPORTUNITIES

- Cigarette sales set to grow modestly as inflation eases and controls tighten
- Premium positioning and format innovation will shape market dynamics
- Brand development to focus on line extensions over disruptive innovation

TAXATION AND PRICING

Taxation rates

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

- Table 10 - Sales of Cigarettes: Volume 2019-2024
- Table 11 - Sales of Cigarettes by Category: Value 2019-2024
- Table 12 - Sales of Cigarettes: % Volume Growth 2019-2024
- Table 13 - Sales of Cigarettes by Category: % Value Growth 2019-2024
- Table 14 - Sales of Cigarettes by Blend: % Volume 2019-2024
- Table 15 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2019-2024
- Table 16 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2019-2024
- Table 17 - Sales of Cigarettes by Pack Size: % Volume2019-2024
- Table 18 - Sales of Cigarettes by Price Band: % Volume 2019-2024
- Table 19 - NBO Company Shares of Cigarettes: % Volume 2020-2024
- Table 20 - LBN Brand Shares of Cigarettes: % Volume 2021-2024
- Table 21 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024
- Table 22 - Illicit Trade Estimate of Cigarettes: Volume 2019-2024
- Table 23 - Forecast Sales of Cigarettes: Volume 2024-2029
- Table 24 - Forecast Sales of Cigarettes by Category: Value 2024-2029
- Table 25 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029
- Table 26 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029
- Table 27 - Forecast Sales of Cigarettes by Blend: % Volume 2024-2029
- Table 28 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2024-2029
- Table 29 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2024-2029
- Table 30 - Forecast Sales of Cigarettes by Pack Size: % Volume2024-2029
- Table 31 - Forecast Sales of Cigarettes by Price Band: % Volume 2024-2029

Cigars, Cigarillos and Smoking Tobacco in Turkey

KEY DATA FINDINGS

2024 DEVELOPMENTS

- High prices and regulation contribute to declining volumes across both categories
- Teka and Royal Tobacco lead in their respective segments amid shifting competitive dynamics
- Tobacco specialists expand their lead as the most trusted distribution channel

PROSPECTS AND OPPORTUNITIES

- Recovery expected across all categories, supported by premium offerings and regulatory shifts
- Price hikes to continue, driven by inflation and currency pressures
- Product differentiation likely to focus on flavours and presentation, not innovation

CATEGORY DATA

- Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024
- Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024
- Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024
- Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024
- Table 36 - Sales of Cigars by Size: % Volume2019-2024
- Table 37 - Sales of Cigarillos by Price Platform 2019-2024
- Table 38 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024
- Table 39 - LBN Brand Shares of Cigarsand Cigarillos: % Volume 2021-2024
- Table 40 - NBO Company Shares of Cigars: % Volume 2020-2024

Table 41 - LBN Brand Shares of Cigars: % Volume 2021-2024

Table 42 - NBO Company Shares of Cigarillos: % Volume 2020-2024

Table 43 - LBN Brand Shares of Cigarillos: % Volume 2021-2024

Table 44 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024

Table 45 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024

Table 46 - NBO Company Shares of Pipe Tobacco: % Volume 2020-2024

Table 47 - LBN Brand Shares of Pipe Tobacco: % Volume 2021-2024

Table 48 - NBO Company Shares of Fine Cut Tobacco: % Volume 2020-2024

Table 49 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2021-2024

Table 50 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024

Table 51 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024

Table 52 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029

Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029

Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029

Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2024-2029

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-turkey/report.