



# Cigarettes and Alternative Nicotine Products in Asia Pacific

August 2024

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Asia Pacific the biggest regional market for sales of cigarettes

Thanks to Japan, Asia Pacific has the biggest regional market for heated tobacco

Stagnation expected for cigarette unit volumes from 2025

Smokeless tobacco, e-vapour products and heated tobacco will be growing again from 2024

Japanese cigarette sales decline by more than 44 billion sticks over 2018-2023

Double-digit heated tobacco product CAGRs recorded in Japan and South Korea

Slim and superslim cigarettes gaining share in China

Convenience stores helping to drive heated tobacco sales in Indonesia

Unit volume sales of cigarettes decline in Asia Pacific over 2018-2023

State Tobacco Monopoly Administration with a clear focus on high-end cigarettes in China

Cigarette sales declining in Japan as smokers switch to heated tobacco

Heated tobacco products driving growth in the overall category

Heated tobacco continues to dominate sales in next-generation products

Sales of e-vapour products devastated by the raft of new regulations in China

E-vapour products banned in a number of markets in Asia Pacific

Small local grocers the main distribution channel for cigarettes in Asia Pacific

Convenience stores lead sales in Japan and South Korea

Convenience stores the main distribution channel in Japan and South Korea

Vaping specialists a key channel in Indonesia

## LEADING COMPANIES AND BRANDS

Concentrated competitive landscapes nationally for cigarettes

JTI taps into the price-sensitive consumer segment with new low-price products

PMI, JTI and BAT present across much of the region

China National Tobacco Corp's brands dominate the top 10 rankings

RELX Technology losing sales but gaining share in Chinese e-vapour products

Philip Morris International the leading player in heated tobacco products in Asia Pacific

## FORECAST PROJECTIONS

General flatlining of unit volume sales of cigarettes expected over the forecast period

Modest annual growth expected in real value terms for cigarettes in Asia Pacific

Heated tobacco to set the pace, but e-vapour products will return to positive growth

Philippines most dynamic, but Japan and South Korea will drive heated tobacco growth

Bans and stricter regulations will continue to suppress e-vaping growth in the region

## COUNTRY SNAPSHOTS

China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

India: Market Context

India: Competitive and Retail Landscape

Indonesia: Market Context

Indonesia: Competitive and Retail Landscape

Japan: Market Context

Japan: Competitive and Retail Landscape

Malaysia: Market Context

Malaysia: Competitive and Retail Landscape

Pakistan: Market Context  
Pakistan: Competitive and Retail Landscape  
Philippines: Market Context  
Philippines: Competitive and Retail Landscape  
Singapore: Market Context  
Singapore: Competitive and Retail Landscape  
South Korea: Market Context  
South Korea: Competitive and Retail Landscape  
Taiwan: Market Context  
Taiwan: Competitive and Retail Landscape  
Thailand: Market Context  
Thailand: Competitive and Retail Landscape  
Vietnam: Market Context  
Vietnam: Competitive and Retail Landscape

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