



# Passport

## Cigarettes in Finland

Euromonitor International

May 2024

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# LIST OF CONTENTS AND TABLES

Cigarettes in Finland - Category Analysis.....	1
KEY DATA FINDINGS.....	1
2023 DEVELOPMENTS.....	1
Further decline in 2023, as consistent tax rises hit the pockets of smokers .....	1
New restrictions make it harder for consumers to indulge their smoking habit .....	1
Introduction of plain packaging benefits major players .....	2
PROSPECTS AND OPPORTUNITIES.....	2
Further decline expected, as more finns quit smoking due to health concerns and increasing prices .....	2
Revised tobacco act will impact the category, with players having little incentive to develop new products .....	2
Nicotine pouches and e-vapour products will represent strong competition .....	3
TAXATION AND PRICING .....	3
Taxation rates.....	3
Table 1      Taxation and Duty Levies 2018-2023.....	3
Average cigarette pack price breakdown.....	3
Summary 1    Average Cigarette Pack Price Breakdown: Brand Examples .....	3
CATEGORY DATA.....	4
Table 2      Sales of Cigarettes: Volume 2018-2023.....	4
Table 3      Sales of Cigarettes by Category: Value 2018-2023 .....	4
Table 4      Sales of Cigarettes: % Volume Growth 2018-2023 .....	4
Table 5      Sales of Cigarettes by Category: % Value Growth 2018-2023.....	5
Table 6      Sales of Cigarettes by Blend: % Volume 2018-2023.....	5
Table 7      Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023 .....	5
Table 8      Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023 .....	5
Table 9      Sales of Cigarettes by Pack Size: % Volume 2018-2023 .....	6
Table 10     Sales of Cigarettes by Price Band: % Volume 2018-2023 .....	6
Table 11     NBO Company Shares of Cigarettes: % Volume 2019-2023 .....	6
Table 12     LBN Brand Shares of Cigarettes: % Volume 2020-2023.....	6
Table 13     Sales of Cigarettes by Distribution Format: % Volume 2018-2023.....	7
Table 14     Illicit Trade Estimate of Cigarettes: Volume 2018-2023.....	8
Table 15     Forecast Sales of Cigarettes: Volume 2023-2028.....	8
Table 16     Forecast Sales of Cigarettes by Category: Value 2023-2028.....	8
Table 17     Forecast Sales of Cigarettes: % Volume Growth 2023-2028 .....	8
Table 18     Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028 .....	9
Table 19     Forecast Sales of Cigarettes by Blend: % Volume 2023-2028.....	9
Table 20     Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028.....	9
Table 21     Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028.....	9
Table 22     Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028 .....	10
Table 23     Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028 .....	10

<b>Tobacco in Finland - Industry Overview .....</b>	<b>11</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>11</b>
Tobacco in 2023: The big picture.....	11
2023 key trends .....	11
Competitive landscape .....	11
Retailing developments .....	12
What next for tobacco? .....	12
<b>OPERATING ENVIRONMENT .....</b>	<b>12</b>
Legislation .....	12
Summary 2     Legislation Summary at a Glance .....	12
Minimum legal smoking age .....	13
Smoking prevalence .....	13
Tar levels .....	13
Health warnings.....	13
Plain packaging .....	14
Advertising and sponsorship.....	14
Point-of-sale display bans.....	14
Smoking in public places .....	14
Flavoured tobacco product ban .....	14
Vapour products .....	15
<b>PRODUCTION/IMPORTS/EXPORTS .....</b>	<b>15</b>
<b>MARKET INDICATORS .....</b>	<b>15</b>
Table 24     Number of Adult Smokers by Gender 2018-2023 .....	15
<b>MARKET DATA.....</b>	<b>16</b>
Table 25     Sales of Tobacco by Category: Volume 2018-2023 .....	16
Table 26     Sales of Tobacco by Category: Value 2018-2023 .....	16
Table 27     Sales of Tobacco by Category: % Volume Growth 2018-2023 .....	17
Table 28     Sales of Tobacco by Category: % Value Growth 2018-2023 .....	17
Table 29     Forecast Sales of Tobacco by Category: Volume 2023-2028 .....	17
Table 30     Forecast Sales of Tobacco by Category: Value 2023-2028 .....	18
Table 31     Forecast Sales of Tobacco by Category: % Volume Growth 2023- 2028 .....	18
Table 32     Forecast Sales of Tobacco by Category: % Value Growth 2023-2028.....	18
<b>DISCLAIMER .....</b>	<b>19</b>
<b>SOURCES.....</b>	<b>19</b>
Summary 3     Research Sources.....	19

# CIGARETTES IN FINLAND - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2023 DEVELOPMENTS

Further decline in 2023, as consistent tax rises hit the pockets of smokers

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New restrictions make it harder for consumers to indulge their smoking habit

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Introduction of plain packaging benefits major players

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### **PROSPECTS AND OPPORTUNITIES**

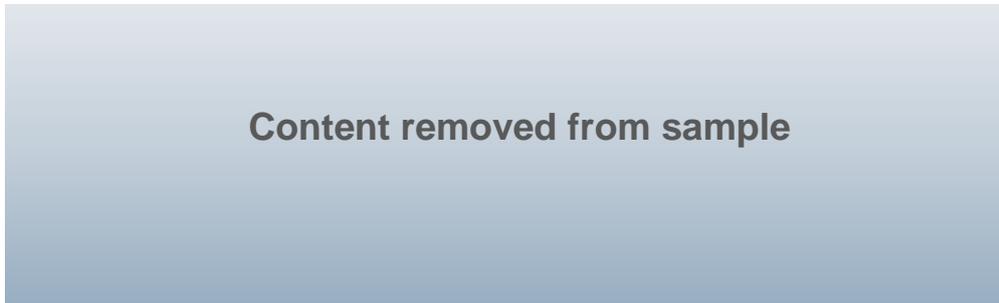
Further decline expected, as more finns quit smoking due to health concerns and increasing prices

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Revised tobacco act will impact the category, with players having little incentive to develop new products

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## Nicotine pouches and e-vapour products will represent strong competition



## TAXATION AND PRICING

### Taxation rates



Table 1 Taxation and Duty Levies 2018-2023

	2018	2019	2020	2021	2022	2023
Taxation (% of TIRSP) - Ad valorem (National)						
Taxation (Local Currency per 1000 Sticks) – Specific Excise (National)						
Taxation (% of TIRSP) - VAT/Sales (National)						

Source: Euromonitor International

## Average cigarette pack price breakdown

The vast majority of the retail selling price of a pack of cigarettes consists of taxes.

Summary 1 Average Cigarette Pack Price Breakdown: Brand Examples

P = 'price' in Euro						
	Premium		Mid-Priced		Economy	
	(Pack of 20)		(Pack of 20)		(Pack of 20)	
	P	%	P	%	P	%

Wholesale

Retailer	<b>Data removed from sample</b>
TOTAL Retained	
Specific Excise	
Ad valorem Excise	
VAT	
TOTAL Tax	
End Price	

Source: Calculated from storecheck data and Taxation and Duty Levies Table.  
 Notes: Figures may not sum up to 100% due to rounding

## CATEGORY DATA

**Table 2 Sales of Cigarettes: Volume 2018-2023**

million sticks	2018	2019	2020	2021	2022	2023
Cigarettes	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Cigarettes by Category: Value 2018-2023**

EUR million	2018	2019	2020	2021	2022	2023
Cigarettes Cigarettes Including Fine Cut Stick Equivalent	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Cigarettes: % Volume Growth 2018-2023**

% volume growth	2022/23	2018-23 CAGR	2018/23 Total

Cigarettes

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Sales of Cigarettes by Category: % Value Growth 2018-2023**

% current value growth

2022/23    2018-23 CAGR    2018/23 Total

Cigarettes  
Cigarettes Including Fine Cut Stick Equivalent

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 Sales of Cigarettes by Blend: % Volume 2018-2023**

% retail volume

2018    2019    2020    2021    2022    2023

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023**

% retail volume

2018    2019    2020    2021    2022    2023

Standard (non-capsule/  
non-menthol)  
Flavour Capsule (all  
flavours)  
Menthol (non-capsule)  
Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023**

% retail volume

2018    2019    2020    2021    2022    2023

Regular  
Slim  
Superslim  
Microslim

**Data removed from sample**

Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9 Sales of Cigarettes by Pack Size: % Volume 2018-2023**

% retail volume	2018	2019	2020	2021	2022	2023
20s	<b>Data removed from sample</b>					
20 +						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10 Sales of Cigarettes by Price Band: % Volume 2018-2023**

% retail volume	2018	2019	2020	2021	2022	2023
Economy price band	<b>Data removed from sample</b>					
Mid price band						
Premium price band						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

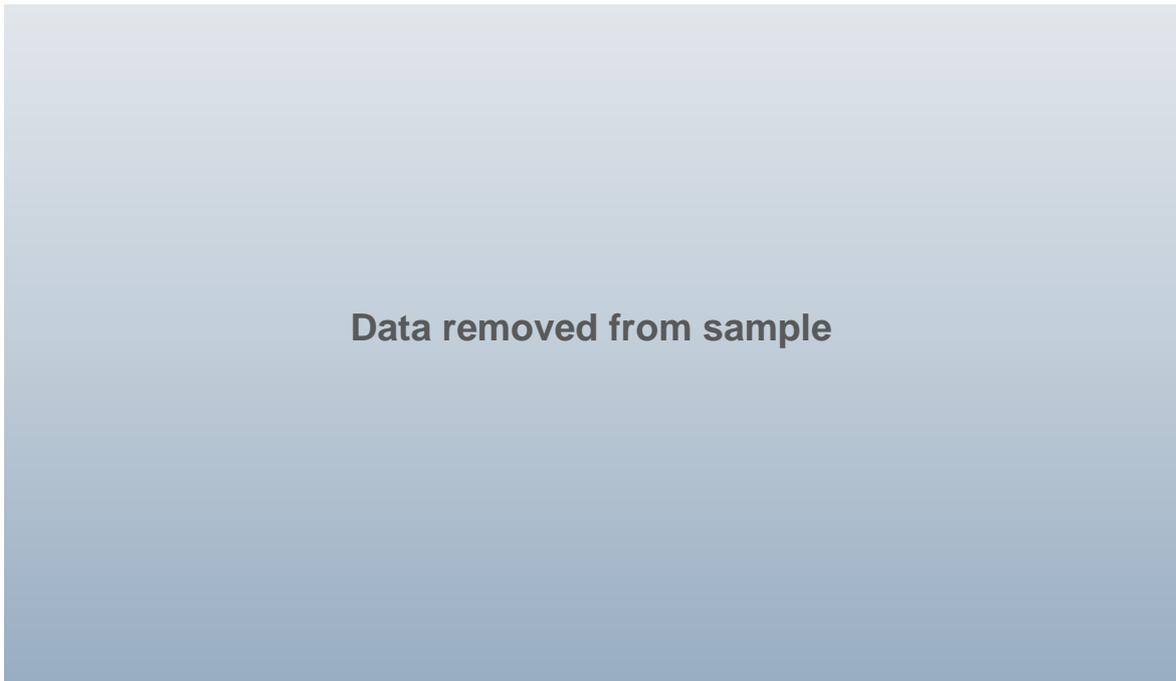
**Table 11 NBO Company Shares of Cigarettes: % Volume 2019-2023**

% retail volume					
Company	2019	2020	2021	2022	2023
	<b>Data removed from sample</b>				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 12 LBN Brand Shares of Cigarettes: % Volume 2020-2023**

% retail volume					
Brand (GBO)	Company (NBO)	2020	2021	2022	2023

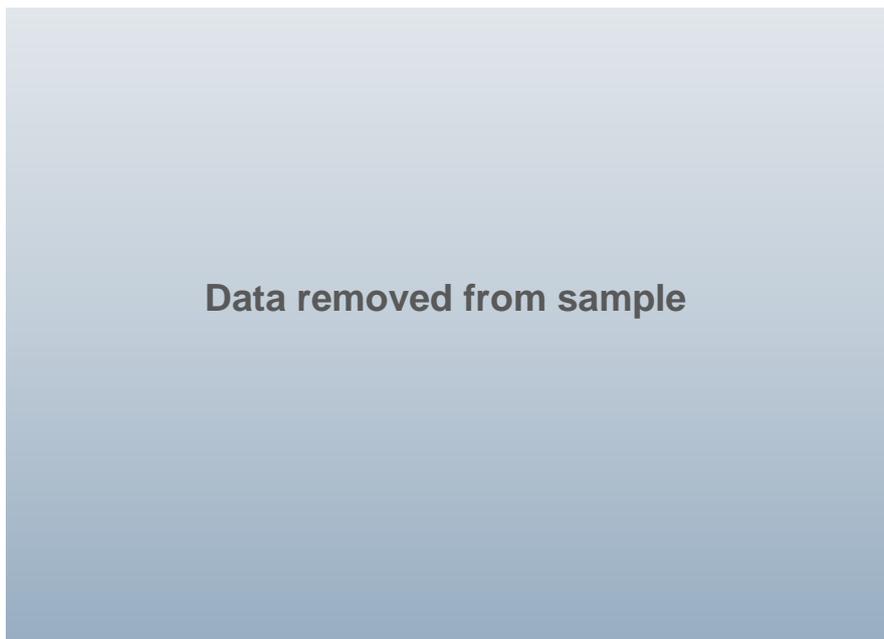


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Cigarettes by Distribution Format: % Volume 2018-2023

% retail volume	2018	2019	2020	2021	2022	2023
-----------------	------	------	------	------	------	------

- Retail Channels
- Retail Offline
- Grocery Retailers
- Convenience Retail
- Convenience Stores
- Forecourt Retailers
- Supermarkets
- Hypermarkets
- Discounters
- Warehouse Clubs
- Food/drink/tobacco specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists



- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hospitality (on-trade)
- Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 14 Illicit Trade Estimate of Cigarettes: Volume 2018-2023**

million sticks

	2018	2019	2020	2021	2022	2023
--	------	------	------	------	------	------

Legal sales  
Actual consumption

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade interviews

**Table 15 Forecast Sales of Cigarettes: Volume 2023-2028**

million sticks

	2023	2024	2025	2026	2027	2028
--	------	------	------	------	------	------

Cigarettes

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 16 Forecast Sales of Cigarettes by Category: Value 2023-2028**

EUR million

	2023	2024	2025	2026	2027	2028
--	------	------	------	------	------	------

Cigarettes  
Cigarettes Including Fine Cut Stick Equivalent

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 17 Forecast Sales of Cigarettes: % Volume Growth 2023-2028**

% volume growth

	2023/24	2023-28 CAGR	2023/28 Total
--	---------	--------------	---------------

Cigarettes

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 18 Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028**

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
Cigarettes	<b>Data removed from sample</b>		
Cigarettes Including Fine Cut Stick Equivalent			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 19 Forecast Sales of Cigarettes by Blend: % Volume 2023-2028**

% retail volume

	2023	2024	2025	2026	2027	2028
American Blend	<b>Data removed from sample</b>					
Virginia						
Other Blend						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028**

% retail volume

	2023	2024	2025	2026	2027	2028
Standard (non-capsule/ non-menthol)	<b>Data removed from sample</b>					
Flavour Capsule (all flavours)						
Menthol (non-capsule)						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21 Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028**

% retail volume

	2023	2024	2025	2026	2027	2028
Regular	<b>Data removed from sample</b>					
Slim						
Superslim						
Microslim						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 22 Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028**

% retail volume	2023	2024	2025	2026	2027	2028
20s	<b>Data removed from sample</b>					
20 +						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 23 Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028**

% retail volume	2023	2024	2025	2026	2027	2028
Economy price band	<b>Data removed from sample</b>					
Mid price band						
Premium price band						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

# TOBACCO IN FINLAND - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Tobacco in 2023: The big picture

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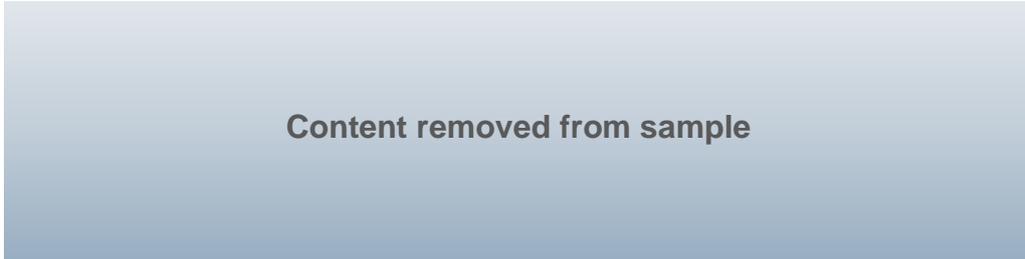
### 2023 key trends

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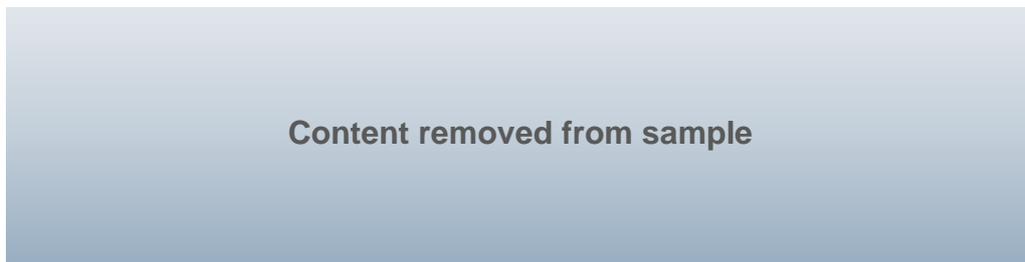
### Competitive landscape

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## Retailing developments

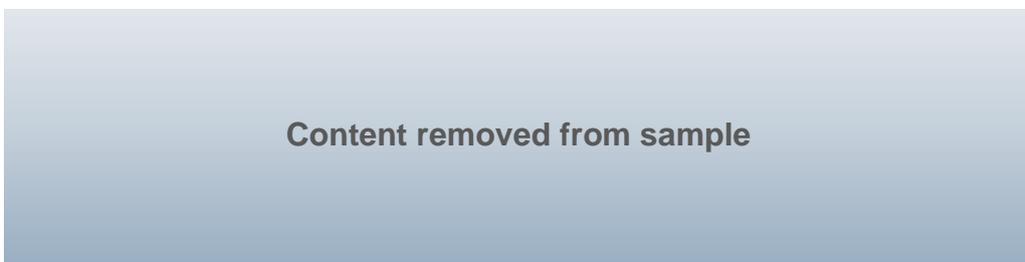


## What next for tobacco?



## OPERATING ENVIRONMENT

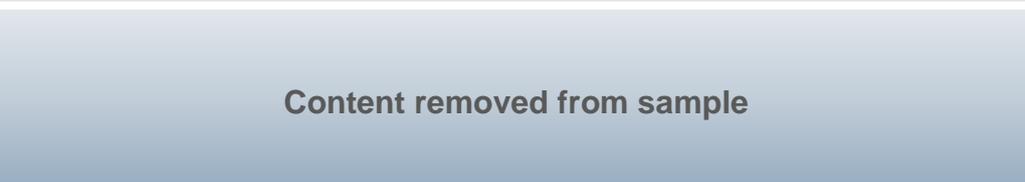
### Legislation



### Legislative overview

#### Summary 2 Legislation Summary at a Glance

A	B	C	D	E	F	G	H	I
---	---	---	---	---	---	---	---	---



Source: Euromonitor International

### Minimum legal smoking age

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### Smoking prevalence

**Content removed from sample**

### Tar levels

**Content removed from sample**

### Health warnings

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### Plain packaging

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### Advertising and sponsorship

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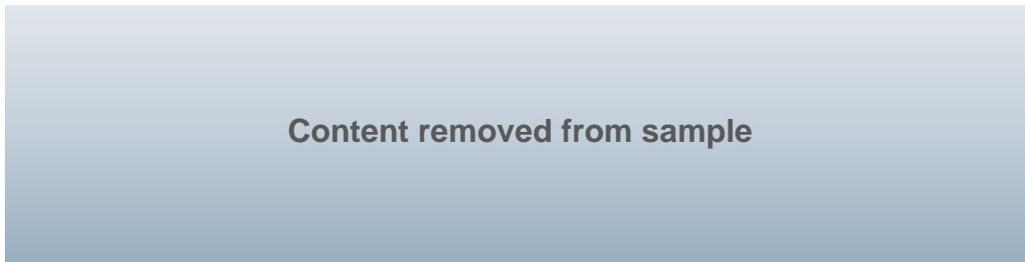
### Point-of-sale display bans

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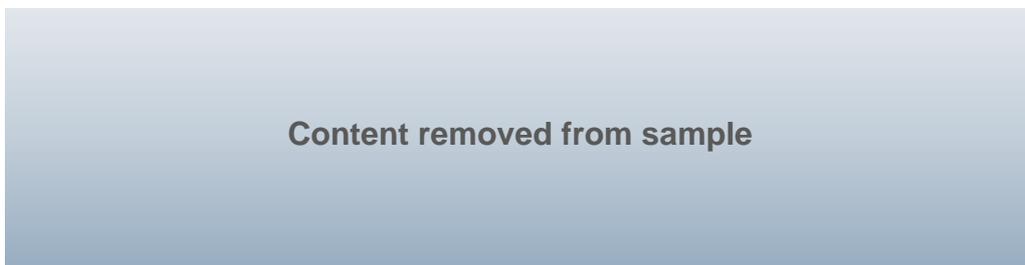
### Smoking in public places

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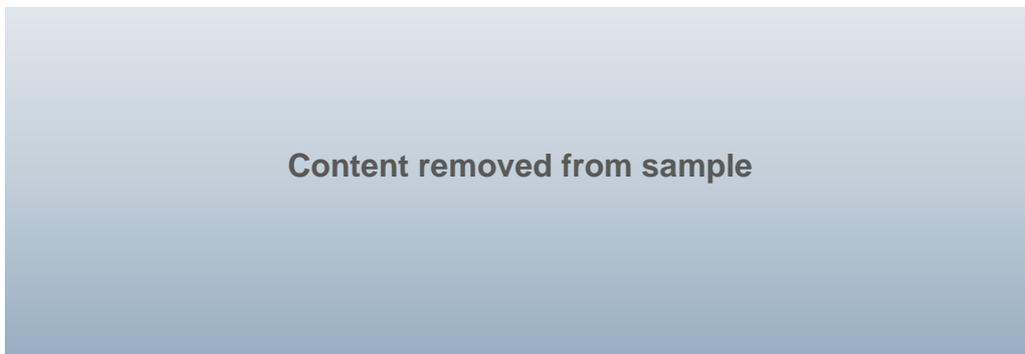
### Flavoured tobacco product ban



Vapour products



**PRODUCTION/IMPORTS/EXPORTS**

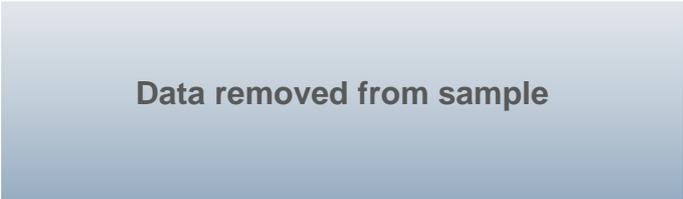


**MARKET INDICATORS**

Table 24 Number of Adult Smokers by Gender 2018-2023

	2018	2019	2020	2021	2022	2023
Male Number of Smokers ('000)						
Female Number of Smokers ('000)						
Total Number of Smokers ('000)						

Male Number of Smokers (%)  
 Female Number of Smokers (%)  
 Total Number of Smokers (%)



Source: Euromonitor International from official statistics

## MARKET DATA

Table 25 Sales of Tobacco by Category: Volume 2018-2023

	2018	2019	2020	2021	2022	2023
Cigarettes (million sticks)	Data removed from sample					
Cigarettes (Illicit+Legal) (million sticks)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						
Cigars and Cigarillos (million units)						
Smoking Tobacco (Tonne)						
Smokeless Tobacco (Tonne)						
E-Vapour Products (million units)						
Tobacco Free Oral Nicotine (million units)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Sales of Tobacco by Category: Value 2018-2023

EUR million	2018	2019	2020	2021	2022	2023
Tobacco	Data removed from sample					
Cigarettes						
Cigarettes Including Fine Cut Stick Equivalent						
Cigars, Cigarillos and Smoking Tobacco						
Cigars and Cigarillos Smoking Tobacco						
Smokeless Tobacco, E-Vapour Products and Heated Tobacco						
Smokeless Tobacco						
E-Vapour Products						
Heated Tobacco Products						
Tobacco Free Oral Nicotine						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 27 Sales of Tobacco by Category: % Volume Growth 2018-2023**

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Cigarettes	<b>Data removed from sample</b>		
Cigarettes (Illicit+Legal)			
Cigars, Cigarillos and Smoking Tobacco			
Cigars and Cigarillos			
Smoking Tobacco			
Smokeless Tobacco			
E-Vapour Products			
Tobacco Free Oral Nicotine			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 28 Sales of Tobacco by Category: % Value Growth 2018-2023**

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Tobacco	<b>Data removed from sample</b>		
Cigarettes			
Cigarettes Including Fine Cut Stick Equivalent			
Cigars, Cigarillos and Smoking Tobacco			
Cigars and Cigarillos			
Smoking Tobacco			
Smokeless Tobacco, E-Vapour Products and Heated Tobacco			
Smokeless Tobacco			
E-Vapour Products			
Heated Tobacco Products			
Tobacco Free Oral Nicotine			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 29 Forecast Sales of Tobacco by Category: Volume 2023-2028**

	2023	2024	2025	2026	2027	2028
Cigarettes (million sticks)	<b>Data removed from sample</b>					
Cigarettes (Illicit+Legal) (million sticks)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						
Cigars and Cigarillos (million units)						
Smoking Tobacco (Tonne)						
Smokeless Tobacco (Tonne)						
E-Vapour Products						

(million units)  
Tobacco Free Oral  
Nicotine (million units)

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 30 Forecast Sales of Tobacco by Category: Value 2023-2028**

EUR million	2023	2024	2025	2026	2027	2028
Tobacco	<b>Data removed from sample</b>					
Cigarettes						
Cigarettes Including Fine Cut Stick Equivalent						
Cigars, Cigarillos and Smoking Tobacco						
Cigars and Cigarillos Smoking Tobacco						
Smokeless Tobacco, E-Vapour Products and Heated Tobacco						
Smokeless Tobacco						
E-Vapour Products						
Heated Tobacco Products						
Tobacco Free Oral						
Nicotine						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 31 Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028**

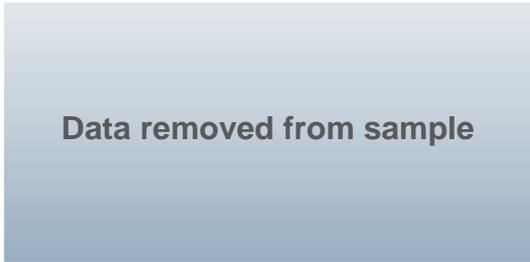
% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Cigarettes	<b>Data removed from sample</b>		
Cigarettes (Illicit+Legal)			
Cigars, Cigarillos and Smoking Tobacco			
Cigars and Cigarillos			
Smoking Tobacco			
Smokeless Tobacco			
E-Vapour Products			
Tobacco Free Oral Nicotine			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 32 Forecast Sales of Tobacco by Category: % Value Growth 2023-2028**

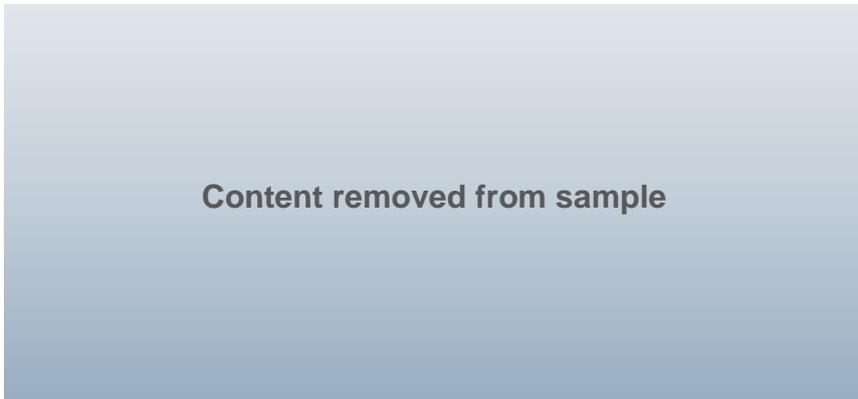
% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Tobacco			
Cigarettes			
Cigarettes Including Fine Cut Stick Equivalent			
Cigars, Cigarillos and Smoking Tobacco			

Cigars and Cigarillos  
Smoking Tobacco  
Smokeless Tobacco, E-Vapour Products and Heated Tobacco  
Smokeless Tobacco  
E-Vapour Products  
Heated Tobacco Products  
Tobacco Free Oral Nicotine



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## DISCLAIMER



## SOURCES

Sources used during research include the following:

### Summary 3 Research Sources

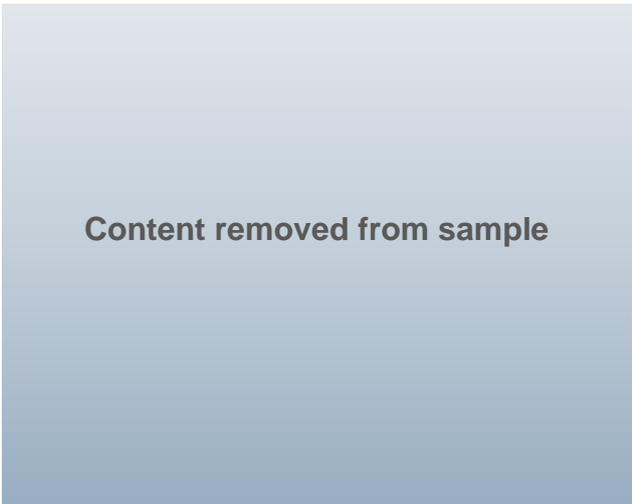
Official Sources

Trade Associations

[Redacted]

[Redacted]

Trade Press



Source: Euromonitor International