

Tobacco Market Assessment, By Product Type [Cigarettes, Cigars and Cigarillos, Smokeless Tobacco, Dissolvable Tobacco, Others], By Type [FCV, Burley, Oriental, Natu, Others], By Flavor [Flavored, Unflavored], By Nicotine Content [Upto 10mg, 10mg – 20mg, 20mg – 30mg, Above 30mg], By Price Range [Mass, Premium], By Distribution Channel [Online, Offline], By Region, Opportunities and Forecast, 2017-2031F

<https://marketpublishers.com/r/TAD45D533B63EN.html>

Date: March 2025

Pages: 221

Price: US\$ 4,500.00 (Single User License)

ID: TAD45D533B63EN

Abstracts

Global tobacco market is projected to witness a CAGR of 3.9% during the forecast period 2024-2031, growing from USD 351.5 billion in 2023 to USD 477.36 billion in 2031. Global tobacco market is a huge market that involves the cultivation of tobacco, manufacturing of tobacco products, and consumption. China, India, and Brazil hold a major share of tobacco cultivation globally, together producing over 4.2 million tons of tobacco, which are exported to different countries in raw or finished product form. Tobacco is primarily used for producing cigarettes, cigars, smokeless tobacco and other related products. The market has seen various trends over the years, including new product launches, novel product innovations, and aggressive marketing and advertisement of tobacco products. The market is highly influenced by various factors like cultural factors, government policies, rules, and regulations, consumer preferences, and health concerns. Increasing consumption of tobacco among women also adds up to the market growth.

The production and distribution of various tobacco products, ranging from traditional cigarettes to emerging alternatives like electronic cigarettes, contribute to the market's

resilience and adaptability. The addictive nature of tobacco products is one of the primary reasons that drive the global tobacco market, as consumers consume more and more of the product despite being aware of the risks associated with it. There are different types of tobacco available in the market including Burley, FCV and Natu, that are used to manufacture different tobacco products like cigarettes and smokeless chewing tobacco. Major multinational companies, including industry giants such as Philip Morris International, British American Tobacco (BAT), and Japan Tobacco International (JTI), continue to have significant influence over the market's trajectory and market development.

Changing Consumer Behavior and Product Acceptance

Over the past decade, people's perception regarding tobacco has changed to some extent as now more and more adults are including tobacco products in their lifestyles. For instance, hookah and vaping have gained significant popularity among the young population. The rise of clubbing and partying culture among Generation Z and millennials has fueled the demand for products like flavored cigarettes and hookah. In 2023, more than 85% of the school students who consumed E-cigarettes preferred flavored ones. Tobacco companies are investing heavily in the development and marketing of electronic cigarettes (e-cigarettes) and other alternative products. These products are often perceived as less harmful than traditional cigarettes and have gained popularity among certain demographics. Economies that house younger populations, like Africa, India, Pakistan, Indonesia, and China, coupled with a large consumer base, are going to drive the global tobacco market.

On 31st December 2023, VegaFina, based in the USA, introduced a new limited edition in which the Nicaraguan roots are fully reflected. VF Nicaragua Estel offers a selection of cigars that differ from the normal mix. Cigar contains tobacco sourced solely from the Estel region, regarded as the country's tobacco capital. VegaFina Nicaragua Estel provides all tobacco flavors from this region, distinguished by its dark, deep soils and cultivation of plants exposed to direct sunlight. The VegaFina Nicaragua Estel is presented in an original box comprising 12 cigars.

High Demand for Tobacco Products in Middle and Low-Income Countries

Developing and underdeveloped countries that lie in the Middle East and Africa and Asia-Pacific regions contribute significantly to the global tobacco market. India and China are the biggest markets for tobacco companies as these countries have huge populations and are complemented with money to spend on products like cigarettes and

plugs. As per WHO, out of the 1.3 billion tobacco consumers, more than 1 billion live in low and middle-income countries. The growing population in various regions across the globe contributes to an expanding consumer base for tobacco products.

India is also the world's second-largest producer and consumer of tobacco, after China. According to the Global Adult Tobacco Survey India, more than 250 million adults (15 years and older) in India use tobacco in different forms. The most widespread type of tobacco usage in India is smokeless tobacco and popular products include khaini, gutkha, betel quid with tobacco, and zarda.

Addiction to Tobacco Products

The concept of addiction plays a significant role in driving the global tobacco market. Nicotine, a highly addictive substance found in tobacco, is a key factor that contributes to the persistent demand for tobacco products. Nicotine addiction encourages repeated consumption of tobacco products, including cigarettes, bidis, cigars, plugs, etc. Once individuals become addicted to nicotine, they often develop brand loyalty and preference for specific products. Because of this addiction, the market remains stable even in the face of health concerns and government regulatory pressures. In addition to traditional cigarettes, companies introduce various tobacco products, including smokeless tobacco and next-generation alternatives, to cater to the diverse preferences of addicted consumers. It is estimated that there are more than 1.3 billion tobacco consumers globally, which make up about 24% of the world's population, and cigarettes are the most common form of tobacco product.

High Demand for Smokeless Tobacco

Smoking tobacco in the form of cigarettes and cigars has been popular worldwide in both developed and developing regions for decades. In the past years, the demand for smokeless tobacco has grown significantly in different regions depending on the regional consumer taste and preferences. Smokeless tobacco is popular among consumers primarily in two forms, one being chewing tobacco and the other being snuff. In Europe and America, dry snuff tobacco, in powdered form, is very popular, where tobacco is inhaled through the nose and absorbed through the nasal mucosa or taken orally, while moist tobacco is held in the mouth between the cheek and gum. Manufacturers are actively prepackaging moist snuff tobacco into small paper or cloth packets to make the product easily accessible and more convenient. Other moist snuff products are known as khaini, snus, shammaah, nass or naswa.

There are many varieties of smokeless tobacco, including plug, loose-leaf, chimo, toombak, gutkha, and twist. Pan masala or betel quid also contains tobacco. This type of tobacco is popular in the United States, but the majority of the demand for it is generated in the South Asian region.

Impact of COVID-19

The COVID-19 pandemic has had multifaceted effects on various industries, including the global tobacco market. The pandemic disrupted global supply chains, affecting the production and distribution of tobacco products. Lockdowns, restrictions on movement, and health and safety measures impacted the manufacturing processes, leading to potential delays and shortages. Changing consumer behavior during the pandemic had implications for the tobacco market. Some individuals reduced discretionary spending on non-essential items, like tobacco products. Individuals become more conscious of the health risks associated with smoking, potentially leading to a decline in tobacco consumption. However, once normalcy returned and tobacco products became easily available, people started consuming them the way they were doing.

Key Players Landscape and Outlook

The outlook for global tobacco market is neutral and the market is estimated to grow at a consistent rate for the forecast period. However, the market outlook is significantly influenced by factors such as changing consumer behavior, government rules and regulations, policies, and innovation in alternate products like herbal and organic smoking powder. In the forecast period, both the developed and the developing regions will contribute to the market growth. With constant efforts from governments and non-governmental organizations, there has been increased awareness regarding the health risks and people are looking to quit smoking. However, global tobacco market is not far from consistently launching new tobacco-based products. Manufacturers and brands regularly introduce new products based on different flavors, tobacco content, and limited editions to mark their success in the industry.

In October 2022, Japan Tobacco (JT) announced that the JT Group, through its subsidiary JTI, formed a joint venture with Altria Group (Altria), through its subsidiary PM USA, to market and commercialize heated tobacco sticks (HTS) products in the United States using Ploom branded devices and Marlboro branded consumables. In addition, the two organizations signed a long-term, non-binding worldwide memorandum of understanding to explore commercial opportunities for a wide range of potentially reduced-risk products.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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