

# Research Report of the Major Brands on Chinese Cigarette Market, 2009

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## Abstracts

China is the world's largest tobacco production and consumption country. The tobacco industry occupies an important position in Chinese national economy, the major financial revenue source of Chinese government. In 2008, Chinese tobacco industry accumulatively realized the industrial and commercial taxes of 449.9 billion Yuan (64.3 billion USD). Chinese tobacco industry is a controversial industry. On the one hand, the government monopoly tobacco industry brings huge profits for the government; on the other hand, the voice of smoking harmful to health is getting higher and higher.

China has about 400 million smokers, accounting for over 30% of total Chinese population and one fourth of the world's smokers, 15 million of which are female. Besides, the smokers in China show the increasing tendency. The cigarettes, as a kind of special commodity, undertake multiple roles in China's social life, such as household products, gifts and luxury products etc. with the sustainable development of Chinese economy, people's demand level on the cigarette is also enhanced. The sales volumes of the cigarettes in medium and high quality are rising year by year

In 2008, China produced 2.2 trillion cigarettes, up by 3.7% year on year and sold 2.2044 trillion cigarettes, up by 3.1% year on year.

The market concentration of Chinese tobacco industry is gradually accelerating. The most cigarette brands in China were near to 2,400, which were 758 in 2002 and reduced to 582 in 2003. With the intensification of the cigarette brand integration in China, there were only 155 cigarette brands and 873 specifications in production by the end of 2008. Meanwhile, the mergers and acquisitions among Chinese cigarette enterprises are going on, in which some acquisitions enhance the competitiveness of the enterprises, but some only follow the fashion.

At present, it is impossible for the cigarettes to introduce into China in large quantities because of the high duties. Therefore, the foreign cigarettes, with great advantages in price and quality, will enter Chinese market through smuggling. Taking 555 cigarettes of British American Tobacco for example, the largest sales volumes of imported cigarettes in China, the retail price of the legal package is about 1.7 to 2.2 USD, but the retail price of the smuggling one is only about 1 to 1.2 USD/package. The price advantage is obvious. It is estimated that the annual scale of the smuggling cigarettes in Chinese market exceeds 5 billion USD; however, the legal cigarette import amounts were only 665.71 million USD in 2008, released by Chinese customers.

As the international financial crisis brings increasing uncertainty to Chinese economy, it is uncertain about the influences on Chinese cigarette consumption market. If the general environment of the cigarette market is in bad tendency, the first stricken will hit the medium and high quality brands. The smuggling cigarette volumes will be increased, exclusive the possibility of the reduction in the total cigarette sales volumes.

All in all, Chinese cigarette market has great attractiveness for the global tobacco enterprises. They will enter Chinese market sooner or later, but only the time, labor forces and materials spent on the process are unknown.

This report mainly researches the operations of more than 20 outstanding domestic cigarettes enterprises in Chinese market and analyzes the present situations of over 100 cigarette brands of these companies.

Meanwhile, this report introduces detailed to the present situation and characteristics of Chinese tobacco monopoly systems and some confusing concepts, such as the grading standards of Chinese domestic cigarettes and the prices of various cigarettes.

This report is of high reference values for Chinese and global cigarette factories and import and export dealers to understand Chinese cigarette industry and discover the opportunities in the market.

More following information can be obtained in this report:

- Type Grading of Chinese Domestic Cigarettes
- Price Systems of Chinese Cigarettes
- Major Local Cigarettes Factories and Their Cigarettes Brands in China
- Retail Prices of the Major Brand Cigarettes in Chinese Market

- History and Present Situation of Chinese Tobacco Monopoly Systems
- Imports and Exports of Chinese Cigarettes Industry
- Present Situation and Trends of the Mergers and Acquisitions in Chinese Cigarette Industry
- Contacts of the Major Cigarette Factories in China
- Investment Opportunities of Chinese Cigarette Industry

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