



# Tobacco in Poland

June 2024

Table of Contents

## Tobacco in Poland

### EXECUTIVE SUMMARY

Tobacco in 2023: The big picture

2023 key trends

Competitive landscape

Retailing 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

Advertising and sponsorship

Flavoured tobacco product ban

Vapour products

### PRODUCTION/IMPORTS/EXPORTS

### MARKET INDICATORS

Table 1 - Number of Adult Smokers by Gender 2018-2023

### MARKET DATA

Table 2 - Sales of Tobacco by Category: Volume 2018-2023

Table 3 - Sales of Tobacco by Category: Value 2018-2023

Table 4 - Sales of Tobacco by Category: % Volume Growth 2018-2023

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

Table 6 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 7 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 2 - Research Sources

## Cigarettes in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Cigarettes sales slowing down despite increasing sales to tourists

Philip Morris strengthens its position in Poland thanks to competitive pricing

Brands from "bottom" price segment increasingly in demand

### PROSPECTS AND OPPORTUNITIES

Cigarettes to gradually decline in the forecast period

Rising prices could encourage more people to quit

Heated tobacco and other tobacco alternatives expected to cannibalise sales of cigarettes

## TAXATION AND PRICING

Taxation rates

Table 10 - Taxation and Duty Levies 2018-2023

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

## CATEGORY DATA

Table 11 - Sales of Cigarettes: Volume 2018-2023

Table 12 - Sales of Cigarettes by Category: Value 2018-2023

Table 13 - Sales of Cigarettes: % Volume Growth 2018-2023

Table 14 - Sales of Cigarettes by Category: % Value Growth 2018-2023

Table 15 - Sales of Cigarettes by Blend: % Volume 2018-2023

Table 16 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023

Table 17 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023

Table 18 - Sales of Cigarettes by Pack Size: % Volume 2018-2023

Table 19 - Sales of Cigarettes by Price Band: % Volume 2018-2023

Table 20 - NBO Company Shares of Cigarettes: % Volume 2019-2023

Table 21 - LBN Brand Shares of Cigarettes: % Volume 2020-2023

Table 22 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023

Table 23 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023

Table 24 - Forecast Sales of Cigarettes: Volume 2023-2028

Table 25 - Forecast Sales of Cigarettes by Category: Value 2023-2028

Table 26 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028

Table 27 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028

Table 28 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028

Table 29 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028

Table 30 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028

Table 31 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028

Table 32 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

## Cigars, Cigarillos and Smoking Tobacco in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Low price of cigarettes limits demand for fine cut tobacco

Lower availability of cigars in Poland limits sales despite stable demand

Demand for cigarillos and pipe tobacco shrinking as smokers switch to trendier alternatives

### PROSPECTS AND OPPORTUNITIES

The EU's Track & Trace system set to shake up the category

Uncertain future for fine cut tobacco

Demand for cigars will remain stable thanks to a loyal and well-established consumer base for these products

## CATEGORY DATA

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2018-2023

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2018-2023

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2018-2023

Table 36 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2018-2023

Table 37 - Sales of Cigars by Size: % Volume 2018-2023

Table 38 - Sales of Cigarillos by Price Platform 2018-2023

Table 39 - NBO Company Shares of Cigars and Cigarillos: % Volume 2019-2023

Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2020-2023

Table 41 - NBO Company Shares of Cigars: % Volume 2019-2023  
 Table 42 - LBN Brand Shares of Cigars: % Volume 2020-2023  
 Table 43 - NBO Company Shares of Cigarillos: % Volume 2019-2023  
 Table 44 - LBN Brand Shares of Cigarillos: % Volume 2020-2023  
 Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2019-2023  
 Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2020-2023  
 Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2019-2023  
 Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2020-2023  
 Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2019-2023  
 Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2020-2023  
 Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2018-2023  
 Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2018-2023  
 Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2023-2028  
 Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2023-2028  
 Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2023-2028  
 Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2023-2028

## Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Closed system single use e-cigarettes show exceptionally high growth  
 Awareness of e-vapour products is growing benefiting sales across the various categories  
 Heated tobacco a hotbed of innovation and new product development

#### PROSPECTS AND OPPORTUNITIES

Poland's Minister of Health supports ban on the sale of closed system single use products  
 Nicotine pouches coming under growing scrutiny due to lack of regulation  
 Positive performance expected from heated tobacco products but new EU regulation could put the brakes on growth

### CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2018-2023

### CATEGORY DATA

Table 58 - Sales of Smokeless Tobacco by Category: Volume 2018-2023  
 Table 59 - Sales of Smokeless Tobacco by Category: % Volume Growth 2018-2023  
 Table 60 - Sales of E-Vapour Products by Category: Volume 2018-2023  
 Table 61 - Sales of E-Vapour Products by Category: % Volume Growth 2018-2023  
 Table 62 - Sales of Tobacco Heating Devices: Volume 2018-2023  
 Table 63 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2023  
 Table 64 - Sales of Heated Tobacco: Volume 2018-2023  
 Table 65 - Sales of Heated Tobacco: % Volume Growth 2018-2023  
 Table 66 - Sales of Tobacco Free Oral Nicotine: Volume 2018-2023  
 Table 67 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023  
 Table 68 - Sales of Tobacco Free Oral Nicotine by Category: Value 2018-2023  
 Table 69 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2018-2023  
 Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2018-2023  
 Table 71 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2018-2023  
 Table 72 - Sales of E-Liquids by Nicotine Strength: % Value 2020-2023  
 Table 73 - NBO Company Shares of Smokeless Tobacco: % Volume 2019-2023  
 Table 74 - LBN Brand Shares of Smokeless Tobacco: % Volume 2020-2023  
 Table 75 - NBO Company Shares of E-Vapour Products: % Value 2019-2023  
 Table 76 - LBN Brand Shares of E-Vapour Products: % Value 2020-2023

Table 77 - NBO Company Shares of Tobacco Heating Devices: % Volume 2019-2023

Table 78 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2020-2023

Table 79 - NBO Company Shares of Heated Tobacco: % Volume 2019-2023

Table 80 - LBN Brand Shares of Heated Tobacco: % Volume 2020-2023

Table 81 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2019-2023

Table 82 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2020-2023

Table 83 - Distribution of Smokeless Tobacco by Format: % Volume 2018-2023

Table 84 - Distribution of E-Vapour Products by Format: % Value 2018-2023

Table 85 - Distribution of Tobacco Heating Devices by Format: % Volume 2018-2023

Table 86 - Distribution of Heated Tobacco by Format: % Volume 2018-2023

Table 87 - Forecast Sales of Smokeless Tobacco by Category: Volume 2023-2028

Table 88 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2023-2028

Table 89 - Forecast Sales of E-Vapour Products by Category: Volume 2023-2028

Table 90 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2023-2028

Table 91 - Forecast Sales of Tobacco Heating Devices: Volume 2023-2028

Table 92 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2023-2028

Table 93 - Forecast Sales of Heated Tobacco: Volume 2023-2028

Table 94 - Forecast Sales of Heated Tobacco: % Volume Growth 2023-2028

Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2023-2028

Table 96 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2023-2028

Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2023-2028

Table 98 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2023-2028

Table 100 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2023-2028

## 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-poland/report](http://www.euromonitor.com/tobacco-in-poland/report).