



Tobacco in France

June 2025

Table of Contents

Tobacco in France

EXECUTIVE SUMMARY

- Tobacco in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retail 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
- Flavoured tobacco product ban
- Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

- Table 1 - Number of Adult Smokers by Gender 2019-2024

MARKET DATA

- Table 2 - Sales of Tobacco by Category: Volume 2019-2024
- Table 3 - Sales of Tobacco by Category: Value 2019-2024
- Table 4 - Sales of Tobacco by Category: % Volume Growth 2019-2024
- Table 5 - Sales of Tobacco by Category: % Value Growth 2019-2024
- Table 6 - Forecast Sales of Tobacco by Category: Volume 2024-2029
- Table 7 - Forecast Sales of Tobacco by Category: Value 2024-2029
- Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029
- Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 2 - Research Sources

Cigarettes in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Accelerated volume decline with new taxes leading to cannibalisation by illicit sales
- Major players see ongoing decline
- Tobacco specialists remains dominant, but focus shifts away from cigarettes

PROSPECTS AND OPPORTUNITIES

- Despite local fight against illicit trade, ongoing decline in legal sales of cigarettes anticipated
- Significant smoking demographic faces considerable economic challenges
- Innovation becoming increasingly limited

TAXATION AND PRICING

Taxation rates

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 10 - Sales of Cigarettes: Volume 2019-2024

Table 11 - Sales of Cigarettes by Category: Value 2019-2024

Table 12 - Sales of Cigarettes: % Volume Growth 2019-2024

Table 13 - Sales of Cigarettes by Category: % Value Growth 2019-2024

Table 14 - Sales of Cigarettes by Blend: % Volume 2019-2024

Table 15 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2019-2024

Table 16 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2019-2024

Table 17 - Sales of Cigarettes by Pack Size: % Volume 2019-2024

Table 18 - Sales of Cigarettes by Price Band: % Volume 2019-2024

Table 19 - NBO Company Shares of Cigarettes: % Volume 2020-2024

Table 20 - LBN Brand Shares of Cigarettes: % Volume 2021-2024

Table 21 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024

Table 22 - Illicit Trade Estimate of Cigarettes: Volume 2019-2024

Table 23 - Forecast Sales of Cigarettes: Volume 2024-2029

Table 24 - Forecast Sales of Cigarettes by Category: Value 2024-2029

Table 25 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029

Table 26 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029

Table 27 - Forecast Sales of Cigarettes by Blend: % Volume 2024-2029

Table 28 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2024-2029

Table 29 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2024-2029

Table 30 - Forecast Sales of Cigarettes by Pack Size: % Volume 2024-2029

Table 31 - Forecast Sales of Cigarettes by Price Band: % Volume 2024-2029

Cigars, Cigarillos and Smoking Tobacco in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

More resilient than cigarettes ... with pipe tobacco proving dynamic

The lion's share for Scandinavian Tobacco Group in cigars and cigarillos and JTI in smoking tobacco

Tobacco specialists officially monopolise the distribution of cigars, cigarillos and smoking tobacco

PROSPECTS AND OPPORTUNITIES

All products to decline with the exception of pipe tobacco

"Follow the accessories" to find the real unofficial sales of smoking tobacco

Innovation in blond cigarillos, pre-rolled tobacco and premium handmade cigars

CATEGORY DATA

Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024

Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024

Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024

Table 36 - Sales of Cigars by Size: % Volume 2019-2024

Table 37 - Sales of Cigarillos by Price Platform 2019-2024

Table 38 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024

Table 39 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2021-2024

Table 40 - NBO Company Shares of Cigars: % Volume 2020-2024

Table 41 - LBN Brand Shares of Cigars: % Volume 2021-2024

Table 42 - NBO Company Shares of Cigarillos: % Volume 2020-2024

Table 43 - LBN Brand Shares of Cigarillos: % Volume 2021-2024

Table 44 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024

Table 45 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024

Table 46 - NBO Company Shares of Pipe Tobacco: % Volume 2020-2024

Table 47 - LBN Brand Shares of Pipe Tobacco: % Volume 2021-2024

Table 48 - NBO Company Shares of Fine Cut Tobacco: % Volume 2020-2024

Table 49 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2021-2024

Table 50 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024

Table 51 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024

Table 52 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029

Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029

Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029

Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2024-2029

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sudden turnaround in 2024 due the proposed ban on puffs

BAT is doing well in tobacco specialists

Tobacco specialists remains dominant but loses share to e-commerce

PROSPECTS AND OPPORTUNITIES

Too many uncertainties to be optimistic in a category that theoretically has potential

Despite a higher level of innovation within open systems, closed systems rechargeable and cartridges could gain further ground thanks to smart novelties

CATEGORY INDICATORS

Table 56 - Number of Adult Vapers 2019-2024

CATEGORY DATA

Table 57 - Sales of Smokeless Tobacco by Category: Volume 2019-2024

Table 58 - Sales of Smokeless Tobacco by Category: % Volume Growth 2019-2024

Table 59 - Sales of E-Vapour Products by Category: Volume 2019-2024

Table 60 - Sales of E-Vapour Products by Category: % Volume Growth 2019-2024

Table 61 - Sales of Tobacco Heating Devices: Volume 2019-2024

Table 62 - Sales of Tobacco Heating Devices: % Volume Growth 2019-2024

Table 63 - Sales of Heated Tobacco: Volume 2019-2024

Table 64 - Sales of Heated Tobacco: % Volume Growth 2019-2024

Table 65 - Sales of Tobacco Free Oral Nicotine: Volume 2019-2024

Table 66 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2019-2024

Table 67 - Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024

Table 68 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2019-2024

Table 69 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024

Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024

Table 71 - Sales of E-Liquids by Nicotine Strength: % Value 2021-2024

Table 72 - NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024

Table 73 - LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024

Table 74 - NBO Company Shares of E-Vapour Products: % Value 2020-2024

Table 75 - LBN Brand Shares of E-Vapour Products: % Value 2021-2024

Table 76 - NBO Company Shares of Tobacco Heating Devices: % Volume 2020-2024

Table 77 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2021-2024

Table 78 - NBO Company Shares of Heated Tobacco: % Volume 2020-2024
Table 79 - LBN Brand Shares of Heated Tobacco: % Volume 2021-2024
Table 80 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2020-2024
Table 81 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2021-2024
Table 82 - Distribution of Smokeless Tobacco by Format: % Volume 2019-2024
Table 83 - Distribution of E-Vapour Products by Format: % Value 2019-2024
Table 84 - Distribution of Tobacco Heating Devices by Format: % Volume 2019-2024
Table 85 - Distribution of Heated Tobacco by Format: % Volume 2019-2024
Table 86 - Forecast Sales of Smokeless Tobacco by Category: Volume 2024-2029
Table 87 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2024-2029
Table 88 - Forecast Sales of E-Vapour Products by Category: Volume 2024-2029
Table 89 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2024-2029
Table 90 - Forecast Sales of Tobacco Heating Devices: Volume 2024-2029
Table 91 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2024-2029
Table 92 - Forecast Sales of Heated Tobacco: Volume 2024-2029
Table 93 - Forecast Sales of Heated Tobacco: % Volume Growth 2024-2029
Table 94 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2024-2029
Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2024-2029
Table 96 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2024-2029
Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2024-2029
Table 98 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029
Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2024-2029

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-france/report.