



Euromonitor
International

Tobacco in the Philippines

June 2025

Table of Contents

Tobacco in the Philippines

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

Tar levels

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Low ignition propensity (LIP) cigarette regulation

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cigarettes witness further decline in retail volume sales

Philip Morris Fortune Tobacco Corp remains category leader

Small local grocers dominate the distribution of cigarettes

PROSPECTS AND OPPORTUNITIES

Cigarette consumption will continue to decline in the Philippines
Strategic focus on alternatives will enable incumbents to mitigate falling sales of cigarettes
Small local grocers will remain key distribution channel whilst illicit trade rises

TAXATION AND PRICING

Taxation rates
Table 10 - Taxation and Duty Levies 2019-2024
Average cigarette pack price breakdown
Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 11 - Sales of Cigarettes: Volume 2019-2024
Table 12 - Sales of Cigarettes by Category: Value 2019-2024
Table 13 - Sales of Cigarettes: % Volume Growth 2019-2024
Table 14 - Sales of Cigarettes by Category: % Value Growth 2019-2024
Table 15 - Sales of Cigarettes by Blend: % Volume 2019-2024
Table 16 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2019-2024
Table 17 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2019-2024
Table 18 - Sales of Cigarettes by Pack Size: % Volume 2019-2024
Table 19 - Sales of Cigarettes by Price Band: % Volume 2019-2024
Table 20 - NBO Company Shares of Cigarettes: % Volume 2020-2024
Table 21 - LBN Brand Shares of Cigarettes: % Volume 2021-2024
Table 22 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024
Table 23 - Illicit Trade Estimate of Cigarettes: Volume 2019-2024
Table 24 - Forecast Sales of Cigarettes: Volume 2024-2029
Table 25 - Forecast Sales of Cigarettes by Category: Value 2024-2029
Table 26 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029
Table 27 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029
Table 28 - Forecast Sales of Cigarettes by Blend: % Volume 2024-2029
Table 29 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2024-2029
Table 30 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2024-2029
Table 31 - Forecast Sales of Cigarettes by Pack Size: % Volume 2024-2029
Table 32 - Forecast Sales of Cigarettes by Price Band: % Volume 2024-2029

Cigars, Cigarillos and Smoking Tobacco in the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cigars and cigarillos remains buoyant amid steady demand
Tabacalera Inc maintains its solid lead in cigars/cigarillos
Tobacco specialist retailers is key channel for cigars and cigarillos

PROSPECTS AND OPPORTUNITIES

Cigars and cigarillos anticipated to grow steadily
Brand promotions will target young adult smokers
Flavoured cigarillos should stimulate consumer interest

CATEGORY DATA

Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024
Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024
Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024
Table 36 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024
Table 37 - Sales of Cigars by Size: % Volume 2019-2024

Table 38 - Sales of Cigarillos by Price Platform 2019-2024
Table 39 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024
Table 40 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2021-2024
Table 41 - NBO Company Shares of Cigars: % Volume 2020-2024
Table 42 - LBN Brand Shares of Cigars: % Volume 2021-2024
Table 43 - NBO Company Shares of Cigarillos: % Volume 2020-2024
Table 44 - LBN Brand Shares of Cigarillos: % Volume 2021-2024
Table 45 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024
Table 46 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024
Table 47 - NBO Company Shares of Pipe Tobacco: % Volume 2020-2024
Table 48 - LBN Brand Shares of Pipe Tobacco: % Volume 2021-2024
Table 49 - NBO Company Shares of Fine Cut Tobacco: % Volume 2020-2024
Table 50 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2021-2024
Table 51 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024
Table 52 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024
Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029
Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029
Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029
Table 56 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2024-2029

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

E-vapour and heated tobacco registers robust value growth
Philip Morris Fortune Tobacco Corp leads heated tobacco while closed vaping systems remain fragmented
Specialist retailers and e-commerce are important channels for e-vapour and heated tobacco products

PROSPECTS AND OPPORTUNITIES

Regulation of e-vapour products offers long-term benefits for the industry
Convenience will drive shift to closed vaping systems
Leading players to spearhead innovation in heated tobacco

CATEGORY INDICATORS

Table 57 - Number of Adult Vapers 2019-2024

CATEGORY DATA

Table 58 - Sales of Smokeless Tobacco by Category: Volume 2019-2024
Table 59 - Sales of Smokeless Tobacco by Category: % Volume Growth 2019-2024
Table 60 - Sales of E-Vapour Products by Category: Volume 2019-2024
Table 61 - Sales of E-Vapour Products by Category: % Volume Growth 2019-2024
Table 62 - Sales of Tobacco Heating Devices: Volume 2019-2024
Table 63 - Sales of Tobacco Heating Devices: % Volume Growth 2019-2024
Table 64 - Sales of Heated Tobacco: Volume 2019-2024
Table 65 - Sales of Heated Tobacco: % Volume Growth 2019-2024
Table 66 - Sales of Tobacco Free Oral Nicotine: Volume 2019-2024
Table 67 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2019-2024
Table 68 - Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024
Table 69 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2019-2024
Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024
Table 71 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024
Table 72 - Sales of E-Liquids by Nicotine Strength: % Value 2021-2024
Table 73 - NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024

Table 74 - LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024
Table 75 - NBO Company Shares of E-Vapour Products: % Value 2020-2024
Table 76 - LBN Brand Shares of E-Vapour Products: % Value 2021-2024
Table 77 - NBO Company Shares of Tobacco Heating Devices: % Volume 2020-2024
Table 78 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2021-2024
Table 79 - NBO Company Shares of Heated Tobacco: % Volume 2020-2024
Table 80 - LBN Brand Shares of Heated Tobacco: % Volume 2021-2024
Table 81 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2020-2024
Table 82 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2021-2024
Table 83 - Distribution of Smokeless Tobacco by Format: % Volume 2019-2024
Table 84 - Distribution of E-Vapour Products by Format: % Value 2019-2024
Table 85 - Distribution of Tobacco Heating Devices by Format: % Volume 2019-2024
Table 86 - Distribution of Heated Tobacco by Format: % Volume 2019-2024
Table 87 - Forecast Sales of Smokeless Tobacco by Category: Volume 2024-2029
Table 88 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2024-2029
Table 89 - Forecast Sales of E-Vapour Products by Category: Volume 2024-2029
Table 90 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2024-2029
Table 91 - Forecast Sales of Tobacco Heating Devices: Volume 2024-2029
Table 92 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2024-2029
Table 93 - Forecast Sales of Heated Tobacco: Volume 2024-2029
Table 94 - Forecast Sales of Heated Tobacco: % Volume Growth 2024-2029
Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2024-2029
Table 96 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2024-2029
Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2024-2029
Table 98 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2024-2029
Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029
Table 100 - 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-the-philippines/report.