



Euromonitor
International

Tobacco in El Salvador

June 2025

Table of Contents

EXECUTIVE SUMMARY

Tobacco in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
What next for tobacco?

MARKET BACKGROUND

Legislation

TAXATION AND DUTY LEVIES

MARKET DATA

- Table 1 - Sales of Tobacco by Category: Volume 2019-2024
- Table 2 - Sales of Tobacco by Category: Value 2019-2024
- Table 3 - Sales of Tobacco by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Tobacco by Category: % Value Growth 2019-2024
- Table 5 - Forecast Sales of Tobacco by Category: Volume 2024-2029
- Table 6 - Forecast Sales of Tobacco by Category: Value 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

CIGARETTES

Key Data Findings
2024 Developments
Positive volume sales growth of cigarettes as a result of more effective controls on illicit trade
Philip Morris International Inc consolidates its leadership by refreshing Marbolro's position among young generations of adult smokers
Higher levels of citizen security stimulate the resurgence of small local grocers
Prospects and Opportunities
Cigarette category projects a sustained decline in consumption as new generations of adults adopt more preventive health patterns
The range of cigarettes with flavoured capsules is democratised
Slow development of cigarette innovations in El Salvador amid a strict regulatory environment
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 - NBO Company Shares of Cigarettes: % Volume 2020-2024
- Table 15 - LBN Brand Shares of Cigarettes: % Volume 2021-2024
- Table 16 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024
- Table 17 - Forecast Sales of Cigarettes: Volume 2024-2029
- Table 18 - Forecast Sales of Cigarettes by Category: Value 2024-2029
- Table 19 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029
- Table 20 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029

CIGARS, CIGARILLOS AND SMOKING TOBACCO

Key Data Findings
2024 Developments
Complex economic environment and a lack of connection between the product and Salvadoreans reduce demand for cigars, cigarillos, and smoking

tobacco
Non-existent commercial strategies, limiting the best performance to those brands with more regular supply
The availability of cigars, cigarillos, and smoking tobacco in El Salvador remains underdeveloped in specialised stores
Prospects and Opportunities
New generations show greater reluctance to consume tobacco products as they are more concerned about their health
Flavoured options in cigars and smoking tobacco increase in supply, seeking to refresh their positioning among younger adult smokers
The prospects for positioning innovations remain niche
Category Data
Table 21 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024
Table 22 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024
Table 23 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024
Table 24 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024
Table 25 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024
Table 26 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2021-2024
Table 27 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024
Table 28 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024
Table 29 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024
Table 30 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024
Table 31 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029
Table 32 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029
Table 33 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029
Table 34 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2024-2029

SMOKELESS TOBACCO, E-VAPOUR PRODUCTS AND HEATED TOBACCO

Key Data Findings
2024 Developments
Demand grows for e-vapour products, driven by more affordable disposable options and their appeal to young adult Salvadorans
E-vapour products and heated tobacco in El Salvador are in the initial stage of brand building
The entry of major global e-vapour and heated tobacco brands drives the expansion of distribution in supermarket chains and retail e-commerce platforms
Prospects and Opportunities
More affordable prices and a wide range of innovative flavors in e-vapour products attract an increasing number of smokers, while heated tobacco is forecast to remain niche
Growing pressure in El Salvador for possible legislation on e-vapour products
E-vapour products innovate with functional repositioning and wellbeing claims
Category Data
Table 35 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024
Table 36 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024
Table 37 - NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024
Table 38 - LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024
Table 39 - Distribution of Smokeless Tobacco by Format: % Volume 2019-2024
Table 40 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029
Table 41 - 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-el-salvador/report.