



Euromonitor
International

Tobacco in Cambodia

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
 - Volume sales of cigarettes rise in 2024 as the government clamps down on illegal trade and tourism continues to rebound
 - Japan Tobacco Internatinal maintains its lead thanks to the strength of lower-priced variants of its Mevius brand
 - Small local grocers retains its outright leadership in the distribution of cigarettes
- Prospects and Opportunities
 - Moderate forecast period volume sales growth due to several dampening factors
 - Growing popularity of e-vapour products as consumers seek out perceived reduced harm products
 - Leading players expand their product lines to include flavour options and engage in bundling promotions
- 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
 - Sales growth of cigars and cigarillos although this category remains highly niche, with little demand for smoking tobacco

Scandinavian Tobacco Group A/S leads with its popular Café Crème brand

Hospitality (on trade) remains the leading channel for premium brands, while small local grocers and supermarkets stock more accessibly priced brands

Prospects and Opportunities

Moderate forecast period growth of cigars, cigarillos and smoking tobacco

Waning social acceptance of smoking in all forms affects demand and consumption of cigars and cigarillos

Smoking tobacco is perceived as old fashioned thanks to changing consumer norms

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

2024 Developments

Declining popularity of smokeless tobacco, especially chewing tobacco, due to growing popularity of alternatives and rising health awareness

Decline seen in smokeless tobacco, while e-vapour products grow in popularity, despite government ban

Rural practices favour wet markets for smoking tobacco, while retail e-commerce and online marketing provide an avenue for banned e-vapour and heated tobacco products

Prospects and Opportunities

E-vapour products grow in popularity over the forecast period, despite ongoing ban in Cambodia

E-vapour usage potentially evolves into a social trend

Ongoing challenges for the government in enforcing and regulating restrictions on e-vapour products

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-cambodia/report.