



Euromonitor  
International

# Tobacco in Paraguay

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

- Table 1 - Taxation and Duty Levies 2019-2029

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: Volume 2024-2029
- Table 8 - Forecast Sales of Tobacco by Category: Value 2024-2029
- Table 9 - Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029
- Table 10 - Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

DISCLAIMER

CIGARETTES

- Key Data Findings
- 2024 Developments
  - Cigarettes sales decrease due to a decline in smoking prevalence, and tight anti-tobacco policies
  - Tabacalera del Este SA leads but loses ground to Compañía Distribuidora Internacional and its Lucky Strike and Kent brands
  - Small local grocers remains by far the leading distribution channel for cigarettes
- Prospects and Opportunities
  - Forecast period sales of cigarettes decline due to increased consumer awareness of the harmful effects of smoking
  - Strong legislation and a further increase in the tax burden may create further obstacles to the development of cigarettes sales
  - Ongoing innovation in flavoured capsules aims to capture new smokers and recover ex-smokers
- 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 - NBO Company Shares of Cigarettes: % Volume 2020-2024
  - Table 16 - LBN Brand Shares of Cigarettes: % Volume 2021-2024
  - Table 17 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024
  - Table 18 - Forecast Sales of Cigarettes: Volume 2024-2029
  - Table 19 - Forecast Sales of Cigarettes by Category: Value 2024-2029
  - Table 20 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029
  - Table 21 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029

CIGARS, CIGARILLOS AND SMOKING TOBACCO

- Key Data Findings
- 2024 Developments

Moderate growth of cigars and cigarillos is driven by mid to high income smokers  
Black Leaf leads in cigars and cigarillos thanks to the strong presence of its Café Crème brand  
Non-grocery specialists and tobacco specialists lead although retail e-commerce experiences a strong increase  
Prospects and Opportunities  
Further growth likely for cigars and cigarillos while pipe tobacco sales are stagnant  
New premium flavour profiles or even organic new products have a positive impact on category sales  
Category Data

Table 22 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024  
Table 23 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024  
Table 24 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024  
Table 25 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024  
Table 26 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024  
Table 27 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2021-2024  
Table 28 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024  
Table 29 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024  
Table 30 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024  
Table 31 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024  
Table 32 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029  
Table 33 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029  
Table 34 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029  
Table 35 - 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  
E-vapour products benefit from their attraction among young adults  
Convenience stores leads in e-vapour sales and experiences strong growth thanks to expansion of the Biggie chain  
Prospects and Opportunities  
E-vapour sales benefit from the growing popularity of single use devices  
The legalisation of heated tobacco could happen in response to global megatrends, especially health and wellness  
New cutting-edge devices and flavour varieties have the potential to expand sales to a wider consumer base  
Category Data

Table 36 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024  
Table 37 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024  
Table 38 - NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024  
Table 39 - LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024  
Table 40 - Distribution of Smokeless Tobacco by Format: % Volume 2019-2024  
Table 41 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029  
Table 42 - 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-paraguay/report](http://www.euromonitor.com/tobacco-in-paraguay/report).