

# The Ukraine HTP market (dominated by PMI and BAT) increased from 2019 to 2022.

Despite the lack of competition,  
the **number of brand variants** offered by  
both companies **also increased**.

## Ukraine: Market Analysis of Available HTP Brand Variants

### Background

The global heated tobacco product (HTP) market is dominated by transnational tobacco companies; 94% of the market is held by PMI (70%), BAT (16%), and JTI (8%). Ukraine is among the few countries, outside of Japan and South Korea, where there is a significant consumer market for HTPs. This study explores the range of HTP product offerings in Ukraine, which could provide some insight into why HTPs are popular there.

### Methods

- Used NielsenIQ retail data from Feb. 2019–Feb. 2022, collected through a retail audit
- Examined the annual sales value in US dollars (USD) for the years ending in Feb. 2020, 2021, and 2022
- Using manufacturer and brand information, analyzed changes in market share and the number of different unique brand variants available overall and by manufacturer during this period

BAT & PMI HTP Market Snapshot: Ukraine, 2019–2022			
Feb. 2021– Feb. 2022 TOTAL MARKET: \$446 million			
▲ 21%	MARKET SHARE	79% ▼	
2	# BRANDS	3	
▲ 24	# VARIANTS	27 ▲	
Feb. 2020– Feb. 2021 TOTAL MARKET: \$255 million			
▲ 12%	MARKET SHARE	88% ▼	
2	# BRANDS	3 ▲	
▲ 20	# VARIANTS	22 ▲	
Feb. 2019– Feb. 2020 TOTAL MARKET: \$118 million			
7%	MARKET SHARE	93%	
2	# BRANDS	2	
13	# VARIANTS	13	

### Results

- 278% increase in Ukraine's total HTP market from 2019 to 2022
- For the year ending Feb. 2020, PMI had two brands (HEETS, 11 variants; Parliament, 2 variants) and comprised 93% of the market, compared to BAT with two brands (Kent, 5 variants; Neo, 8 variants) that made up the remaining 7% of the market
- By the end of Feb. 2021, PMI's market share decreased to 88%, but they increased their HEETS variants to 17 and introduced a third brand (FIIT, 3 variants), while BAT's market share nearly doubled (12%) and expanded to 15 variants of Neo
- By the end of Feb. 2022, PMI's market share further decreased to 79% while its variants increased (FIIT, 5; HEETS, 20) and BAT's market share increased further to 21% with 19 Neo variants
- Hongta Tobacco entered the market during Feb. 2020–Feb. 2021 with one brand (MC) and 4 variants; by Feb. 2022 it had introduced a 5th MC variant but still controlled only <0.01% of the market

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Tobacco  
industry

E-cigarette  
& nicotine  
product  
industry

Pharma  
industry

NO

NO

NO

NO

NO

NO

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