



ECMA

The European Cigar Manufacturers Association





Maintaining a differentiated regulatory approach

Harmonising regulation of tobacco products needs to consider and address the significant underlying differences in product characteristics and properties, consumer expectations and behaviours, as well as market size.

A 'one size fits all' approach to taxation and regulation for all tobacco products, would be highly disproportionate and disregard the divergent characteristics, as well as the different tax-bearing capacity of cigars and cigarillos, which is not the same as mass-produced tobacco products.

Because cigars / cigarillos are:

- enjoyment products consumed by adult connoisseurs;
- **not products associated with starting smoking;**
- niche products consumed only occasionally;
- produced by small and medium-sized manufacturers;
- culturally and economically important category for many third countries.

Made for connoisseurs...

The skilled craftsmanship involved, and their small-batch manufacturing make cigars and cigarillos a premium product enjoyed by connoisseurs with a specific profile: predominantly older men with higher income, who are well-aware of associated smoking risks.

...not the mass-market

The EU's market for cigars and cigarillos represents only 1.6% of the total consumption of tobacco products in the Single Market. Their specific consumer profile ensures they are not initiation or gateway products for further tobacco use among young people.

According to the latest Special Eurobarometer (published February 2021), only 1% or less of smokers in the EU consume cigarillos, cigars or pipes on a daily basis, as opposed to 69% for factory-made cigarettes.

Truly natural and artisanal

The production of cigars and cigarillos is a centuries-old industry characterised by artisanal tradecraft. Cigars are the oldest tobacco products in the world, with only

three distinct parts: a filler, in most cases a binder, and a natural wrapper. Particularly the natural wrapper of tobacco leaves needs careful handling by skilled workers using a combination of traditional and modern methods, making them very expensive to grow, create and purchase.

Europe's cigar industry...

The European Cigar Manufacturers Association (ECMA) was founded in the early 1990s as the representative body of the European manufacturers of cigars and cigarillos. Today ECMA represents the major cigar and cigarillos manufacturers in Belgium, Denmark, Germany, Hungary, Italy, The Netherlands, Spain and Switzerland. Together the ECMA members account for over 80% of the cigars and cigarillos produced in and exported from the European Union.

ECMA includes a wide range of different types of European companies involved in tobacco manufacturing – from companies with a global footprint to SMEs.

...is an important anchor in rural communities

Some of these companies are over 150 years in existence, with many spanning seven or eight generations. Across the European Union, ECMA members are proud to provide high-quality jobs to some 5.500 people across the EU, mostly in rural areas.

Cigar making is an enduring European cultural heritage and part of the cultural patrimony of numerous countries in Central America. ECMA members' long-standing partnerships with local plantations and suppliers employs an estimated 500,000 people in jobs relating to the production and processing of tobacco leaves across the world, specifically in Indonesia, Brazil, Cuba, Ecuador, Honduras, Nicaragua Sri Lanka, and the Dominican Republic.

Employment	Number of cigar plants	Employment
Belgium	4	881
Denmark	-	378
France	-	223
Germany	7	2.503
Hungary	1	460
Italy	3	462
Netherlands	2	407
Portugal	-	21
Spain	1	245
Sweden	0	13
Total	18	5.593

Estimated market shares of tobacco products in the European Union in 2019

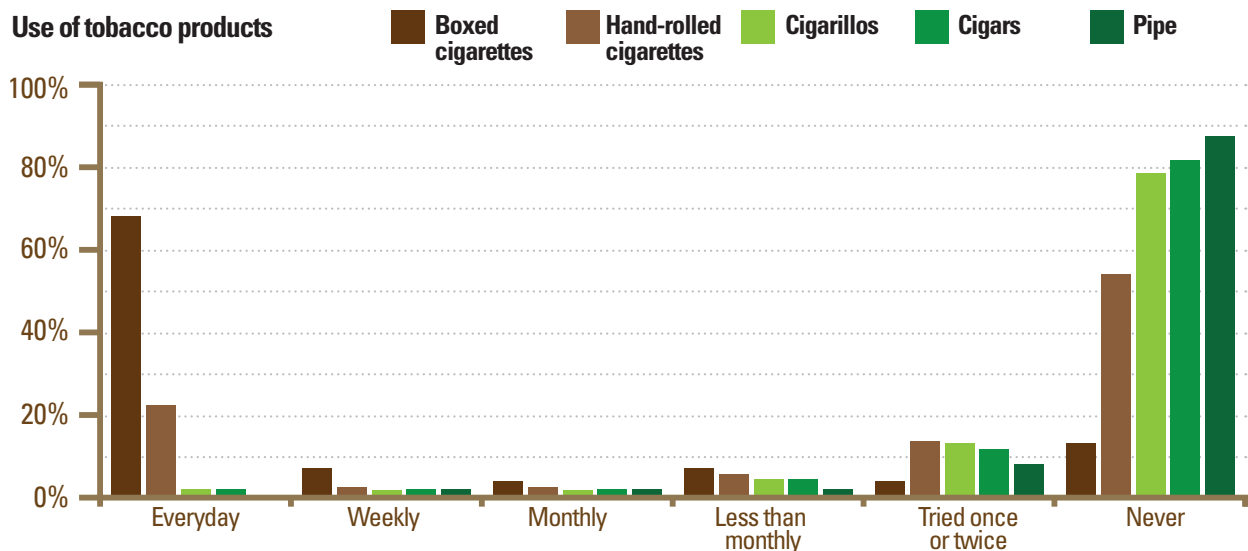
	Number of pieces, billions	% of total market
Factory-made cigarettes	458.4	80.1
Fine-cut tobacco	79.25	13.8
Heat-not-burn products	12.3	2.2
Cigars and Cigarillos	9.23	1.6
Smokeless tobacco	7	1.2
Pipe tobacco	6.5	1.1
Total	572.68	100.0

Source: DG TAXUD, Releases for consumption of cigarettes and fine cut tobacco (2002-2019), ECMA figures for cigars/cigarillos and Euromonitor International; Tobacco Industry Edition, 2021 for heat-not-burn, smokeless and pipe tobacco products. The estimate of 'units' for the fine-cut, smokeless and pipe tobacco categories are based on a conversion of tonnage data at 1 gramme per piece. These figures include consumption in the United Kingdom.

Products used or tried first (%)

	Boxed cigarettes		Hand-rolled cigarettes		Cigars		Cigarillos		Pipe		Water pipe tobacco (shisha, hookah)	
	Aug / Sep 2020	Difference Aug / Sep 2020 – Dec 2017	Aug / Sep 2020	Difference Aug / Sep 2020 – Dec 2017	Aug / Sep 2020	Difference Aug / Sep 2020 – Dec 2017	Aug / Sep 2020	Difference Aug / Sep 2020 – Dec 2017	Aug / Sep 2020	Difference Aug / Sep 2020 – Dec 2017	Aug / Sep 2020	Difference Aug / Sep 2020 – Dec 2017
EU27	82	1	6	0	2	1	1	0	1	0	4	1

Use of tobacco products



Our Members



ECMA Associated Members

- Asociacion Empresarial del Tabaco *Spain*
- Associação Nacional dos Fabricantes e Importadores de Charutos e Cigarilhas *Portugal*
- Bundesverband der Zigarrenindustrie *Germany*
- Fecibel *Belgium and Luxembourg*
- Fédération des fabricants de cigares *France*
- Imported Tobacco Products Advisory Council *United Kingdom*
- Nederlandse Vereniging voor de Sigarenindustrie *Netherlands*
- Tobaksindustrien *Denmark*
- Verband Schweizerischer Zigarrenfabrikanten *Switzerland*



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