



# Smokeless Tobacco, E-Vapour Products and Heated Tobacco in China

June 2024

Table of Contents

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Sales of e-vapour products plummet in 2023, due to new National Standards

Illicit products remain significant in the market

Government stepping up enforcement efforts over unlicensed products

### PROSPECTS AND OPPORTUNITIES

Limited prospects for growth for e-vapour products in China

Distribution channels likely to remain stable, due to restrictive measures

### CATEGORY INDICATORS

Table 1 - Number of Adult Vapers 2018-2023

### CATEGORY DATA

Table 2 - Sales of Smokeless Tobacco by Category: Volume 2018-2023

Table 3 - Sales of Smokeless Tobacco by Category: % Volume Growth 2018-2023

Table 4 - Sales of E-Vapour Products by Category: Volume 2018-2023

Table 5 - Sales of E-Vapour Products by Category: % Volume Growth 2018-2023

Table 6 - Sales of Tobacco Heating Devices: Volume 2018-2023

Table 7 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2023

Table 8 - Sales of Heated Tobacco: Volume 2018-2023

Table 9 - Sales of Heated Tobacco: % Volume Growth 2018-2023

Table 10 - Sales of Tobacco Free Oral Nicotine: Volume 2018-2023

Table 11 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023

Table 12 - Sales of Tobacco Free Oral Nicotine by Category: Value 2018-2023

Table 13 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2018-2023

Table 14 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2018-2023

Table 15 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2018-2023

Table 16 - Sales of E-Liquids by Nicotine Strength: % Value 2020-2023

Table 17 - NBO Company Shares of Smokeless Tobacco: % Volume 2019-2023

Table 18 - LBN Brand Shares of Smokeless Tobacco: % Volume 2020-2023

Table 19 - NBO Company Shares of E-Vapour Products: % Value 2019-2023

Table 20 - LBN Brand Shares of E-Vapour Products: % Value 2020-2023

Table 21 - NBO Company Shares of Tobacco Heating Devices: % Volume 2019-2023

Table 22 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2020-2023

Table 23 - NBO Company Shares of Heated Tobacco: % Volume 2019-2023

Table 24 - LBN Brand Shares of Heated Tobacco: % Volume 2020-2023

Table 25 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2019-2023

Table 26 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2020-2023

Table 27 - Distribution of Smokeless Tobacco by Format: % Volume 2018-2023

Table 28 - Distribution of E-Vapour Products by Format: % Value 2018-2023

Table 29 - Distribution of Tobacco Heating Devices by Format: % Volume 2018-2023

Table 30 - Distribution of Heated Tobacco by Format: % Volume 2018-2023

Table 31 - Forecast Sales of Smokeless Tobacco by Category: Volume 2023-2028

Table 32 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2023-2028

Table 33 - Forecast Sales of E-Vapour Products by Category: Volume 2023-2028

Table 34 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Tobacco Heating Devices: Volume 2023-2028

Table 36 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2023-2028

Table 37 - Forecast Sales of Heated Tobacco: Volume 2023-2028

Table 38 - Forecast Sales of Heated Tobacco: % Volume Growth 2023-2028

Table 39 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2023-2028

Table 40 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2023-2028

Table 41 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2023-2028

Table 42 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2023-2028

Table 43 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2023-2028

Table 44 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2023-2028

## Tobacco in China - Industry Overview

### EXECUTIVE SUMMARY

Tobacco in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for tobacco?

### OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 1 - Legislation Summary at a Glance

Minimum legal smoking age

Smoking prevalence

Tar levels

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Low ignition propensity (LIP) cigarette regulation

Flavoured tobacco product ban

Reduced harm

Vapour products

### PRODUCTION/IMPORTS/EXPORTS

### MARKET INDICATORS

Table 45 - Number of Adult Smokers by Gender 2018-2023

### MARKET DATA

Table 46 - Sales of Tobacco by Category: Volume 2018-2023

Table 47 - Sales of Tobacco by Category: Value 2018-2023

Table 48 - Sales of Tobacco by Category: % Volume Growth 2018-2023

Table 49 - Sales of Tobacco by Category: % Value Growth 2018-2023

Table 50 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 51 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 52 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 53 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 2 - Research Sources

## 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/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-china/report](http://www.euromonitor.com/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-china/report).