



Nicotine in Canada

July 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

Broad-Based Volume Decline Reflects Pressure across All Nicotine Categories

Tightening Regulation Increases Pressure across Combustible and Alternative Nicotine Products

Declining Smoking Prevalence Continues to Reshape Nicotine Demand

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Alternative Formats Are Set to Underpin Nicotine Demand as Cigarette Volumes Continue to Decline

Regulation and Enforcement Are Projected to Determine the Size of the Legal Market Opportunity

Chart 4 - Analyst Insight for Nicotine

Value and Convenience Are Anticipated to Shape Future Competitive Advantage

Chart 5 - Forecast Volume Sales 2020-2030

Chart 6 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Pacific Smoke International Gains Ground as E-Vapour Reshapes Competition

Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Forecourt Retailers and Convenience Stores Remain Central to Nicotine Distribution

E-Commerce Remains Limited Despite Growth in Alternative Nicotine Formats

PRODUCTS

Tightening Regulation and Declining Smoking Prevalence Are Reshaping Innovation Priorities

Smoke-Free Retail Initiatives and High-Capacity E-Vapour Formats Illustrate Recent Innovation

Innovation Is Increasing the Importance of Compliance and Portfolio Adaptability

OPERATING ENVIRONMENT

Legislation

Legislative Overview

Chart 9 - 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

PRODUCTION/IMPORTS/EXPORTS

ECONOMIC CONTEXT

Chart 10 - Economic Context for Nicotine

Chart 11 - Real Gdp Growth 2020-2030

Chart 12 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 13 - Consumer Context for Nicotine

Chart 14 - Population 2020-2030

Chart 15 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigarettes in Canada](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigarettes Summary

KEY INDUSTRY TRENDS

Chart 16 - Key Industry Trends for Cigarettes

INDUSTRY PERFORMANCE

Declining Smoking Prevalence and Higher Taxes Accelerate Category Decline

Declining Smoking Prevalence Concentrates Demand among Older Smokers

Regulatory Pressure and Illicit Trade Continue to Challenge the Legal Market

Chart 17 - Volume Sales 2020-2030

WHAT'S NEXT?

Declining Smoking Prevalence Set to Sustain Long-Term Category Contraction

Chart 18 - Analyst Insight for Cigarettes

Rising Taxes Expected to Intensify Affordability Pressures and Downtrading

Regulation and Illicit Trade Forecast to Shape the Future of the Legal Market

Chart 19 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Leading Manufacturers Defend Share through Portfolio Breadth and Pricing Discipline

Chart 20 - Company Shares 2025

Chart 21 - Brand Shares 2025

CHANNELS

Forecourt Retailers and Convenience Stores Remain Central to Cigarette Distribution

Regulatory Restrictions Limit the Role of E-Commerce

Chart 22 - Retail Channels 2020-2025

PRODUCTS

Declining Smoking Prevalence and Tighter Regulation Redirect Innovation Away From Product Development

Retail Switching Initiatives and Portfolio Management Exemplify Current Innovation

Recent Developments Strengthen Incumbent Positions and Raise Barriers to Competition

TAXATION AND PRICING

Taxation Rates

Average Cigarette Pack Price Breakdown

Chart 23 - Cigarette Price Band Definitions

ECONOMIC CONTEXT

Chart 24 - Economic Context for Cigarettes

Chart 25 - Real Gdp Growth 2020-2030

Chart 26 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 27 - Consumer Context for Cigarettes

Chart 28 - Population 2020-2030

Chart 29 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigars, Cigarillos and Smoking Tobacco in Canada](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigars, Cigarillos and Smoking Tobacco Summary

INDUSTRY PERFORMANCE

Combustible Tobacco Remains in Structural Decline Despite Stable Economic Conditions

Declining Smoking Prevalence Accelerates Category Contraction

Tightening Regulation Increases Compliance Pressure across the Category

Chart 30 - Volume Sales 2020-2030

Chart 31 - Volume Sales by Category 2025

WHAT'S NEXT?

Combustible Tobacco Decline Expected to Continue as the Consumer Base Contracts

Tightening Regulation Set to Further Limit Opportunities for Differentiation

Value Expected to Outperform Volume as Pricing Remains the Key Defence

Chart 32 - Forecast Volume Sales 2020-2030

Chart 33 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Scandinavian Tobacco Group Maintains Leadership in a Stable Competitive Environment

Chart 34 - Company Shares 2025

Chart 35 - Brand Shares 2025

CHANNELS

Specialist Retail Remains Central as Combustible Tobacco Demand Contracts

ECONOMIC CONTEXT

Chart 36 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 37 - Real Gdp Growth 2020-2030

Chart 38 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 39 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 40 - Population 2020-2030

Chart 41 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Canada

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Heated Tobacco Growth Partially Offsets Continued Weakness in E-Vapour

Value-Seeking Behaviour Reinforces Demand for High-Capacity Formats and Non-Compliant Products

Regulatory Pressure Increasingly Shapes Legal Market Development

Chart 42 - Volume Sales 2020-2030

Chart 43 - Volume Sales by Category 2025

WHAT'S NEXT?

Growth in Heated Tobacco and High-Capacity E-Vapour Formats Is Set to Outweigh Broader Category Decline

Format Optimisation Is Set to Become the Key Driver of Competitive Success

Regulation and Enforcement Are Expected to Remain the Main Determinants of Legal Market Growth

Chart 44 - Forecast Volume Sales 2020-2030

Chart 45 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Pacific Smoke International and Valor Strengthen Leadership through Value-Focused Portfolios

Scale and Product Innovation Raise Barriers to Competition

Chart 46 - Company Shares 2025

Chart 47 - Brand Shares 2025

CHANNELS

Specialist Retail Remains Central as E-Vapour Distribution Expands across Complementary Channels

Omnichannel Specialist Operators Strengthen Their Competitive Position

ECONOMIC CONTEXT

Chart 48 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 49 - Real Gdp Growth 2020-2030

Chart 50 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 51 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 52 - Population 2020-2030

Chart 53 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/nicotine-in-canada/report.