



Euromonitor
International

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

August 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Alternative Nicotine Formats Continued to Gain Momentum as Consumers Shifted Away From Traditional Tobacco

Cross-Format Use Gathered Pace as Nicotine Pouches Gained Traction Alongside Vaping and Heated Tobacco

Regulatory Tightening Reshaped Innovation and Product Strategies across Alternative Nicotine Formats

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Regulation Set to Narrow Product Choice and Redirect Innovation Towards Compliant Nicotine Formats

Multi-Format Nicotine Use Expected to Strengthen the Advantage of Diversified Portfolios

Device Personalisation and Sustainable Design Projected to Shape Future Product Development

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

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Philip Morris Spain Retained Category Leadership as Concentration Increased

Multi-Format Portfolios Strengthened Competitive Positioning

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Specialist Retail Channels Maintained Their Lead as Online Sales Gained Traction

E-Commerce Attracts Value-Seeking Buyers but Remains Niche

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2025 Developments

KEY DATA INSIGHTS

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Cross-Format Consumption Continues to Redistribute Demand across Nicotine Categories

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WHAT'S NEXT?

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Chart 17 - Forecast Volume Sales 2020-2030

Chart 18 - Forecast Volume Sales by Category 2025-2030

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Jt International Iberia Strengthens Its Position as Winston Overtakes Marlboro

Portfolio Adaptation and Format Diversification Support Competitive Gains

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Chart 20 - Brand Shares 2025

CHANNELS

Tobacco Specialists Retain Their Central Role in a Tightly Regulated Retail Environment

Regulation Continues to Limit the Role of E-Commerce in Nicotine Distribution

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Compliance and Discretion Increasingly Shape Nicotine Product Innovation

Elf Bar, Velo and Jti Illustrate Distinct Responses to Changing Market Conditions

Multi-Format Portfolios Increasingly Strengthen Competitive Positioning

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Flavoured Tobacco Product Ban

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PRODUCTION/IMPORTS/EXPORTS

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