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International

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the United Kingdom

July 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

INDUSTRY PERFORMANCE

Ske Crystal and Edge Liq Respond to Disposable Vape Ban by Shifting Users to Compliant Formats

Tobacco Free Oral Nicotine Experiences Most Dynamic Growth Due to Discreet Nature and Regulatory Compliance

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Regulatory Changes Expected to Increase Demand for Open Vaping Systems

Tobacco Free Oral Nicotine Set to Remain the Most Dynamic Due to Regulatory Compliance and Discreetness

Consumer Demand Anticipated to Remain Stable Despite Format Shifts

Chart 4 - Forecast Volume Sales 2020-2030

Chart 5 - Forecast Volume Sales by Category 2025-2030

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Vuse and Ske Crystal Outpace with Portfolio Expansions

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Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Other Non-Grocery Retailers Lose Ground as Convenience and Online Channels Gain Traction

Retail E-Commerce Anchors Repeat Purchases as Offline Stores Adapt to Regulatory Change

PRODUCTS

Regulatory Compliance Replaces Competitive Freedom as the Primary Innovation Driver

Rechargeable Pod Systems and Reformulated E-Liquids Define the New Product Landscape

Format Disruption Accelerates Competitive Consolidation and Reshapes Long-Term Brand Strategy

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Nicotine in the United Kingdom - Industry Overview

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KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

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Economic Factors Drive Demand for Lower-Cost Alternatives

Cigarettes Loses Ground Due to Regulatory Pressure, While E-Vapour Systems Gain Traction

Intensifying Regulation Accelerates Shift to Reduced-Risk Formats

Chart 16 - Volume Sales 2020-2030

Chart 17 - Volume Sales by Category 2025

WHAT'S NEXT?

Rechargeable Devices Anticipated to Displace Disposables as Compliance Drives Consolidation

Cigarettes Set to Continue Contracting, While Retention-Oriented Nicotine Delivery Platforms Gain Traction

Chart 18 - Forecast Volume Sales 2020-2030

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COMPETITIVE LANDSCAPE

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Chart 21 - Company Shares 2025

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CHANNELS

Convenience Stores Retain Lead as Specialists and Vape Outlets Expand

Online Channels Capture Repeat Purchases in Reduced-Risk Nicotine

PRODUCTS

Consumer Retention and Format Continuity Become the New Axes of Innovation

Bladeless Heating Technology and High-Capacity Pod Systems Mark the Leading Edge of New Launches

Portfolio Breadth and Route to Market Strength Determine Which Companies Capture the Transition

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ECONOMIC CONTEXT

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