



Euromonitor
International

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

July 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Bat Leverages Omni Platform to Drive Cross-Format Adoption

E-Liquid Tax Prompts Shift to Refillables and Informal Supply

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Consumers to Prioritise Usability as Regulatory Tightening Limits New Entries

Excise Increases and Flavour Bans to Accelerate Shift to Informal Channels

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Top Companies Maintain Stable Shares through Strong Brand Presence and Consistency

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Specialist Retailers Sustain Lead as Excise Prompts Channel Shift

Specialist Webshops Face Limits as E-Commerce Adoption Remains Slow

ECONOMIC CONTEXT

Chart 7 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 10 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 11 - Population 2020-2030

Chart 12 - Population by Generation 2025

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[Nicotine in Croatia - Industry Overview](#)

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Excise Increases and Flavour Bans Drive Consumer Downtrading

Cigarettes Maintain Dominance as Heated Tobacco Accelerates

Bat Consolidates Multi-Format Strategy to Boost Switching and Retention

Chart 13 - Volume Sales 2020-2030

Chart 14 - Volume Sales by Category 2025

WHAT'S NEXT?

Bat to Expand Regional Supply Base as Demand Outpaces Western Europe
Retailers to Adopt Age-Verification Technology as Compliance Tightens
Tourism and Cross-Border Flows to Reshape Demand and Business Models
Chart 15 - Forecast Volume Sales 2020-2030
Chart 16 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Bat Defends Lead as New Formats Gain Relevance
Chart 17 - Company Shares 2025
Chart 18 - Brand Shares 2025

CHANNELS

Small Local Grocers Sustain Habitual Nicotine Purchases
Regulatory Barriers Restrict E-Commerce to a Marginal Role

OPERATING ENVIRONMENT

Legislation
Legislative Overview
Chart 19 - 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

ECONOMIC CONTEXT

Chart 20 - Economic Context for Nicotine
Chart 21 - Real Gdp Growth 2020-2030
Chart 22 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 23 - Consumer Context for Nicotine
Chart 24 - Population 2020-2030
Chart 25 - Population by Generation 2025

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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-croatia/report.