



Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the Netherlands

July 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Regulatory Pressures Drive Sharp Decline in Nicotine Products

Competition Shifts From Marketing to Product Experience

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Specialist Retail and Smoking Alternatives Support a Cautious Recovery

Compliance and Specialist Retail Become Critical Competitive Advantages

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Ug Holland and British American Tobacco Expand as Regulations Shift Preferences

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Specialist Retail Strengthens Its Dominance

Offline Distribution Remains the Only Route to Market

Chart 7 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 8 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 9 - Real Gdp Growth 2020-2030

Chart 10 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 11 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 12 - Population 2020-2030

Chart 13 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Nicotine in the Netherlands - Industry Overview](#)

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Volado and Eleaf Drive Channel Shift as Regulation Tightens

Cigarettes Remain Largest as Alternatives Face Legal Constraints

Chart 14 - Volume Sales 2020-2030

Chart 15 - Volume Sales by Category 2025

WHAT'S NEXT?

Specialist Shops Capture Value as Mainstream Channels Exit
Cigarettes Retain Volume Leadership as Alternatives Show Resilience
Chart 16 - Forecast Volume Sales 2020-2030
Chart 17 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Philip Morris Gains Share as Smaller Players Lose Ground
Chart 18 - Company Shares 2025
Chart 19 - Brand Shares 2025

CHANNELS

Forecourts and Tobacconists Gain Share as Supermarkets Exit Sales
E-Commerce Ban Eliminates Online Sales
Chart 20 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 21 - Economic Context for Nicotine
Chart 22 - Real Gdp Growth 2020-2030
Chart 23 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 24 - Consumer Context for Nicotine
Chart 25 - Population 2020-2030
Chart 26 - 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/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-the-netherlands/report.