



Top Five Trends in Nicotine

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Our expert's view of Nicotine in 2025

Key findings

INTRODUCTION

Industry evolution is framed by the poly-usage evolution of nicotine formats

Top five trends in Nicotine

Top five trends uncovered

RISING REGULATION RESHAPES MARKET STRUCTURE

Policy complexity is shifting competition, demand and accessibility

Retail channel regulation will become the next battleground

Policy conversation should balance safe access and shifting consumer demand

VISIBILITY COLLAPSE FORCES ACCELERATION BEYOND SMOKING

As smoking loses relevance, markets with accessible alternatives will benefit

US: Collapse in smokers meets fast adoption of nicotine pouches

Transformation is most effective while some visibility remains

FORMAT NAVIGATION BECOMES THE NORM

Nicotine is not a single product industry, with product exploration gaining relevance

A brand portfolio to support the poli-format user

Winning strategies enable consumer exploration of RRP formats

AFFORDABILITY ARCHITECTURE EXPANDS

Failure to address affordability gaps risks accelerating downtrading and illicit trade

Tiered price architectures look to preserve equity and capture value-seeking consumers

Affordability and premiumisation will continue to be key drivers in RRP adoption

BEYOND NICOTINE AND INTO STIMULATION

Consumer search for need states is also reflected in demand for new stimulants

Blurring lines of functionality as newcomers take on the pouch format

Winning strategies will involve portfolio innovation focused on need states

CONCLUSION

Top five trends uncovered

Future implications

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