

# Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Australia

June 2025

# Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Australia - Category analysis

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Regulations reshape category

Regulatory shifts undermine The Vape Store's market position

Retail e-vapour access collapses under new framework

## PROSPECTS AND OPPORTUNITIES

Therapeutic framework refines e-vapour category

Illicit trade surges as legal sales collapse

From recreational to therapeutic use

## **CATEGORY INDICATORS**

Table 1 - Number of Adult Vapers 2019-2024

## **CATEGORY DATA**

- Table 2 Sales of Smokeless Tobacco by Category: Volume 2019-2024
- Table 3 Sales of Smokeless Tobacco by Category: % Volume Growth 2019-2024
- Table 4 Sales of E-Vapour Products by Category: Volume 2019-2024
- Table 5 Sales of E-Vapour Products by Category: % Volume Growth 2019-2024
- Table 6 Sales of Tobacco Heating Devices: Volume 2019-2024
- Table 7 Sales of Tobacco Heating Devices: % Volume Growth 2019-2024
- Table 8 Sales of Heated Tobacco: Volume 2019-2024
- Table 9 Sales of Heated Tobacco: % Volume Growth 2019-2024
- Table 10 Sales of Tobacco Free Oral Nicotine: Volume 2019-2024
- Table 11 Sales of Tobacco Free Oral Nicotine: % Volume Growth 2019-2024
- Table 12 Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024
- Table 13 Sales of Tobacco Free Oral Nicotine: % Value Growth 2019-2024
- Table 14 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024
- Table 15 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024
- Table 16 Sales of E-Liquids by Nicotine Strength: % Value 2021-2024
- Table 17 NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024
- Table 18 LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024
- Table 19 NBO Company Shares of E-Vapour Products: % Value 2020-2024
- Table 20 LBN Brand Shares of E-Vapour Products: % Value 2021-2024
- Table 21 NBO Company Shares of Tobacco Heating Devices: % Volume 2020-2024
- Table 22 LBN Brand Shares of Tobacco Heating Devices: % Volume 2021-2024
- Table 23 NBO Company Shares of Heated Tobacco: % Volume 2020-2024
- Table 24 LBN Brand Shares of Heated Tobacco: % Volume 2021-2024
- Table 25 NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2020-2024
- Table 26 LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2021-2024
- Table 27 Distribution of Smokeless Tobacco by Format: % Volume 2019-2024
- Table 28 Distribution of E-Vapour Products by Format: % Value 2019-2024
- Table 29 Distribution of Tobacco Heating Devices by Format: % Volume 2019-2024
- Table 30 Distribution of Heated Tobacco by Format: % Volume 2019-2024
- Table 31 Forecast Sales of Smokeless Tobacco by Category: Volume 2024-2029
- Table 32 Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2024-2029
- Table 33 Forecast Sales of E-Vapour Products by Category: Volume 2024-2029
- Table 34 Forecast Sales of E-Vapour Products by Category: % Volume Growth 2024-2029
- Table 35 Forecast Sales of Tobacco Heating Devices: Volume 2024-2029
- Table 36 Forecast Sales of Tobacco Heating Devices: % Volume Growth 2024-2029

- Table 37 Forecast Sales of Heated Tobacco: Volume 2024-2029
- Table 38 Forecast Sales of Heated Tobacco: % Volume Growth 2024-2029
- Table 39 Forecast Sales of Tobacco Free Oral Nicotine: Volume 2024-2029
- Table 40 Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2024-2029
- Table 41 Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2024-2029
- Table 42 Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2024-2029
- Table 43 Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029
- Table 44 Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2024-2029

# Tobacco in Australia - Industry Overview

## **EXECUTIVE SUMMARY**

Tobacco in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

What next for tobacco?

# OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 1 - 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

Flavoured tobacco product ban

Vapour products

# PRODUCTION/IMPORTS/EXPORTS

## MARKET INDICATORS

Table 45 - Number of Adult Smokers by Gender 2019-2024

## MARKET DATA

- Table 46 Sales of Tobacco by Category: Volume 2019-2024
- Table 47 Sales of Tobacco by Category: Value 2019-2024
- Table 48 Sales of Tobacco by Category: % Volume Growth 2019-2024
- Table 49 Sales of Tobacco by Category: % Value Growth 2019-2024
- Table 50 Forecast Sales of Tobacco by Category: Volume 2024-2029
- Table 51 Forecast Sales of Tobacco by Category: Value 2024-2029
- Table 52 Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029
- Table 53 Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

## DISCLAIMER

## **SOURCES**

Summary 2 - Research Sources

# 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 focusing 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-australia/report.