



Euromonitor
International

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

June 2025

KEY DATA FINDINGS

2024 DEVELOPMENTS

E-vapour products suffer steep decline following implementation of flavour ban, while heated tobacco continues to grow
Competitive landscape sees consolidation in heated tobacco and nicotine pouches, but fragmentation persists in e-vapour
E-commerce continues to expand in tobacco alternatives, supported by delivery infrastructure and consumer preferences

PROSPECTS AND OPPORTUNITIES

Heated tobacco and nicotine pouches forecast strong growth, while e-vapour faces continued regulatory headwinds
Illicit and semi-legal trade expected to dominate e-vapour consumption in the absence of regulatory reform
JTI enters heated tobacco with Ploom X Advanced, heightening competition and accelerating innovation

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 Ukraine - 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

Low ignition propensity (LIP) cigarette regulation

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 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-ukraine/report.