



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

June 2025

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Legislation banning flavoured e-vapour products limits appeal in 2024
- Shenzhen Joye Technology Co Ltd retains its lead, driven by open systems
- Tobacco and e-vapour specialists benefit from channel restrictions

PROSPECTS AND OPPORTUNITIES

- An excise duty on e-liquids would challenge sales across the forecast period
- Distribution restrictions will support growth for tobacco specialist and vape stores
- The flavour ban and ongoing regulations are set to limit innovation opportunities

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2024 key trends

Competitive landscape

Retail developments

What next for tobacco?

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Legislation

Legislative overview

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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

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