

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

June 2023

Table of Contents

## KEY DATA FINDINGS

### 2022 DEVELOPMENTS

Heated tobacco leads growth among a diverse group of highly dynamic categories

The range of products on offer in disposable e-cigarettes expands rapidly

Philipp Morris likely to remain the only player in heated tobacco

### PROSPECTS AND OPPORTUNITIES

Ongoing growth in heated tobacco to come largely at the cost of other categories

Particularly high tax increases in sight for heated tobacco

Further regulations about to shape the future of nicotine pouches in Austria

### CATEGORY INDICATORS

Table 1 - Number of Adult Vapers 2017-2022

### CATEGORY DATA

Table 2 - Sales of Tobacco Heating Devices: Volume 2017-2022

Table 3 - Sales of Tobacco Heating Devices: % Volume Growth 2017-2022

Table 4 - Sales of Heated Tobacco: Volume 2017-2022

Table 5 - Sales of Heated Tobacco: % Volume Growth 2017-2022

Table 6 - Sales of Tobacco Free Oral Nicotine: Volume 2017-2022

Table 7 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2017-2022

Table 8 - Sales of Tobacco Free Oral Nicotine by Category: Value 2017-2022

Table 9 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2017-2022

Table 10 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022

Table 11 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022

Table 12 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2022

Table 13 - NBO Company Shares of E-Vapour Products: % Value 2018-2022

Table 14 - LBN Brand Shares of E-Vapour Products: % Value 2019-2022

Table 15 - NBO Company Shares of Tobacco Heating Devices: % Volume 2018-2022

Table 16 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2019-2022

Table 17 - NBO Company Shares of Heated Tobacco: % Volume 2018-2022

Table 18 - LBN Brand Shares of Heated Tobacco: % Volume 2019-2022

Table 19 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2018-2022

Table 20 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2019-2022

Table 21 - Distribution of E-Vapour Products by Format: % Value 2017-2022

Table 22 - Forecast Sales of Tobacco Heating Devices: Volume 2022-2027

Table 23 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2022-2027

Table 24 - Forecast Sales of Heated Tobacco: Volume 2022-2027

Table 25 - Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027

Table 26 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2022-2027

Table 27 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2022-2027

Table 28 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2022-2027

Table 29 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2022-2027

Table 30 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027

Table 31 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2022-2027

## Tobacco in Austria - Industry Overview

### EXECUTIVE SUMMARY

Tobacco in 2022: The big picture

2022 key trends

Competitive landscape  
Retailing 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  
Point-of-sale display bans  
Smoking in public places  
Flavoured tobacco product ban  
Vapour products

## PRODUCTION/IMPORTS/EXPORTS

## MARKET INDICATORS

Table 32 - Number of Adult Smokers by Gender 2017-2022

## MARKET DATA

Table 33 - Sales of Tobacco by Category: Volume 2017-2022  
Table 34 - Sales of Tobacco by Category: Value 2017-2022  
Table 35 - Sales of Tobacco by Category: % Volume Growth 2017-2022  
Table 36 - Sales of Tobacco by Category: % Value Growth 2017-2022  
Table 37 - Forecast Sales of Tobacco by Category: Volume 2022-2027  
Table 38 - Forecast Sales of Tobacco by Category: Value 2022-2027  
Table 39 - Forecast Sales of Tobacco by Category: % Volume Growth 2022-2027  
Table 40 - Forecast Sales of Tobacco by Category: % Value Growth 2022-2027

## 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-austria/report](http://www.euromonitor.com/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-austria/report).