



Nicotine in Spain

August 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

Cigarette Contraction Continues to Offset Strong Growth in Alternative Nicotine Products

Tightening Regulation Reshapes Growth Prospects across All Nicotine Formats

Cross-Format Consumption Continues to Redistribute Demand across Nicotine Categories

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Nicotine Volumes Are Projected to Decline as Regulation Reshapes the Category

Consumer Behaviour Is Anticipated to Shift Towards Discreet, Multi-Format and Lower-Cost Nicotine Products

Market Power Is Set to Consolidate around Multi-Format Players and Regulated Retail Channels

Chart 4 - Analyst Insight for Nicotine

Chart 5 - Forecast Volume Sales 2020-2030

Chart 6 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Jt International Iberia Strengthens Its Position as Winston Overtakes Marlboro

Portfolio Adaptation and Format Diversification Support Competitive Gains

Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Tobacco Specialists Retain Their Central Role in a Tightly Regulated Retail Environment

Regulation Continues to Limit the Role of E-Commerce in Nicotine Distribution

PRODUCTS

Compliance and Discretion Increasingly Shape Nicotine Product Innovation

Elf Bar, Velo and Jti Illustrate Distinct Responses to Changing Market Conditions

Multi-Format Portfolios Increasingly Strengthen Competitive Positioning

OPERATING ENVIRONMENT

Legislation

Legislative Overview

Chart 9 - 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

Reduced Harm
Vapour Products

PRODUCTION/IMPORTS/EXPORTS

ECONOMIC CONTEXT

Chart 10 - Economic Context for Nicotine
Chart 11 - Real Gdp Growth 2020-2030
Chart 12 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 13 - Consumer Context for Nicotine
Chart 14 - Population 2020-2030
Chart 15 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigarettes in Spain](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigarettes Summary

INDUSTRY PERFORMANCE

Excise-Driven Price Increases Sustain Value Growth as Cigarette Volumes Continue to Decline
Winston Gains Momentum as Declining Smoking Prevalence Reshapes the Smoker Base
Cross-Format Consumption Continues to Erode Cigarette Consumption Intensity
Chart 16 - Volume Sales 2020-2030

WHAT'S NEXT?

Cigarettes Value Growth Is Set to Remain Price-Led as Cigarette Consumption Continues to Decline
Multi-Format Nicotine Portfolios Are Anticipated to Become Increasingly Important to Competitive Success
Stricter Tobacco Controls Are Projected to Reinforce Pressure on Cigarette Demand and Brand Differentiation
Chart 17 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Jti Strengthens Its Lead as Winston Overtakes Marlboro
Value Positioning and Portfolio Adaptation Support Competitive Gains
Chart 18 - Company Shares 2025
Chart 19 - Brand Shares 2025

CHANNELS

Tobacco Specialists Retain Their Central Role in a Tightly Regulated Retail Environment
Regulation Continues to Limit the Role of Digital Retail in Cigarette Distribution
Chart 20 - Retail Channels 2020-2025

TAXATION AND PRICING

Taxation Rates
Average Cigarette Pack Price Breakdown
Chart 21 - Cigarette Price Band Definitions

ECONOMIC CONTEXT

Chart 22 - Economic Context for Cigarettes
Chart 23 - Real Gdp Growth 2020-2030

Chart 24 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 25 - Consumer Context for Cigarettes

Chart 26 - Population 2020-2030

Chart 27 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigars, Cigarillos and Smoking Tobacco in Spain](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigars, Cigarillos and Smoking Tobacco Summary

INDUSTRY PERFORMANCE

Volume Contraction across All Categories Reflects Declining Smoking Rates and Rising Consumption Costs

Declining Smoking Prevalence Shifts Cigar Demand Towards Occasional Premium Consumption

Pursuit of Value Strengthens Demand for Cost-Efficient Formats

Chart 28 - Volume Sales 2020-2030

Chart 29 - Volume Sales by Category 2025

WHAT'S NEXT?

Value Formats Are Set to Capture an Increasing Share of Remaining Demand

Tobacco Control Measures Are Anticipated to Reduce Habitual Consumption Opportunities

Market Polarisation Is Projected to Strengthen as Mid-Priced Positions Erode

Chart 30 - Forecast Volume Sales 2020-2030

Chart 31 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Consumer Polarisation Reshapes Competition in a Moderately Concentrated Market

Chart 32 - Company Shares 2025

Chart 33 - Brand Shares 2025

CHANNELS

Food, Drink and Tobacco Specialists Remain Central to Distribution as Alternative Channels Play a Limited Role

ECONOMIC CONTEXT

Chart 34 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 35 - Real Gdp Growth 2020-2030

Chart 36 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 37 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 38 - Population 2020-2030

Chart 39 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Spain](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Alternative Nicotine Formats Continued to Gain Momentum as Consumers Shifted Away From Traditional Tobacco

Cross-Format Use Gathered Pace as Nicotine Pouches Gained Traction Alongside Vaping and Heated Tobacco

Regulatory Tightening Reshaped Innovation and Product Strategies across Alternative Nicotine Formats

Chart 40 - Volume Sales 2020-2030

Chart 41 - Volume Sales by Category 2025

WHAT'S NEXT?

Regulation Set to Narrow Product Choice and Redirect Innovation Towards Compliant Nicotine Formats

Multi-Format Nicotine Use Expected to Strengthen the Advantage of Diversified Portfolios

Device Personalisation and Sustainable Design Projected to Shape Future Product Development

Chart 42 - Forecast Volume Sales 2020-2030

Chart 43 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Philip Morris Spain Retained Category Leadership as Concentration Increased

Multi-Format Portfolios Strengthened Competitive Positioning

Chart 44 - Company Shares 2025

Chart 45 - Brand Shares 2025

CHANNELS

Specialist Retail Channels Maintained Their Lead as Online Sales Gained Traction

E-Commerce Attracts Value-Seeking Buyers but Remains Niche

ECONOMIC CONTEXT

Chart 46 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 47 - Real Gdp Growth 2020-2030

Chart 48 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 49 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 50 - Population 2020-2030

Chart 51 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/nicotine-in-spain/report.