Euromonitor International

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

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

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

INDUSTRY PERFORMANCE

Pharmacies and Illicit Sellers Reshape Vape Supply after New Tga Rules
Open Vaping System Demand Shifts to Illicit Channels as Legal Options Shrink
Therapeutic Approvals Boost Compliant Brands as Illicit Trade Expands
Chart 2 - Volume Sales 2020-2030

WHAT'S NEXT?

Pharmacies and Specialty Retailers to Secure Demand for Compliant Nicotine Products
E-Vapour Products to Sustain Leadership as Legal Options Narrow
Tight Compliance to Drive Channel Partnerships and Limit Innovation
Chart 3 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Therapeutic Approvals and Black Market Reshape Brand Dominance

ECONOMIC CONTEXT

Chart 4 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco
Chart 5 - Real Gdp Growth 2020-2030
Chart 6 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 7 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco
Chart 8 - Population 2020-2030
Chart 9 - Population by Generation 2025

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Nicotine in Australia - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 10 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

The Collapse of Legal Cigarette Volumes under Heavy Taxation
Black Market Expansion Fuelled by Extreme Price Disparities
Younger Adults Pivot to E-Vapour Products Despite Retail Bans
Chart 11 - Volume Sales 2020-2030
Chart 12 - Volume Sales by Category 2025

WHAT'S NEXT?

Pharmacy Partnerships to Reshape Nicotine Access and Compliance Requirements
Illicit Trade to Persist as Vaping Gains Further Momentum among Younger Adults

Chart 13 - What's Next? for Nicotine
Rising Consumer Spend Sustains Nicotine Despite Regulatory Headwinds
Chart 14 - Forecast Volume Sales 2020-2030
Chart 15 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Imperial Tobacco Gains Ground as Legal Volumes Collapse
Regulatory-Driven Launches Redefine Nicotine Access and Compliance
Chart 16 - Company Shares 2025
Chart 17 - Brand Shares 2025

CHANNELS

Supermarkets Dominates Cigarette Distribution Despite Pressure From Illicit Access via Specialists
Pharmacy Collaborations Drive Shift in Nicotine Access Strategies
Online Sales Remain Marginal as Regulation Limits E-Commerce Growth

PRODUCTS

Adapting to Stringent Compliance and the Pursuit of Extended Utility
The Rise of Clinical Formulations and Advanced Hardware
Strategic Pivots Towards Healthcare Distribution Networks

OPERATING ENVIRONMENT

Legislation
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

ECONOMIC CONTEXT

Chart 18 - Economic Context for Nicotine
Chart 19 - Real Gdp Growth 2020-2030
Chart 20 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 21 - Consumer Context for Nicotine
Chart 22 - Population 2020-2030
Chart 23 - Population by Generation 2025

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