

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

June 2023

Table of Contents

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Dynamic growth enjoyed by heated tobacco  
Imperial Tobacco Polska enters heated tobacco  
Tobacco-free nicotine gain appeal

#### PROSPECTS AND OPPORTUNITIES

Shift to alternative tobacco will disrupt overall tobacco category  
Strong growth prospects in heated tobacco  
E-vapour products holds strong potential

#### 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 Poland - 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  
Health warnings  
Plain packaging  
Point-of-sale display bans  
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-](http://www.euromonitor.com/smokeless-tobacco-e-vapour-products-and-)

