



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

August 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Tobacco Free Oral Nicotine Continues to Drive Category Growth

Declining Smoking Prevalence Accelerates Adoption of Smoke-Free Nicotine Products

Regulatory Divergence Strengthens the Position of Tobacco Free Oral Nicotine

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Nicotine Pouches Are Expected to Drive Category Growth through Wider Accessibility and Local Production

Digital Retail Is Expected to Expand Category Access beyond Major Urban Centres

Regulatory Change Is Expected to Favour Established Players and Reshape Competition

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Brand Leadership Remains Firmly Established across Key Nicotine Formats

Brand Equity, Distribution Strength and Category Investment Reinforce Competitive Advantages

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Traditional Retail Leads Smokeless Tobacco While Specialist Nicotine Retailers Drive Alternative Nicotine Distribution

Digital Retail Broadens Access to Vaping Products and Nicotine Alternatives

ECONOMIC CONTEXT

Chart 7 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 10 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 11 - Population 2020-2030

Chart 12 - Population by Generation 2025

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[Nicotine in Pakistan - Industry Overview](#)

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 13 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

Cigarette Contraction Continues to Outweigh Strong Growth in Alternative Nicotine Formats

Declining Smoking Prevalence Continues to Erode the Traditional Cigarette Consumer Base
Alternative Nicotine Products Gain Momentum as Consumers Seek Modern and Affordable Alternatives
Chart 14 - Volume Sales 2020-2030
Chart 15 - Volume Sales by Category 2025

WHAT'S NEXT?

Nicotine Volumes Are Projected to Recover as Alternative Formats Offset Cigarette Decline
Alternative Nicotine Formats Are Set to Drive Category Expansion beyond Major Urban Centres
Regulatory Developments Are Anticipated to Strengthen the Position of Compliant Market Leaders
Chart 16 - Analyst Insight for Nicotine
Chart 17 - Forecast Volume Sales 2020-2030
Chart 18 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Pakistan Tobacco Co Ltd Maintains Leadership as Value Brands and Smoke-Free Formats Strengthen Their Position
Portfolio Adaptation and Value Positioning Support Share Gains
Chart 19 - Company Shares 2025
Chart 20 - Brand Shares 2025

CHANNELS

Affordability and Accessibility Sustain the Dominance of Traditional Nicotine Retail
Digital Retail and Specialist Vape Stores Broaden Access to Alternative Nicotine Products

PRODUCTS

Portfolio Diversification and Export Ambitions Reshape Product Innovation
Omni, Velo and Iqos Illustrate Evolving Approaches to Category Development
Compliance and Portfolio Breadth Strengthen Competitive Advantage

OPERATING ENVIRONMENT

Legislation
Chart 21 - 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 22 - Economic Context for Nicotine
Chart 23 - Real Gdp Growth 2020-2030
Chart 24 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 25 - Consumer Context for Nicotine
Chart 26 - Population 2020-2030

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