

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

June 2023

Table of Contents

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

KEY DATA FINDINGS

2022 DEVELOPMENTS

Single-use vapour products gain ground thanks to their convenience, low cost and wide availability Smokeless tobacco continues to decline Heated tobacco remains immature with potential for growth

PROSPECTS AND OPPORTUNITIES

Rising health awareness and convenience drive e-vapour growth Potential growth of illicit e-vapour and heated tobacco products Specialist vape stores will continue to have an advantage over convenience stores

CATEGORY INDICATORS

Table 1 - Number of Adult Vapers 2017-2022

CATEGORY DATA

Table 2 - Sales of Smokeless Tobacco by Category: Volume 2017-2022 Table 3 - Sales of Smokeless Tobacco by Category: % Volume Growth 2017-2022 Table 4 - Sales of Tobacco Heating Devices: Volume 2017-2022 Table 5 - Sales of Tobacco Heating Devices: % Volume Growth 2017-2022 Table 6 - Sales of Heated Tobacco: Volume 2017-2022 Table 7 - Sales of Heated Tobacco: % Volume Growth 2017-2022 Table 8 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022 Table 9 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022 Table 10 - Sales of E-Liquids by Nicotine Strength: % Value 2019-2022 Table 11 - NBO Company Shares of Smokeless Tobacco: % Volume 2018-2022 Table 12 - LBN Brand Shares of Smokeless Tobacco: % Volume 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 - Distribution of Smokeless Tobacco by Format: % Volume 2017-2022 Table 20 - Distribution of E-Vapour Products by Format: % Value 2017-2022 Table 21 - Forecast Sales of Smokeless Tobacco by Category: Volume 2022-2027 Table 22 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2022-2027 Table 23 - Forecast Sales of Heated Tobacco: Volume 2022-2027 Table 24 - Forecast Sales of Heated Tobacco: % Volume Growth 2022-2027 Table 25 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027 Table 26 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2022-2027

Tobacco in Canada - 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 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

MARKET INDICATORS

Table 27 - Number of Adult Smokers by Gender 2017-2022

MARKET DATA

Table 28 - Sales of Tobacco by Category: Volume 2017-2022Table 29 - Sales of Tobacco by Category: Value 2017-2022Table 30 - Sales of Tobacco by Category: % Volume Growth 2017-2022Table 31 - Sales of Tobacco by Category: % Value Growth 2017-2022Table 32 - Forecast Sales of Tobacco by Category: Volume 2022-2027Table 33 - Forecast Sales of Tobacco by Category: Value 2022-2027Table 34 - Forecast Sales of Tobacco by Category: % Volume Growth 2022-2027Table 35 - 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-canada/report.