



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

September 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Alternative Nicotine Products Drive Strong Category Growth as Heated Tobacco Growth Moderates

Cross-Format Nicotine Use Broadens the Consumer Base as Younger Adults Adopt E-Vapour Products and Nicotine Pouches

Regulation and Value Positioning Reshape Innovation as Manufacturers Prepare for the Single-Use Vape Ban

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Heated Tobacco Is Projected to Strengthen Its Position as New Entrants Broaden Consumer Choice

E-Vapour Growth Is Projected to Slow as the Single-Use Ban Redirects Demand Towards Rechargeable Systems

Nicotine Pouches Are Projected to Sustain Strong Growth Despite Tighter Regulation

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

British American Tobacco and Shenzhen Weiboli and Gain Share through Vaping and Nicotine Pouches

Growth in Vaping and Nicotine Pouches Continues to Concentrate Market Share

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Trafiken Retailers Remain Dominant While Specialist Vape Stores Retain a Distinct Role

E-Commerce Remains Constrained by Austria's Regulatory Framework

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 - Consumer Expenditure 2020-2030

Chart 13 - Population by Generation 2025

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[Nicotine in Austria - Industry Overview](#)

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Alternative Nicotine Products Offset Declines in Traditional Tobacco as Consumers Migrate across Formats

Cross-Format Nicotine Use Accelerates as Manufacturers Target Entry-Level Consumers and Dual Users

Tightening Regulation Accelerates the Shift Towards Rechargeable Vaping Systems

Chart 14 - Volume Sales 2020-2030

Chart 15 - Volume Sales by Category 2025

WHAT'S NEXT?

Alternative Nicotine Products Are Projected to Accelerate the Decline of Combustible Tobacco

E-Vapour Growth Is Expected to Slow as Regulation Reshapes Distribution and Product Development

Heated Tobacco and Nicotine Pouches Are Projected to Expand Despite Tighter Regulation

Chart 16 - Forecast Volume Sales 2020-2030

Chart 17 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Philip Morris Strengthens Its Lead through Leadership in Cigarettes and Heated Tobacco

Regulatory Barriers and Brand Strength Reinforce Competitive Advantages

Chart 18 - Company Shares 2025

Chart 19 - Brand Shares 2025

CHANNELS

State Control Continues to Concentrate Nicotine Sales within the Trafiken Network

New Distribution Rules Are Set to Further Strengthen the State-Controlled Retail Network

E-Commerce Remains Constrained by Austria's Regulatory Framework

OPERATING ENVIRONMENT

Legislation

Legislative Overview

Chart 20 - 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 21 - Economic Context for Nicotine

Chart 22 - Real Gdp Growth 2020-2030

Chart 23 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 24 - Consumer Context for Nicotine

Chart 25 - Population 2020-2030

Chart 26 - Population by Generation 2025

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