



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

August 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Growth Remains Steady Despite Excise Tax and Vat Hikes

Disposable Menthol E-Vapour Products Drive Sales Resilience

Philip Morris Leverages Regulatory Gaps to Consolidate Heated Tobacco Gains

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Tobacco Free Oral Nicotine Accelerates as E-Vapour Retains Lead

New Entrants and Regulatory Shifts Redefine Nicotine Alternatives

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Nicorex Baltic OÜ Expands Menthol Vape Range to Strengthen Lead

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Grocery Retailers Capture Heated Tobacco Sales as Specialised Stores Decline

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

COUNTRY REPORTS DISCLAIMER

[Nicotine in Estonia - Industry Overview](#)

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Tax Increases Drive Value up as Volume Declines

Heated Tobacco and E-Vapour Gain Ground as Cigarettes Lose Share

Illicit Trade Rebounds as Tax Hikes Shift Consumer Choices

Chart 13 - Volume Sales 2020-2030

Chart 14 - Volume Sales by Category 2025

WHAT'S NEXT?

Flavour Bans and New Rivals Shift Consumer Choices in Alternatives

New Companies Fuel Rivalry as Traditional Products Retreat

Chart 15 - Forecast Volume Sales 2020-2030

Chart 16 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Top Players Intensify Rivalry as Alternative Products Gain Traction

Chart 17 - Company Shares 2025

Chart 18 - Brand Shares 2025

CHANNELS

Grocery Retailers Capture Nearly All Sales as Online Faces Legal Barriers

OPERATING ENVIRONMENT

Legislation

Chart 19 - 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 20 - Economic Context for Nicotine

Chart 21 - Real Gdp Growth 2020-2030

Chart 22 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 23 - Consumer Context for Nicotine

Chart 24 - Population 2020-2030

Chart 25 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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-estonia/report.