Euromonitor International

Where Consumers Shop for Nicotine

August 2025

Table of Contents

WHERE CONSUMERS SHOP FOR NICOTINE

Key findings
Key facts to share
Coverage and definitions

STATE OF THE INDUSTRY

Volume growth for the total industry, with positive tailwinds
Regional dynamics fuelled by socioeconomic tensions
Geographic expansion is a key component of growth
Channel shifts: Retail offline vs retail e-commerce

OFFLINE RETAIL

Modernisation is the key element in offline retail
Industry distribution realigns slowly
Asymmetrical landscape of tobacco product distribution
Convenience retail benefits from industry transformation
Balancing modern, traditional and specialist retailers
Netherlands and Saudi Arabia limit channels for Nicotine
Belgium: Tobacco products can no longer be displayed at points of sale

RETAIL E-COMMERCE

Regulation and consumer demand shape e-commerce growth
E-commerce growth correlates with new product categories
HAYPP Group: Expanding Scandinavian success beyond home turf
Q-commerce and s-commerce are the next frontiers for nicotine distribution

CONCLUSION

Key findings
Distribution and product landscape will be linked in the medium term

APPENDIX

Nicotine data contains total nicotine volumes including e-vapour

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/where-consumers-shop-for-nicotine/report.