

Europe E-Cigarettes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Europe E-Cigarettes Market Analysis

The European e-cigarette market size was valued at USD 11.23 billion in 2025 and is projected to grow to USD 14.86 billion by 2030, registering a compound annual growth rate (CAGR) of 5.77%. This growth highlights the shift of vaping from being a niche alternative to becoming a widely accepted category, supported by endorsements from several public health authorities across Europe. The increasing demand is driven by factors such as harm-reduction evidence, improved product availability, and supportive regulations in countries like the United Kingdom and some Central and Eastern European nations. However, the market faces challenges, including inconsistent regulations across the European Union, higher excise taxes, and the proliferation of illegal disposable vaping products. These issues make it more complex for companies to navigate the market and emphasize the importance of adhering to strict compliance measures. The competition in the market is intensifying as established tobacco companies and emerging technology-driven players compete to stand out. Companies are focusing on innovations such as scientifically backed product claims, advanced coil technologies, and measures to prevent youth access to vaping products. The European e-cigarette market is moderately consolidated, with global tobacco giants, hardware innovators, and regional players competing for market share and shelf space.

Europe E-Cigarettes Market Trends and Insights

Increasing health consciousness and harm reduction awareness

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Health awareness and the growing focus on harm reduction are driving the increasing use of e-cigarettes across Europe. Consumers are moving away from traditional tobacco products and opting for less harmful alternatives. In the first quarter of 2025, Philip Morris International reported that 42% of its total revenue came from smoke-free products, with a strong presence in Europe. This growth was supported by the launch of products like IQOS Iluma in several EU markets in late 2024. Scandinavia, known for its low smoking rates, continues to set an example for effective and balanced tobacco regulation. In France, a 2024 survey conducted by Kumulus Vape, in collaboration with the French Institute of Public Opinion (IFOP), revealed that 83% of vapers experienced improved well-being and cost savings compared to smoking traditional cigarettes. Adding to this momentum, British American Tobacco introduced its Vuse Pro in early 2025 across several European countries.

Public health campaigns and awareness programs

Governments across Europe are increasingly supporting vaping as a safer alternative to help adults quit smoking, while also taking steps to prevent its misuse among young people. The WHO European Region has the highest adult smoking rate globally, at 28%, which highlights the need for effective alternatives. To address this, the UK government launched the "Swap to Stop" program in 2023, providing one million adult smokers with free vape starter kits and behavioral support. The Government of the UK reports that vaping helps an additional 50,000-70,000 people quit smoking each year. Among exclusive vapers, this confidence rises to 85%, showing growing trust in vaping as a solution. However, youth experimentation with vaping is also increasing. For example, in England, 1 in 4 teens aged 11-15 have tried vaping, which highlights the need for better education and awareness, according to the National Health Service (NHS), England, as of 2024. Moving forward, public health campaigns must focus on clear messaging emphasizing vaping's benefits for adult smokers while educating young people about its appropriate use.

Availability of illegal and unauthorized products

The increasing availability of illegal and unauthorized vaping products is creating significant challenges for the regulated vaping market in Europe, both financially and in terms of public health. Major manufacturers are feeling the strain. For example, British American Tobacco highlighted in its 2024 earnings call that the rise of illicit single-use vapes has been a major factor in declining sales volumes. The company pointed out that weak enforcement is shifting consumer demand to the illegal market rather than reducing overall consumption. Regulatory measures, such as flavor bans, can unintentionally worsen this issue. In Quebec, for instance, flavor restrictions led to a noticeable increase in illegal sales as consumers sought alternatives outside the legal market. This situation highlights the need for stronger and more coordinated enforcement efforts. Customs agencies, trading standards authorities, and e-commerce platforms must work together to close enforcement gaps. Without such collaboration, regulatory goals may remain unachieved, and the illegal market will continue to grow.

Other drivers and restraints analyzed in the detailed report include:

Supportive regulatory stances in key markets / Availability and diversity of flavors / Youth vaping concerns and related restrictions /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2024, devices dominated the European e-cigarette market, making up 85.28% of total sales. Their allure lies in features like temperature control and biometric locking, offering long-term value to a diverse consumer base. These customizable features cater to both novice and experienced users, enhancing the overall vaping experience. Meanwhile, e-liquids surged with a 5.33% CAGR, fueled by the rising trend of refillable vaping systems, especially as regulations clamp down on disposables. The shift toward refillable systems not only aligns with sustainability goals but also provides consumers with a wider variety of flavors and

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nicotine strengths. Projections for 2030 indicate that while device revenue will stay above USD 12 billion, e-liquids will play a pivotal role in bolstering customer retention and lifetime value for businesses.

Technological strides, including enhanced power chips, quick-charge batteries, and leak-proof pods, have lengthened the lifespan of vaping devices, curbing the frequency of replacements. These advancements not only improve device reliability but also enhance user convenience, making vaping more accessible and appealing. Yet, this evolution has paved the way for firms to pivot towards higher-margin accessories and premium components, such as advanced coils. Brands delving into modular systems stand to gain from both hardware sales and the recurring revenue stream from e-liquid purchases. However, they face the intricate challenge of regulatory compliance, as any design updates under the Tobacco Products Directive necessitate re-certification, complicating operations and inflating costs.

In 2024, closed pods captured a dominant 76.83% share of the revenue, underscoring their widespread appeal, thanks to their user-friendly nature and reliable performance. These systems have taken the lead in Europe's e-cigarette landscape, catering to users who favor the convenience of pre-filled cartridges. With the integration of cartridge-lock technology, closed-pod systems not only safeguard the quality of e-liquids but also thwart unauthorized refills. This safeguard has gained prominence amid heightened regulatory scrutiny, especially in light of flavor bans reshaping the market. The blend of convenience and dependability has cemented closed pods as a top choice for consumers, reinforcing their status as a primary revenue generator.

Conversely, open tanks are carving out a niche, especially among seasoned users who value cost-effectiveness and flavor customization. With a growth rate of 5.25% CAGR, these systems resonate with a more discerning market segment. Open tanks empower users to refill with diverse e-liquids, enhancing flexibility and personalizing the vaping journey. In response to this trend, leading brands are broadening their offerings, introducing open-system devices to complement their established closed pods. A case in point is Hangsen, whose BAR range of salt-nicotine e-liquids is tailored for refillable pods, nudging users towards sustainable choices over disposable ones.

The E-Cigarettes Market Report is Segmented by Product Type (E-Cigarette Device and E-Liquid), Category (Open Vaping Systems and Closed Vaping Systems), End User (Men and Women), Distribution Channel (Offline Stores and Online Stores), and Geography (United Kingdom, Germany, Italy, France, Spain, Netherlands, Poland, Belgium, Sweden, and Rest of Europe). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

British American Tobacco PLC / Philip Morris International, Inc. / Imperial Tobacco Group plc / Japan Tobacco International / Altria Group, Inc. / JUUL Labs, Inc. / Shenzhen Imiracle / Smoore International / Innokin Technology Ltd. / Aspire Global (Eigate) / Shenzhen Geekvape Technology Co., Ltd / Dinner Lady Ltd. / Xyfil Ltd. / Totally Wicked Group / Gaiatrend / Vaptio / NextGEN360 Ltd / RELX Technology Co Ltd / Stlth Vape Inc / Shenzhen Joye Technology Co.Ltd /

Additional Benefits:

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