

## **Middle East And Africa E-Cigarettes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Middle East And Africa E-Cigarettes Market Analysis

The Middle East and Africa e-cigarette market is expected to grow from USD 162.29 million in 2025 to USD 190.37 million in 2026 and is forecast to reach USD 423.27 million by 2031 at 17.31% CAGR over 2026-2031. Driven by diverse tobacco-control policies, heightened health awareness, and a pivot to lower-risk nicotine products, the region witnesses a robust double-digit growth. In the Gulf Cooperation Council (GCC) countries, clear regulations, swift flavor innovations, and the allure of high-puff disposables draw in new adult users. Meanwhile, premium product positioning aids in counterbalancing significant excise taxes. Across Africa, however, the landscape is more fragmented. Stricter enforcement on youth access and growing environmental concerns over single-use devices are reshaping strategies for both global and regional players. Companies that swiftly adapt to compliance, innovate in sustainable design, and boast a broad distribution reach stand to gain in this evolving market.

Middle East And Africa E-Cigarettes Market Trends and Insights

Rapid shift toward high-puff disposable vapes

In the Middle East and Africa, the e-cigarette market is witnessing a surge in the adoption of high-puff disposable devices. This shift is not only altering consumer behavior but also changing distribution strategies. As manufacturers navigate this trend, they're feeling the pinch in their supply chains. They grapple with the need to balance production capacity against the backdrop of regulatory compliance. This is especially pronounced in markets like Egypt, where a 14% VAT, specifically targeting disposable

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e-cigarettes, adds another layer of complexity, as highlighted by OKK Vapes. However, the pivot towards disposable e-cigarettes isn't without its challenges. These devices produce a notably higher waste output per nicotine delivery unit than their refillable counterparts, raising significant environmental concerns. In response, industry players are pivoting towards biodegradable materials and are championing recycling programs. Yet, they are keen on preserving the convenience that has fueled the rapid consumer adoption of these products. Adding to the complexities, the Emirates Authority for Standardisation and Metrology mandates thorough product certification for these disposable devices. This requirement acts as a gatekeeper, creating hurdles that predominantly benefit established players, armed with both regulatory know-how and the necessary financial clout.

#### Growing health consciousness and smoking cessation

In the Middle East and Africa, health consciousness is driving the market, with many consumers viewing e-cigarettes as tools for harm reduction, despite mixed scientific evidence and regulatory warnings. Data from the WHO's Eastern Mediterranean Regional Office indicate that in 2022, 92.5 million adults, or 19% of the region's population, used tobacco products. This statistic underscores a significant market for cessation products, as highlighted by the World Health Organization. Yet, research from sub-Saharan Africa contests the harm reduction narrative. It suggests that, due to limited healthcare infrastructure and patterns of dual use, e-cigarettes may not be effective cessation tools and could even heighten overall nicotine dependence, as reported by Tobacco Control. In December 2023, the Saudi Public Investment Fund launched Badael Company and its DZRT brand, signaling institutional acknowledgment of the cessation market's potential. By positioning nicotine alternatives as public health instruments rather than mere recreational items, they open up marketing avenues. However, this approach demands meticulous adherence to medical claims regulations and the WHO's Tobacco Control guidelines, which stress the importance of safeguarding public health policy from industry sway.

#### High production and operational costs

Market expansion in the Middle East and Africa faces significant constraints due to manufacturing and operational cost pressures, with smaller players and new entrants feeling the brunt. In the UAE, regulatory mandates require thorough product testing at ISO/IEC 17025 accredited labs. Conformity certification fees, as highlighted by Hangsen International Group, amount to AED 1,760 (USD 480) per SKU. This is in addition to costs for RoHS compliance and annual renewals. These compliance costs are further exacerbated by excise taxes. Notably, GCC countries levy a hefty 100% excise tax on electronic smoking devices, on top of standard VAT rates that vary between 5% and 15%. International manufacturers grapple with rising operational costs and complex inventory management, especially after disruptions like the Red Sea shipping delays in the first half of 2024. Such cost challenges hit price-sensitive consumers the hardest, curtailing market penetration in lower-income groups. However, this scenario opens doors for local manufacturers, who, due to their proximity to key markets and lighter regulatory burdens, can carve out cost advantages.

Other drivers and restraints analyzed in the detailed report include:

Youth-oriented flavour innovation driving trial Customizable nicotine levels Growing anti-disposable environmental campaigns

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

#### Segment Analysis

In 2025, e-cigarette devices captured a commanding 75.86% share of the market, underscoring a consumer tilt towards integrated hardware solutions. This trend is further bolstered by regulatory frameworks, particularly in the UAE, where the Emirates Authority for Standardisation and Metrology mandates distinct conformity certificates for both hardware and e-liquids. Such regulations bestow a competitive edge upon manufacturers adept at bundling compliance across these categories, a

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sentiment echoed by Hangsen International Group. Within the e-cigarette realm, disposable devices reign supreme, largely due to their convenience and allure to younger demographics. Yet, a 14% VAT in Egypt, specifically targeting these disposables, hints at potential market recalibrations, as noted by OKK Vapes. Meanwhile, non-disposable devices are carving out a niche, appealing to both budget-conscious consumers and environmental advocates. This shift is further fueled by technological advancements, like the induction heating and smartphone connectivity features of Philip Morris International's IQOS ILUMA i.

E-liquids are on a rapid ascent, boasting an 18.26% CAGR projected through 2031. This surge is largely attributed to innovative flavors and customizable nicotine levels that resonate with a broad spectrum of consumers. Regulatory frameworks, such as the UAE's adherence to European Pharmacopoeia standards and GSO flavor regulations, bolster the segment by ensuring quality benchmarks, as highlighted by Hangsen International Group. Yet, challenges loom. Flavor restrictions in GCC states, which prohibit specific named additives, not only complicate the market landscape but also amplify the demand for flavor accessories. These accessories cleverly sidestep direct restrictions while still captivating consumers. Additionally, the e-liquid segment's growth trajectory is tempered by regulations on container sizes - with the UAE capping tanks at 10ml and refill packages at 50ml - a limitation that significantly shapes packaging strategies and consumer buying behaviors.

In 2025, closed vaping systems commanded a dominant 68.10% market share, underscoring a clear consumer preference for their simplicity and the manufacturers' comprehensive control over the user experience. These systems not only cater to consumer desires but also align with regulatory mandates, ensuring controlled nicotine delivery and minimizing the risk of tampering. This alignment is crucial for adhering to stringent nicotine concentration limits, such as the 20 mg/ml cap set in markets like the UAE, as highlighted by Hangsen International Group. Furthermore, closed systems bolster brand loyalty through their proprietary cartridge ecosystems. However, this strategy is under the regulatory microscope, raising questions about consumer choice and market competition. Technological advancements, such as authentication systems, play a pivotal role in this segment, preventing counterfeit cartridge usage and ensuring quality control throughout the user's journey.

Open vaping systems are rapidly gaining traction, boasting an impressive 18.56% CAGR projected through 2031. Their appeal lies in catering to enthusiasts who crave customization and cost savings through refillable designs. These systems resonate with seasoned users, emphasizing flavor diversity and precise nicotine strength control. This is further validated by the World Health Organization's data, showcasing a global palette of over 16,000 flavor options. However, open systems navigate a labyrinth of regulatory challenges, grappling with fluctuating nicotine concentrations and the intricacies of third-party e-liquid compatibility. This complexity underscores the need for robust compliance frameworks to guarantee product safety and quality. The segment's growth hinges on two pivotal factors: regulatory endorsement of user-customizable systems and the establishment of safety standards that mitigate misuse risks while championing consumer choice.

The Middle East and Africa E-Cigarette Market Report is Segmented by Product Type (E-Cigarettes Device, E-Liquid), Category (Open Vaping Systems, Closed Vaping Systems), End User (Men, Women), Distribution Channel (Offline Stores, Online Stores), and Geography (United Arab Emirates, Saudi Arabia, South Africa, Nigeria, Egypt, Morocco, Turkey, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

British American Tobacco (BAT) Philip Morris International (PMI) Japan Tobacco International (JTI) Imperial Brands Altria Group SMOORE International (ANDS partnership) Aspire Global Innokin Technology Shenzhen KangerTech Joyetech Group GeekVape Vapresso (Shenzhen SMISS) Uwell Technology RELX International Lost Vape Voofoo Technology Horizon Tech VIP Electronic Cigarettes Njoy, Inc. Eastern Tobacco Company (ETC)

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