



Smokeless Tobacco, E-Vapour Products and Heated Tobacco in New Zealand

June 2024

Table of Contents

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cannibalisation of tobacco continues to drive growth of e-vapour and heated tobacco products

New Zealand among the world's biggest vaping nations according to the OECD

Single use vape ban introduced

PROSPECTS AND OPPORTUNITIES

Retail display restrictions being mooted

Heated tobacco products to remain niche

As inflationary pressures ease, unit price growth is expected to slow

CATEGORY INDICATORS

Table 1 - Number of Adult Vapers 2018-2023

CATEGORY DATA

Table 2 - Sales of Smokeless Tobacco by Category: Volume 2018-2023

Table 3 - Sales of Smokeless Tobacco by Category: % Volume Growth 2018-2023

Table 4 - Sales of E-Vapour Products by Category: Volume 2018-2023

Table 5 - Sales of E-Vapour Products by Category: % Volume Growth 2018-2023

Table 6 - Sales of Tobacco Heating Devices: Volume 2018-2023

Table 7 - Sales of Tobacco Heating Devices: % Volume Growth 2018-2023

Table 8 - Sales of Heated Tobacco: Volume 2018-2023

Table 9 - Sales of Heated Tobacco: % Volume Growth 2018-2023

Table 10 - Sales of Tobacco Free Oral Nicotine: Volume 2018-2023

Table 11 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2018-2023

Table 12 - Sales of Tobacco Free Oral Nicotine by Category: Value 2018-2023

Table 13 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2018-2023

Table 14 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2018-2023

Table 15 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2018-2023

Table 16 - Sales of E-Liquids by Nicotine Strength: % Value 2020-2023

Table 17 - NBO Company Shares of Smokeless Tobacco: % Volume 2019-2023

Table 18 - LBN Brand Shares of Smokeless Tobacco: % Volume 2020-2023

Table 19 - NBO Company Shares of E-Vapour Products: % Value 2019-2023

Table 20 - LBN Brand Shares of E-Vapour Products: % Value 2020-2023

Table 21 - NBO Company Shares of Tobacco Heating Devices: % Volume 2019-2023

Table 22 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2020-2023

Table 23 - NBO Company Shares of Heated Tobacco: % Volume 2019-2023

Table 24 - LBN Brand Shares of Heated Tobacco: % Volume 2020-2023

Table 25 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2019-2023

Table 26 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2020-2023

Table 27 - Distribution of Smokeless Tobacco by Format: % Volume 2018-2023

Table 28 - Distribution of E-Vapour Products by Format: % Value 2018-2023

Table 29 - Distribution of Tobacco Heating Devices by Format: % Volume 2018-2023

Table 30 - Distribution of Heated Tobacco by Format: % Volume 2018-2023

Table 31 - Forecast Sales of Smokeless Tobacco by Category: Volume 2023-2028

Table 32 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2023-2028

Table 33 - Forecast Sales of E-Vapour Products by Category: Volume 2023-2028

Table 34 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Tobacco Heating Devices: Volume 2023-2028

Table 36 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2023-2028

Table 37 - Forecast Sales of Heated Tobacco: Volume 2023-2028

Table 38 - Forecast Sales of Heated Tobacco: % Volume Growth 2023-2028

Table 39 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2023-2028

Table 40 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2023-2028

Table 41 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2023-2028

Table 42 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2023-2028

Table 43 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2023-2028

Table 44 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2023-2028

Tobacco in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Tobacco in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for tobacco?

OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 1 - Legislation Summary at a Glance

Minimum legal smoking age

Smoking prevalence

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Flavoured tobacco product ban

Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

Table 45 - Number of Adult Smokers by Gender 2018-2023

MARKET DATA

Table 46 - Sales of Tobacco by Category: Volume 2018-2023

Table 47 - Sales of Tobacco by Category: Value 2018-2023

Table 48 - Sales of Tobacco by Category: % Volume Growth 2018-2023

Table 49 - Sales of Tobacco by Category: % Value Growth 2018-2023

Table 50 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 51 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 52 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 53 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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-new-zealand/report.