



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

July 2026

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Regulation and Enforcement Pressures Drive Steady Decline

Relx Introduces Accessible Entry-Level Devices to Lower Trial Barriers for Compliant Products

Relx's Tobacco Flavour Layering Drives Legal Channel Differentiation

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Leading Brands to Intensify Compliance and Consolidate Legal Sales

Hardware and Sensory Innovation Set to Drive Value Extraction From Existing Users

Illicit Sales to Persist but Enforcement Gradually Narrows Their Reach

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Rlx Strengthens Dominance through Compliance-Driven Consolidation and Modular Innovation

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Chart 6 - Brand Shares 2025

CHANNELS

Relx Advances Experiential Stores as Illicit Channels Undermine Independents

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CONSUMER CONTEXT

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2025 Developments

KEY DATA INSIGHTS

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Chart 20 - Brand Shares 2025

CHANNELS

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Smoking Prevalence

Tar Levels

Health Warnings

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Low Ignition Propensity (Lip) Cigarette Regulation

Flavoured Tobacco Product Ban

Reduced Harm

Vapour Products

PRODUCTION/IMPORTS/EXPORTS

ECONOMIC CONTEXT

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