



Euromonitor  
International

# Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Pakistan

August 2026

## KEY DATA INSIGHTS

### 2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

### INDUSTRY PERFORMANCE

Tobacco Free Oral Nicotine Continues to Drive Category Growth

Declining Smoking Prevalence Accelerates Adoption of Smoke-Free Nicotine Products

Regulatory Divergence Strengthens the Position of Tobacco Free Oral Nicotine

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

### WHAT'S NEXT?

Nicotine Pouches Are Expected to Drive Category Growth through Wider Accessibility and Local Production

Digital Retail Is Expected to Expand Category Access beyond Major Urban Centres

Regulatory Change Is Expected to Favour Established Players and Reshape Competition

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

### COMPETITIVE LANDSCAPE

Brand Leadership Remains Firmly Established across Key Nicotine Formats

Brand Equity, Distribution Strength and Category Investment Reinforce Competitive Advantages

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

### CHANNELS

Traditional Retail Leads Smokeless Tobacco While Specialist Nicotine Retailers Drive Alternative Nicotine Distribution

Digital Retail Broadens Access to Vaping Products and Nicotine Alternatives

### ECONOMIC CONTEXT

Chart 7 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

### CONSUMER CONTEXT

Chart 10 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 11 - Population 2020-2030

Chart 12 - Population by Generation 2025

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[Nicotine in Pakistan - Industry Overview](#)

### EXECUTIVE SUMMARY

2025 Developments

### KEY DATA INSIGHTS

### KEY INDUSTRY TRENDS

Chart 13 - Key Industry Trends for Nicotine

### INDUSTRY PERFORMANCE

Cigarette Contraction Continues to Outweigh Strong Growth in Alternative Nicotine Formats

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Alternative Nicotine Products Gain Momentum as Consumers Seek Modern and Affordable Alternatives  
Chart 14 - Volume Sales 2020-2030  
Chart 15 - Volume Sales by Category 2025

## WHAT'S NEXT?

Nicotine Volumes Are Projected to Recover as Alternative Formats Offset Cigarette Decline  
Alternative Nicotine Formats Are Set to Drive Category Expansion beyond Major Urban Centres  
Regulatory Developments Are Anticipated to Strengthen the Position of Compliant Market Leaders  
Chart 16 - Analyst Insight for Nicotine  
Chart 17 - Forecast Volume Sales 2020-2030  
Chart 18 - Forecast Volume Sales by Category 2025-2030

## COMPETITIVE LANDSCAPE

Pakistan Tobacco Co Ltd Maintains Leadership as Value Brands and Smoke-Free Formats Strengthen Their Position  
Portfolio Adaptation and Value Positioning Support Share Gains  
Chart 19 - Company Shares 2025  
Chart 20 - Brand Shares 2025

## CHANNELS

Affordability and Accessibility Sustain the Dominance of Traditional Nicotine Retail  
Digital Retail and Specialist Vape Stores Broaden Access to Alternative Nicotine Products

## PRODUCTS

Portfolio Diversification and Export Ambitions Reshape Product Innovation  
Omni, Velo and Iqos Illustrate Evolving Approaches to Category Development  
Compliance and Portfolio Breadth Strengthen Competitive Advantage

## OPERATING ENVIRONMENT

Legislation  
Chart 21 - Legislation Summary at a Glance  
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Smoking Prevalence  
Tar Levels  
Health Warnings  
Plain Packaging  
Advertising and Sponsorship  
Point-Of-Sale Display Bans  
Smoking in Public Places  
Low Ignition Propensity (Lip) Cigarette Regulation  
Flavoured Tobacco Product Ban  
Reduced Harm  
Vapour Products

## PRODUCTION/IMPORTS/EXPORTS

## ECONOMIC CONTEXT

Chart 22 - Economic Context for Nicotine  
Chart 23 - Real Gdp Growth 2020-2030  
Chart 24 - Inflation 2020-2030

## CONSUMER CONTEXT

Chart 25 - Consumer Context for Nicotine  
Chart 26 - Population 2020-2030

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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-pakistan/report](https://www.euromonitor.com/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-pakistan/report).