



Euromonitor  
International

# Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the Netherlands

July 2026

## KEY DATA INSIGHTS

### 2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

### INDUSTRY PERFORMANCE

Regulatory Pressures Drive Sharp Decline in Nicotine Products

Competition Shifts From Marketing to Product Experience

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

### WHAT'S NEXT?

Specialist Retail and Smoking Alternatives Support a Cautious Recovery

Compliance and Specialist Retail Become Critical Competitive Advantages

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

### COMPETITIVE LANDSCAPE

Ug Holland and British American Tobacco Expand as Regulations Shift Preferences

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

### CHANNELS

Specialist Retail Strengthens Its Dominance

Offline Distribution Remains the Only Route to Market

Chart 7 - Retail Channels 2020-2025

### ECONOMIC CONTEXT

Chart 8 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 9 - Real Gdp Growth 2020-2030

Chart 10 - Inflation 2020-2030

### CONSUMER CONTEXT

Chart 11 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 12 - Population 2020-2030

Chart 13 - Population by Generation 2025

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[Nicotine in the Netherlands - Industry Overview](#)

### EXECUTIVE SUMMARY

2025 Developments

## KEY DATA INSIGHTS

### INDUSTRY PERFORMANCE

Volado and Eleaf Drive Channel Shift as Regulation Tightens

Cigarettes Remain Largest as Alternatives Face Legal Constraints

Chart 14 - Volume Sales 2020-2030

Chart 15 - Volume Sales by Category 2025

### WHAT'S NEXT?

Specialist Shops Capture Value as Mainstream Channels Exit  
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Chart 16 - Forecast Volume Sales 2020-2030  
Chart 17 - Forecast Volume Sales by Category 2025-2030

## COMPETITIVE LANDSCAPE

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Chart 18 - Company Shares 2025  
Chart 19 - Brand Shares 2025

## CHANNELS

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Chart 20 - Retail Channels 2020-2025

## ECONOMIC CONTEXT

Chart 21 - Economic Context for Nicotine  
Chart 22 - Real Gdp Growth 2020-2030  
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## CONSUMER CONTEXT

Chart 24 - Consumer Context for Nicotine  
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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-the-netherlands/report](https://www.euromonitor.com/smokeless-tobacco-e-vapour-products-and-heated-tobacco-in-the-netherlands/report).