

# Where Consumers Shop for Nicotine

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#### WHERE CONSUMERS SHOP FOR NICOTINE

Key findings

Key facts to share

Coverage and definitions

### STATE OF THE INDUSTRY

Volume growth for the total industry, with positive tailwinds

Regional dynamics fuelled by socioeconomic tensions

Geographic expansion is a key component of growth

Channel shifts: Retail offline vs retail e-commerce

#### OFFLINE RETAIL

Modernisation is the key element in offline retail

Industry distribution realigns slowly

Asymmetrical landscape of tobacco product distribution

Convenience retail benefits from industry transformation

Balancing modern, traditional and specialist retailers

Netherlands and Saudi Arabia limit channels for Nicotine

Belgium: Tobacco products can no longer be displayed at points of sale

## RETAIL E-COMMERCE

Regulation and consumer demand shape e-commerce growth

E-commerce growth correlates with new product categories

HAYPP Group: Expanding Scandinavian success beyond home turf

Q-commerce and s-commerce are the next frontiers for nicotine distribution

## CONCLUSION

Key findings

Distribution and product landscape will be linked in the medium term

### **APPENDIX**

Nicotine data contains total nicotine volumes including e-vapour

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