

Vapor Products Market (E-vapor and Heat-not-Burn Devices) - Global Outlook and Forecast 2018-2023

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Abstracts

This market research report on the vapor products market offers an analysis about market size and forecast, market share, industry trends, growth drivers, and vendor analysis. The market study offers insights about segmentation in terms of products (cig-a-likes, closed tanks systems, VTMs, e-liquids, cartomizers, e-cigarette batteries, heat-not-burn (HnB) devices, tobacco sticks, and tobacco cartridges), and by distribution (retail and online), and by region (APAC, Europe, Latin America, MEA, and North America).

Vapor Products Market - Overview

The e-cigarette market is growing at a tremendous rate, thereby gaining popularity worldwide. Several key vendors are introducing next generation vapor products such as Heat-not -Burn (HnB) devices, e-vapor, smoke vapes, smokeless tobacco products, cig-a-likes, and reduced risk products (RRP) cigarettes due to the increasing popularity of e-cigarettes. The recent developments in the vapor products market are the introduction of vaping devices or battery-powered inhalers. These vaping products reduce the risk of tobacco-related diseases by eliminating the inhalation of tar and other toxicants by active and passive smokers. E-cigarettes/e-vapor and HnB devices are designed to simulate tobacco smoking by providing inhaled doses of e-juices through vaporizing the flavored liquid, which, in turn, will boost sales in the e-cigarette market.

About one billion people in the world fall under the category of tobacco smokers, constituting approximately 13% of the total world population. According to the WHO, around 7 million people die due to tobacco smoking annually, out of which 890,000 die due to passive smoking. The growing global health awareness and technological developments aiding safer smoking is driving the global vapor products (e-vapor and

heat-not-burn (HnB) devices) market and is expected to cross \$43 billion by 2023, growing at an impressive CAGR of over 15% over 2017–2023.

Vapor Products Market - Dynamics

Launch of new vapor product lines to contribute to the growth of the e-cigarette market globally

The perception of end-users toward e-vapor and HnB tobacco vapor products is changing worldwide. The vapor products market is witnessing an increase in desire among end-users globally to quit smoking because of the increasing number of deaths caused by smoking-related cancer, respiratory diseases, and heart diseases. These factors are primarily contributing to the decline of the global sales volume of traditional cigarettes over the last few years. This trend, coupled with continuous innovations in e-vapor and HnB devices, is prompting large tobacco companies such as Altria Group, Imperial Tobacco, Philip Morris International, and British American Tobacco to shift their focus toward the development of these products.

HnB Devices Market - Brief Analysis

The increasing demand and the potential growth of the vapor products market can be estimated through the case of Philip Morris. The company launched its first HnB device, iQOS, in Japan for pilot testing. Due to its high popularity, iQOS was launched nationwide in Japan in 2016 and became an immediate sensation in the HnB tobacco vapor market in Japan. As of November 2017, the penetration of iQOS in the Japanese tobacco market reached 11.9%. It also made its way into markets in 31 countries worldwide, with Japan being its largest market. According to Philip Morris, over 3.7 million consumers have already switched to iQOS globally.

Vapor Products Market Segmentation

This market research report includes a detailed segmentation of the market by products, by distribution channels, and by geography.

Vapor Products Market – By Products

Global vapor products (e-vapor and heat-not-burn (HnB) Devices) market expected to grow at a faster pace over the next few years

E-vapors or e-cigarettes are electronic nicotine delivery systems that heat liquid nicotine or flavored juices to create inhalable vapor. These devices are categorized into cig-a-likes, closed tanks systems, and open tanks systems. The availability of these products will boost the sale in the vapor products market.

HnB tobacco vapor systems heat tobacco instead of burning them. They are commonly cited as the next-generation products in the tobacco market and are segmented into direct and indirect heating devices and infused/hybrid systems, based on the way the nicotine is delivered to end-users. This product category also has an aftermarket consisting of products such as tobacco sticks, tobacco capsules, and tobacco cartridges.

Vapor Products Market – By Distribution Channels

Online sales to increase significantly due to availability of more choices to consumers than retail stores

E-vapor and HnB tobacco vapor products are mainly sold through retail distribution channels such as convenience stores, vape shops, tobacco shops, grocery shops, drug stores, and other retail outlets. These products are also available to end-users through online OEMs' e-commerce portals and online direct-to-consumer stores such as Amazon, eBay, Alibaba, and AliExpress. Retail sales constitute the bulk of the distribution model in the e-cigarette market.

Therefore, analysts at Arizton forecast online sales in the vapor products market to increase significantly during the next five years on account of more choices available online as compared to retail stores.

Vapor Products Market – By Geography

APAC expected to be the largest potential retail market by 2023

In 2017, North America was the largest e-vapor and HnB tobacco vapor product market globally. The popularity of vapor products in the US and Canada is increasing rapidly due to the easy availability of vapor products in vape shops and over the Internet. However, the FDA regulations pose a significant threat to the vaping industry in North America.

E-vapor and HnB devices are gaining popularity in many Asian countries such as China,

Japan, South Korea, and Malaysia. Driven by rapid urbanization, increasing per capita disposable income, availability of low-cost vapor products, advancements in vendor products technology, and increase in the number of smokers in the region. APAC is expected to be the largest potential retail market during the forecast period.

Europe, led by the UK, in spite of losing share to the rapidly growing market in North America during the forecast period, is expected to account for more than 30% of the market share by 2023.

The sales of e-vapor products are restricted in several countries in MEA and Latin America such as Saudi Arabia, Brazil, and Argentina.

Key Countries Profiled

The key countries profiled in the report are as following:

US

Canada

Australia

China

Japan

Malaysia

UK

Poland

France

Germany

Italy

Spain

Key Vendor Analysis

The competitive scenario in the global vapor products (e-vapor and heat-not-burn (HnB) Devices) market is currently intensifying with continual innovations and upgrades being the primary characteristics of the market. The vapor products market is highly fragmented with over 300 vendors that operate and sell e-cigarettes under different brand names across the world.

The major vendors in the global market are as following:

Altria Group

British American Tobacco

Imperial Brands

Japan Tobacco International

JUUL Labs

Philip Morris International

Other prominent vendors include Ballantyne Brands, CB Distributors, ECIG, Gamucci, Gilla, International Vapor Group, Johnson Creek, Joyetech Co, KangerTech, MCIG, Nicotek, NJOY, PAX Labs, RR Chemicals, Totally Wicked E-Liquid USA, Vape Holdings, Vapor Hub, VMR Products, VPR Brands, White Cloud, and XEO International.

KEY MARKET INSIGHTS INCLUDE

1. Analysis of the vapor products market provides market size and growth rate for the forecast period 2018–2023.
2. Comprehensive insights on current industry trends, trend forecasts, and growth drivers of vapor products market.
3. Latest analysis of market share, growth drivers, challenges, and investment opportunities
4. A complete overview of market segments and regional outlook of global vapor

products market

5. A detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage

Report Snapshot

Vapor products (E-vapor and Heat-not-Burn Devices) are battery-powered inhaler that simulates tobacco smoking. It is designed to provide inhaled doses of e-juices by vaporizing the flavored liquid, and then simulating the effects of smoking by vaporizing the liquid, which the user inhales and exhales. E-vapor devices, also known as e-vaping devices, personal vaporizers, or ENDS use a heating element to vaporize the flavored liquid

Report Scope

Historical Year: 2015-2016

Base Year: 2017

Forecast Year: 2018-2023

The report considers 2017 as the base year. All calculations involving quantitative data are based on the year 2017. The values represented in the report are actual values for 2017, whereas, the values are estimated for the 2018-2023 period.

Market Segmentation by Distribution Channel

Retail

Convenience Stores

Vape Shops

Tobacco Shops

Grocery Shops

Drug Shops

Others

Online

Market Segmentation by Product Category

E-Vapor

Cig-a-likes

Disposables

Rechargeable

Closed Tanks Systems

VTMs

E-Liquids

Pre-filled cartridges

Refill bottles

E-vapor aftermarket

Cartomizers

E-cigarette batteries

Heat-not-Burn (HnB) Tobacco Vapor Products

HnB Devices

HnB Tobacco Vapor Product Aftermarket

Market Segmentation by Geography

APAC

Australia

China

Japan

Malaysia

North America

US

Canada

Europe

France

Germany

Italy

Poland

Spain

UK

MEA

Latin America

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