

Heat Not Burn (HNB) Tobacco Market by Product (Devices, Consumables), Distribution Channel (Offline Stores, Online Stores), and Region 2024-2032

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Abstracts

The global heat not burn (HNB) tobacco market size reached US\$ 21.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 162.8 Billion by 2032, exhibiting a growth rate (CAGR) of 24.44% during 2024-2032. The cost-effectiveness of the product, wide availability through offline and online distribution channels, and the growing prevalence of diseases due to chewing tobacco and cigarettes represent some of the key factors driving the market.

Heat not burn (HNB) tobacco is an electronic device that contains tobacco. It heats tobacco without burning and creates an aerosol that the user inhales. It comprises a carbon tip wrapped in glass fibers that do not cause the product to create ash or burn down in size. It uses real tobacco, not flavored liquid nicotine, as compared to e-cigarettes. It allows users to experience the sensation of smoking a regular cigarette without inhaling combusted tobacco. HNB tobacco can help reduce the risk of tobacco-related harm for adult smokers who switch from combusted cigarettes. It delivers reduced toxicity, lowers levels of harmful chemicals, and causes minimal impact on lung or heart health as compared to regular cigarettes. As they assist in reducing oxidative stress, inflammation, and deoxyribonucleic acid (DNA) damage, the demand for HNB tobacco is rising across the globe.

Heat Not Burn (HNB) Tobacco Market Trends:

At present, the increasing demand for HNB tobacco products due to their low and effective pricing represents one of the key factors supporting the growth of the market. Besides this, there is a rise in the demand for HNB products on account of the growing consumption of tobacco products with minimal nicotine content among smokers. This, along with the increasing awareness among the masses about the harmful impacts of

smoking traditional cigarettes, is offering lucrative growth opportunities to industry investors. In addition, key market players are focusing on new marketing strategies to increase the sales of their products and highlight various benefits of using HNB tobacco products. They are also organizing advertising campaigns that encourage people to limit the habit of smoking cigarettes that rely on tobacco. Moreover, there is an increase in the demand for reduced risk products (RRPs) to minimize the dangerous side effects of burning tobacco. This, coupled with the growing prevalence of diseases due to chewing tobacco and cigarettes, is positively influencing the market. Apart from this, the wide availability of HNB tobacco products through offline and online distribution channels, along with the burgeoning e-commerce industry around the world, is propelling the growth of the market. Additionally, governing agencies of various countries are approving the sale of HNB tobacco products, which is strengthening the growth of the market.

Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global heat not burn (HNB) tobacco market, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on product and distribution channel.

Product Insights:

Devices

Direct/Indirect Heating

Hybrid/Infused

Consumables

Tobacco Capsules and Cartridges

Tobacco Sticks

The report has provided a detailed breakup and analysis of the heat not burn (HNB) tobacco market based on the product. This includes devices (direct/indirect heating and hybrid/infused) and consumables (tobacco capsules and cartridges and tobacco sticks). According to the report, devices (direct/indirect heating and hybrid/infused) represented the largest segment.

Distribution Channel Insights:

Offline Stores

Convenience Stores

Tobacco Shops
Grocery Shops
Drug Shops
Others
Online Stores

A detailed breakup and analysis of the heat not burn (HNB) tobacco market based on the distribution channel has also been provided in the report. This includes offline stores (convenience stores, tobacco shops, grocery shops, drug shops, and others) and online stores. According to the report, offline stores (convenience stores, tobacco shops, grocery shops, drug shops, and others) accounted for the largest market share.

Regional Insights:

North America
United States
Canada
Asia Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific was the largest market for heat not burn (HNB) tobacco. Some of the factors driving the Asia Pacific heat not burn (HNB) tobacco market included the growing consumption of IQOS brand heat-not-burn devices, rising number of smokers, inflating income levels of individuals, etc.

Competitive Landscape:

The report has also provided a comprehensive analysis of the competitive landscape in the global heat not burn (HNB) tobacco market. Competitive analysis such as market structure, market share by key players, player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. Some of the companies covered include British American Tobacco plc, HiTaste, Imperial Brands PLC, Japan Tobacco Inc., Philip Morris International Inc., Shenzhen Royal Tobacco Industrial Limited, etc.

Key Questions Answered in This Report:

How has the global heat not burn (HNB) tobacco market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global heat not burn (HNB) tobacco market?

What is the impact of each driver, restraint, and opportunity on the global heat not burn (HNB) tobacco market?

What are the key regional markets?

Which countries represent the most attractive heat not burn (HNB) tobacco market?

What is the breakup of the market based on the product?

Which is the most attractive product in the heat not burn (HNB) tobacco market?

What is the breakup of the market based on the distribution channel?

Which is the most attractive distribution channel in the heat not burn (HNB) tobacco market?

What is the competitive structure of the global heat not burn (HNB) tobacco market?

Who are the key players/companies in the global heat not burn (HNB) tobacco market?

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