

# Heat Not Burn (HNB) Tobacco Market by Product (Devices, Consumables), Distribution Channel (Offline Stores, Online Stores), and Region 2025-2033

<https://marketpublishers.com/r/H2BEE38CD3C8EN.html>

Date: March 2025

Pages: 142

Price: US\$ 2,999.00 (Single User License)

ID: H2BEE38CD3C8EN

## Abstracts

The global heat not burn (HNB) tobacco market size reached USD 26.8 Billion in 2024. Looking forward, IMARC Group expects the market to reach USD 178.7 Billion by 2033, exhibiting a growth rate (CAGR) of 23.47% during 2025-2033. 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 2025-2033. 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?

## Contents

### **1 PREFACE**

### **2 SCOPE AND METHODOLOGY**

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
  - 2.3.1 Primary Sources
  - 2.3.2 Secondary Sources
- 2.4 Market Estimation
  - 2.4.1 Bottom-Up Approach
  - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

### **3 EXECUTIVE SUMMARY**

### **4 INTRODUCTION**

- 4.1 Overview
- 4.2 Key Industry Trends

### **5 GLOBAL HEAT NOT BURN (HNB) TOBACCO MARKET**

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

### **6 MARKET BREAKUP BY PRODUCT**

- 6.1 Devices
  - 6.1.1 Market Trends
  - 6.1.2 Key Segments
    - 6.1.2.1 Direct/Indirect Heating
    - 6.1.2.2 Hybrid/Infused
  - 6.1.3 Market Forecast
- 6.2 Consumables

- 6.2.1 Market Trends
- 6.2.2 Key Segments
  - 6.2.2.1 Tobacco Capsules and Cartridges
  - 6.2.2.2 Tobacco Sticks
- 6.2.3 Market Forecast

## **7 MARKET BREAKUP BY DISTRIBUTION CHANNEL**

- 7.1 Offline Stores
  - 7.1.1 Market Trends
  - 7.1.2 Key Segments
    - 7.1.2.1 Convenience Stores
    - 7.1.2.2 Tobacco Shops
    - 7.1.2.3 Grocery Shops
    - 7.1.2.4 Drug Shops
    - 7.1.2.5 Others
  - 7.1.3 Market Forecast
- 7.2 Online Stores
  - 7.2.1 Market Trends
  - 7.2.2 Market Forecast

## **8 MARKET BREAKUP BY REGION**

- 8.1 North America
  - 8.1.1 United States
    - 8.1.1.1 Market Trends
    - 8.1.1.2 Market Forecast
  - 8.1.2 Canada
    - 8.1.2.1 Market Trends
    - 8.1.2.2 Market Forecast
- 8.2 Asia-Pacific
  - 8.2.1 China
    - 8.2.1.1 Market Trends
    - 8.2.1.2 Market Forecast
  - 8.2.2 Japan
    - 8.2.2.1 Market Trends
    - 8.2.2.2 Market Forecast
  - 8.2.3 India
    - 8.2.3.1 Market Trends

- 8.2.3.2 Market Forecast
- 8.2.4 South Korea
  - 8.2.4.1 Market Trends
  - 8.2.4.2 Market Forecast
- 8.2.5 Australia
  - 8.2.5.1 Market Trends
  - 8.2.5.2 Market Forecast
- 8.2.6 Indonesia
  - 8.2.6.1 Market Trends
  - 8.2.6.2 Market Forecast
- 8.2.7 Others
  - 8.2.7.1 Market Trends
  - 8.2.7.2 Market Forecast
- 8.3 Europe
  - 8.3.1 Germany
    - 8.3.1.1 Market Trends
    - 8.3.1.2 Market Forecast
  - 8.3.2 France
    - 8.3.2.1 Market Trends
    - 8.3.2.2 Market Forecast
  - 8.3.3 United Kingdom
    - 8.3.3.1 Market Trends
    - 8.3.3.2 Market Forecast
  - 8.3.4 Italy
    - 8.3.4.1 Market Trends
    - 8.3.4.2 Market Forecast
  - 8.3.5 Spain
    - 8.3.5.1 Market Trends
    - 8.3.5.2 Market Forecast
  - 8.3.6 Russia
    - 8.3.6.1 Market Trends
    - 8.3.6.2 Market Forecast
  - 8.3.7 Others
    - 8.3.7.1 Market Trends
    - 8.3.7.2 Market Forecast
- 8.4 Latin America
  - 8.4.1 Brazil
    - 8.4.1.1 Market Trends
    - 8.4.1.2 Market Forecast

#### 8.4.2 Mexico

##### 8.4.2.1 Market Trends

##### 8.4.2.2 Market Forecast

#### 8.4.3 Others

##### 8.4.3.1 Market Trends

##### 8.4.3.2 Market Forecast

#### 8.5 Middle East and Africa

##### 8.5.1 Market Trends

##### 8.5.2 Market Breakup by Country

##### 8.5.3 Market Forecast

### **9 DRIVERS, RESTRAINTS, AND OPPORTUNITIES**

#### 9.1 Overview

#### 9.2 Drivers

#### 9.3 Restraints

#### 9.4 Opportunities

### **10 VALUE CHAIN ANALYSIS**

### **11 PORTERS FIVE FORCES ANALYSIS**

#### 11.1 Overview

#### 11.2 Bargaining Power of Buyers

#### 11.3 Bargaining Power of Suppliers

#### 11.4 Degree of Competition

#### 11.5 Threat of New Entrants

#### 11.6 Threat of Substitutes

### **12 PRICE ANALYSIS**

### **13 COMPETITIVE LANDSCAPE**

#### 13.1 Market Structure

#### 13.2 Key Players

#### 13.3 Profiles of Key Players

##### 13.3.1 British American Tobacco plc

###### 13.3.1.1 Company Overview

###### 13.3.1.2 Product Portfolio

- 13.3.1.3 Financials
- 13.3.1.4 SWOT Analysis
- 13.3.2 HiTaste
  - 13.3.2.1 Company Overview
  - 13.3.2.2 Product Portfolio
- 13.3.3 Imperial Brands PLC
  - 13.3.3.1 Company Overview
  - 13.3.3.2 Product Portfolio
  - 13.3.3.3 Financials
  - 13.3.3.4 SWOT Analysis
- 13.3.4 Japan Tobacco Inc.
  - 13.3.4.1 Company Overview
  - 13.3.4.2 Product Portfolio
  - 13.3.4.3 Financials
  - 13.3.4.4 SWOT Analysis
- 13.3.5 Philip Morris International Inc.
  - 13.3.5.1 Company Overview
  - 13.3.5.2 Product Portfolio
  - 13.3.5.3 Financials
  - 13.3.5.4 SWOT Analysis
- 13.3.6 Shenzhen Royal Tobacco Industrial Limited
  - 13.3.6.1 Company Overview
  - 13.3.6.2 Product Portfolio

Kindly note that this only represents a partial list of companies, and the complete list has been provided in the report.

## List Of Tables

### LIST OF TABLES

Table 1: Global: Heat Not Burn Tobacco Market: Key Industry Highlights, 2024 & 2033

Table 2: Global: Heat Not Burn Tobacco Market Forecast: Breakup by Product (in Million USD), 2025-2033

Table 3: Global: Heat Not Burn Tobacco Market Forecast: Breakup by Distribution Channel (in Million USD), 2025-2033

Table 4: Global: Heat Not Burn Tobacco Market Forecast: Breakup by Region (in Million USD), 2025-2033

Table 5: Global: Heat Not Burn Tobacco Market: Competitive Structure

Table 6: Global: Heat Not Burn Tobacco Market: Key Players

## List Of Figures

### LIST OF FIGURES

?Figure 1: Global: Heat Not Burn Tobacco Market: Major Drivers and Challenges

Figure 2: Global: Heat Not Burn Tobacco Market: Sales Value (in Billion USD), 2019-2024

Figure 3: Global: Heat Not Burn Tobacco Market Forecast: Sales Value (in Billion USD), 2025-2033

Figure 4: Global: Heat Not Burn Tobacco Market: Breakup by Product (in %), 2024

Figure 5: Global: Heat Not Burn Tobacco Market: Breakup by Distribution Channel (in %), 2024

Figure 6: Global: Heat Not Burn Tobacco Market: Breakup by Region (in %), 2024

Figure 7: Global: Heat Not Burn Tobacco (Devices) Market: Sales Value (in Million USD), 2019 & 2024

Figure 8: Global: Heat Not Burn Tobacco (Devices) Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 9: Global: Heat Not Burn Tobacco (Consumables) Market: Sales Value (in Million USD), 2019 & 2024

Figure 10: Global: Heat Not Burn Tobacco (Consumables) Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 11: Global: Heat Not Burn Tobacco (Offline Stores) Market: Sales Value (in Million USD), 2019 & 2024

Figure 12: Global: Heat Not Burn Tobacco (Offline Stores) Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 13: Global: Heat Not Burn Tobacco (Online Stores) Market: Sales Value (in Million USD), 2019 & 2024

Figure 14: Global: Heat Not Burn Tobacco (Online Stores) Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 15: North America: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 16: North America: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 17: United States: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 18: United States: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 19: Canada: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 20: Canada: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 21: Asia-Pacific: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 22: Asia-Pacific: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 23: China: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 24: China: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 25: Japan: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 26: Japan: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 27: India: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 28: India: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 29: South Korea: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 30: South Korea: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 31: Australia: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 32: Australia: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 33: Indonesia: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 34: Indonesia: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 35: Others: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 36: Others: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 37: Europe: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 38: Europe: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 39: Germany: Heat Not Burn Tobacco Market: Sales Value (in Million USD),

2019 & 2024

Figure 40: Germany: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 41: France: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 42: France: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 43: United Kingdom: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 44: United Kingdom: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 45: Italy: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 46: Italy: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 47: Spain: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 48: Spain: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 49: Russia: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 50: Russia: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 51: Others: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 52: Others: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 53: Latin America: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 54: Latin America: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 55: Brazil: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 56: Brazil: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 57: Mexico: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 58: Mexico: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 59: Others: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 60: Others: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 61: Middle East and Africa: Heat Not Burn Tobacco Market: Sales Value (in Million USD), 2019 & 2024

Figure 62: Middle East and Africa: Heat Not Burn Tobacco Market: Breakup by Country (in %), 2024

Figure 63: Middle East and Africa: Heat Not Burn Tobacco Market Forecast: Sales Value (in Million USD), 2025-2033

Figure 64: Global: Heat Not Burn Tobacco Industry: Drivers, Restraints, and Opportunities

Figure 65: Global: Heat Not Burn Tobacco Industry: Value Chain Analysis

Figure 66: Global: Heat Not Burn Tobacco Industry: Porter's Five Forces Analysis

## I would like to order

Product name: Heat Not Burn (HNB) Tobacco Market by Product (Devices, Consumables), Distribution Channel (Offline Stores, Online Stores), and Region 2025-2033

Product link: <https://marketpublishers.com/r/H2BEE38CD3C8EN.html>

Price: US\$ 2,999.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/H2BEE38CD3C8EN.html>