

# Global HNB Pods Market Growth 2026-2032

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## Abstracts

The global HNB Pods market size is predicted to grow from US\$ 14719 million in 2025 to US\$ 42560 million in 2032; it is expected to grow at a CAGR of 16.4% from 2026 to 2032.

HNB pods, also known as heated tobacco sticks, heated tobacco units or heat-not-burn sticks, are core disposable consumables used in heat-not-burn devices. They usually take the form of short cigarette-like sticks or proprietary rod-shaped consumables and are mainly composed of specially formulated tobacco sheet, reconstituted tobacco, tobacco granules or other nicotine-containing tobacco substrates, together with filter sections, cooling sections, support sections, wrapping paper, sealing structures and device-recognition components. Unlike e-liquid cartridges used in vaping products, HNB cartridges do not rely on the vaporization of liquid e-liquid; instead, they are inserted into dedicated heating devices, where a heating blade, heating pin, heating chamber, surrounding heating module or induction heating module precisely heats the tobacco substrate, releasing nicotine, tobacco aroma compounds and certain additives to form an aerosol for adult consumers to inhale.

In 2025, global HNB pods production reached approximately 210 billion units, with an average global market price is \$70 per thousand units.

HNB pods are core consumables used in heat-not-burn or heated tobacco products, typically consisting of tobacco sheets, reconstituted tobacco, tobacco granules or nicotine-containing tobacco substrates combined with filters, cooling segments, support elements, wrapping paper or pod structures, and designed to be heated rather than burned in dedicated devices to generate a nicotine-containing aerosol.

From a global industry perspective, HNB pods have evolved from alternative consumables to conventional cigarettes into an important subcategory within the

broader new tobacco product system. Unlike e-cigarette pods, HNB Pods usually contain real tobacco or tobacco-based substrates, and their usage model depends on a device-plus-consumable ecosystem. Product development therefore needs to consider tobacco formulation, heating temperature, aerosol release, draw resistance, filter cooling, aroma stability and device compatibility at the same time. The FDA describes certain heated tobacco products as tobacco-filled sticks used with electronic heating devices to generate a nicotine-containing aerosol, while the CDC notes that heated tobacco products heat actual tobacco leaf, unlike e-cigarettes, which typically heat nicotine-containing liquids.

In terms of industry trends, HNB pods are moving toward more refined formulations, lower residual odor, stable aerosol release, closer device compatibility, flavor compliance, regionalized product design and stronger quality consistency. Conventional cigarettes rely on combustion to release tobacco flavor, while HNB Pods must deliver stable nicotine release, tobacco aroma and acceptable sensory experience under lower heating temperatures. This creates higher requirements for reconstituted tobacco processing, humectant systems such as glycerol or propylene glycol, tobacco-particle uniformity, cooling materials and filter design. Regulation is also becoming a defining boundary for product design: EU Directive 2022/2100 withdrew certain exemptions for heated tobacco products regarding characterizing flavors and some labeling requirements, indicating stricter constraints on flavor, packaging and market access.

The main growth drivers come from three areas. First, demand from some adult smokers for a flame-free, ash-free, lower-odor and more convenient usage experience is supporting substitution demand outside conventional cigarette scenarios. Second, tobacco companies and supply chains are developing heating devices, pod structures, tobacco substrates and production consistency as integrated systems, turning HNB Pods from ordinary tobacco consumables into precision consumable products closely tied to specific devices. Third, stronger regulatory compliance and public-health scrutiny are pushing product development away from simple flavor expansion toward ingredient control, emissions management, youth-access prevention, packaging warnings and market-authorization compliance.

LP Information, Inc. (LPI) ' newest research report, the "HNB Pods Industry Forecast" looks at past sales and reviews total world HNB Pods sales in 2025, providing a comprehensive analysis by region and market sector of projected HNB Pods sales for 2026 through 2032. With HNB Pods sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world HNB Pods industry.

This Insight Report provides a comprehensive analysis of the global HNB Pods landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on HNB Pods portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global HNB Pods market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for HNB Pods and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global HNB Pods.

This report presents a comprehensive overview, market shares, and growth opportunities of HNB Pods market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Slurry-Cast Method

Paper-Making Method

Others

#### Segmentation by Composition:

Tobacco-containing

Tobacco-free

#### Segmentation by User Group:

Male

Female

Segmentation by Application:

Online Sales

Offline Sales

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Philip Morris International

British American Tobacco

KT&G

Japan Tobacco

Imperial Brands PLC

China Tobacco

### Key Questions Addressed in this Report

What is the 10-year outlook for the global HNB Pods market?

What factors are driving HNB Pods market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do HNB Pods market opportunities vary by end market size?

How does HNB Pods break out by Type, by Application?

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
  - 2.1.1 Global HNB Pods Annual Sales 2021-2032
  - 2.1.2 World Current & Future Analysis for HNB Pods by Geographic Region, 2021, 2025 & 2032
  - 2.1.3 World Current & Future Analysis for HNB Pods by Country/Region, 2021, 2025 & 2032
- 2.2 HNB Pods Segment by Type
  - 2.2.1 Slurry-Cast Method
  - 2.2.2 Paper-Making Method
  - 2.2.3 Others
  - 2.2.4 HNB Pods Sales by Type
    - 2.2.4.1 Global HNB Pods Sales Market Share by Type (2021-2026)
    - 2.2.4.2 Global HNB Pods Revenue and Market Share by Type (2021-2026)
    - 2.2.4.3 Global HNB Pods Sale Price by Type (2021-2026)
- 2.3 HNB Pods Segment by Composition
  - 2.3.1 Tobacco-containing
  - 2.3.2 Tobacco-free
  - 2.3.3 HNB Pods Sales by Composition
    - 2.3.3.1 Global HNB Pods Sales Market Share by Composition (2021-2026)
    - 2.3.3.2 Global HNB Pods Revenue and Market Share by Composition (2021-2026)
    - 2.3.3.3 Global HNB Pods Sale Price by Composition (2021-2026)
- 2.4 HNB Pods Segment by User Group
  - 2.4.1 Male
  - 2.4.2 Female

#### 2.4.3 HNB Pods Sales by User Group

2.4.3.1 Global HNB Pods Sales Market Share by User Group (2021-2026)

2.4.3.2 Global HNB Pods Revenue and Market Share by User Group (2021-2026)

2.4.3.3 Global HNB Pods Sale Price by User Group (2021-2026)

#### 2.5 HNB Pods Segment by Application

2.5.1 Online Sales

2.5.2 Offline Sales

2.5.3 HNB Pods Sales by Application

2.5.3.1 Global HNB Pods Sale Market Share by Application (2021-2026)

2.5.3.2 Global HNB Pods Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global HNB Pods Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

#### 3.1 Global HNB Pods Breakdown Data by Company

3.1.1 Global HNB Pods Annual Sales by Company (2021-2026)

3.1.2 Global HNB Pods Sales Market Share by Company (2021-2026)

#### 3.2 Global HNB Pods Annual Revenue by Company (2021-2026)

3.2.1 Global HNB Pods Revenue by Company (2021-2026)

3.2.2 Global HNB Pods Revenue Market Share by Company (2021-2026)

#### 3.3 Global HNB Pods Sale Price by Company

#### 3.4 Key Manufacturers HNB Pods Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers HNB Pods Product Location Distribution

3.4.2 Players HNB Pods Products Offered

#### 3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

#### 3.6 New Products and Potential Entrants

#### 3.7 Market M&A Activity & Strategy

### **4 WORLD HISTORIC REVIEW FOR HNB PODS BY GEOGRAPHIC REGION**

#### 4.1 World Historic HNB Pods Market Size by Geographic Region (2021-2026)

4.1.1 Global HNB Pods Annual Sales by Geographic Region (2021-2026)

4.1.2 Global HNB Pods Annual Revenue by Geographic Region (2021-2026)

#### 4.2 World Historic HNB Pods Market Size by Country/Region (2021-2026)

4.2.1 Global HNB Pods Annual Sales by Country/Region (2021-2026)

4.2.2 Global HNB Pods Annual Revenue by Country/Region (2021-2026)

- 4.3 Americas HNB Pods Sales Growth
- 4.4 APAC HNB Pods Sales Growth
- 4.5 Europe HNB Pods Sales Growth
- 4.6 Middle East & Africa HNB Pods Sales Growth

## **5 AMERICAS**

- 5.1 Americas HNB Pods Sales by Country
  - 5.1.1 Americas HNB Pods Sales by Country (2021-2026)
  - 5.1.2 Americas HNB Pods Revenue by Country (2021-2026)
- 5.2 Americas HNB Pods Sales by Type (2021-2026)
- 5.3 Americas HNB Pods Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

- 6.1 APAC HNB Pods Sales by Region
  - 6.1.1 APAC HNB Pods Sales by Region (2021-2026)
  - 6.1.2 APAC HNB Pods Revenue by Region (2021-2026)
- 6.2 APAC HNB Pods Sales by Type (2021-2026)
- 6.3 APAC HNB Pods Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

## **7 EUROPE**

- 7.1 Europe HNB Pods by Country
  - 7.1.1 Europe HNB Pods Sales by Country (2021-2026)
  - 7.1.2 Europe HNB Pods Revenue by Country (2021-2026)
- 7.2 Europe HNB Pods Sales by Type (2021-2026)
- 7.3 Europe HNB Pods Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

## **8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa HNB Pods by Country

8.1.1 Middle East & Africa HNB Pods Sales by Country (2021-2026)

8.1.2 Middle East & Africa HNB Pods Revenue by Country (2021-2026)

8.2 Middle East & Africa HNB Pods Sales by Type (2021-2026)

8.3 Middle East & Africa HNB Pods Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of HNB Pods

10.3 Manufacturing Process Analysis of HNB Pods

10.4 Industry Chain Structure of HNB Pods

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 HNB Pods Distributors

11.3 HNB Pods Customer

## **12 WORLD FORECAST REVIEW FOR HNB PODS BY GEOGRAPHIC REGION**

### **12.1 Global HNB Pods Market Size Forecast by Region**

#### **12.1.1 Global HNB Pods Forecast by Region (2027-2032)**

#### **12.1.2 Global HNB Pods Annual Revenue Forecast by Region (2027-2032)**

### **12.2 Americas Forecast by Country (2027-2032)**

### **12.3 APAC Forecast by Region (2027-2032)**

### **12.4 Europe Forecast by Country (2027-2032)**

### **12.5 Middle East & Africa Forecast by Country (2027-2032)**

### **12.6 Global HNB Pods Forecast by Type (2027-2032)**

### **12.7 Global HNB Pods Forecast by Application (2027-2032)**

## **13 KEY PLAYERS ANALYSIS**

### **13.1 Philip Morris International**

#### **13.1.1 Philip Morris International Company Information**

#### **13.1.2 Philip Morris International HNB Pods Product Portfolios and Specifications**

#### **13.1.3 Philip Morris International HNB Pods Sales, Revenue, Price and Gross Margin (2021-2026)**

#### **13.1.4 Philip Morris International Main Business Overview**

#### **13.1.5 Philip Morris International Latest Developments**

### **13.2 British American Tobacco**

#### **13.2.1 British American Tobacco Company Information**

#### **13.2.2 British American Tobacco HNB Pods Product Portfolios and Specifications**

#### **13.2.3 British American Tobacco HNB Pods Sales, Revenue, Price and Gross Margin (2021-2026)**

#### **13.2.4 British American Tobacco Main Business Overview**

#### **13.2.5 British American Tobacco Latest Developments**

### **13.3 KT&G**

#### **13.3.1 KT&G Company Information**

#### **13.3.2 KT&G HNB Pods Product Portfolios and Specifications**

#### **13.3.3 KT&G HNB Pods Sales, Revenue, Price and Gross Margin (2021-2026)**

#### **13.3.4 KT&G Main Business Overview**

#### **13.3.5 KT&G Latest Developments**

### **13.4 Japan Tobacco**

#### **13.4.1 Japan Tobacco Company Information**

#### **13.4.2 Japan Tobacco HNB Pods Product Portfolios and Specifications**

#### **13.4.3 Japan Tobacco HNB Pods Sales, Revenue, Price and Gross Margin**

(2021-2026)

13.4.4 Japan Tobacco Main Business Overview

13.4.5 Japan Tobacco Latest Developments

13.5 Imperial Brands PLC

13.5.1 Imperial Brands PLC Company Information

13.5.2 Imperial Brands PLC HNB Pods Product Portfolios and Specifications

13.5.3 Imperial Brands PLC HNB Pods Sales, Revenue, Price and Gross Margin

(2021-2026)

13.5.4 Imperial Brands PLC Main Business Overview

13.5.5 Imperial Brands PLC Latest Developments

13.6 China Tobacco

13.6.1 China Tobacco Company Information

13.6.2 China Tobacco HNB Pods Product Portfolios and Specifications

13.6.3 China Tobacco HNB Pods Sales, Revenue, Price and Gross Margin

(2021-2026)

13.6.4 China Tobacco Main Business Overview

13.6.5 China Tobacco Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

Table 1. HNB Pods Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. HNB Pods Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Slurry-Cast Method

Table 4. Major Players of Paper-Making Method

Table 5. Major Players of Others

Table 6. Global HNB Pods Sales by Type (2021-2026) & (Million Units)

Table 7. Global HNB Pods Sales Market Share by Type (2021-2026)

Table 8. Global HNB Pods Revenue by Type (2021-2026) & (\$ million)

Table 9. Global HNB Pods Revenue Market Share by Type (2021-2026)

Table 10. Global HNB Pods Sale Price by Type (2021-2026) & (US\$/K Unit)

Table 11. Major Players of Tobacco-containing

Table 12. Major Players of Tobacco-free

Table 13. Global HNB Pods Sales by Composition (2021-2026) & (Million Units)

Table 14. Global HNB Pods Sales Market Share by Composition (2021-2026)

Table 15. Global HNB Pods Revenue by Composition (2021-2026) & (\$ million)

Table 16. Global HNB Pods Revenue Market Share by Composition (2021-2026)

Table 17. Global HNB Pods Sale Price by Composition (2021-2026) & (US\$/K Unit)

Table 18. Major Players of Male

Table 19. Major Players of Female

Table 20. Global HNB Pods Sales by User Group (2021-2026) & (Million Units)

Table 21. Global HNB Pods Sales Market Share by User Group (2021-2026)

Table 22. Global HNB Pods Revenue by User Group (2021-2026) & (\$ million)

Table 23. Global HNB Pods Revenue Market Share by User Group (2021-2026)

Table 24. Global HNB Pods Sale Price by User Group (2021-2026) & (US\$/K Unit)

Table 25. Global HNB Pods Sale by Application (2021-2026) & (Million Units)

Table 26. Global HNB Pods Sale Market Share by Application (2021-2026)

Table 27. Global HNB Pods Revenue by Application (2021-2026) & (\$ million)

Table 28. Global HNB Pods Revenue Market Share by Application (2021-2026)

Table 29. Global HNB Pods Sale Price by Application (2021-2026) & (US\$/K Unit)

Table 30. Global HNB Pods Sales by Company (2021-2026) & (Million Units)

Table 31. Global HNB Pods Sales Market Share by Company (2021-2026)

Table 32. Global HNB Pods Revenue by Company (2021-2026) & (\$ millions)

Table 33. Global HNB Pods Revenue Market Share by Company (2021-2026)

|                                                                                            |
|--------------------------------------------------------------------------------------------|
| Table 34. Global HNB Pods Sale Price by Company (2021-2026) & (US\$/K Unit)                |
| Table 35. Key Manufacturers HNB Pods Producing Area Distribution and Sales Area            |
| Table 36. Players HNB Pods Products Offered                                                |
| Table 37. HNB Pods Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)                   |
| Table 38. New Products and Potential Entrants                                              |
| Table 39. Market M&A Activity & Strategy                                                   |
| Table 40. Global HNB Pods Sales by Geographic Region (2021-2026) & (Million Units)         |
| Table 41. Global HNB Pods Sales Market Share Geographic Region (2021-2026)                 |
| Table 42. Global HNB Pods Revenue by Geographic Region (2021-2026) & (\$ millions)         |
| Table 43. Global HNB Pods Revenue Market Share by Geographic Region (2021-2026)            |
| Table 44. Global HNB Pods Sales by Country/Region (2021-2026) & (Million Units)            |
| Table 45. Global HNB Pods Sales Market Share by Country/Region (2021-2026)                 |
| Table 46. Global HNB Pods Revenue by Country/Region (2021-2026) & (\$ millions)            |
| Table 47. Global HNB Pods Revenue Market Share by Country/Region (2021-2026)               |
| Table 48. Americas HNB Pods Sales by Country (2021-2026) & (Million Units)                 |
| Table 49. Americas HNB Pods Sales Market Share by Country (2021-2026)                      |
| Table 50. Americas HNB Pods Revenue by Country (2021-2026) & (\$ millions)                 |
| Table 51. Americas HNB Pods Sales by Type (2021-2026) & (Million Units)                    |
| Table 52. Americas HNB Pods Sales by Application (2021-2026) & (Million Units)             |
| Table 53. APAC HNB Pods Sales by Region (2021-2026) & (Million Units)                      |
| Table 54. APAC HNB Pods Sales Market Share by Region (2021-2026)                           |
| Table 55. APAC HNB Pods Revenue by Region (2021-2026) & (\$ millions)                      |
| Table 56. APAC HNB Pods Sales by Type (2021-2026) & (Million Units)                        |
| Table 57. APAC HNB Pods Sales by Application (2021-2026) & (Million Units)                 |
| Table 58. Europe HNB Pods Sales by Country (2021-2026) & (Million Units)                   |
| Table 59. Europe HNB Pods Revenue by Country (2021-2026) & (\$ millions)                   |
| Table 60. Europe HNB Pods Sales by Type (2021-2026) & (Million Units)                      |
| Table 61. Europe HNB Pods Sales by Application (2021-2026) & (Million Units)               |
| Table 62. Middle East & Africa HNB Pods Sales by Country (2021-2026) & (Million Units)     |
| Table 63. Middle East & Africa HNB Pods Revenue Market Share by Country (2021-2026)        |
| Table 64. Middle East & Africa HNB Pods Sales by Type (2021-2026) & (Million Units)        |
| Table 65. Middle East & Africa HNB Pods Sales by Application (2021-2026) & (Million Units) |
| Table 66. Key Market Drivers & Growth Opportunities of HNB Pods                            |
| Table 67. Key Market Challenges & Risks of HNB Pods                                        |
| Table 68. Key Industry Trends of HNB Pods                                                  |
| Table 69. HNB Pods Raw Material                                                            |

Table 70. Key Suppliers of Raw Materials

Table 71. HNB Pods Distributors List

Table 72. HNB Pods Customer List

Table 73. Global HNB Pods Sales Forecast by Region (2027-2032) & (Million Units)

Table 74. Global HNB Pods Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 75. Americas HNB Pods Sales Forecast by Country (2027-2032) & (Million Units)

Table 76. Americas HNB Pods Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. APAC HNB Pods Sales Forecast by Region (2027-2032) & (Million Units)

Table 78. APAC HNB Pods Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Europe HNB Pods Sales Forecast by Country (2027-2032) & (Million Units)

Table 80. Europe HNB Pods Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. Middle East & Africa HNB Pods Sales Forecast by Country (2027-2032) & (Million Units)

Table 82. Middle East & Africa HNB Pods Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Global HNB Pods Sales Forecast by Type (2027-2032) & (Million Units)

Table 84. Global HNB Pods Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 85. Global HNB Pods Sales Forecast by Application (2027-2032) & (Million Units)

Table 86. Global HNB Pods Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 87. Philip Morris International Basic Information, HNB Pods Manufacturing Base, Sales Area and Its Competitors

Table 88. Philip Morris International HNB Pods Product Portfolios and Specifications

Table 89. Philip Morris International HNB Pods Sales (Million Units), Revenue (\$ Million), Price (US\$/K Unit) and Gross Margin (2021-2026)

Table 90. Philip Morris International Main Business

Table 91. Philip Morris International Latest Developments

Table 92. British American Tobacco Basic Information, HNB Pods Manufacturing Base, Sales Area and Its Competitors

Table 93. British American Tobacco HNB Pods Product Portfolios and Specifications

Table 94. British American Tobacco HNB Pods Sales (Million Units), Revenue (\$ Million), Price (US\$/K Unit) and Gross Margin (2021-2026)

Table 95. British American Tobacco Main Business

Table 96. British American Tobacco Latest Developments

Table 97. KT&G Basic Information, HNB Pods Manufacturing Base, Sales Area and Its Competitors

Table 98. KT&G HNB Pods Product Portfolios and Specifications

Table 99. KT&G HNB Pods Sales (Million Units), Revenue (\$ Million), Price (US\$/K Unit) and Gross Margin (2021-2026)

Table 100. KT&G Main Business

Table 101. KT&G Latest Developments

Table 102. Japan Tobacco Basic Information, HNB Pods Manufacturing Base, Sales Area and Its Competitors

Table 103. Japan Tobacco HNB Pods Product Portfolios and Specifications

Table 104. Japan Tobacco HNB Pods Sales (Million Units), Revenue (\$ Million), Price (US\$/K Unit) and Gross Margin (2021-2026)

Table 105. Japan Tobacco Main Business

Table 106. Japan Tobacco Latest Developments

Table 107. Imperial Brands PLC Basic Information, HNB Pods Manufacturing Base, Sales Area and Its Competitors

Table 108. Imperial Brands PLC HNB Pods Product Portfolios and Specifications

Table 109. Imperial Brands PLC HNB Pods Sales (Million Units), Revenue (\$ Million), Price (US\$/K Unit) and Gross Margin (2021-2026)

Table 110. Imperial Brands PLC Main Business

Table 111. Imperial Brands PLC Latest Developments

Table 112. China Tobacco Basic Information, HNB Pods Manufacturing Base, Sales Area and Its Competitors

Table 113. China Tobacco HNB Pods Product Portfolios and Specifications

Table 114. China Tobacco HNB Pods Sales (Million Units), Revenue (\$ Million), Price (US\$/K Unit) and Gross Margin (2021-2026)

Table 115. China Tobacco Main Business

Table 116. China Tobacco Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of HNB Pods
- Figure 2. HNB Pods Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global HNB Pods Sales Growth Rate 2021-2032 (Million Units)
- Figure 7. Global HNB Pods Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. HNB Pods Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. HNB Pods Sales Market Share by Country/Region (2025)
- Figure 10. HNB Pods Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Slurry-Cast Method
- Figure 12. Product Picture of Paper-Making Method
- Figure 13. Product Picture of Others
- Figure 14. Global HNB Pods Sales Market Share by Type in 2026
- Figure 15. Global HNB Pods Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Tobacco-containing
- Figure 17. Product Picture of Tobacco-free
- Figure 18. Global HNB Pods Sales Market Share by Composition in 2026
- Figure 19. Global HNB Pods Revenue Market Share by Composition (2021-2026)
- Figure 20. Product Picture of Male
- Figure 21. Product Picture of Female
- Figure 22. Global HNB Pods Sales Market Share by User Group in 2026
- Figure 23. Global HNB Pods Revenue Market Share by User Group (2021-2026)
- Figure 24. HNB Pods Consumed in Online Sales
- Figure 25. Global HNB Pods Market: Online Sales (2021-2026) & (Million Units)
- Figure 26. HNB Pods Consumed in Offline Sales
- Figure 27. Global HNB Pods Market: Offline Sales (2021-2026) & (Million Units)
- Figure 28. Global HNB Pods Sale Market Share by Application (2025)
- Figure 29. Global HNB Pods Revenue Market Share by Application in 2025
- Figure 30. HNB Pods Sales by Company in 2025 (Million Units)
- Figure 31. Global HNB Pods Sales Market Share by Company in 2025
- Figure 32. HNB Pods Revenue by Company in 2025 (\$ millions)
- Figure 33. Global HNB Pods Revenue Market Share by Company in 2025
- Figure 34. Global HNB Pods Sales Market Share by Geographic Region (2021-2026)
- Figure 35. Global HNB Pods Revenue Market Share by Geographic Region in 2025

- Figure 36. Americas HNB Pods Sales 2021-2026 (Million Units)
- Figure 37. Americas HNB Pods Revenue 2021-2026 (\$ millions)
- Figure 38. APAC HNB Pods Sales 2021-2026 (Million Units)
- Figure 39. APAC HNB Pods Revenue 2021-2026 (\$ millions)
- Figure 40. Europe HNB Pods Sales 2021-2026 (Million Units)
- Figure 41. Europe HNB Pods Revenue 2021-2026 (\$ millions)
- Figure 42. Middle East & Africa HNB Pods Sales 2021-2026 (Million Units)
- Figure 43. Middle East & Africa HNB Pods Revenue 2021-2026 (\$ millions)
- Figure 44. Americas HNB Pods Sales Market Share by Country in 2025
- Figure 45. Americas HNB Pods Revenue Market Share by Country (2021-2026)
- Figure 46. Americas HNB Pods Sales Market Share by Type (2021-2026)
- Figure 47. Americas HNB Pods Sales Market Share by Application (2021-2026)
- Figure 48. United States HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 49. Canada HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 50. Mexico HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 51. Brazil HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 52. APAC HNB Pods Sales Market Share by Region in 2025
- Figure 53. APAC HNB Pods Revenue Market Share by Region (2021-2026)
- Figure 54. APAC HNB Pods Sales Market Share by Type (2021-2026)
- Figure 55. APAC HNB Pods Sales Market Share by Application (2021-2026)
- Figure 56. China HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 57. Japan HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 58. South Korea HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 59. Southeast Asia HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 60. India HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 61. Australia HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 62. China Taiwan HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 63. Europe HNB Pods Sales Market Share by Country in 2025
- Figure 64. Europe HNB Pods Revenue Market Share by Country (2021-2026)
- Figure 65. Europe HNB Pods Sales Market Share by Type (2021-2026)
- Figure 66. Europe HNB Pods Sales Market Share by Application (2021-2026)
- Figure 67. Germany HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 68. France HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 69. UK HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 70. Italy HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 71. Russia HNB Pods Revenue Growth 2021-2026 (\$ millions)
- Figure 72. Middle East & Africa HNB Pods Sales Market Share by Country (2021-2026)
- Figure 73. Middle East & Africa HNB Pods Sales Market Share by Type (2021-2026)
- Figure 74. Middle East & Africa HNB Pods Sales Market Share by Application

(2021-2026)

Figure 75. Egypt HNB Pods Revenue Growth 2021-2026 (\$ millions)

Figure 76. South Africa HNB Pods Revenue Growth 2021-2026 (\$ millions)

Figure 77. Israel HNB Pods Revenue Growth 2021-2026 (\$ millions)

Figure 78. Turkey HNB Pods Revenue Growth 2021-2026 (\$ millions)

Figure 79. GCC Countries HNB Pods Revenue Growth 2021-2026 (\$ millions)

Figure 80. Manufacturing Cost Structure Analysis of HNB Pods in 2026

Figure 81. Manufacturing Process Analysis of HNB Pods

Figure 82. Industry Chain Structure of HNB Pods

Figure 83. Channels of Distribution

Figure 84. Global HNB Pods Sales Market Forecast by Region (2027-2032)

Figure 85. Global HNB Pods Revenue Market Share Forecast by Region (2027-2032)

Figure 86. Global HNB Pods Sales Market Share Forecast by Type (2027-2032)

Figure 87. Global HNB Pods Revenue Market Share Forecast by Type (2027-2032)

Figure 88. Global HNB Pods Sales Market Share Forecast by Application (2027-2032)

Figure 89. Global HNB Pods Revenue Market Share Forecast by Application

(2027-2032)

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