

# **Electronic Nicotine Delivery System Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Product Type**

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## **Abstracts**

### **Electronic Nicotine Delivery System Market Summary**

#### **Introduction**

Electronic Nicotine Delivery Systems (ENDS), encompassing e-cigarettes and vaping devices, are battery-powered tools designed to deliver nicotine through inhaled vapor, offering a less harmful alternative to traditional combustible tobacco products. Known for their portability, customization, and variety of flavors, ENDS have gained traction as a smoking cessation aid and recreational product, appealing to a broad demographic, including younger users. The industry is characterized by rapid innovation in device design and e-liquid formulations, alongside a complex regulatory landscape that shapes market dynamics. Globally, as many as 121 countries or territories regulate electronic nicotine delivery systems, based on a 2023 World Health Organization report. That includes 33 countries that have moved to ban their sale, and 87 that have implemented regulations such as age restrictions on sales, bans on advertising, and prohibiting vaping in public indoor areas. Currently, 88 countries have no minimum age at which e-cigarettes can be bought, and 74 countries have no regulations in place for these harmful products. E-cigarettes target children through social media and influencers, with at least 16,000 attractive flavors. The World Health Organization (WHO) and STOP, a global tobacco industry watchdog, are launching “Hooking the next generation,” which shows that globally an estimated 37 million children aged 13–15 years use tobacco, and in many countries, the rate of e-cigarette use among adolescents exceeds that of adults. In the WHO European Region, 20% of 15-year-olds surveyed reported using e-cigarettes in the past 30 days. The global market for e-cigarettes is growing rapidly, with a significant increase from USD 7,806 million in 2015 to USD 22,349 million in 2022,

reflecting its evolving role in the nicotine consumption landscape.

### Market Size and Growth Forecast

The Electronic Nicotine Delivery System market is projected to reach USD 28 billion to USD 32 billion in 2025 and expand to USD 60 billion to USD 70 billion by 2030. This growth trajectory corresponds to a compound annual growth rate (CAGR) of 15% to 18% from 2025 to 2030, driven by increasing consumer adoption and technological advancements.

### Regional Analysis

**North America:** Expected to grow at 14% to 17%, the U.S. dominates with strong demand for vaping products, driven by a shift toward reduced-risk alternatives. Trends focus on regulatory compliance and premium device innovation.

**Europe:** Forecasted at 13% to 16%, the UK and Germany lead, supported by smoking cessation programs. The market trends toward stricter regulations and health-focused vaping solutions.

**Asia Pacific:** Projected at 16% to 19%, China and Japan drive growth with high production and consumption. Trends emphasize affordable devices and flavor diversity.

**Middle East and Africa (MEA):** Anticipated at 12% to 15%, South Africa and the UAE show potential with growing urban demand. Trends lean toward disposable systems.

**South America:** Expected at 13% to 16%, Brazil leads with rising awareness of alternatives. Trends focus on cost-effective vaping options.

### Product Type Analysis

**Open Vapor System:** Projected at 15% to 18%, these customizable devices appeal to enthusiasts seeking flexibility in flavor and nicotine levels. Trends favor advanced technology and user control.

**Closed Vapor System:** Expected at 14% to 17%, these user-friendly, pre-filled systems cater to beginners. Growth shifts toward convenience and regulatory compliance.

### Key Market Players

**Altria Group:** A major tobacco firm, Altria offers ENDS through its subsidiary NJOY, focusing on harm reduction.

**British American Tobacco p.l.c.:** A global leader, BAT provides vaping products like Vuse, emphasizing innovation.

**Swedish Match:** Known for nicotine alternatives, Swedish Match explores ENDS with a focus on quality.

**Swisher International:** A traditional player, Swisher diversifies into vaping with accessible products.

Imperial Brands, PLC: A multinational, Imperial offers blu vaping devices, prioritizing user experience.

NJOY: A vaping specialist, NJOY delivers compliant, high-quality ENDS solutions.

Logic Technology: A key innovator, Logic focuses on sleek, user-friendly vaping devices.

Kaival Brands Innovations Group: A rising firm, Kaival emphasizes unique vaping offerings.

### Porter's Five Forces Analysis

Threat of New Entrants: Moderate, as high regulatory barriers and R&D costs deter newcomers, though innovative startups can disrupt with niche offerings.

Threat of Substitutes: High, with nicotine patches, gums, and traditional tobacco vying for share. ENDS maintain an edge through customization and perceived safety.

Bargaining Power of Buyers: High, as consumers demand affordable, diverse options, pushing firms to innovate and compete on price.

Bargaining Power of Suppliers: Moderate, with reliance on battery and e-liquid suppliers balanced by diversified sourcing.

Competitive Rivalry: Intense, fueled by rapid innovation, brand loyalty battles, and regulatory pressures, driving differentiation.

### Market Opportunities and Challenges

#### Opportunities

Regulatory Support: Favorable policies in some regions boost adoption as cessation tools.

Youth Appeal: Flavor variety and social media marketing expand the user base.

Technological Advancements: Smart devices enhance user experience and market growth.

Emerging Markets: Untapped regions offer expansion potential with rising awareness.

#### Challenges

Regulatory Restrictions: Bans and strict rules in many countries limit market access.

Health Concerns: Perceptions of harm, especially among youth, fuel scrutiny.

Competition: Substitutes and rival innovations pressure market share.

Supply Chain Risks: Trade tensions disrupt raw material availability.

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