

Research Report on China's Electronic Cigarette Industry, 2018-2022

<https://marketpublishers.com/r/R27B90DFE9CEN.html>

Date: November 2018

Pages: 50

Price: US\$ 2,600.00 (Single User License)

ID: R27B90DFE9CEN

Abstracts

Description

Statistics show that the number of smokers in China is about 300 million to 350 million, and is still growing. More than 700 million non-smokers are exposed to second-hand smoke, and more than 1 million people die of smoking-related diseases every year. In 2017, the sales revenue of China's cigarette industry reached CNY 1,435 billion (USD 208 billion)

An electronic cigarette is an electronic device that simulates the work of traditional cigarettes. It simulates tobacco smoke to provide the feeling of smoking and satisfy the smoker's craving for nicotine. Therefore, it can be used as a substitute for traditional cigarettes to some extent. Compared with traditional tobacco, electronic cigarettes are much less harmful to human health, and cost only 2/3 or less.

Since the cigarette industry can bring huge taxes to the Chinese government, the Chinese government holds different attitudes towards different types of electronic cigarettes. Overall, it does not regulate vapes. While it prohibits the import and sale of heat-not-burn electronic cigarettes that are more similar to traditional cigarettes in flavor in fear that heat-not-burn electronic cigarettes would seriously impact the sales of traditional cigarettes. Therefore, heat-not-burn electronic cigarettes can only be sold online.

According to CRI's market research, China is the world's biggest base of electronic cigarette production. Accounting for over 90% of the global electronic cigarette production, in 2017, China-made electronic cigarettes exceeded 1.6 billion units. Despite the huge production volume, over 90% of China-made cigarettes are exported.

Only a small portion is sold domestically. In recent years, as Chinese smokers raise their health consciousness, China's electronic cigarette market is growing rapidly. From 2013 to 2017, the market size of electronic cigarettes in China grew from less than CNY 1 billion to more than CNY 4 billion. Although there are some leading enterprises in China's electronic cigarette industry, the overall market concentration ratio is low, and the growth potential is huge.

As Chinese smokers are more concerned about health, and electronic cigarettes contain much less harmful substances such as nicotine, electronic cigarettes will be welcomed by many smokers, especially young smokers who prefer diversified tastes and plentiful smoke. Moreover, the advancement in electronic cigarette technology can reduce production costs and enhance flavors, thereby cutting the migration costs for traditional smokers. It is expected that as the consciousness of smoking ban is strengthened, the Chinese government will loosen up on its electronic cigarette policies, which will promote the development of China's electronic cigarette industry. It is expected that with the continuous strengthening of the smoking ban, the Chinese government's policy on e-cigarettes will gradually become looser, which will help promote the development of China's e-cigarette industry. If 10% or 30 million to 35 million of Chinese smokers turn to electronic cigarettes, the potential market size will be above USD 15 billion.

Topics Covered:

Development environment of China's electronic cigarette industry

Supply of and demand for electronic cigarettes in China

Export of electronic cigarettes in China

Competition on China's electronic cigarette market

Major factors influencing the development of China's electronic cigarette industry

Prospect of China's electronic cigarette market from 2018 to 2022

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