

Europe Nicotine Pouches Market Forecast to 2030 - Regional Analysis - by Strength (Less than 6 mg/g, 6 mg/g to 12 mg/g, and More than 12 mg/g), Flavor [Original/Plain, and Flavored (Mint, Berry, Citrus, Fruity, Others)], and Distribution Channel (Supermarkets & Hypermarkets, Convenience Stores, Online Retail, and Others)

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Abstracts

The Europe nicotine pouches market was valued at US\$ 763.11 million in 2022 and is expected to reach US\$ 1,233.66 million by 2030; it is estimated to grow at a CAGR of 6.2% from 2022 to 2030.

Effective Branding and Marketing Strategies Drive Europe Nicotine Pouches Market

Nicotine pouch manufacturers use various branding and marketing strategies to promote their products, such as emphasis on the health-conscious aspect of nicotine pouches. The major manufacturers market these pouches by specifically highlighting them as smoke-free alternatives and products that reduce the harmful effects associated with traditional smoking. Manufacturers leverage online platforms to engage with consumers, share educational content, and create a community of nicotine pouch consumers. The players offer a diverse range of flavors that play a significant role in marketing nicotine pouches. Flavor diversity attracts a large customer base beyond traditional tobacco consumers. For instance, in 2023, TACJA introduced nicotine pouches in Sweden, Switzerland, and the UK. The products come in two taste series (Frozen and Mellow) with eight flavors and three different nicotine doses (20, 18, and 12 mg/g). TACJA claims that the goods adhere to EU Good Manufacturing Practices and include pharmaceutical-grade components. In the UK, key market players are running

interactive campaigns, adopting influencer collaboration activities, and performing online promotions to build brand awareness. In 2022, Swedish Match added a Tobacco Gold expression to its ZYN nicotine pouch line; this expression is tobacco-free.

Appealing flavored nicotine pouches enhances the overall user experience and differentiates nicotine pouches from other oral nicotine products.

Nicotine pouch manufacturers invest in branding that conveys a modern, sleek, and sophisticated product image. This branding strategy aims to attract tobacco users and consumers who prefer a contemporary and stylish persona associated with the product. Research by Truth Initiative, a nonprofit public health organization, was published in Tobacco Control Journal in 2022. The research reported the advertisement and marketing strategies of nicotine pouch brands to appeal to youth and young adults. It revealed that brands such as Zyn, On!, and Velo highlight flavors and suggest less harmful effects of nicotine pouches compared to traditional tobacco products in product advertisements. Key market players invested ~US\$ 25 million in advertisements between January 2019 and September 2021. A report published in November 2023 by the Campaign for Tobacco-Free Kid revealed that the top five smokeless tobacco companies invested US\$ 572.7 million in advertising and marketing their products in 2022. Thus, effective branding and marketing strategies fuel the demand for nicotine pouches.

Europe Nicotine Pouches Market Overview

Europe has witnessed a dynamic shift in nicotine consumption. These discreet, smoke-free alternatives to traditional cigarettes and e-cigarettes are captivating consumers across the continent. Heightened health awareness plays a pivotal role. Smokers, seeking to distance themselves from the harmful effects of combustion, are drawn to the smoke-free nature of pouches. Additionally, pouches avoid the negative connotations associated with vaping, which has faced regulatory scrutiny in several European countries. Stringent tobacco regulations and anti-smoking campaigns have led to a decline in cigarette consumption, prompting individuals to explore less harmful alternatives. Nicotine pouches, being devoid of tobacco and combustion-related toxins, align with this shift toward harm reduction and are perceived as a safer option. In addition, Europe has a long-standing tradition of consuming oral tobacco products such as snus. This familiarity with similar delivery methods creates a receptive market for nicotine pouches, making them easier to adopt and integrate into existing consumption patterns.

Manufacturers of nicotine pouches are keenly engaging in marketing campaigns that emphasize the benefits of nicotine pouches as a safer alternative to traditional tobacco products. Emphasizing harm reduction, convenience, and the absence of tobacco-related toxins helps build a positive perception among consumers, contributing to increased adoption. In October 2023, smokeless tobacco brand TACJA launched nicotine pouches in the UK, Switzerland, and Sweden, with eight flavors in two taste series—MELLOW and FROZEN. In addition, strategic partnerships, collaborations, and mergers allow companies to pool resources, share expertise, and streamline operations. This synergy enhances research and development capabilities, fostering innovation in product offerings and manufacturing processes, ultimately meeting evolving consumer demands. In November 2022, Philip Morris International (PMI) acquired over 90% of Swedish multinational tobacco company Swedish Match AB for US\$ 15.7 billion. This move will increase the PMI's non-combustible tobacco and nicotine product footprint. Swedish Match sells snus-like nicotine pouches. Its leading brand in the global market is Zyn. Such mergers and acquisitions provide manufacturers with opportunities to diversify their product portfolios. By integrating complementary products or technologies, companies can offer a broader range of nicotine pouch options, catering to diverse preferences and expanding their market share. These factors intertwine to create a perfect storm propelling the growth of the nicotine pouches market in Europe. Continuous innovation, flavor expansion, market initiatives, and evolving regulations are poised to carve out a significant space in the European landscape of nicotine consumption.

Europe Nicotine Pouches Market Revenue and Forecast to 2030 (US\$ Million)

Europe Nicotine Pouches Market Segmentation

The Europe nicotine pouches market is segmented based on strength, flavor, distribution channel and country. Based on strength, the Europe nicotine pouches market is categorized into less than 6 mg/g, 6 mg/g to 12 mg/g, and more than 12 mg/g. The 6mg/g to 12mg/g segment held the largest market share in 2022.

In terms of flavor, the Europe nicotine pouches market is bifurcated into original/plain, and flavored. The flavored segment held a larger market share in 2022. The flavored segment is further sub segmented into mint, berry, citrus, fruity, and others.

By distribution channel, the Europe nicotine pouches market is categorized into supermarkets & hypermarkets, convenience stores, online retail, and others. The

convenience store segment held the largest market share in 2022.

Based on country, the Europe nicotine pouches market is segmented into France, Italy, the UK, Sweden, and the Rest of Europe. The Rest of Europe dominated the Europe nicotine pouches market share in 2022.

Swisher International Inc, Imperial Brands Plc, Philip Morris International Inc, British American Tobacco Plc, Atlas International LLC, and Enorama Pharma AB are some of the leading companies operating in the Europe nicotine pouches market.

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