

Middle East & Africa E-Cigarette Market Size and Forecast (2021 - 2031)

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Abstracts

The Middle East and Africa (MEA) e-cigarette market is poised for substantial growth, with projections indicating that the market size will reach approximately US\$ 2,445.3 million by 2031, up from US\$ 1,428.3 million in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 8.1% from 2025 to 2031, driven by several key factors.

Executive Summary and Market Analysis

The e-cigarette market in the MEA region is experiencing a notable expansion, largely due to increasing awareness of alternatives to traditional smoking. A youthful demographic, coupled with evolving regulatory frameworks, significantly contributes to this market growth. Countries like the United Arab Emirates (UAE) and Saudi Arabia have made strides in legalizing and regulating e-cigarette sales, which has helped formalize the market and reduce illicit trade. Additionally, the rising consumer demand for reduced-risk nicotine products and the prevalence of smartphone usage are further propelling market growth. The latter facilitates online sales and digital marketing strategies, enhancing consumer access to e-cigarette products.

In December 2023, the UAE implemented legal and regulatory measures to oversee the use of tobacco and related products, including vaping devices. This regulatory framework aims to ensure consumer safety while promoting responsible use of e-cigarettes. In Saudi Arabia, the Supreme Decree No. 38621, issued on March 18, 2019, allows the sale of e-cigarettes under specific conditions set by the Saudi Food and Drug Authority. These regulations include standards for device design and packaging, although they currently do not restrict the display of e-cigarettes at points of sale or internet sales, which are interpreted as permissible. However, certain flavors are

restricted, with only fruit flavors and menthol allowed.

Strategic Insights

Market Segmentation

The MEA e-cigarette market can be segmented by product type, category type, and distribution channel:

By Product Type: The market is divided into Modular, Rechargeable, and Disposable e-cigarettes. In 2024, Disposable e-cigarettes held the largest market share.

By Category Type: The market is categorized into Tobacco and Non-Tobacco products, with Non-Tobacco products leading in market share in 2024.

By Distribution Channel: The market is segmented into Online and Offline channels, with Offline channels dominating in 2024. Within Offline distribution, Specialty E-Cig Shops, Supermarkets, and Hypermarkets are the primary channels, with Specialty E-Cig Shops holding the largest share.

Market Outlook

A significant driver of the e-cigarette market's growth is the global shift away from traditional tobacco smoking. This transition is fueled by increasing public awareness of the health risks associated with combustible cigarettes, which are linked to various diseases, including lung cancer and cardiovascular issues. As consumers seek less harmful alternatives, e-cigarettes have emerged as a popular choice, offering nicotine without the harmful tar and chemicals found in traditional tobacco smoke.

E-cigarettes are marketed as a "safer" or "cleaner" option compared to conventional cigarettes. They vaporize a liquid solution containing nicotine, propylene glycol, and flavoring agents, significantly reducing exposure to harmful by-products like carbon monoxide and tar. Many smokers are turning to e-cigarettes as a smoking cessation aid, with brands like Juul, RELX, and Vuse gaining traction among those looking to quit or reduce their tobacco intake.

According to the World Health Organization (WHO) in May 2024, e-cigarettes have

gained popularity as an alternative to traditional tobacco products, driven by changing consumer preferences. E-cigarettes are perceived as more attractive due to their flavored liquids and the belief that they are less harmful than traditional tobacco products. The aggressive marketing strategies employed by the tobacco industry, particularly targeting younger demographics, have further increased the appeal of these products.

Country Insights

The MEA e-cigarette market is further segmented by country, including the UAE, Saudi Arabia, South Africa, and the Rest of the MEA region. The UAE is currently the largest market, experiencing rapid growth as consumers shift from traditional tobacco products to e-cigarettes and other nicotine alternatives. However, this growth is accompanied by stringent government regulations aimed at controlling consumption and protecting public health.

In 2019, the UAE introduced a 100% excise tax on all vaping products, which significantly increased retail prices and impacted consumer behavior. This tax has led some consumers to opt for cheaper disposable vapes or reduce their overall consumption. Retailers and distributors must navigate these regulatory requirements and adjust their pricing and marketing strategies accordingly to remain competitive.

Company Profiles

Key players in the MEA e-cigarette market include British American Tobacco Plc, Imperial Brands Plc, Philip Morris International Inc, JT International SA, NJOY, LLC, and several others. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products to consumers.

In conclusion, the Middle East and Africa e-cigarette market is on a growth trajectory, driven by changing consumer preferences, regulatory developments, and the increasing popularity of vaping as an alternative to traditional smoking.

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