

South & Central America E-Cigarette Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America E-Cigarette Market is projected to grow significantly, reaching an estimated US\$ 1,689.3 million by 2031, up from US\$ 1,060.6 million in 2024, reflecting a compound annual growth rate (CAGR) of 7.0% from 2025 to 2031. This growth trajectory is influenced by various factors, including regulatory environments, consumer trends, and technological advancements.

Executive Summary and Market Analysis

In South & Central America, the perception of e-cigarettes varies widely. Some countries view them as safer alternatives to traditional tobacco products, while others impose stringent bans that hinder market growth and consumer access. For instance, Brazil has maintained a long-standing ban on e-cigarettes since 2009, prohibiting their commercialization, importation, and advertising. The Brazilian Health Regulatory Agency (ANVISA) has reinforced this ban with Resolution No. 855 of 2024, which also restricts the use of e-cigarettes in enclosed public spaces.

Argentina similarly prohibits the sale and distribution of e-cigarettes under a 2011 ruling, classifying them as tobacco products and banning their use in public areas. In contrast, Chile has recently enacted legislation that regulates the sale and use of vaping products, including a ban on sales to individuals under 18 and restrictions on usage in enclosed spaces. This law, effective from May 2024, aims to enhance public health protections, particularly for minors.

Colombia presents a different scenario, where e-cigarettes are regulated but not banned. The recent Law 2354 of 2024 establishes a framework for the sale and use of electronic nicotine delivery systems, emphasizing the protection of public health and the

introduction of educational programs to reduce tobacco use.

Market Segmentation

The South & Central America E-Cigarette Market can be segmented by product type, category type, and distribution channel. In 2024, disposable e-cigarettes dominated the product type segment, while non-tobacco products led the category type segment. Offline distribution channels, particularly specialty e-cig shops, held the largest market share, indicating a preference for in-person purchases among consumers.

Market Outlook

The e-cigarette market is on the brink of transformation, driven by the integration of smart technologies and Internet of Things (IoT) capabilities. Future e-cigarettes are expected to feature enhanced connectivity with mobile applications and wearable devices, allowing users to monitor their nicotine intake and device usage in real-time. Innovations such as smart vapes, which include built-in speakers and connectivity features, are emerging, providing a more interactive vaping experience.

Artificial intelligence (AI) is anticipated to play a crucial role in the evolution of e-cigarettes, enabling devices to analyze user behavior and adjust settings for a personalized experience. This could lead to higher user satisfaction and engagement. Additionally, biometric authentication is expected to enhance device security, addressing concerns about unauthorized use, particularly among minors.

Country Insights

Chile is currently the largest market for e-cigarettes in the region, bolstered by its recent regulatory changes that aim to control the sale and use of vaping products. The new law is expected to reduce youth access to e-cigarettes while improving product safety and consumer confidence. In 2022, e-cigarette usage among Chilean adults was relatively low, with only 1% reporting use, but the new regulations may influence future trends.

Competitive Landscape

Key players in the South & Central America E-Cigarette Market include British American Tobacco Plc, Imperial Brands Plc, Philip Morris International Inc, and several others. These companies are focusing on strategies such as product innovation, market expansion, and mergers and acquisitions to enhance their market presence and cater to

evolving consumer preferences.

Research Methodology

The insights presented in this report are derived from a combination of secondary and primary research. Secondary research involved analyzing company reports, industry publications, and government documents, while primary research included interviews with industry stakeholders and experts to validate findings and gain deeper market insights. This comprehensive approach ensures a well-rounded understanding of the market dynamics and future prospects.

In conclusion, the South & Central America E-Cigarette Market is poised for growth, driven by regulatory changes, technological advancements, and shifting consumer preferences. As the market evolves, companies that adapt to these changes and innovate will likely capture significant market share.

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