

About Bündnis für Tabakfreien Genuss e.V.

The “Bündnis für Tabakfreien Genuss e.V. (BFTG)” comprises all leading German e-cigarette producers, retailers and wholesalers. Founded in July 2015, the BFTG advocates solely independent SMEs – start-ups in a market not older than 5 to 6 years. While there is absolutely no connection to the tobacco industry the BFTG welcomes a strong regulation of the market. Hence all members stuck to self-regulation long before any discussion about regulation in Germany started. The member fee financed alliance uses its limited resources to support a fair and reasonable regulation, which in long-term leaves room for young companies, their products and currently about 9000 employees¹ in a developing market. It strives for an acknowledgement of the fundamental difference between electronic and tobacco cigarettes in terms of health risks, product properties and market and is a strong supporter of the harm reduction concept.

Characteristics of Electronic Cigarettes

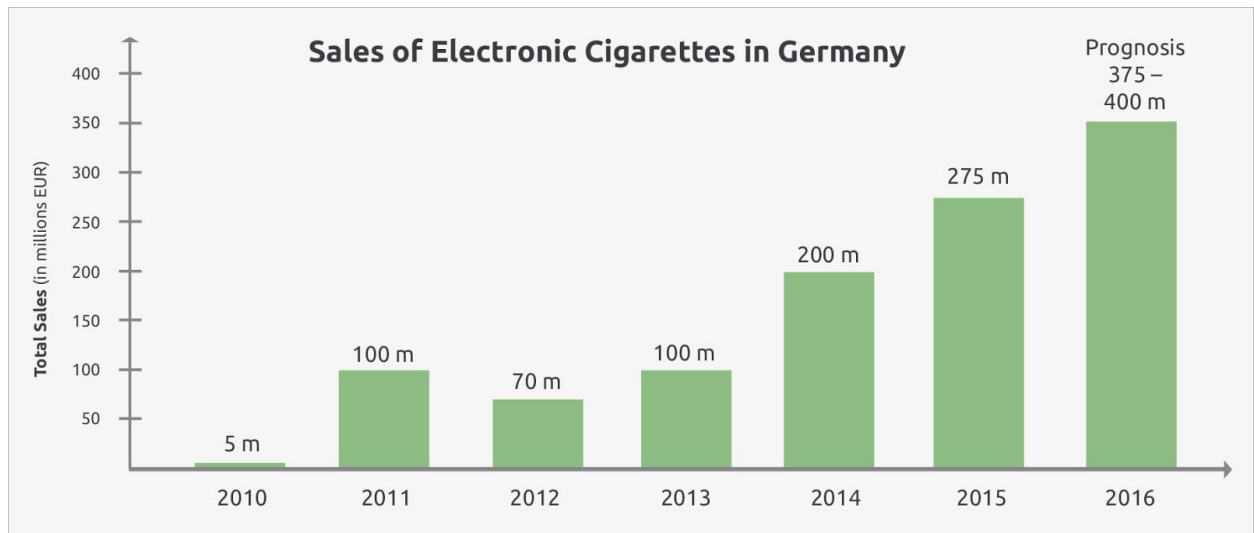
While electronic cigarettes followed tobacco cigarettes’ size and style in its early versions to attract smokers, today’s e-vaping devices stress the strong distinctions between electronic- and tobacco cigarettes as an independent product and valuable alternative for tobacco consumers. Present e-cigarettes emphasize the technological possibilities in modular design, various combinations, adjustable settings and capacities. Also, the variety of e-liquids has evolved to a multitude of tastes and individually selectable nicotine concentrations including non-nicotine alternatives. By now, the innovation pressure in electronic cigarette market has overtaken digital technologies². On the one hand both technical progress and growing variety are strong characteristics of electronic cigarettes and clearly a foundation of its’ success. On the other hand these increase the need for regulation which is greatly welcomed by the BFTG to secure product standards and safety especially regarding EU external suppliers.

¹ VdeH Faktenreport (06/2016) <http://www.vd-eh.de/wp-content/uploads/2016/06/Faktenreport-Juni-2016.pdf>

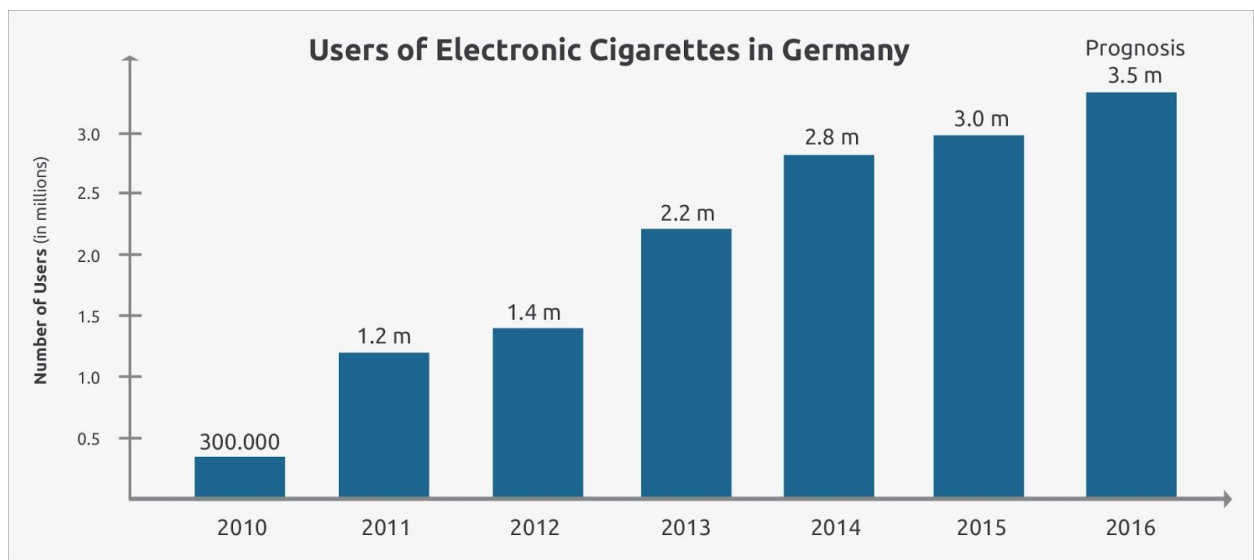
² VdeH Faktenreport (06/2016) <http://www.vd-eh.de/wp-content/uploads/2016/06/Faktenreport-Juni-2016.pdf>

Market Growth and Future Development

From 2013 German sales have grown by 175 percent to 275 million Euros in 2015³. Further increase is expected for 2016.



The national number of users of electronic cigarettes has risen from 2.2 million in 2013 to 3 million in 2015⁴, while there are currently approximately 10 million frequent users of electronic cigarettes in the EU in total.⁵



³ TZ (02/10/2016) <http://www.tz.de/leben/gesundheit/ezigarette-haendler-trotzen-urteil-6110824.html>

Focus Money 13.03.2015 http://www.focus.de/finanzen/news/handel-e-zigaretten-branche-verdoppelt-umsatz-auf-200-millionen-euro_id_4543451.html

⁴ Verband des E-Zigaretten Handels e.V. (05/27/2015) <http://www.vd-eh.de/dank-ezigarette-50-prozent-weniger-tabakraucher-in-sechs-jahren/>

⁵ Special Eurobarometer 429 Attitudes of Europeans towards Tobacco and electronic Cigarettes – Report (05/2015)

As throughout Europe, most popular e-cigarette models in Germany are refillable devices with containers or tanks for e-liquid.⁶ Reflecting the distinct pattern of use of electronic cigarettes the majority of the so called vapers prefers to parallelly consume about three different e-liquids on a regular basis in contrary to tobacco smokers who prefer a single brand.⁷

There are currently about 200 businesses participating in the German e-cigarette market. While until now most consumers buy their devices and e-liquids online, the present 150 specialist shops are with growing demand the prevalent dealer in walk-in retail followed by shops for smoker's supply and kiosks in third place^{8,9}. The BfTG expects a strong increase of specialist shops sales both nationally and throughout Europe in the future. The German producers of electronic cigarettes, vaping accessories and e-liquids are predominantly small companies with an amount of 60 employees at the most. These are represented by the BfTG.

Users and Usage of Electronic Cigarettes

To almost 40 percent the majority of the vapers is between 51 and 60 years old, while the group aged 41 to 50 makes the second biggest share by a quarter of the total consumers. With 10.4 percent the 31 to 40 year olds rank third in Germany.¹⁰ Furthermore, an ongoing research project by the Zentrum für Interdisziplinäre Suchtforschung (ZIS) of Hamburg University shows that less than one percent of the regular users of electronic cigarettes are under the age of 18.¹¹ Concerning frequent usage of e-cigarettes of at least once a week consumers are exclusively either former smokers or parallel users of both electronic and tobacco cigarettes.¹² The predominant motivation to make use of electronic cigarettes is to reduce smoking. In second place another popular reason to choose e-cigarettes is an understanding of the product as less harmful alternative to tobacco cigarettes, followed by the wish to apply electronic cigarettes as a means to smoking cessation.¹³ An England Public Health report illustrates the significance of the aforementioned by estimating a harm reduction of 95 percent with usage of electronic cigarettes in comparison to tobacco cigarettes.¹⁴ According to an EU-wide Eurobarometer survey 21 percent of the respondents reduced smoking while 14 percent stopped smoking entirely by means of electronic cigarettes.¹⁵

⁶ Statista (2013) <http://de.statista.com/statistik/daten/studie/423044/umfrage/umfrage-zu-genutzten-verdampfertypen-bei-e-zigaretten-in-deutschland/>

⁷ GfK (2015) <http://de.statista.com/statistik/daten/studie/492231/umfrage/gruende-fuer-die-verwendung-von-e-zigaretten-in-deutschland/>

⁸ VdeH Faktenreport (06/2016) <http://www.vd-eh.de/wp-content/uploads/2016/06/Faktenreport-Juni-2016.pdf>

⁹ Statista (2012) <http://de.statista.com/statistik/daten/studie/303415/umfrage/distributionsstruktur-von-e-zigaretten-in-deutschland/>

¹⁰ Statista (2013) <http://de.statista.com/statistik/daten/studie/423037/umfrage/umfrage-zum-alter-von-e-rauchern-in-deutschland/>

¹¹ ZIS – University of Hamburg (2015)

http://www.dkfz.de/de/tabakkontrolle/download/Deutsche_Konferenzen_fuer_Tabakkontrolle/13_Deutsche_Konferenz_fuer_Tabakkontrolle/Vortrag_Lehmann.pdf

¹² GfK (2015) <http://de.statista.com/statistik/daten/studie/492233/umfrage/konsum-von-e-zigaretten-unter-ex-und-nie-raucher-in-deutschland/>

¹³ GfK (2015) <http://de.statista.com/statistik/daten/studie/492231/umfrage/gruende-fuer-die-verwendung-von-e-zigaretten-in-deutschland/>

¹⁴ England Public Health Landmark Report (08/2015)

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/457102/Ecigarettes_an_evidence_update_A_report_commissioned_by_Public_Health_England_FINAL.pdf

¹⁵ Special Eurobarometer 429 Attitudes of Europeans towards Tobacco and electronic Cigarettes – Report (05/2015)