



ECigIntelligence

Regulatory and Market Intelligence for the e-Cigarette Sector

IEVA: Vaping Market Behaviour and Political Impacts

21st January 2022



www.ECigIntelligence.com



- ▶ Introduction
- ▶ Market reaction to regulatory change
- ▶ Disposables and vape product trends
- ▶ Disposable Consumers
- ▶ Synthetic nicotine and Consumers

About ECigIntelligence

The leading provider of detailed global market and regulatory analysis, legal tracking, and quantitative data for the e-cig, heated tobacco and combustible-alternatives sector worldwide



Overview

- ▶ 6+ years in the sector
- ▶ Detailed market and legal data and analysis, 40+ markets
- ▶ Regulation/compliance tracking, 70+ jurisdictions
- ▶ Independent and objective



Products

- ▶ Detailed Market and Regulatory reports
- ▶ Compliance trackers
- ▶ Market data spreadsheets and monthly database
- ▶ Customised research



Customers

- ▶ Manufacturers and retailers
- ▶ Supply chain
- ▶ Government and Regulators
- ▶ Trade bodies
- ▶ Tobacco control
- ▶ Pharmaceutical and related sectors



Team

20+ business & legal analysts

15 reporters & editors



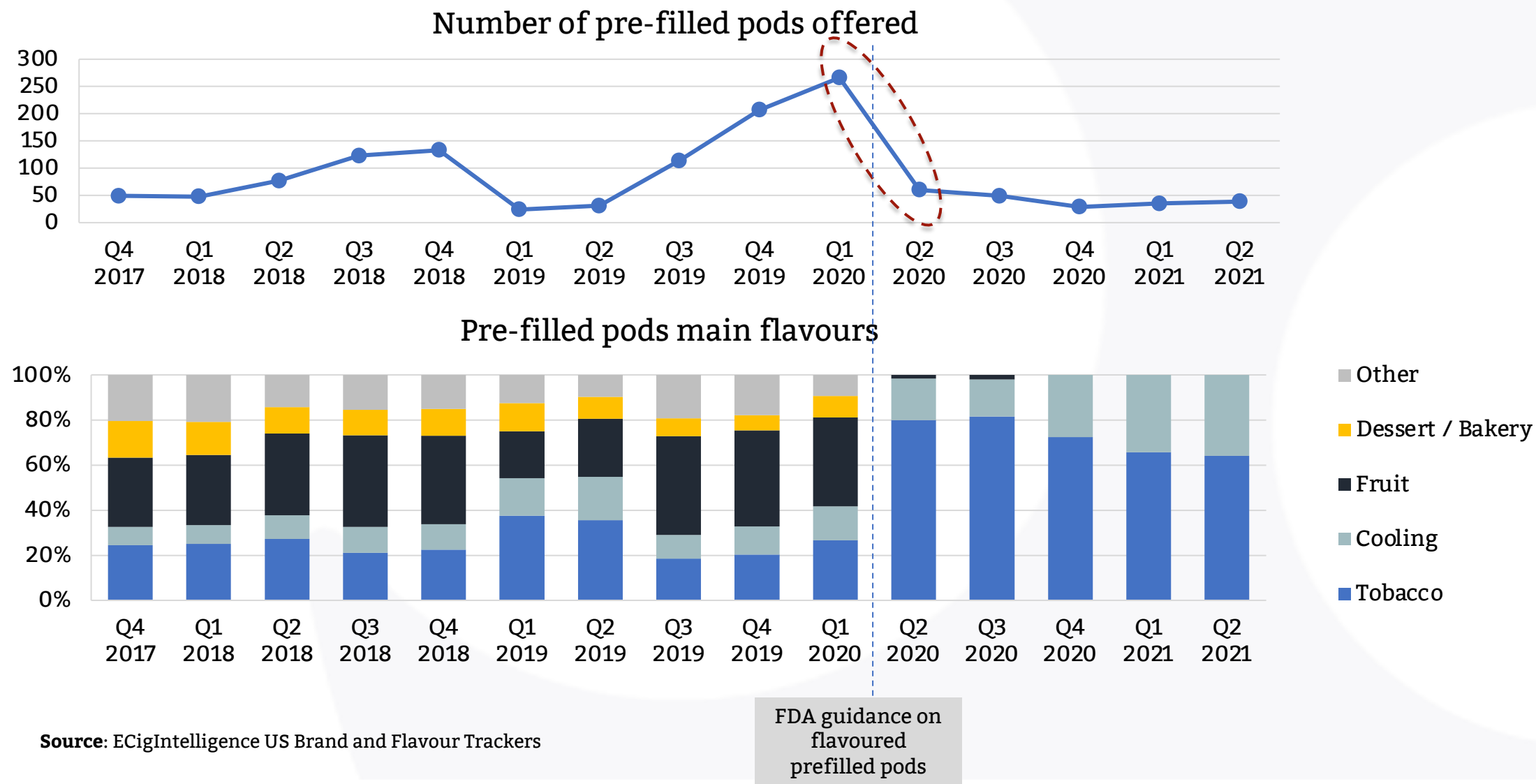
Global network of correspondents



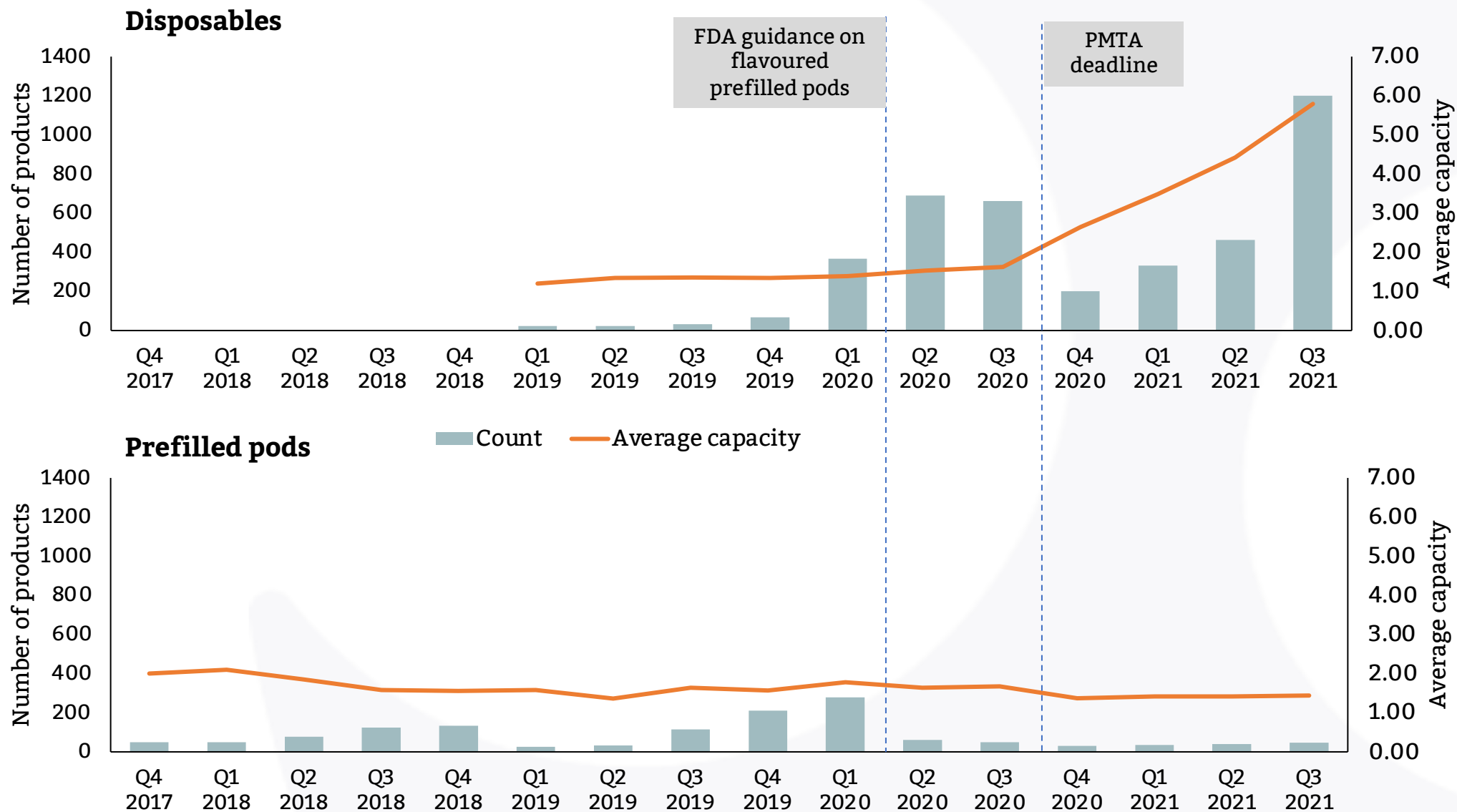
Locations



US Market response: FDA guidance restricting flavoured pods

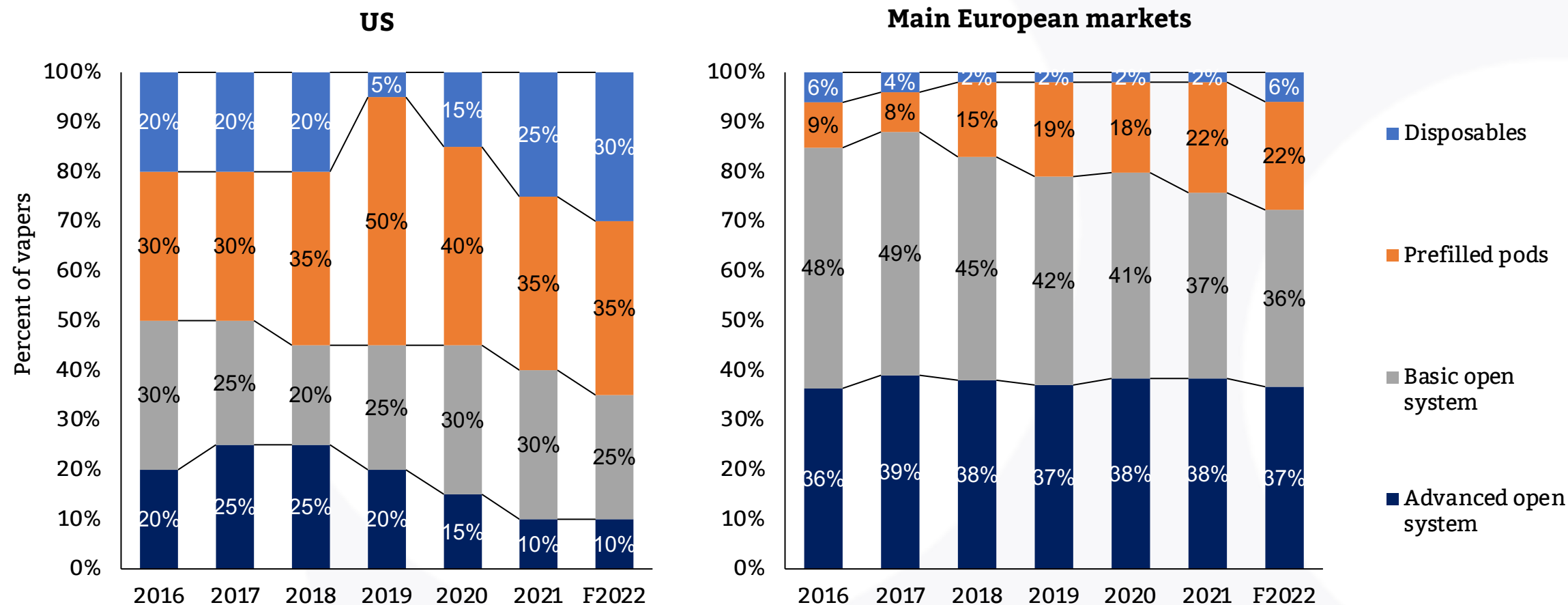


US Market response: Flavour restrictions / PMTA – growth in Disposables



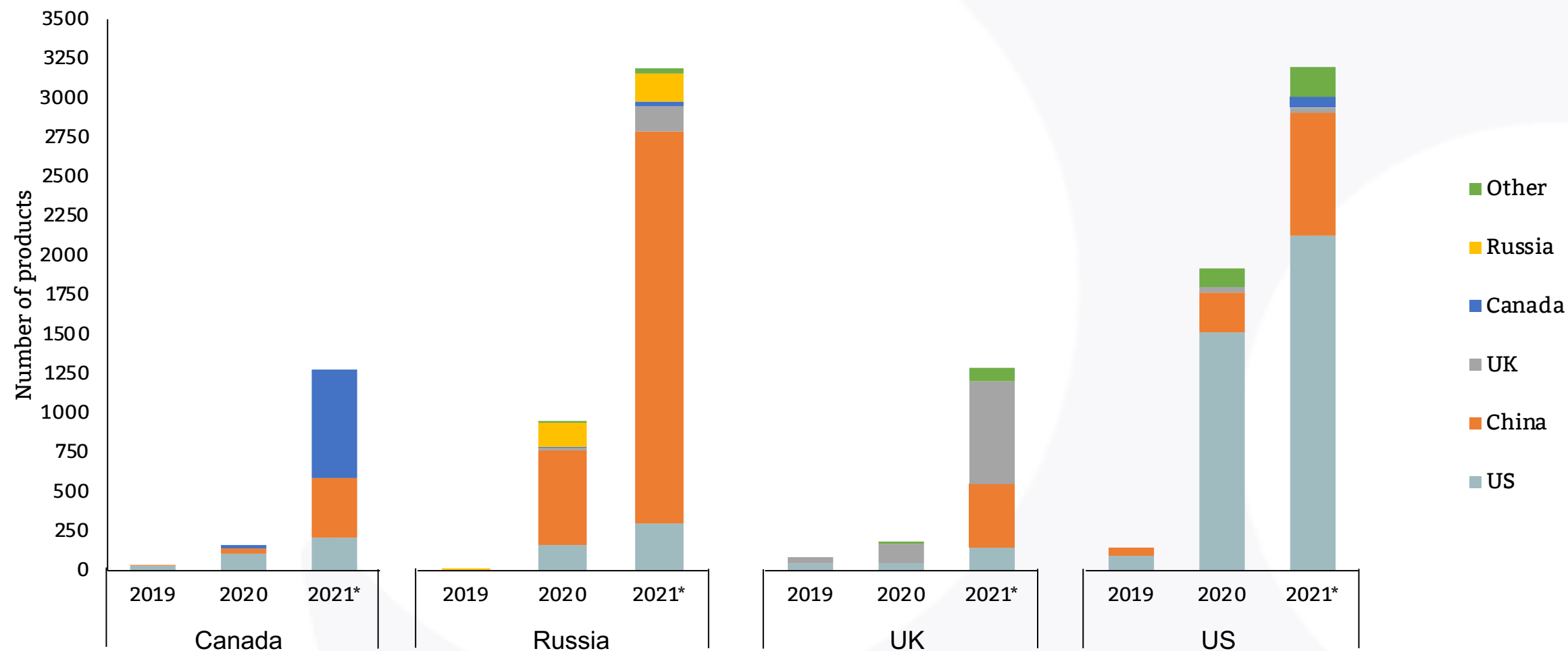
Disposables popular with vapers in the US; growing slowly in Europe

Form factor split



Source: ECigIntelligence market database; Main European markets included: France, Germany, Italy, UK

Disposable Brands: China / US brands in addition to domestic brands



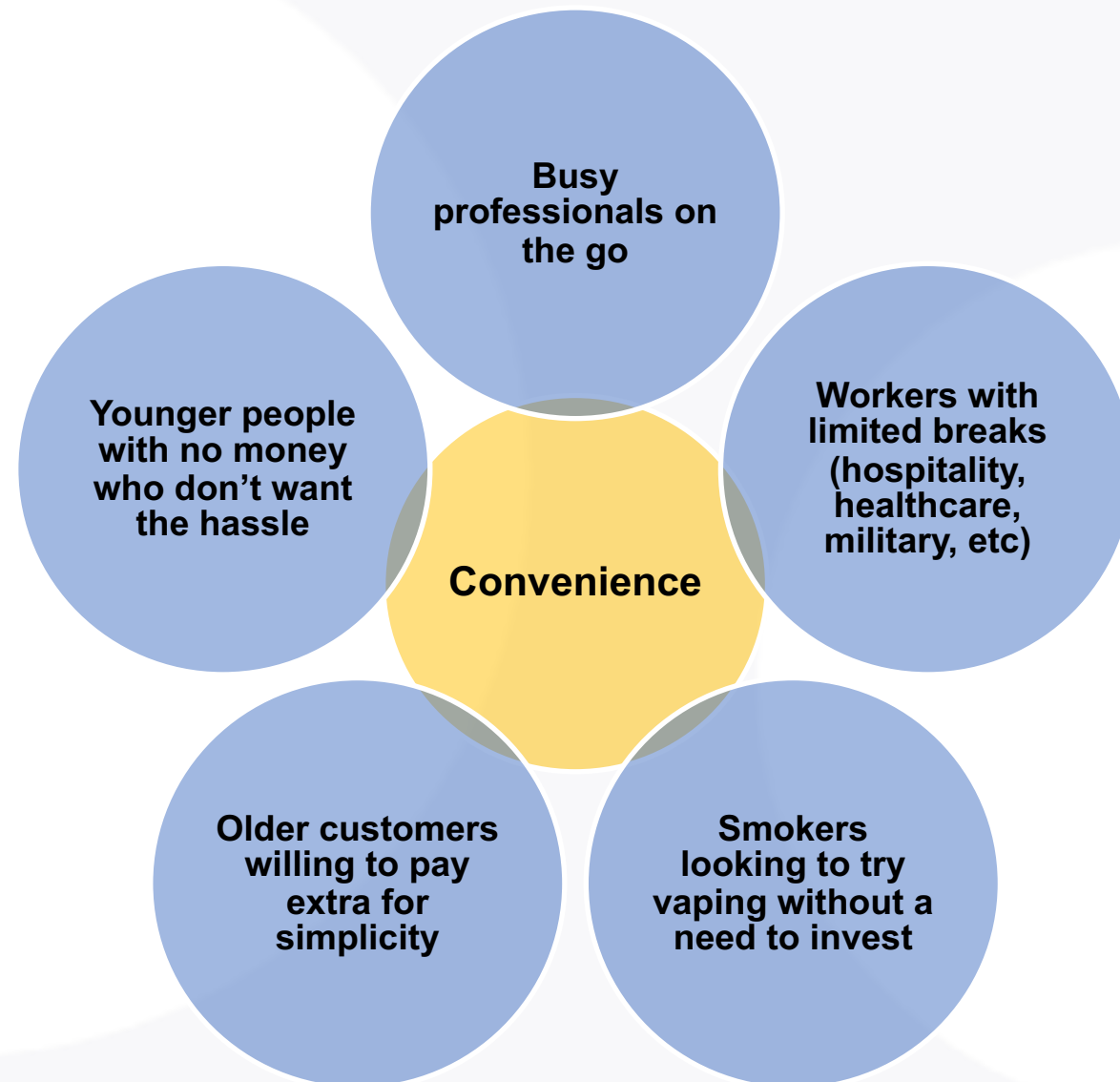
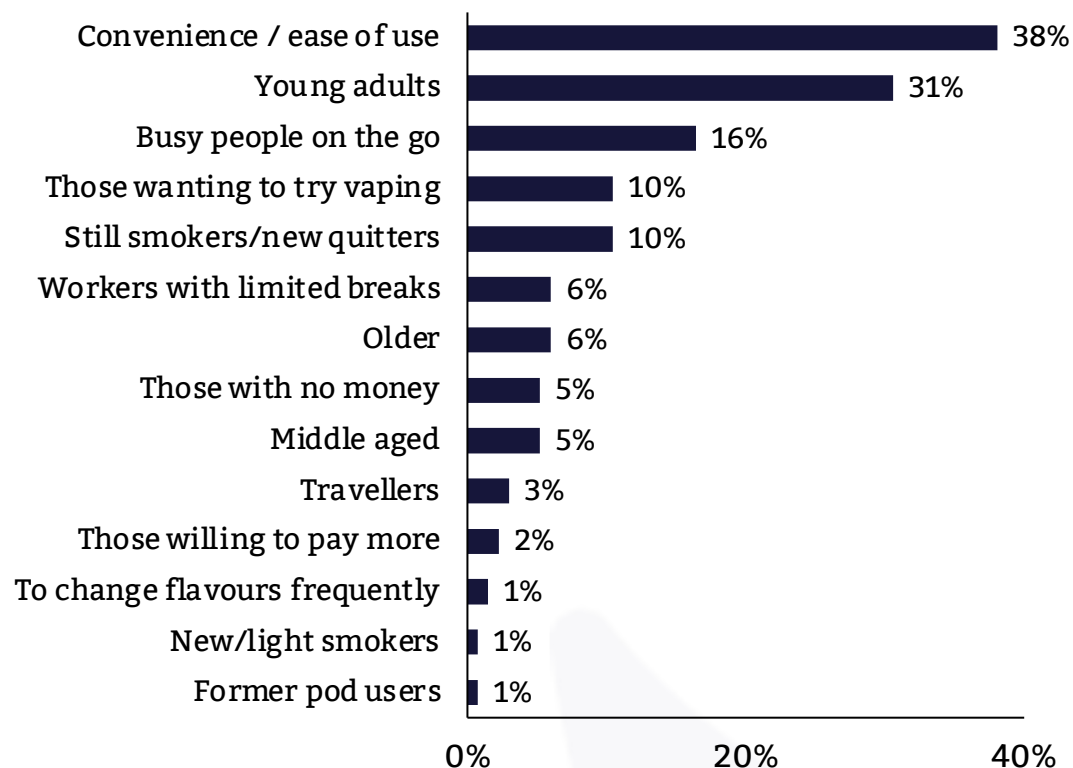
Note 1: * In 2021 we made the following assumptions for full year comparisons: 2021=Q1(actual)+Q2(actual)+Q3(actual)+Q3(assumption)

Note 2: The number of products represents a sum of all the disposables found on our tracked websites in all four quarters in a year. Products identified by brand, model and flavour, the list does not take into account different nicotine content variants.

Source: ECigIntelligence Brands trackers

Disposables: who uses them?

What type of customers do you think disposables appeal to the most?

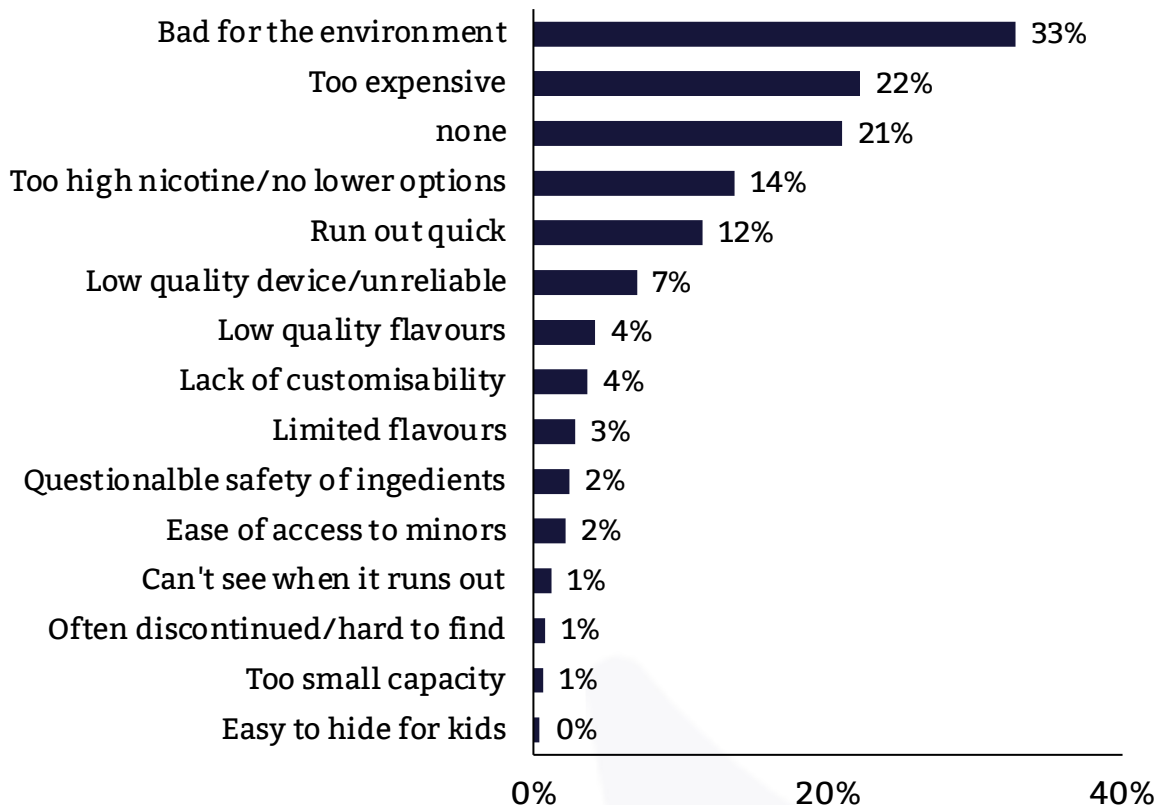


Notes: n=134

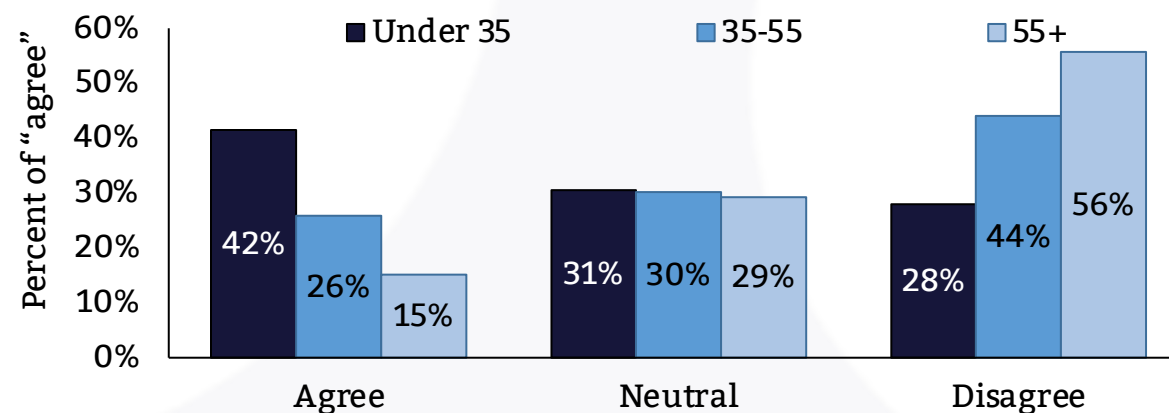
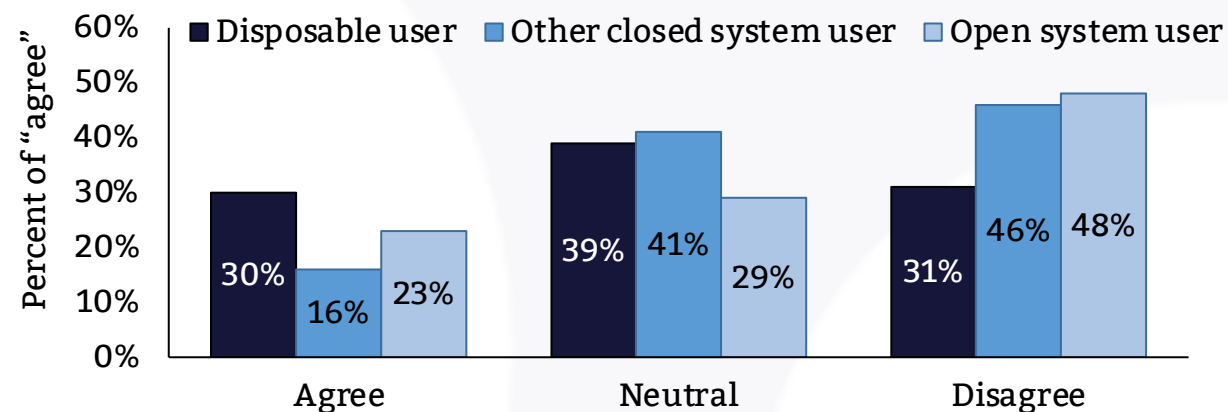
Source: ECigIntelligence US Vape Store Survey 2021

Disposables: Consumer concern with Environmental issues

Can you think of any drawbacks of disposable devices?



"Discarded vaping products pose a serious risk to the environment"

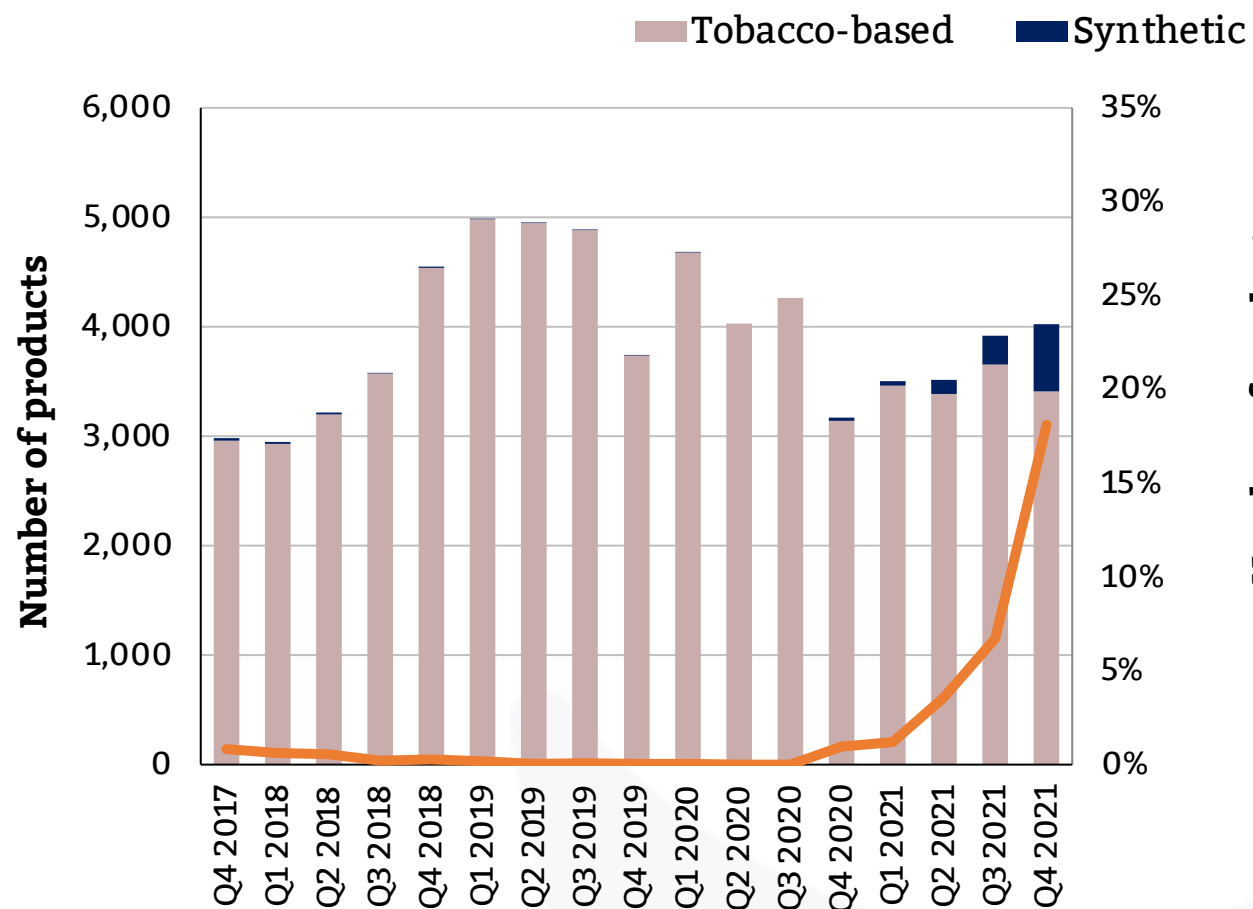


Notes: ECigIntelligence US vape consumer survey 2021; Chart 1: n=739 those who bought a disposable in the previous 6 months; Other charts: n=4445

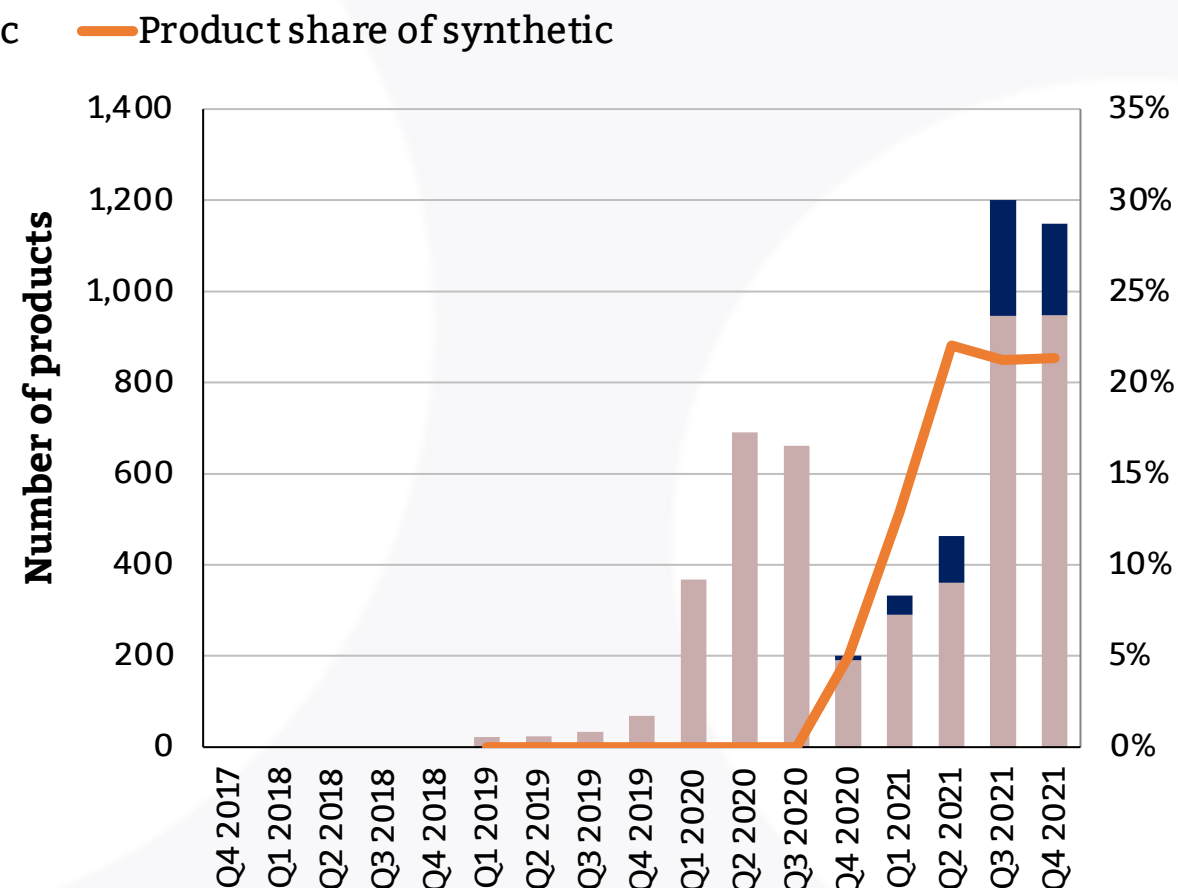
Source: ECigIntelligence

Synthetic Nicotine: 20%+ in Disposables; growth in open system

Bottled e-liquids

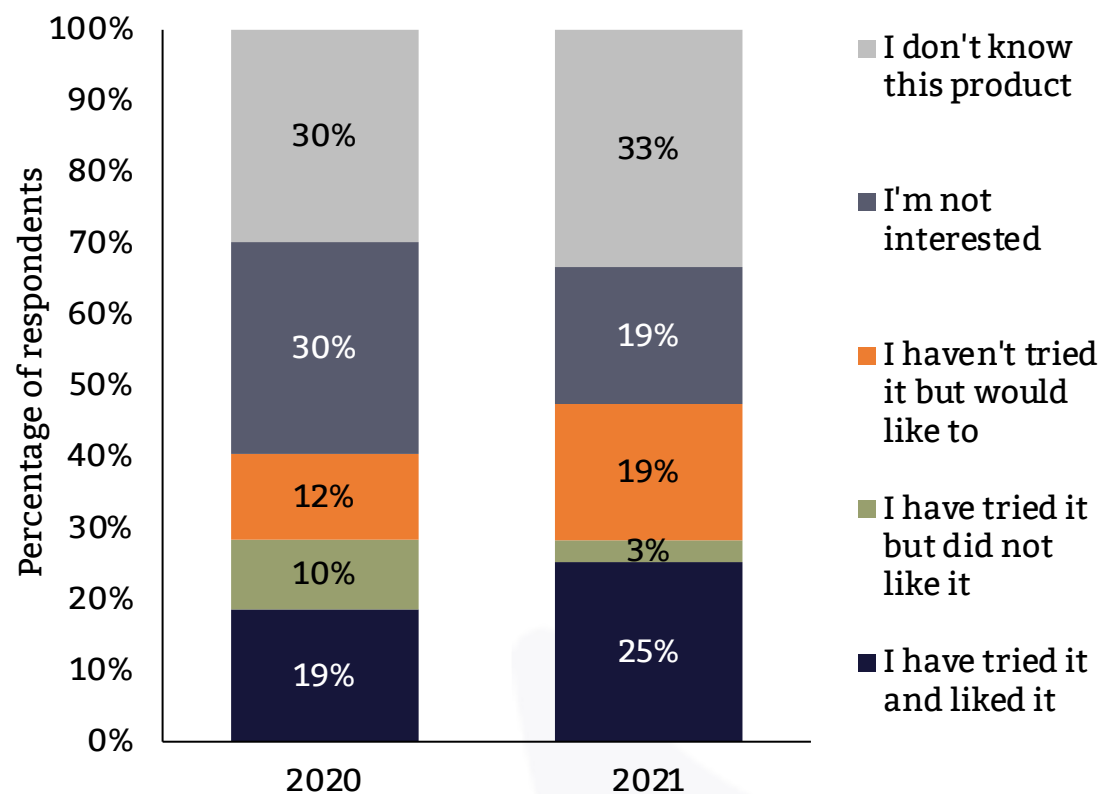


Disposables

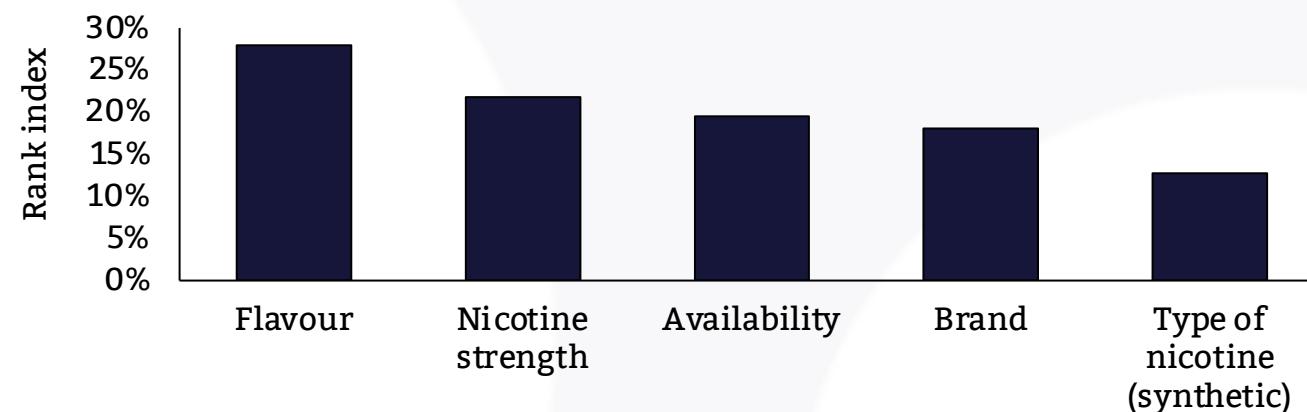


Synthetic Nicotine: Supply-side drivers; Consumers confused

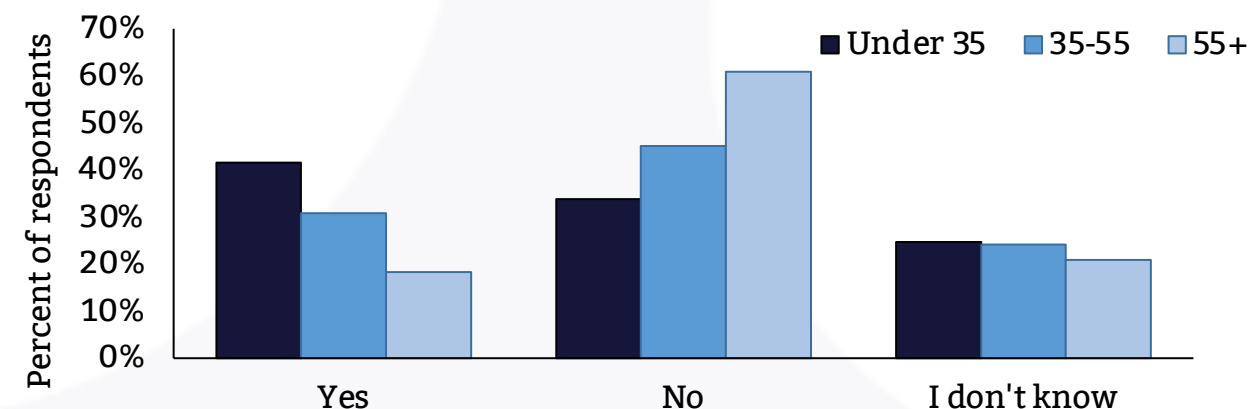
Vapers interest in products with synthetic nicotine



Importance of factors when purchasing a product with synthetic nicotine



Have you ever bought a vaping product with synthetic (tobacco-free) nicotine?



Notes: ECigIntelligence US vape consumer survey: 2020: n=4621; 2021: n=4122; Importance: n=984, Male: n=2748, Under 35: n=429, 35-55: n=1993, 55+: n=1759

Source: ECigIntelligence

Questions?



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Regulatory and Market Intelligence for the e-Cigarette Sector

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