TOBACCO CONTROL UNIT · CATALAN INSTITUTE OF ONCOLOGY

The evolving tobacco and nicotine landscape in Europe

Epidemiological trends and changing patterns of use

Is Europe moving away from smoking — or towards a more diverse pattern of nicotine use?

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Epidemiological briefing for Members of the European Parliament

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Institut Català d'Oncologia

Generalitat de Catalunya

One molecule, different routes into the body

The evolving tobacco and nicotine landscape in Europe — different products, different risks, one dependence.



Cigarette-rolling machine, patented 1881.



The same industry, four generations of delivery: smoke, aerosol, vapour, oral.

ROUTES

CIGARETTES

Combustion. The leaf burns; the dose arrives as smoke.

HEATED TOBACCO

Heating. Tobacco held below combustion, released as an aerosol.

E-CIGARETTES

Aerosol . A liquid turned into an aerosol; no leaf at all.

POUCHES AND SNUS

Oral. No smoke, no aerosol, nicotine absorbed through the gum. Snus carries leaf, pouches do not.

> *1881 — a machine rolled two hundred cigarettes a minute, against four by a skilled hand. Every product since sits in that line.*

Source: WHO Regional Office for Europe, 2026; Directive 2014/40/EU; US Patent records.

What are we measuring?

A number means nothing until we know which product, and which pattern of use, it describes.

THE PRODUCT — FIVE FAMILIES

SMOKED TOBACCO

Cigars, cigarillos, pipe, hand-rolled.

E-CIGARETTES (ENDS)

With or without nicotine; EU limit 20 mg/ml (e-liquid).

HEATED TOBACCO (HTP)

Heats tobacco below combustion — an aerosol, not smoke.

ORAL TOBACCO — SNUS

Contains leaf. Legal in Sweden; banned in every other Member State.

NICOTINE POUCHES

No leaf. Outside the Tobacco Products Directive today.

THE MEASURE — AND WHAT EACH ONE CAN AND CANNOT TELL YOU

01

EVER USE

Tried at least once, at any point in a lifetime.

Relevant to detect access and possibilities of initiation .

02

PAST 30 DAYS

Any use at all in the last thirty days.

The number most surveys report — specially among youth

03

DAILY USE

Used on thirty of the last thirty days.

The number most surveys report — link with dependence

04

DUAL USE

Two products in the same period

A pattern, not a frequency: it needs two products to have been tried.

05

DEPENDENCE

Compulsion, withdrawal, continued use despite harm.

THE ORDER **EVER USE → (30 DAYS → DAILY → DUAL) → DEPENDENCE**

Directive 2014/40/EU; WHO Regional Office for Europe, 2026; Goniewicz et al., Front Public Health 2026.

Which source answers which question?

They cover different ages and measure different things — not a defect, usage of a different methodology, so they cannot be mixed.

EUROBAROMETER

Pooled waves 2014–2023 · 539 (2024)

15+

EU27, about 26,000 respondents per wave, interviewed face to face

How common is smoking, and how do people combine products?

EUROSTAT · EU-SILC

Reference year 2025 · dataset ilc_hch22

16+

All 27 Member States, same questionnaire

How common is daily use of any product, all of them together?

ESPAD

2024 · 37 countries · n=113,882

15–16

Students in the classroom, same age band in every country

What have adolescents used in the past 30 days?

NATIONAL SURVEYS

ESTUDES 2025 · THL 2025

14–18

Spain by age; Finland by school grades — each country its own

What have adolescents used in the past 30 days?

BEFORE ANY COMPARISON

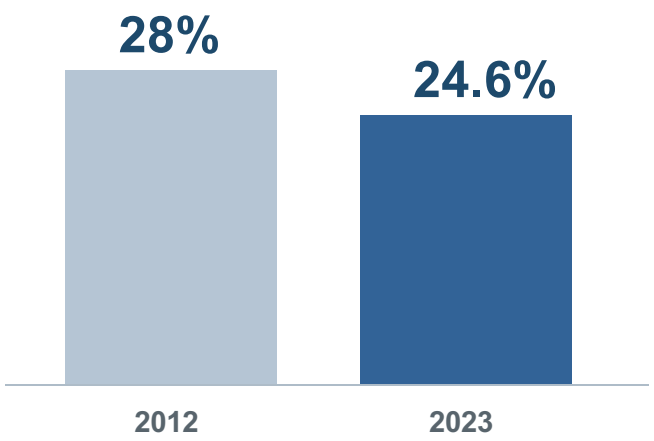
AGE GROUP · PRODUCT · FREQUENCY

Current smoking declined in the EU

About one in four people aged 15 and over reported currently smoking (daily and occasional) in 2023.

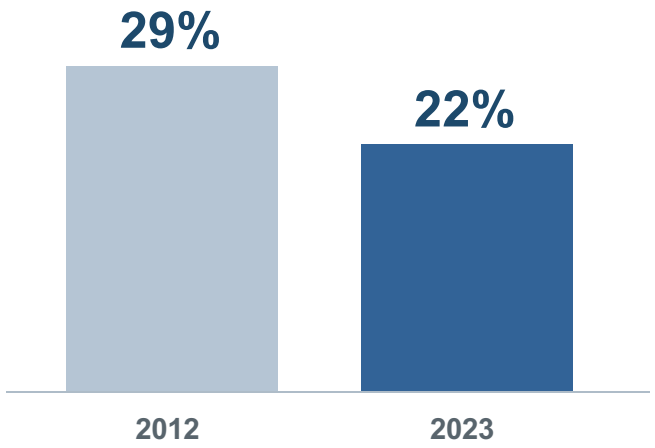


OVERALL · AGES 15 AND OVER



−4 percentage points

YOUNGER GROUP · AGES 15–24



−7 percentage points

2023 · AGES 15 AND OVER **Men 28% · Women 21%** **Smoking was more common among people with lower education or income.**

Sources: Special Eurobarometer 385 (2012) and 539 (2023 fieldwork). Ages 15–24 are included in the overall estimate.

Eurostat and Eurobarometer measure different use

EU population estimates and changes since each survey's previous round

Eurostat counts daily use all products.

EUROSTAT · DAILY USE

EU-SILC · Ages 16+

16.5%

Any covered product in 2025

17.5% in 2022 · down 1 pp

One combined figure for tobacco, vapes, heated tobacco and nicotine pouches.

Eurobarometer includes daily and occasional use

EUROBAROMETER · CURRENT USE (DAILY AND OCCASIONAL)

Special Eurobarometer · Ages 15+

Product	2020	2023	Change
Smoked tobacco[1]	**25.5%**	**24.6%**	**−1 pp**
E-cigarettes	2%	3%	+1 pp
Heated tobacco	2%	2%	See note[2]
Nicotine pouches	—	1.0%	2023 baseline

[1] Cigarettes, cigars, cigarillos or pipe. [2] 2% in both rounds after rounding. The survey reports an increase before rounding.

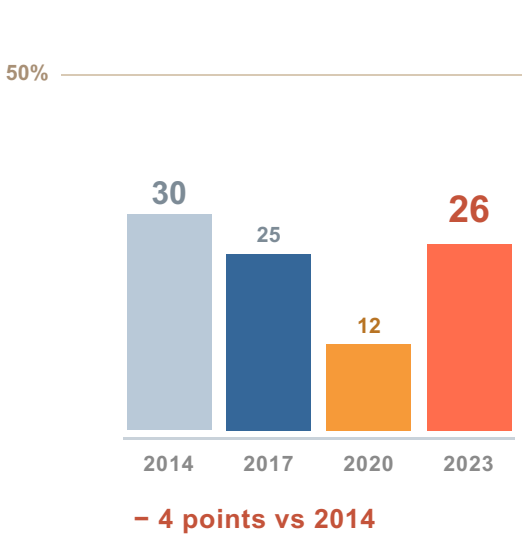
DUAL USE IN 2023 · EU RESPONDENTS AGED 15+

81% of HTP and 44% of nicotine pouch users also smoked tobacco.

Sources: Eurostat EU-SILC (ilc_hch22) · Special Eurobarometer 506 and 539 · 2023 pouch estimate from a secondary analysis of SP539.

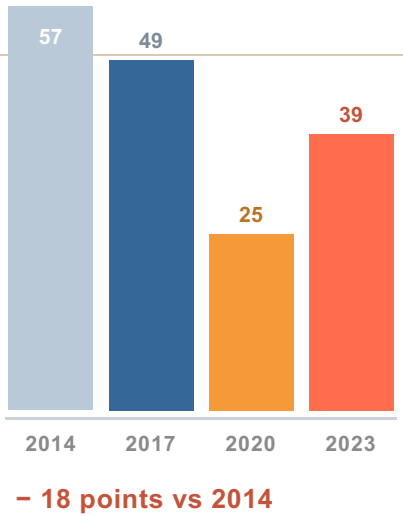
Dual use: among e-cigarette users

Daily smoking + daily e-cigs
strictest definition



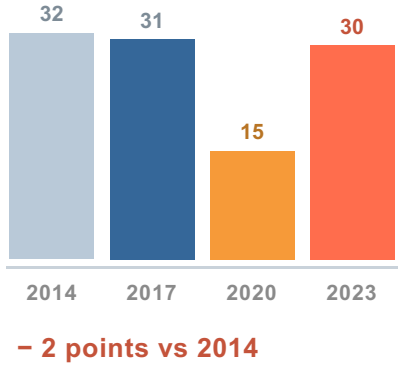
− 4 points vs 2014

Daily smoking + monthly e-cigs



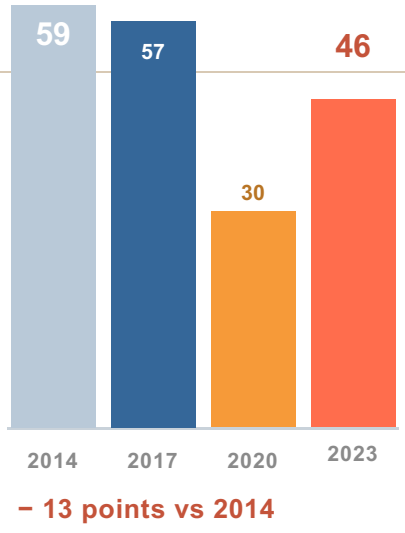
− 18 points vs 2014

Monthly smoking + daily e-cigs



− 2 points vs 2014

Both products, at least monthly
broadest definition



− 13 points vs 2014

One in four vapers also smokes every day; one in two at least monthly. Dual use is not fading as vaping matures.

Mao H, Filippidis FT, Martinez C, Feliu A. Dual use of e-cigarettes and combustible tobacco in the EU27, 2014–2023 (Imperial College London / ICO): repeated cross-sectional analysis of Special Eurobarometer 82.4, 87.1, 93.2 and 99.3, n=106,634. Weighted percentages; the four definitions overlap; denominator = current e-cigarette users with non-missing data. Not published.

Adolescent tobacco and nicotine use: 2019 - 2024

ESPAD · Students aged 15–16 · Use in the past 30 days



CIGARETTES AND E-CIGARETTES

ESPAD countries with comparable data

	2019 → 2024
Cigarettes	20% → 17%
E-cigarettes	14% → 22%

Smoking fell and e-cigarettes rose

32 countries in each trend analysis

OTHER PRODUCTS

ESPAD 2024 · EU member countries

	2024
Nicotine pouches · 22 EU	7%
Nicotine pouches · Spain	1%
Nicotine pouches · Finland	14%

EU-wide rates unavailable in the cited tables

ESPAD measured nicotine pouch use for the first time in 2024.

ESPAD Report 2024. EUDA trend analysis and ESPAD 2024 additional tables (Tables 12–14).

Same survey, same age, two countries

ESPAD · Students aged 15–16 · Use in the past 30 days

PRODUCT	SPAIN	FINLAND
01 **Cigarettes** Past 30 days	2019 21% · 2024 **13%** ↓ −8 points in five years	2019 17% · 2024 **12%** ↓ −5 points in five years
02 **E-cigarettes** Past 30 days	2019 9.4% · 2024 **24%** ↑ +15 points in five years	2019 7.5% · 2024 **20%** ↑ +13 points in five years
03 **Nicotine pouches** Measured for the first time	2024 **1%** First ESPAD estimate. One student in a hundred. A number that will look reassuring until it is plotted.	2024 **14%** First ESPAD estimate. One student in seven — above both countries' e-cigarette level in 2019.

Spain counts one pouch user in a hundred, Finland fourteen — the gap is now in the level, not in the counting.

ESPAD 2024, students aged 15–16 (n=113,882, 37 countries); current use = past 30 days. Spain cross-check: ESTUDES 2025, daily smoking 4.3%.

Is Europe moving away from smoking?

Smoking is falling. E-cigarettes rising. New products attracting youth

Both surveys agree on the direction — and neither can tell you how many people switched.

CURRENT SMOKING

EU 27 · ages 15+ · Eurobarometer

2014 26.9% — 2023 **24.6%**

− 2.3 points in nine years

PAST-MONTH E-CIGS

Students aged 15–16 · ESPAD

2019 14% — 2024 **22%**

+ 8 points in five years

AND THEY DO BOTH

Of current e-cigs users, both products at least monthly

46%

1 in 4 smokes every day as well

THE NEWEST PRODUCTS, ON THE MARKET AND MEASURED LAST

Pouches:

Adults: 0.3% of EU adults in 2021, 1.5% in 2023 — fast rise

Youth: 1% in Spain, 14% in Finland in 2024

**Europe is not switching from tobacco to nicotine.
It is accumulating products**

Three things Parliament can do

Three decisions, three vehicles already on the table

Regulate them together

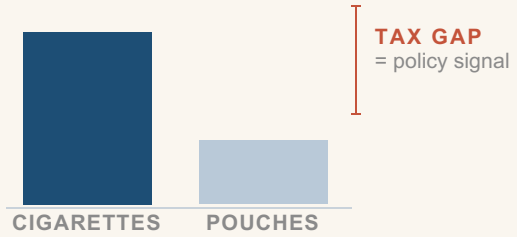


ONE SCOPE · ONE SET OF RULES

A product that delivers nicotine should not escape the rules because it does not burn.

VEHICLE
Tobacco Products Directive revision

Price them coherently



Cheap pouches beside expensive cigarettes is the Union choosing the substitution it says it does not want.

VEHICLE
Tobacco Taxation Directive

Measure what you regulate



A question never asked is not a low estimate.
It is a zero that looks like a fact.

VEHICLE
Eurostat product breakdown + harmonised youth module

THE EXPECTED OUTCOMES

Fewer adolescents starting nicotine addiction. Fewer adults still smoking — or using new nicotine products.

Everything else — market size, number of products on the shelf, the wording of a definition — is detail. These two outcomes are the ones a parliament can be held to.

Evidence base: Special Eurobarometer (EU27, 15+), Eurostat EU-SILC 2025, ESPAD 2024, ESTUDES 2025, THL 2025, and the CHAI dual-use analysis.

Europe is not switching
from tobacco to nicotine.
It is accumulating products —
and the monitoring has not caught up.

REGULATE	PRICE	MEASURE
All products, one rulebook	No cheap alternative	Every product, every age, over time

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