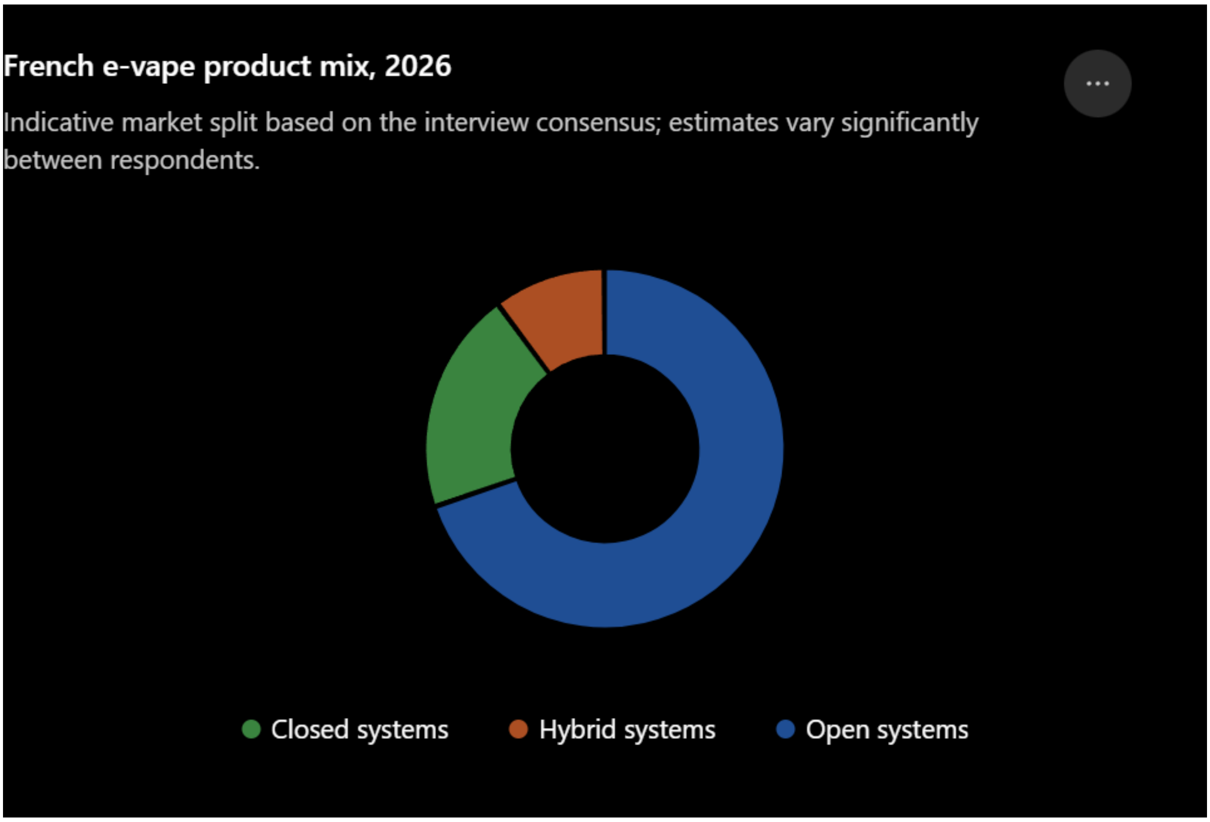
# France E-vape Market – 2026 Market Overview

## 1. Market data

**Market size**

- The French e-vape market is estimated at **€1.75–2.0bn in 2026**, with a market growth rate of **8–9% YoY**.
- Growth is expected to **gradually moderate towards 7%** over the forecast period as the market approaches maturity around **2028–2030**.
- The main structural growth driver is the **economic advantage of vaping versus cigarettes**, as continued cigarette price increases encourage switching and lower-cost consumption.
- Without major regulatory changes, the market is therefore expected to remain on a **mid-to-high single-digit growth trajectory**.

**Product market shares**



- **Open** systems: between **65-70%** of the market.
- **Closed** systems: below **20%**. Growth is slower in 2026, at around **3–5%**, mainly supported by tobacconists.
- **Hybrid** systems: just above **10%**, but by far the fastest-growing category, with **30–50%** growth reported in 2025–26.
- Open systems remain dominant because of their **lower cost per consumption**, while closed systems win on **convenience and simplicity**. Hybrids have benefited directly from the **ban on disposable puffs**.

**Retail channels**

- **Vape specialists: 40-45%** of sales. The channel is now relatively mature, with growth mainly coming through **consolidation, acquisitions and franchising** rather than major like-for-like expansion. Its strength is specialist advice, product variety and consumer loyalty.
- **Online: 30–33%**. Particularly important in **rural areas**, where specialist stores are less accessible. Online sales are predominantly open-system devices and, especially, e-liquids/replenishment.
- **Tobacconists: 15–30%**, with the most variability around each stores' share, depending on their sales' strategy. The channel is rapidly expanding its vape range and could reach **30–40% long term** if the market remains relatively unregulated. Its major advantages are nationwide coverage, high footfall and proximity.
- The market remains **highly fragmented**, with SMEs estimated to account for around **80% of suppliers**, while the major tobacco companies remain concentrated in closed systems.

## 2. Current and future trends

**Economic positioning remains the key market driver.** Cost is described consistently as the **#1 reason French consumers choose vaping**, favouring open systems because they are significantly cheaper over the long term. This advantage should persist while cigarette prices remain high.

**The post-disposable market is driving hybrid growth.** Hybrids are currently benefiting from the consumer need for a convenient alternative to disposable puffs. However, their relatively high cost, unusual refill proposition and limited consumer understanding create uncertainty over whether today's **30–50% growth rates are sustainable**. The category could slow materially once the current novelty effect fades.

**Tobacconists are becoming a major growth engine.** They are rapidly moving beyond their traditional closed-system offer and increasingly stocking open and hybrid products. Their national footprint gives them access to consumers that specialist vape stores and online players cannot reach as easily. This suggests that **a growing share of future market growth could be captured by tobacconists**, rather than necessarily coming at the direct expense of other channels.

**Regulation is the biggest uncertainty.** Multiple experts expect **new regulation within the next few years**, potentially covering online age verification, traceability, taxation, packaging and flavours. A ban or severe restriction on online sales would particularly affect rural consumers and could redirect some demand towards tobacconists and vape specialists, while also **increasing illicit sales through social media and other informal channels**.

**Regulation could structurally favour large tobacco players.** A tax on e-liquids, neutral packaging or restrictions on flavours could affect the highly fragmented French SME base, which currently drives much of the open-system market and product innovation. Conversely, tobacconists are likely to remain strategically important to policymakers because of their role as a nationwide convenience retail network.

**Overall outlook:** absent major regulatory intervention, the French market should continue growing at **7–9% annually**, led by open systems and increasing tobacconist penetration. The key downside risk is **regulatory intervention**, which could reduce market growth by an estimated **~2 percentage points or more** and materially reshape the product and channel mix.