

# TPE

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## The Growth of Nicotine Pouches

David O'Neill (Imperial Brands)

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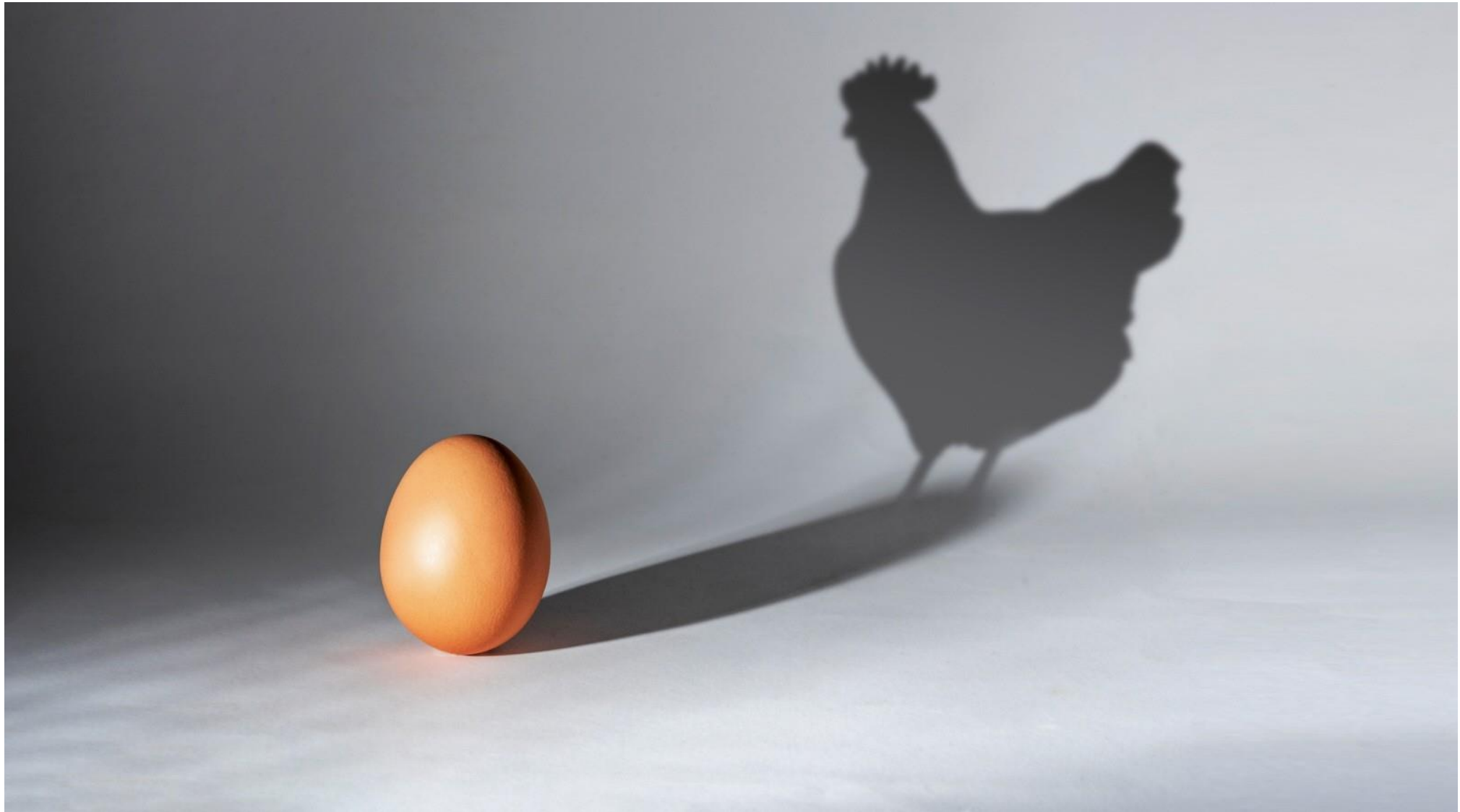
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**Talking  
Growth.**



Who  
is this?



Who  
is this?



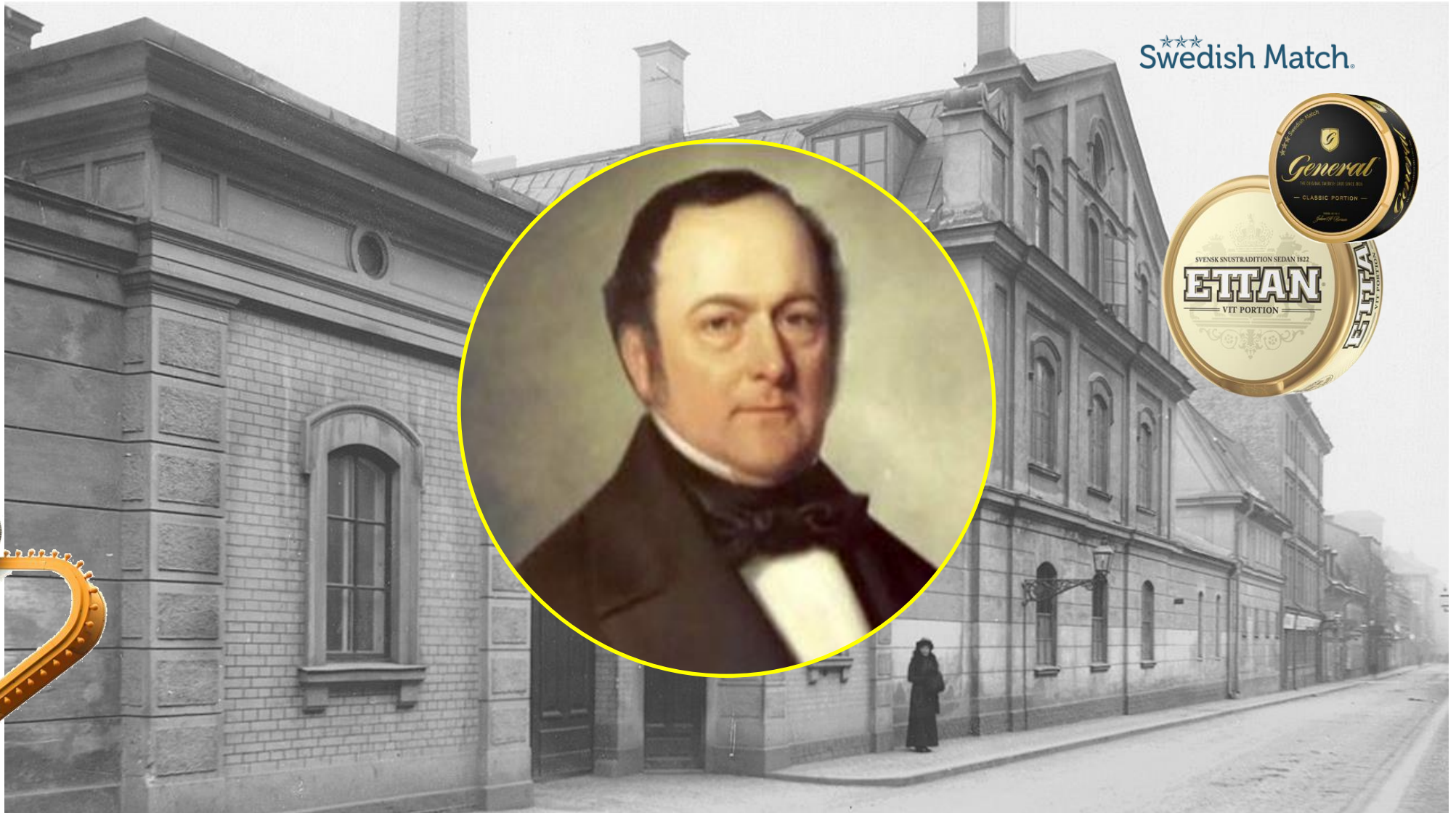
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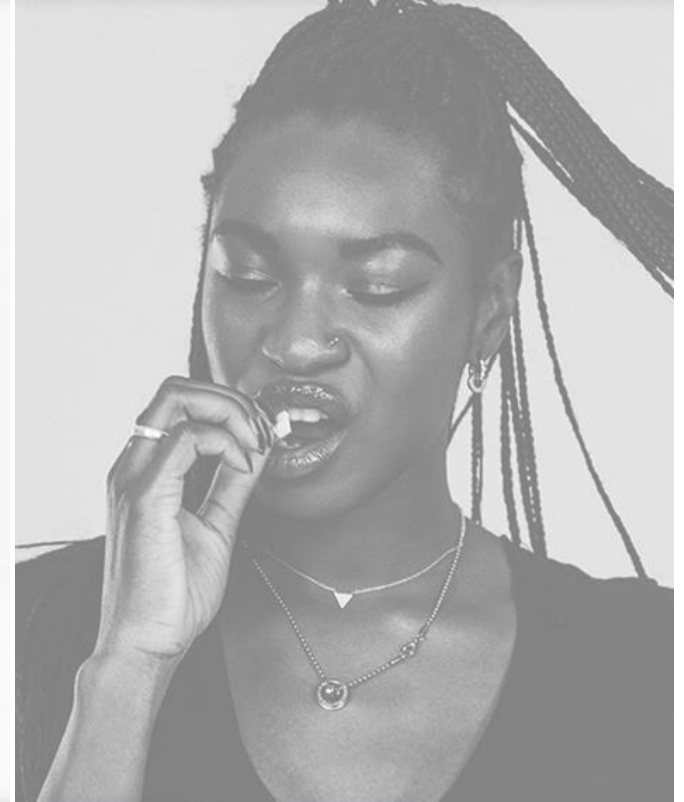
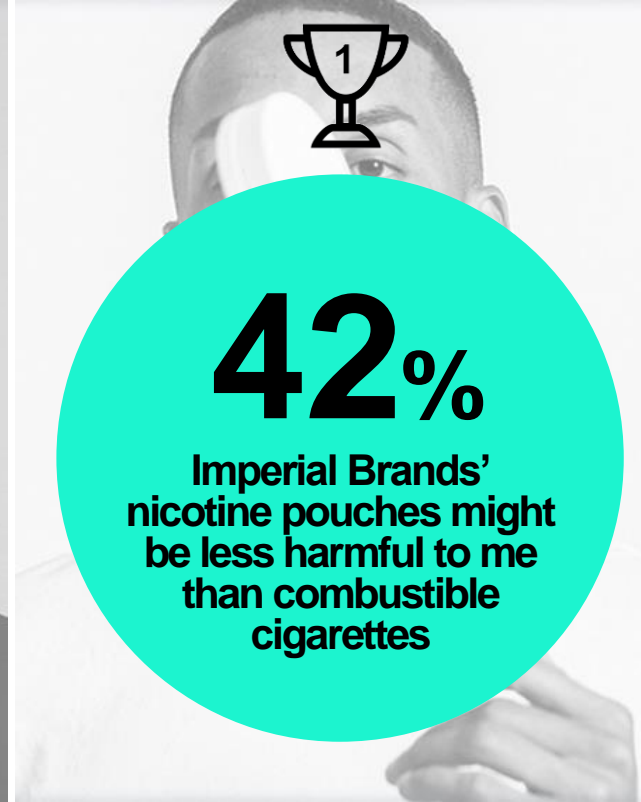
Who  
is this?



# Why choose nicotine pouches?



# Why choose nicotine pouches?

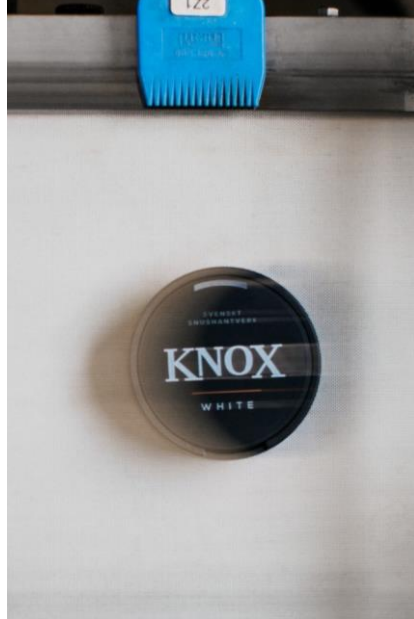
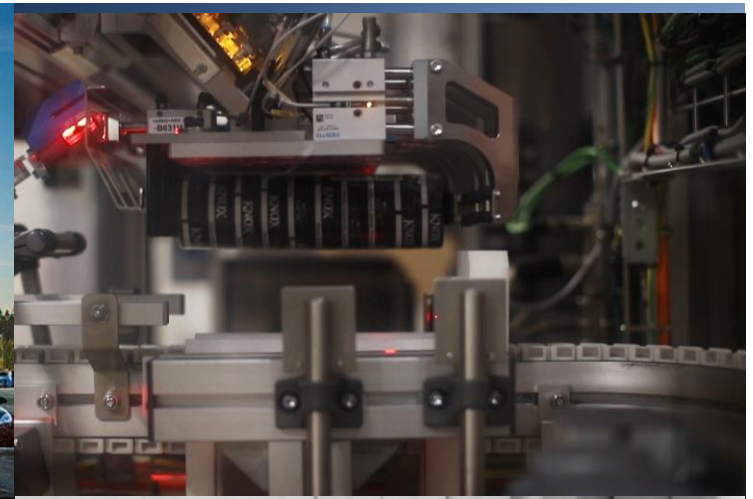


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Data Source: ZONE X UK Risk Perception and Behavioural Intentions / UK; n=374

# Imperial Brands who?

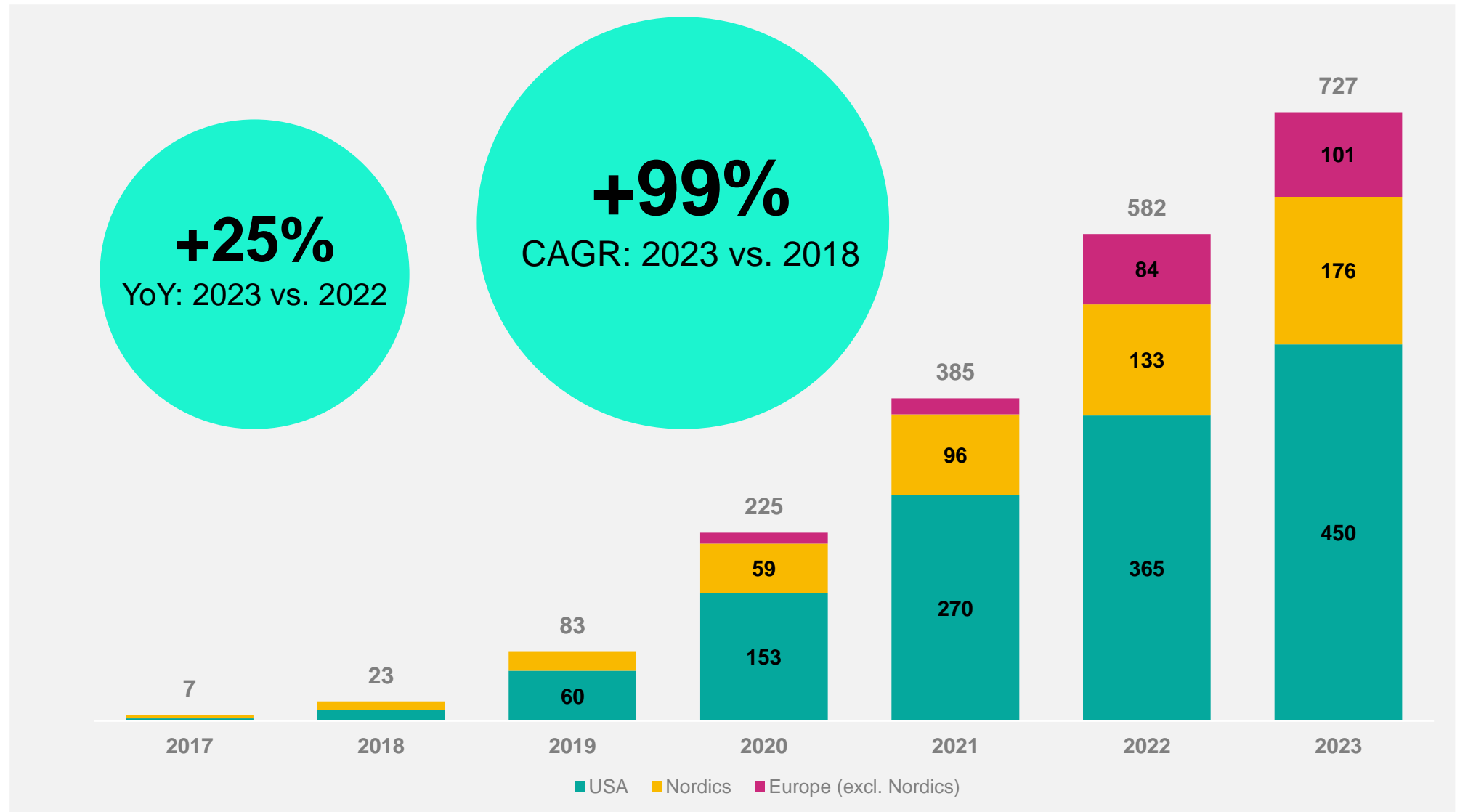


# Imperial Brands who?



# Growth of Nicotine Pouches Segment

USA vs. Europe in mn cans



**Disclaimer:** Presentation on behalf of Imperial Brands and data presented is for products sold outside of the U.S. **Sources:** USA = MSAI Wholesale Shipment to Retail data through 7/1/2023  
Nordics = Sweden, Norway, Finland, Denmark, Estonia & Iceland (internal estimations) Europe = Netherlands, Germany, UK, Czech, Slovakia, France, Italy, Switzerland (internal estimations)

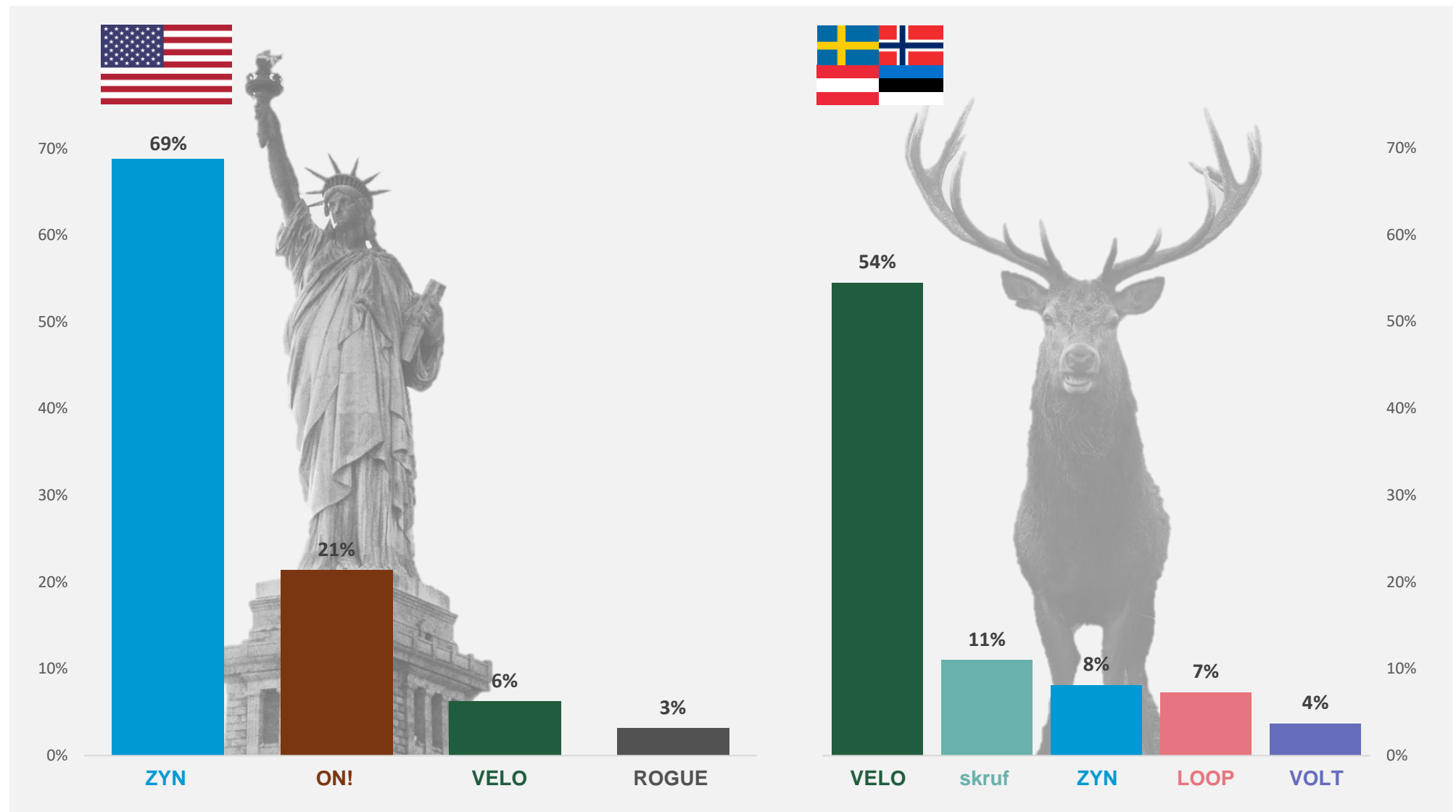
# Welcome to the Nordics.



**Disclaimer:** Presentation on behalf of Imperial Brands and data presented is for products sold outside of the U.S. **Source:** 1) Sweden Nielsen MOND Aug '22 – Sep '23, includes Limited Editions; 3) Nielsen and Haypp MOND weighted Estonia, Sweden and Norway MAT Sep '23; 3) Unique counts on brands & SKUs done on Nielsen/Scanning Data & Online where available, launches count purely on Nielsen/Scanning Data within last year n.b. there might be errors in count due to method of calculation

# Biggest Nicotine Pouches Players.

USA vs. Nordics & Austria  
Market Share 2023

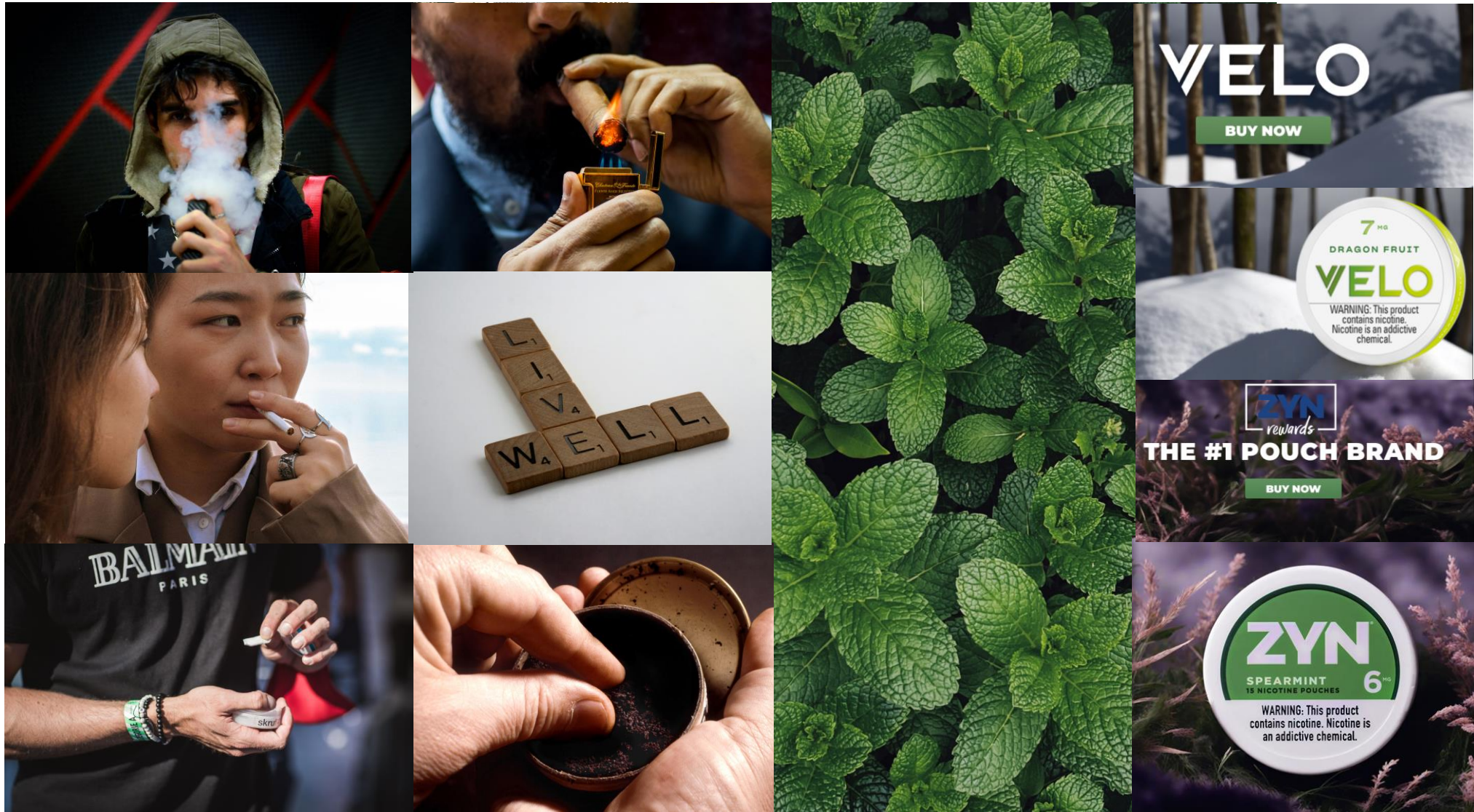


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Same,  
Same.



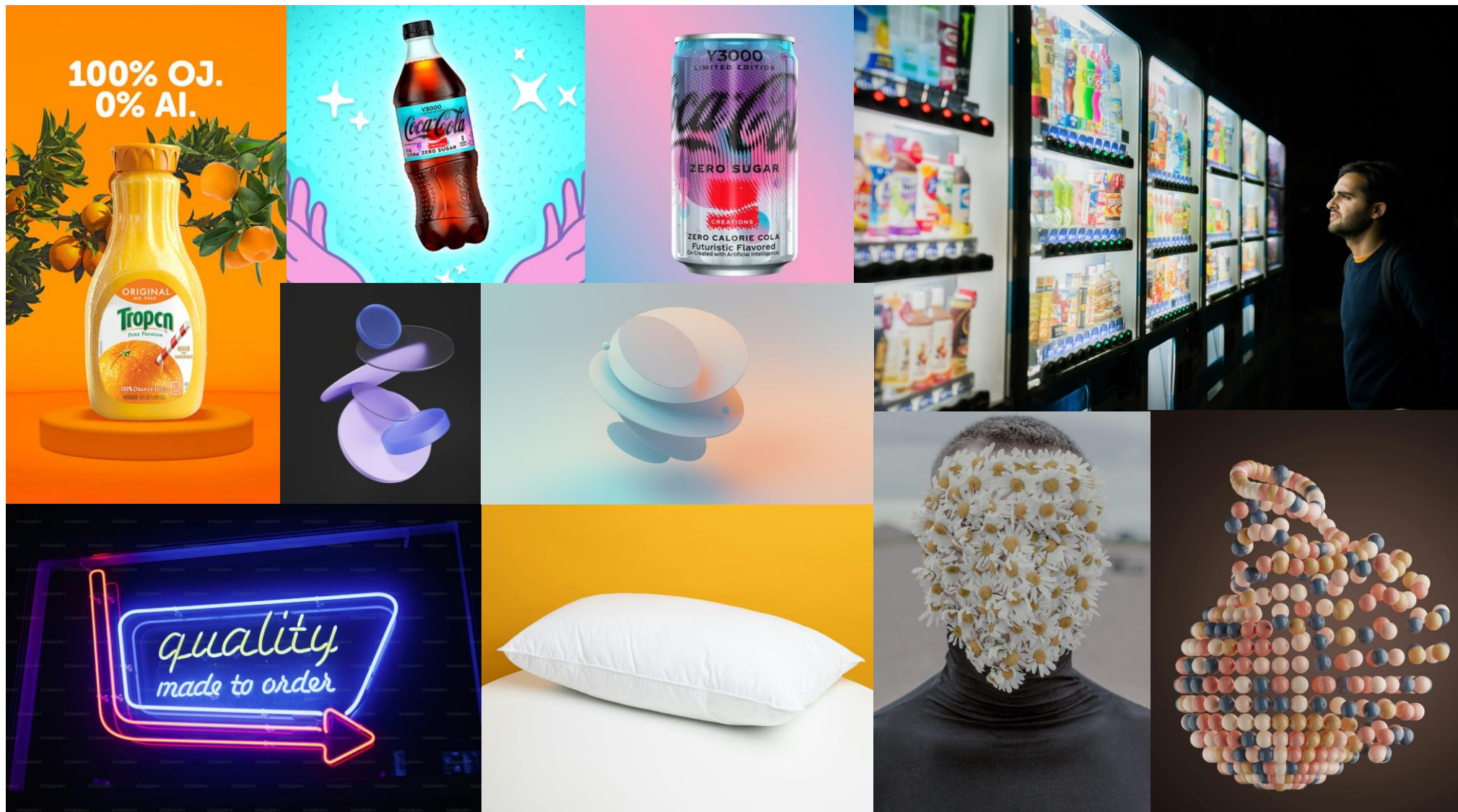
Same,  
Same.



Same,  
Same,  
But  
Different.



Where is  
the  
market  
headed?



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