

Heated Tobacco Is Gaining Ground in Taiwan: What Comes Next?

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Heated tobacco products (HTPs) officially entered Taiwan's legal market in the fourth quarter of 2025. This launch introduced a new tobacco option and made HTP use more visible through legal retail channels and daily life.

According to the Taiwan Health Promotion Administration's 2024 survey¹, HTP use among adults stood at just 0.1% before the legal launch. Since then, HTP devices have become noticeably more visible among smokers, suggesting growing market presence and use.



What Is Driving HTP Appeal?

Since the legal launch, HTPs have become easier to find and buy. Health Promotion Administration findings and post-launch market observations point to three key drivers of consumer interest.

1. Curiosity and Legal availability Makes HTPs Easier to Access

Curiosity is an important reason smokers become interested in HTPs. Before the legal launch, users often relied on overseas travel, friends or relatives bringing products back, or other informal sources. Legal retail availability has made HTPs more visible and easier for smokers to learn about and access.

2. Peer Influence Builds Awareness and Interest

Friends and colleagues also play a role in introducing smokers to HTPs. Because the devices look and operate differently from conventional cigarettes, they tend to attract attention in the early stages of market adoption. Conversations among peers can further build awareness and familiarity with the category.

3. Less lingering Odor Adds to the Appeal

Compared with conventional cigarettes, some users perceive HTPs as producing less smoke and leaving less lingering odor. This can reduce the smell left on clothing and in indoor spaces, making HTPs more appealing in situations where odor is a concern.

Overall, legal availability has made HTPs easier to obtain and opened up more usage occasions. As the market develops, consumers are shifting their attention from “product availability” to “which brand, flavor, and experience best suits them.”

Dual Use Remains Common as HTP Use Grows

Another key development to watch is how HTPs are being used alongside conventional cigarettes. A 2025 cross national study published in the Journal of Epidemiology² found that around two thirds of HTP users globally also smoke conventional cigarettes, with a similar pattern seen across Asian markets. Dual use has also been widely observed in earlier HTP markets such as Japan and South Korea.

In Taiwan, dual use is also likely to remain an important pattern as the legal market develops. For some users, cigarettes and HTPs may serve different occasions, such as drinking, socializing, or before and after meals. This suggests that product choice may vary depending on the occasion.

HTPs are often expected to replace some cigarette consumption, but international evidence suggests that adoption does not necessarily lead to complete switching. Research from Japan also shows that the relationship between HTP growth and declining cigarette use is complex, particularly when dual use remains common. Greater HTP uptake may therefore not translate directly into lower overall tobacco consumption

What matter now is how HTPs become integrated into existing smoking habits, whether they create additional occasions for tobacco use, and how the relationship between cigarette and HTP use changes over time.

Product Experience Shapes HTP Switching

Differences in product experience and smoking sensation are another reason why some consumers continue to use both cigarettes and HTPs. These differences may also influence whether dual users eventually move toward exclusive HTP use.

Social media discussions suggest that many users still evaluate HTPs against conventional cigarettes, asking how closely the experience compares with smoking or whether it resembles a familiar cigarette brand. This shows that existing cigarette experience remains an important reference point when consumers assess whether HTPs suit them.

If HTPs can deliver the tobacco sensation, throat hit and level of satisfaction users are looking for, some may reduce cigarette use or eventually switch fully to HTPs. For those who still value the sensation, intensity or familiarity of conventional cigarettes, a weaker match may lead to continued dual use or even a return to cigarettes.

For brands, the challenge goes beyond trial. The bigger question is whether the overall product experience is strong enough to keep consumers using the product, including the device, tobacco sticks and flavor options.

Convenience Stores Have Become the Main Purchase Channel

Following the legal launch, convenience stores quickly became an important everyday purchase channel for HTPs, helped by their dense store network, easy access and early availability through mainstream retail.

Retail channels matter for more than simply providing a legal place to buy HTPs. Even without changing brands, users may switch where they buy because their usual store is out of stock, another outlet starts carrying the product, a different store is closer to home or work, or preferred flavors are available only through certain channels.

At this early stage of market development, ease of purchase is part of the overall user experience. When users cannot consistently find their preferred tobacco sticks, they may first shop elsewhere or choose another flavor. If supply issues continue, they may eventually switch brands or adjust how they use cigarette and HTPs.

Reliable supply, sufficient retail coverage, and a good range of flavors and products affect more than purchase convenience. They can also influence how often consumers use HTPs and whether they continue choosing the same brand.

In addition to convenience stores, legally approved HTPs may also be sold through duty free shops, selected tobacco and liquor retailers, and other licensed outlets. Even so, convenience stores remain the main choice for everyday replenishment.

Duty free shops play a different role. Compared with convenience stores, which serve immediate and routine purchase needs, duty free channels are more relevant when price and larger volume purchases matter. Although the range of products remains subject to regulatory restrictions, the price advantage can still be attractive to heavier users.

iQOS and Ploom Lead the Legal Market, but Consumers Have Experience with Other Brands

The legal HTP market in Taiwan is currently led by iQOS and Ploom. The two brands differ in market presence, product range and perceptions. According to the Health Promotion Administration, 14 products from two companies had been approved as of July 2026.

Comparison area	iQOS	Ploom
Market Presence	Larger user base across major Asian HTP markets, with strong brand visibility	Established presence in markets such as Japan, with continued growth in recent years
Product Range	Broader range of tobacco sticks and flavors	Currently centered on Ploom X with selected MEVIUS tobacco sticks, resulting in a more focused product range
User Perceptions	Seen as offering greater variety in flavors and taste profiles	A stronger tobacco sensation, with regular tobacco variants feeling closer to conventional cigarettes
Potential Barriers	Stock shortages in some channels or product variants may affect everyday purchase	Some report higher heat during use, occasional discomfort from the heat, and greater cleaning needs

Note: Product information is based on publicly available sources. User perceptions and potential barriers reflect discussions in Taiwanese forums and social media.

However, consumer experience is not limited to these two brands. Compared with more established HTP markets such as Japan and South Korea, Taiwan still offers a relatively limited range of brands, devices, tobacco sticks and flavors. Some consumers had already used HTPs

before the legal launch and may have experience with brands that are not currently approved for sale in Taiwan.

When the legal market does not fully cover products or preferences that consumers have encountered before, some may continue to look at products available overseas.

Looking ahead, the market will be shaped by competition between iQOS and Ploom, whether more products receive approval, how much legal product choice expands, and how the entry of unapproved products is managed. Between February and April 2026, Customs seized nearly 28,000 cartons of HTPs brought into Taiwan in violation of regulations, showing that overseas products remain an issue for market oversight.

Brand Choice and Continued Use Come into Focus

As HTP use grows, brand choice and continued use are becoming increasingly relevant alongside product visibility and initial trial.

Among current HTP users, key questions to watch include:

- Which device brand consumers choose
- Which sticks and flavors become their primary choices
- Whether users continue to choose the same brand

At this early stage of market development, choices around devices, tobacco sticks and purchase channels may still change. Continued use of the same brand depends on more than the device itself. Tobacco sensation, satisfaction, flavor choice, product availability and ongoing cost can all shape future brand decisions.

Looking ahead, the key question is not simply how many consumers try HTPs, but which brands and products become part of their regular use over time.

Device Price Drives Trial, Stick Prices Matter More Over Time

HTP pricing affects consumers in two different ways:

- Devices are generally a one-time purchase, so device prices mainly influence whether smokers are willing to try HTPs, switch brands or upgrade.
- Tobacco sticks are ongoing everyday expenses, so their price has a more direct effect on how often consumers use HTPs and whether they continue using them over time.

The two leading brands currently differ in device pricing and positioning. Ploom offers a lower priced entry device, helping to reduce the barrier to initial trial. iQOS provides devices at different price points depending on materials and functionality.

By comparison, HTP stick prices are currently close to those of conventional cigarettes, and prices across the two leading brands are also relatively similar. This keeps the gap in everyday usage cost fairly limited for now.

Unlike conventional cigarettes, switching HTP brands may require buying a new device, because devices and tobacco sticks are generally not interchangeable across brands. This adds switching cost means that small change in stick price may not immediately trigger a brand switch.

International research also shows that HTP demand is price sensitive and that cigarettes and HTPs can partially substitute for one another. Future price changes may therefore affect usage frequency, brand choice and the relationship between cigarette and HTP use.

Overall, device price matters more at the point of purchase, while stick prices have a more direct impact on ongoing usage and continued use. Over time, stick prices, reliable supply and the overall product experience are likely to play a greater role in whether consumers stay with the same brand



Future Outlook: What to Watch Next

Less than a year after the legal launch, Taiwan's HTP market is already evolving. HPT are more visible in everyday retail, while consumers choices across brands, devices and tobacco sticks are still taking shape.

Rising HTP use does not necessarily mean cigarette use is declining at the same pace. International evidence shows that dual use remains common, and some consumers may choose different products for different occasions.

Future market development will depend on both user growth and how HTP usage patters change over time. Three areas are particularly worth watching:

1. Whether Dual Use Persists

The key question is whether dual use remains a transitional pattern during the early stages of market development or becomes a more lasting form of tobacco use.

Whether HTPs account for a larger share of an individual's total tobacco consumption will also help indicate how their role within existing smoking behaviors change over time.

2. Whether Trial Leads to Continued Use

As the category develop, it will be important to see whether consumers move beyond initial trial and establish a regular brand choice over time.

3. Whether Legal Choice Keep Pace with Demand

The market will also depend on whether more legal products become available, whether brand and flavor choices become more diverse, and how the entry of unapproved products is managed will all influence how the market develops.

Overall, Taiwan's HTP market is still at an early stage of development. The next phase will be shaped by how the relationship between cigarettes and HTPs evolves, which brands and products consumers continue using, and whether the legal market can better reflect actual consumer demand.

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Endnotes

¹ Health Promotion Administration, Ministry of Health and Welfare. (2023). "Results of the Taiwanese Smoking Behavior Survey." <https://www.hpa.gov.tw/Pages/Detail.aspx?nodeid=1718&pid=9913>

² Scala, M., Dallera, G., Gorini, G., Achille, J., Havermans, A., Neto, C., Odone, A., Smits, L., Zambon, A., Lugo, A., & Gallus, S. (2025). "Patterns of Use of Heated Tobacco Products: A Comprehensive Systematic Review." *Journal of Epidemiology*. <https://pmc.ncbi.nlm.nih.gov/articles/PMC11979348/>