

ApiraSol

E-CIGARETTES IN FRANCE 2024/2025 – Q2

SUPPLY CHAIN INTELLIGENCE
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**INTRODUCTION &
METHODOLOGY**

Introduction

ApiraSol has been investigating the routes, brands, and entities involved in the trade of illicit e-cigarettes across various countries worldwide for several years.

In this particular research conducted in 2025, ApiraSol focused on the global illicit e-cigarette trade, drawing from trade data as well as open sources such as enforcement news, press releases from customs agencies, academic research papers, and online intelligence reports. The period covered for trade data spans January 2024 to December 2024, while enforcement-related news generally covers the years 2024 to 2025.

The Illicit E-Cigarette Trade: A Growing Global Challenge

The illicit e-cigarette trade is becoming a significant force reshaping the global nicotine market, fueled by rapid growth and mounting regulatory complexity. According to Euromonitor International, the illicit e-cigarette market was valued at **USD 47 billion in 2024**, representing over **70% of global spending** and roughly **three-quarters of total volume—equivalent to 605 billion cigarettes**. Furthermore, Euromonitor reported that illicit e-cigarette products exceed **80% penetration in North America, Latin America, the Middle East and Africa, and Asia Pacific**,

while Western Europe, though lower, continues to face persistent illicit trade despite increasing legislative pressures.

Regulatory Frameworks Driving Illicit Trade

Stringent bans and fragmented regulations often unintentionally fuel underground trade. Bans do not necessarily eliminate demand for e-cigarettes; where consumer interest persists despite such measures, gaps in legal supply may arise, creating opportunities for illicit suppliers to fill unmet demand. Even in countries with robust regulatory frameworks, unintended consequences may arise—strict compliance requirements and high taxation can make legal products more expensive and less accessible, while the convenience of illicit channels, including online and delivery-based sources, may further draw consumers toward cheaper, non-compliant alternatives. These conditions typically incentivize smuggling and the use of transshipment hubs in regions with weaker oversight, allowing illicit goods to infiltrate regulated markets.

Complex regulations also often create loopholes that illicit networks exploit, such as mislabeling products or routing shipments through multiple jurisdictions to obscure origins. While strong regulations aim to protect public health, without equally strong

enforcement, these often end up driving demand for illicit products rather than curbing it.

China's Regulatory Gaps and Insufficient Enforcements

China produces the vast majority of e-cigarettes globally, making its regulatory framework critical to controlling illicit trade. The **Administrative Measures for Electronic Cigarettes** (effective May 1, 2022) require that all e-cigarette products comply with mandatory national standards and that producers, exporters, and retailers obtain licenses from the State Tobacco Monopoly Administration (STMA). Similarly, the **Administrative Rules for E-Cigarettes Import-Export Trade** (issued October 2022) stipulate that only licensed exporters can ship products abroad, and exported goods must either meet the destination country's regulations or adhere to China's national standards.

In practice, however, exports are not sufficiently controlled. Loopholes in licensing, weak oversight of small-scale producers, and limited monitoring of export compliance allow unlicensed operators to bypass official channels.

Compounding these issues is weak enforcement in many destination countries. These challenges are amplified by the growing use of digital platforms such as social media, messaging apps, and

informal online channels, which make detection and enforcement even harder.

Without stronger controls and enforcement mechanisms in China, and investment in monitoring capabilities in destination countries, illicit trade will continue to thrive despite regulatory efforts.

On December 18, 2025, China's General Office of the State Council issued a policy document titled "Opinions on Combating Tobacco-Related Illegal Activities Across the Entire Chain", which sets out a comprehensive enforcement strategy against illicit tobacco and nicotine products. The Opinions explicitly bring electronic cigarettes and other nicotine-containing products under strengthened regulatory scrutiny, calling for full-chain enforcement against the illegal production, wholesale, transportation, sale, and "export re-flow" of e-cigarettes and related products. This includes tightening oversight of e-cigarette manufacturing and supply chains, cracking down on unauthorized operations, and treating unlawful export and smuggling back into China as enforcement priorities alongside traditional tobacco smuggling.

The text of the Opinions does not designate exports to overseas destination markets as independent enforcement targets; rather, references to other countries and cross-border cooperation are tied specifically to preventing illegal e-cigarette exports from re-entering China's domestic market. This confirms that the

primary focus is safeguarding China’s domestic regulatory objectives, public health, and market order, with international cooperation positioned mainly as a means to curb the re-flow of illicit products back into China. The effectiveness of China in stepping up its enforcement efforts to control the illicit trade of tobacco and nicotine products remains to be seen.

Amid the alarming surge of illicit market activity and mounting regulatory complexity, ApiraSol’s 2025 investigation into the global e-cigarette trade will map illicit trade flows, analyze seizure patterns across countries and regions, and uncover the mechanisms enabling this shadow economy.

Methodology

This report has been prepared using various data sources, including (but not limited to):

- Publicly available customs trade data for the period January 2024 - December 2024. For those countries covered in this report that don’t make their customs data publicly available, data has been obtained from the mirrored data of other countries.
- Statistical data for the period January 2024 - June 2025.
- News articles relating to enforcement and seizures.

Terminology and Definitions

Statistical Data - Numerical information representing measurable aspects of economic, demographic, social, or environmental phenomena, as produced by national statistical offices, government agencies, or intergovernmental organizations.

Trade Data - Information on the movement of goods and services between countries, typically reported by customs authorities and presented in terms of import and export volumes, values, origin, and destination.

Enforcement News - Reports and updates issued by law enforcement, customs, or regulatory agencies on activities such as investigations, product seizures, arrests, policy actions, and other official measures.

In the trade data, Origin and Destination Countries refer to the following:

Origin Countries - Shipment Origin Countries declared in publicly available trade data between January 2024 - June 2025.

Destination Countries - Shipment Destination Countries declared in publicly available trade data between January 2024 - June 2025.

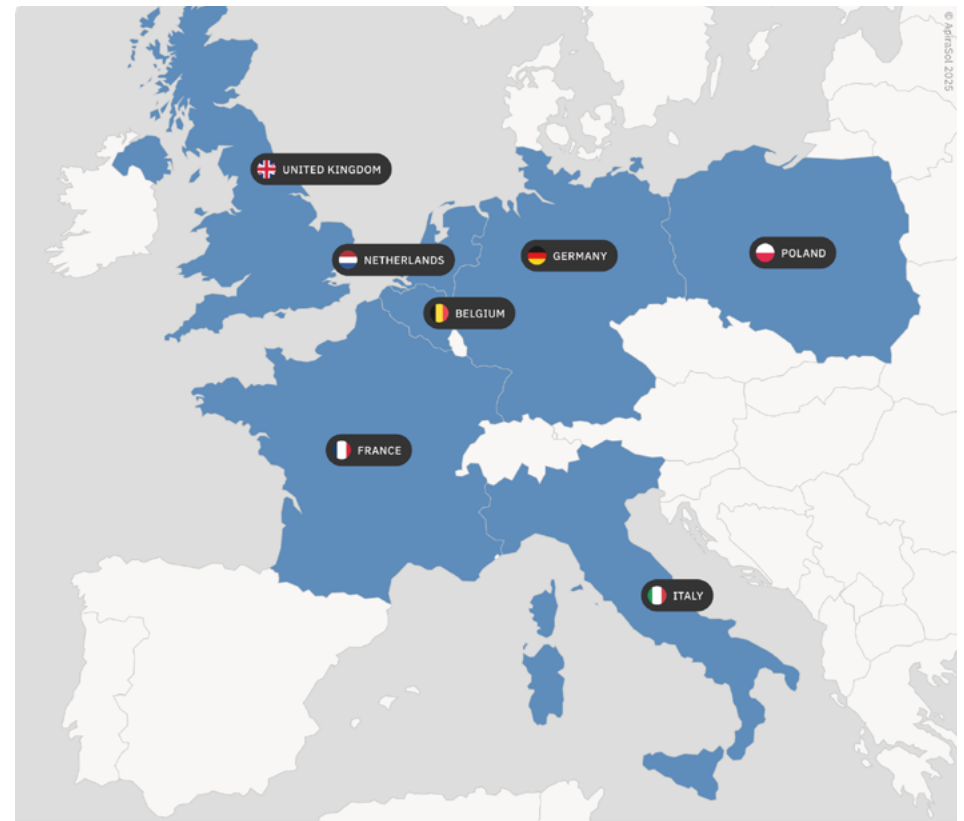
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**E-CIGARETTE
TRADE - EUROPE**

E-Cigarette Trade - Europe

This report examines the trade of e-cigarettes in **France**.

E-cigarette regulations across Europe are among the most structured globally, largely harmonized under the **EU Tobacco Products Directive (TPD)**. Countries such as **Belgium, France, Germany, Italy, Netherlands, and Poland** enforce common standards: nicotine limits (20 mg/mL), size restrictions for refill containers and tanks, child-resistant packaging, health warnings, and strict advertising bans. Several European countries—such as Finland, Denmark, Estonia, Lithuania, Hungary, Slovenia, and Latvia—have gone further by banning non-tobacco flavors to curb youth appeal. While the United Kingdom, post-Brexit, maintains similar rules under domestic law. Based on reported exports, the **UK, Italy, Netherlands, and Poland** show a significant gap between China's e-cigarette export figures and their declared imports, often amounting to millions of dollars. This discrepancy suggests substantial illicit flows into these markets, where demand persists despite strict regulations. In contrast, **Belgium, France, and Germany** report higher declared imports than China's export data, indicating these countries may serve as supply hubs for re-export or informal redistribution to neighboring markets.



European countries generally have lower illicit incidence compared to other regions, with the UK at just over 20% and Poland over 40%, based on Euromonitor estimates. European authorities have intensified crackdowns on illicit e-cigarette trade, uncovering large-scale smuggling operations across multiple countries. Seizures in **Germany, the UK, Belgium, Poland, Italy**, and the **Netherlands** reveal hundreds of thousands of illegal e-cigarettes, mostly originating from China. Common tactics include misdeclaring shipments, concealing products among legitimate goods, disguising them as toys or cosmetics, and routing through logistics hubs like the Netherlands. Distribution often relies on informal retail networks and online platforms, highlighting the role of organized smuggling groups and transnational supply chains in sustaining illicit flows.

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**E-CIGARETTE TRADE -
FRANCE**

Summary

China's and Indonesia's 2024 e-cigarette exports to France show sizeable negative mirror gaps: about USD 135.77 million for China and about USD 3.24 million for Indonesia, with France consistently reporting higher trade than its partners. These discrepancies reflect how France's regulated e-cigarette market and complex trade routes interact with statistical and enforcement constraints.

- **Regulatory Environment:** E-cigarettes are legal but tightly regulated in France under the EU Tobacco Products Directive, with strict limits on nicotine strength, tank and bottle sizes, health warnings, and a ban on sales to minors, while advertising and public-use rules are also restrictive. In addition, France has moved to ban disposable “puff” e-cigarettes, with EU clearance in 2024 and a national ban on sales entering into force in early 2025, increasing both scrutiny of imports and incentives for circumvention and alternative supply channels.
- **Transshipment and re-routing:** Many e-cigarette consignments enter France via third-country hubs or other EU entry points, so France records origin as China or Indonesia while exporters may attribute shipments to the transit state or split them across partners. This routing effect can depress reported direct exports to France in Chinese and Indonesian data yet still appear in France's import series, contributing heavily to the gaps.
- **Misdeclaration and evasion:** To navigate taxes, product rules and impending bans—especially on disposables—traders may declare devices, pods or liquids under broader electrical or chemical HS codes, or manipulate declared values and descriptions. If France reclassifies more of these goods into e-cigarette categories than China or Indonesia do on the export side, French import values will systematically exceed partner export figures.
- **Incomplete or Delayed Reporting:** Some shipments lack complete data—such as shipment weight or transport mode—hampering transparency and granular reconciliation.
- **Customs Data Limitations:** Differences in classification standards, documentation practices, and valuation methods between France and its trading partners exacerbate discrepancies, making reconciliation of bilateral trade figures challenging.
- **Prevalence of Smuggling and Illicit Trade:** France is one of Europe's largest markets for illicit nicotine products, with documented growth in counterfeit and contraband tobacco and concerns over unregulated e-cigarette channels. While mirror data cannot isolate illegal flows, this context makes it plausible that some China- and Indonesia-linked products are routed, declared or valued through semi-formal or illicit circuits that are only partially reflected in exporting-country statistics, adding another layer to the observed discrepancies.

Regulatory Overview

E-cigarettes in France are regulated under the Code de la Santé Publique (Public Health Code) and Ordinance No. 2016-623 of May 2016, which transposed the EU Tobacco Products Directive into national law. These legal provisions govern the manufacture, importation, sale, advertising, packaging, and use of vaping products. Before being placed on the market, nicotine-containing e-cigarettes must be notified to the authorities, a process for which no fee is charged.

France also enforces strict product composition and safety rules. All e-cigarette products must display mandatory health warnings. Nicotine concentration is capped at 20 mg/ml, refill containers are limited to 10 ml, and nicotine-containing tanks may not exceed 2 ml. Nicotine-free tanks are exempt from capacity limits but must still comply with advertising and age restriction rules. In addition, France recognizes voluntary AFNOR standards, which provide further guidance on product quality and manufacturing practices.

Retail channels remain relatively flexible: points of sale are not subject to a specific licensing requirement, and online sales are permitted so long as vendors comply with age verification requirements and product standards obligations. Advertising is tightly controlled: limited point of sale advertising is allowed under regulated conditions, while broader advertising and sponsorship remain prohibited. The use of e-cigarettes is prohibited in

various public spaces, including schools, public transport, parks, beaches, and areas near youth facilities, as stipulated in Decree No. 2025 582 of 27 June 2025.

Unlike many EU countries, e-cigarette products are not subject to excise taxation in France. The proposal within the 2026 Finance Bill to introduce a marginal excise duty on e-liquids was ultimately abandoned by the National Assembly's Finance Committee, leaving e liquids untaxed for 2026.

Under the National Tobacco Control Program (2023–2027), the government has strengthened its response to youth vaping, environmental concerns. A national ban on disposable (“puff”) and non-refillable e-cigarettes entered into force in February 2025, targeting devices known for their high nicotine content and appeal to young consumers. This regulatory tightening has coincided with growing alerts regarding illicit e-cigarettes containing psychoactive substances, including reports of THC-containing puffs with concentrations up to three times higher than those found in traditional cannabis circulating on French territory. Such developments underscore the expanding presence of illicit drug modified vaping products and the need for heightened vigilance. Violations—particularly those involving minors or illicit products—are subject to fifth class contraventions, reflecting France’s increasingly strict enforcement stance across both nicotine-related and psychoactive-substance-related risks.

Statistical Data (China as Origin)

China's declared exports of e-cigarettes to France in 2024 totaled \$156,048,000, while France declared imports from China reached \$291,822,000—creating a **discrepancy of approximately \$135.77 million**. This negative mirror gap is consistent with a mix of factors, including transshipment and re-routing via other hubs, misdeclaration and reclassification of products to minimise scrutiny or tax, customs data limitations and coverage differences, and illicit or semi-formal nicotine product flows in the French market.

Total Value 2024:

- Total Exports from China 2024: \$156,048,000
- Total Imports from China 2024: \$291,822,000
- **Statistical Gap: \$135,774,000**

Statistical Data (Indonesia as Origin)

Indonesia's declared exports of e-cigarettes to France in 2024 totaled \$92,000, while France declared imports from Indonesia reached \$3,331,000—creating a **discrepancy of approximately \$3.24 million**. This scale of discrepancy is modest in absolute terms but significant relative to the size of the reported flow, and is best viewed as the result of several overlapping factors. This gap can plausibly reflect a combination of transshipment and re-routing via third countries, misdeclaration and product misclassification in customs data, and coverage limits for low-value

or niche shipments, which together distort the bilateral picture when overall volumes are small. In the context of France's sizeable grey and illicit nicotine market, it is also reasonable to consider that some Indonesia-linked flows may move through semi-formal or illicit channels and be only partially captured in Indonesia's official export statistics.

Total Value 2024:

- Total Exports from Indonesia 2024: \$92,000
- Total Imports from Indonesia 2024: \$3,331,000
- **Statistical Gap: \$3,239,000**

EXPORTS OF E-CIGARETTES FROM CHINA TO FRANCE - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)	Value in 2025-Q1 -Q2 (Unit : US Dollar thousand)
24041200	Other products containing nicotine, intended for inhalation without combustion	CHINA	FRANCE	57,496	27,435
24041990	Other products containing nicotine substitutes, intended for inhalation without combustion	CHINA	FRANCE	6,595	951
24041910	Other products containing tobacco substitutes, intended for inhalation without combustion	CHINA	FRANCE	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	FRANCE	91,957	40,519
Total:				156,048	68,905

IMPORTS OF E-CIGARETTES TO FRANCE FROM CHINA - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)	Value in 2025-Q1 -Q2 (Unit : US Dollar thousand)
24041200	Products containing nicotine, intended for inhalation without combustion (excl. containing . . .	CHINA	FRANCE	96,433	52,731
24041990	Products containing nicotine substitutes, intended for inhalation without combustion (excl. . . .	CHINA	FRANCE	4,201	809
24041910	Products containing tobacco substitutes, intended for inhalation without combustion (excl. . . .	CHINA	FRANCE	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	FRANCE	191,188	71,677
Total:				291,822	125,217

EXPORTS OF E-CIGARETTES FROM INDONESIA TO FRANCE - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)	Value in 2025-Q1 -Q2 (Unit : US Dollar thousand)
24041210	E-cigarette liquid or gel	INDONESIA	FRANCE	92	134
24041290	Products intended for inhalation without combustion, containing nicotine, other than e-cigarette . . .	INDONESIA	FRANCE	0	0
24041910	Products intended for inhalation without combustion, containing tobacco substitutes	INDONESIA	FRANCE	0	0
24041920	Products intended for inhalation without combustion, containing nicotine substitutes	INDONESIA	FRANCE	0	0
Total:				92	134

IMPORTS OF E-CIGARETTES TO FRANCE FROM INDONESIA - STATISTICAL DATA (ITC DATABASE)

HS Code	HS Code Description	ORIGIN COUNTRY	DESTINATION COUNTRY	Value in 2024 (Unit : US Dollar thousand)	Value in 2025-Q1 -Q2 (Unit : US Dollar thousand)
24041200	Products containing nicotine, intended for inhalation without combustion (excl. containing . . .	INDONESIA	FRANCE	587	301
24041990	Products containing nicotine substitutes, intended for inhalation without combustion (excl. . . .	INDONESIA	FRANCE	0	0
24041910	Products containing tobacco substitutes, intended for inhalation without combustion (excl. . . .	INDONESIA	FRANCE	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	INDONESIA	FRANCE	2,744	17
Total:				3,331	318

 **FRANCE**
STATISTICAL DATA



Exports from China to France
156,048,000
Total 2024 Value (USD)
1H 2025 Value (USD): 68,905,000

Imports to France from China
291,822,000
Total 2024 Value (USD)
1H 2025 Value (USD): 125,217,000

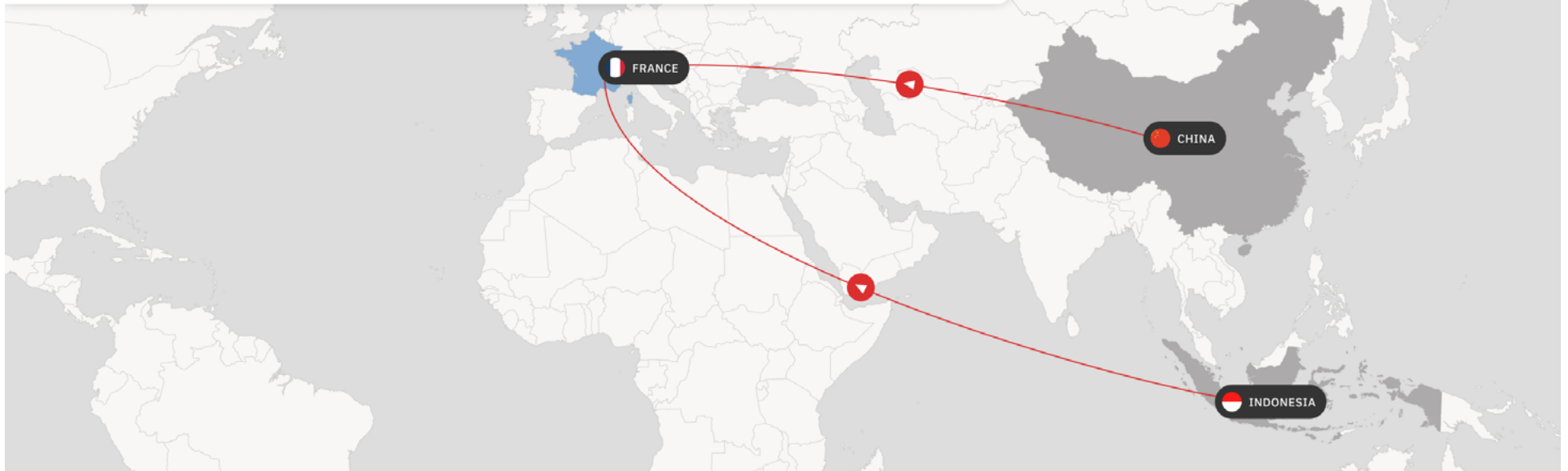
Statistical Data Gap *
-135,774,000

Exports from Indonesia to France
92,000
Total 2024 Value (USD)
1H 2025 Value (USD): 134,000

Imports to France from Indonesia
3,331,000
Total 2024 Value (USD)
1H 2025 Value (USD): 318,000

Statistical Data Gap *
-3,239,000

* Difference between the Exports and the Declared Imports (USD)



FRANCE

TRADE DATA (MIRRORED DATA FROM INDONESIA AND GLOBAL SHIPMENTS DATA)

The small number of identified e-cigarette and disposable e-cigarette shipments between China and France in 2024 should be interpreted as a limitation of available accessible data, not as evidence of a small underlying flow. Because neither China nor France makes detailed, shipment-level customs data publicly available, the observable records capture only a narrow slice of the trade and likely miss a substantial volume moving through undisclosed channels, intermediaries or aggregated declarations.

Shipments:	6 Trade Shipments
Period:	January - December 2024
Origin Countries:	China: 67 %, Indonesia: 33 %
Origin Ports:	Yantian: 67 %, Batu Ampar: 17 %, Not declared: 16 %
Destination Countries:	France
Destination Ports:	Le Havre: 67 %, Roissy En France: 33 %
Products:	Electronic cigarettes and similar personal electric vaporisers, disposable e-cigarettes
E-Cigarette Brands:	
Mode of Transport:	Sea: 67 %, Unknown: 33 %
Value declared:	92,000 USD (33 % of shipments)
Weight declared:	81,192 KG (100 % of shipments)

FRANCE

Number of exporters:	4
Number of importers:	4
Top Exporters:	<i>lorem ipsum dolor amet, consectetur adipiscing elit. Sed ut elit, tincidunt nec, ultricies ac, leo. Nulla facilis. Sed ut elit, tincidunt nec, ultricies ac, leo.</i>
Top Importers:	<i>lorem ipsum dolor amet,</i>
HS Codes declared in shipments:	854340: Electronic cigarettes and similar personal electric vaporising devices (4 shipments) 240412: Other products containing nicotine, intended for inhalation without combustion (2 shipments)

FRANCE
TRADE DATA (Mirrored Data from Indonesia and Global Shipments Data)



Shipments (Period FY 2024)

6 | **92,000**
 Quantity | Value (USD)

All included shipments and brands are recognized by regulatory authorities and involve only companies operating in compliance with legal requirements.



Destination Ports

- Le Havre (67 %)
- Roissy En France (33 %)



Origin Ports from China and Indonesia

- Yantian (67 %)
- Batu Ampar (17 %)
- Not declared (16 %)

Mode of Transportation

Sea: 67 %, Unknown: 33 %

E-Cigarette Products

Electronic cigarettes and similar personal electric vaporisers, disposable e-cigarettes

Legal Brands at Time of Shipment

Not available

Top Importers

Not available

Top Exporters

Not available

The online articles report on **seizures of illegal e-cigarette products in France**.

French enforcement news on puffs and disposable e-cigarettes indicates a persistent and geographically dispersed illicit or non-compliant market, despite regulatory restrictions and public debate about bans. French customs have seized thousands of disposable e-cigarettes and large quantities of e-liquids in shops, business centers, and at the Franco-Swiss border, with operations in Paris, Aubervilliers, and Creil targeting both retail and wholesale distribution and uncovering products containing high concentrations of nicotine or cannabis extracts.

Seizures in Aubervilliers and Les Rousses involve thousands of puffs, often discovered during customs or police checks on vehicles near borders or in wholesale zones, which points to organized supply chains feeding the French market rather than isolated retail offences. The Bassin creillois operation, where police and customs jointly seized hundreds of illegal disposable e-cigarettes, fits the same pattern of coordinated controls combining road checks and local retail inspections, while advocacy commentary underlines that puffs remain widely available even after regulatory measures, suggesting a resilient grey and black market sustained by ongoing demand.

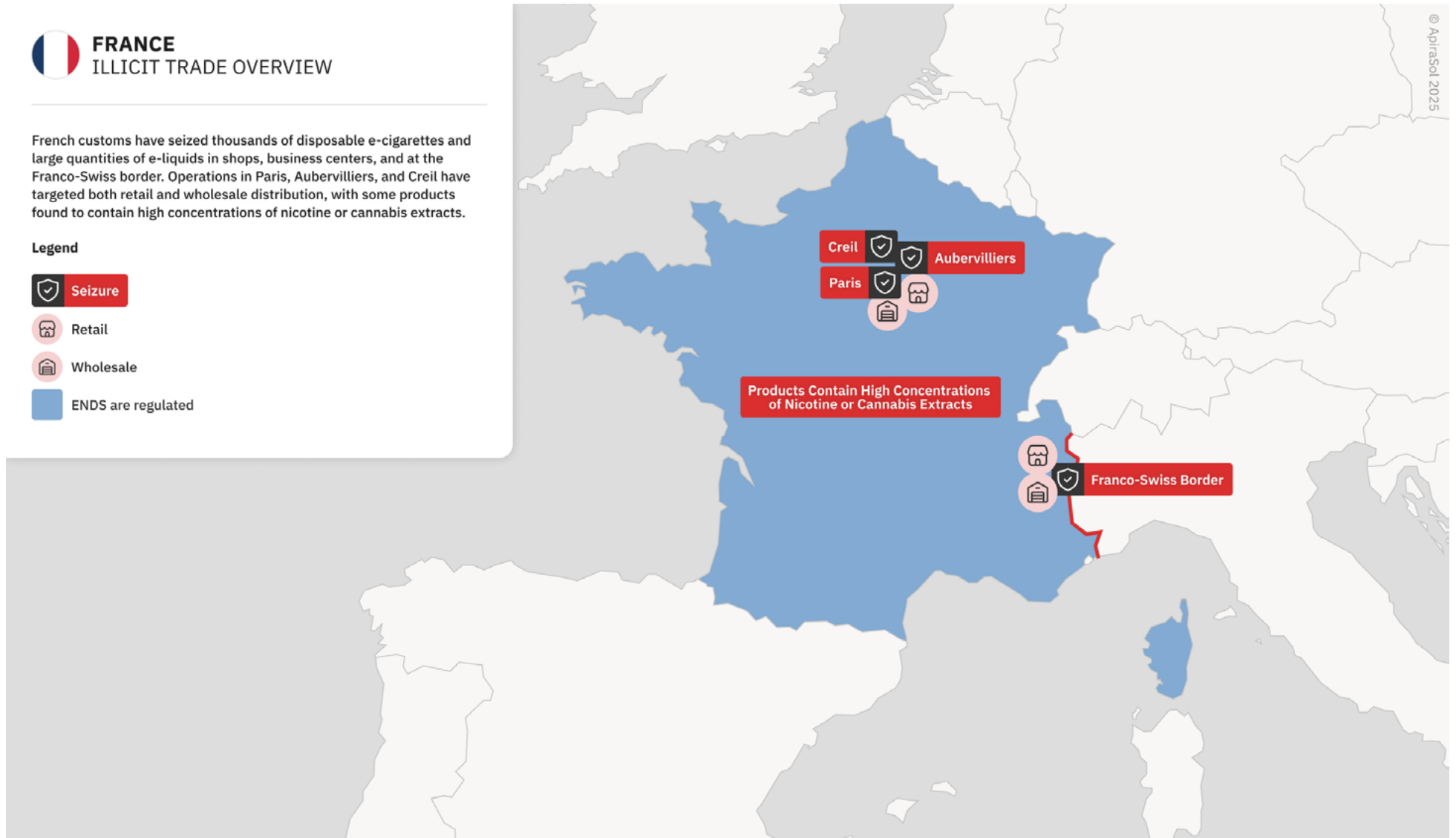
- **Locations of seizures:** Franco-Swiss border near Les Rousses (Jura), Paris region including Aubervilliers, and the Bassin creillois (Creil area, Oise).
- **Products seized:** Thousands of disposable “puff” e-cigarettes, other single-use e-cigarettes, and significant quantities of e-liquids, with some products containing high nicotine levels or cannabis-derived substances.
- **Brands seized:** Reports mainly refer to puffs and counterfeit/contraband e-cigarettes without consistently naming specific brands, focusing instead on non-compliance and counterfeit status.
- **Methods:** Cartons hidden in vehicles at or near the border, and stocks stored in shops, back rooms and business centres.
- **Enforcement:** Joint customs–police road checks, targeted inspections of retail outlets and business centres, and follow-on sanctions and investigations for illicit tobacco and nicotine products.

 **FRANCE**
ILLCIT TRADE OVERVIEW

French customs have seized thousands of disposable e-cigarettes and large quantities of e-liquids in shops, business centers, and at the Franco-Swiss border. Operations in Paris, Aubervilliers, and Creil have targeted both retail and wholesale distribution, with some products found to contain high concentrations of nicotine or cannabis extracts.

Legend

-  Seizure
-  Retail
-  Wholesale
-  ENDS are regulated



Despite France's ban on disposable e-cigarettes ("puffs") in February 2025, police have seized nearly 5,000 illegal devices in cities like Cambrai, Toulon, Gap, and Saint-Ouen, but illicit street and social media sales targeting minors remain widespread, with high-nicotine products and poor-quality ingredients posing serious health risks.

FRANCE : UNE INTERDICTION PLUS TARD, LA PUFF TOUJOURS EN VENTE



Legend



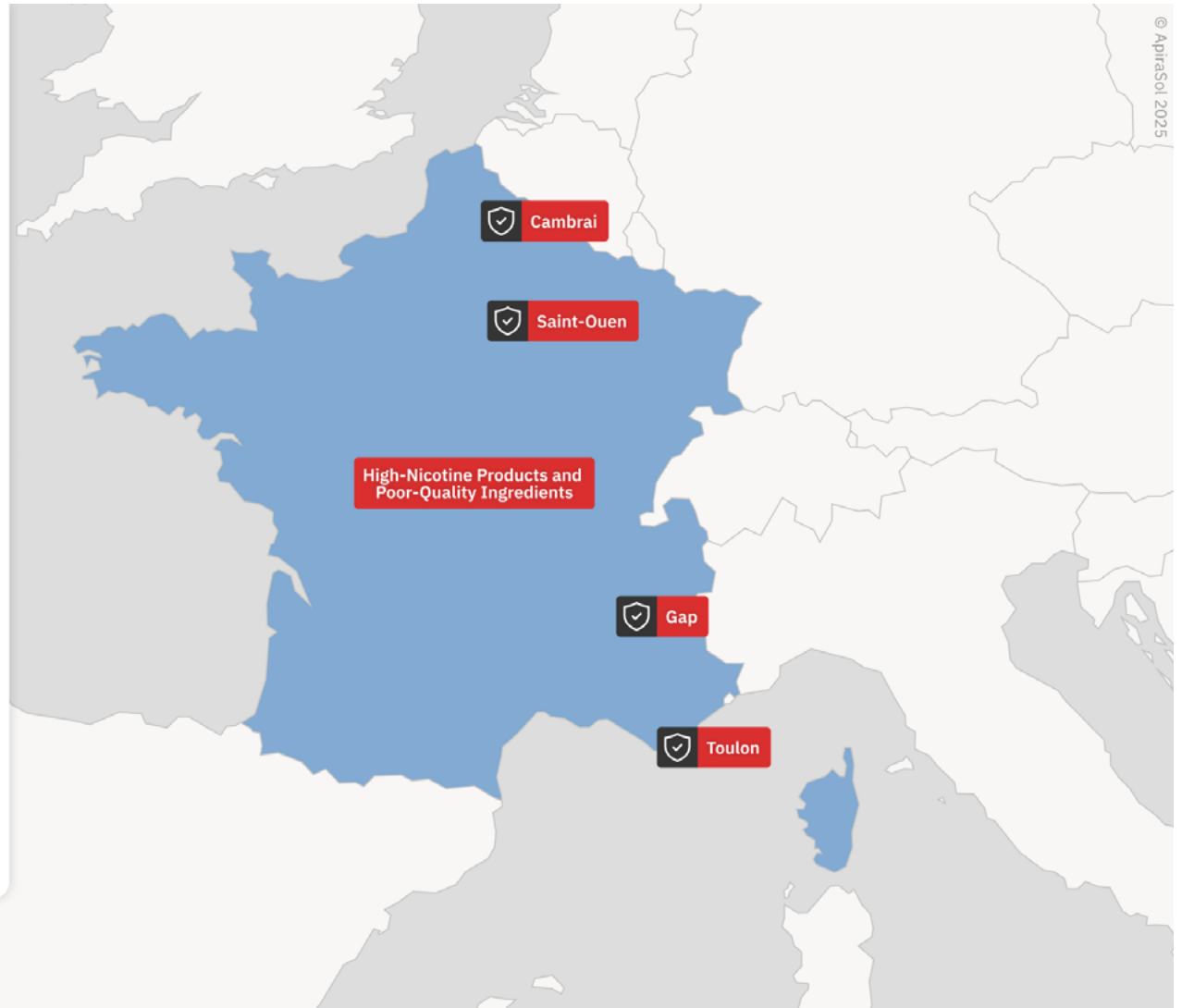
Seizure



ENDS are regulated

Source

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