

ApiraSol

E-CIGARETTES IN RUSSIA 2024/2025 – Q2

SUPPLY CHAIN INTELLIGENCE
APRIL 2026



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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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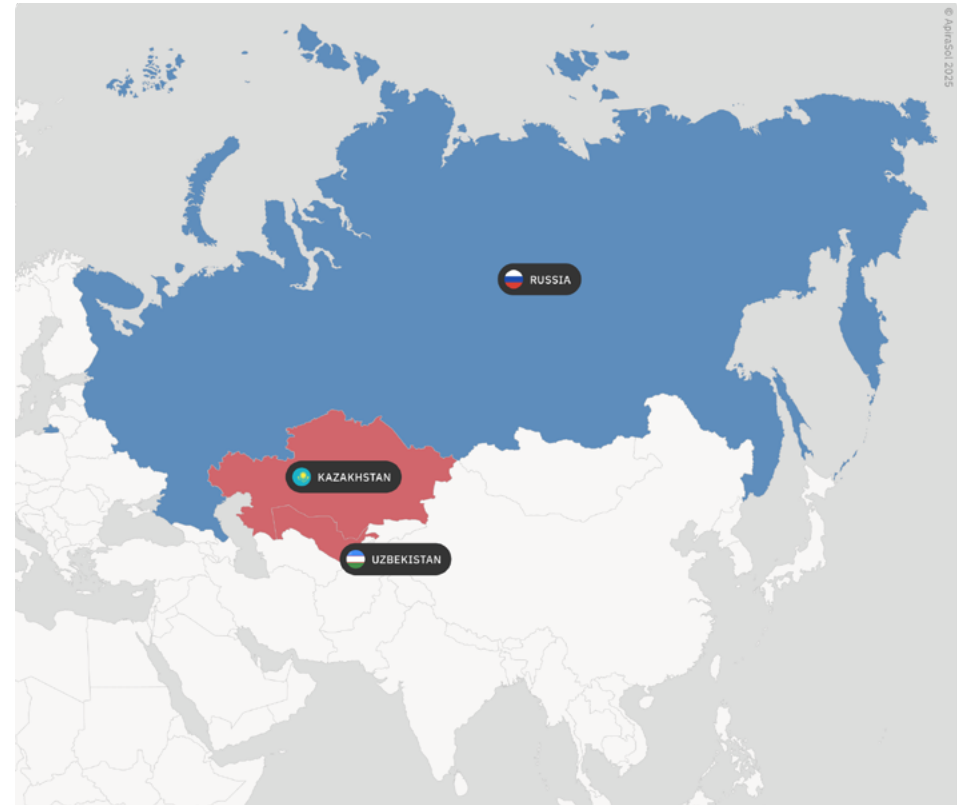
**E-CIGARETTE TRADE -
RUSSIA AND CENTRAL ASIA**

E-Cigarette Trade - Russia and Central Asia

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

The e-cigarette regulatory environment in **Russia and Central Asia** is becoming increasingly restrictive. In **Russia**, e-cigarettes are permitted but subject to stringent controls under Federal Law and related technical standards. Current measures include mandatory licensing for production, storage, import, and retail (effective March 2026), product certification, health warnings, and bans on advertising and online sales. Additional rules impose excise tax hikes, while a nationwide ban on retail sales is under active consideration following proposals supported by the Ministry of Health. In **Central Asia**, the trend is toward prohibition: **Kazakhstan** imposed a full ban on the sale, production, and import of e-cigarettes in 2024, with severe penalties for violations, and **Uzbekistan** followed in 2025 by banning all circulation of e-cigarettes, disposable e-cigarettes, and nicotine pouches. These measures reflect growing concerns over youth uptake, illicit trade, and public health across the region.

Russia is one of China's largest e-cigarette export destinations, with Chinese customs reporting **hundreds of millions of dollars in shipments annually**. While Russia's official statistics import data has not been available since its invasion of Ukraine, the



Russian customs trade data indicates significantly lower imports from China, suggesting that a significant share of these products may enter the market through unrecorded or untaxed channels, fueling illicit trade. In **Kazakhstan**, despite the June 2024 ban, Chinese export data show shipments continuing through late 2024 and into 2025 implying smuggling through informal routes. In **Uzbekistan**, prior to its 2025 ban, declared imports from China exceeded China's reported exports, creating a statistical gap that suggests the country may have served as a transshipment hub.

Given Uzbekistan's strategic location in Central Asia, this pattern indicates that e-cigarettes—both legal and illicit—were likely imported, stored, and then re-exported to neighboring markets. This pattern continued into early 2025, with Chinese customs data still reporting millions of dollars in e-cigarette exports to Uzbekistan, even after the nationwide ban on circulation came into effect.

Illicit e-cigarette trade remains widespread across the region despite bans and strict regulations. Enforcement reports from **Russia** highlight a deeply entrenched black market, with Tamarind Intelligence citing illicit trade levels at around 60%. Recent raids have dismantled illegal production sites and intercepted cross-border shipments sourced from East Asia. In **Kazakhstan**, where Euromonitor estimates illicit e-cigarette penetration to be over 90%, authorities have conducted major operations at border checkpoints and warehouses, uncovering

smuggling networks linked to China and Russia, with the messaging app Telegram being used as a sales channel. **Uzbekistan** has concentrated on disrupting distribution networks in urban and regional hubs, conducting customs inspections and raids in schools and warehouses that resulted in the seizure of thousands of devices. Many of these products are suspected to originate from China and appear intended for redistribution to neighboring countries. These patterns reveal ongoing cross-border smuggling and organized networks exploiting porous borders and bans, fueling a robust underground market.

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E-CIGARETTE TRADE -
RUSSIA

Summary

Analysis of statistical data, trade flows, and enforcement news reveals a complex landscape for e-cigarettes and nicotine products in Russia. Chinese trade statistics report substantial exports of e-cigarettes to Russia—over \$529 million in 2024—underscoring Russia’s position as a major destination market. At the same time, a high volume and broad mix of products are reflected in both shipment data and the wide range of participating trading companies, concentrated around key locations such as St. Petersburg. Despite the commercial significance indicated by Chinese statistics, direct Russian import data for these goods is often unavailable or incomplete, contributing to a lack of clear alignment and making true market size and compliance difficult to assess.

This misalignment is shaped by several key factors:

- **Regulatory Environment:** Russia has tightened its import and sales regulations for e-cigarettes and nicotine products, including stricter requirements for product labeling, registration, and safety standards. However, enforcement is inconsistent and authorities face challenges maintaining oversight, especially as new regulations are implemented and adapted to evolving product types and import channels.
- **Re-Routing:** A significant share of shipments moves through re-routing and concealment—often via distribution hubs such

as St. Petersburg—with some trade likely channeled through neighboring or third countries, inflating discrepancies and masking true origins and destinations.

- **Misdeclaration and Evasion:** Frequent customs misclassification and underreporting practices—such as improper HS codes, undervaluing shipments, and incomplete product labeling—undermine reliable trade records and conceal the real scope and value of cross-border activity.
- **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 Russia and its trading partners exacerbate discrepancies, making reconciliation of bilateral trade figures challenging.
- **Prevalence of Smuggling and Illicit Trade:** Industrial-scale illicit manufacturing facilities and workshops have been uncovered inside Russia, with authorities routinely seizing unlabeled, counterfeit, and smuggled products. These operations use sophisticated concealment and digital distribution channels—particularly Telegram—to enable widespread illicit supply and evade official oversight.

In conclusion, although trade and Chinese export data point to a thriving Russian e-cigarette market, the lack of corresponding

import statistics and frequent enforcement actions demonstrate that unregulated and counterfeit flows remain a major concern. Addressing these challenges will require improved transparency, better trade monitoring, and close cooperation between customs and law enforcement.

Regulatory Overview

Russia enforces a comprehensive regulatory framework for e-cigarettes under Federal Law No. 15-FZ on tobacco control and Federal Law No. 178-FZ, which introduced key amendments related to licensing and consumer protection. These laws apply uniformly to both nicotine-containing and nicotine-free e-liquids, all of which must undergo mandatory certification. The production, storage, import, and export of vaping products require official licensing, and all items must meet established technical standards and be registered through the Chestny Znak track-and-trace system to ensure transparency and compliance.

In terms of taxation, Russia imposes excise duties on nicotine-containing e-liquids, with rates increasing annually. As of January 2025, excise taxes have also been extended to raw nicotine materials. To further curb youth access and prevent underpricing, the government has introduced minimum selling prices for e-cigarette products, effective from 1 January 2025.

Marketing and retail practices are tightly regulated. Health warn-

ings and detailed packaging labels are mandatory, while product displays, free samples, and in-store promotions are strictly prohibited. Online sales of e-cigarettes are banned nationwide, and all transactions must occur through licensed physical retailers. These retailers are required to enforce age restrictions rigorously, ensuring that sales to minors are completely prohibited.

Statistical Data (China as Origin)

China's declared exports of e-cigarettes to Russia in 2024 totaled \$529,778,000, however Russia's declared imports from China were not available. The absence of Russian import figures prevents a direct comparison and calculation of a statistical gap. This lack of data may reflect differences in reporting standards, limitations in Russia's trade statistics, or issues with product classification, making it challenging to assess the true scale and compliance of cross-border e-cigarette trade.

Total Value 2024:

- Total Exports from China 2024: \$529,778,000
- Total Imports from China 2024: N/A
- **Statistical Gap: N/A**

EXPORTS OF E-CIGARETTES FROM CHINA TO RUSSIA - 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	RUSSIA	394,974	114,009
24041990	Other products containing nicotine substitutes, intended for inhalation without combustion	CHINA	RUSSIA	585	123
24041910	Other products containing tobacco substitutes, intended for inhalation without combustion	CHINA	RUSSIA	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	RUSSIA	134,219	7
Total:				529,778	37,570

IMPORTS OF E-CIGARETTES TO RUSSIA 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)
2404120000	Products containing nicotine, intended for inhalation without combustion (excl. containing . . .	CHINA	RUSSIA	N/A	N/A
2404190001	Products containing tobacco or nicotine substitutes, intended for inhalation without combustion . . .	CHINA	RUSSIA	N/A	N/A
8543400000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	RUSSIA	N/A	N/A
Total:				-	-

 **RUSSIA**
STATISTICAL DATA



Exports from China to Russia

529,778,000

Total 2024 Value (USD)
1H 2025 Value (USD): 37,570,000

Imports to Russia from China

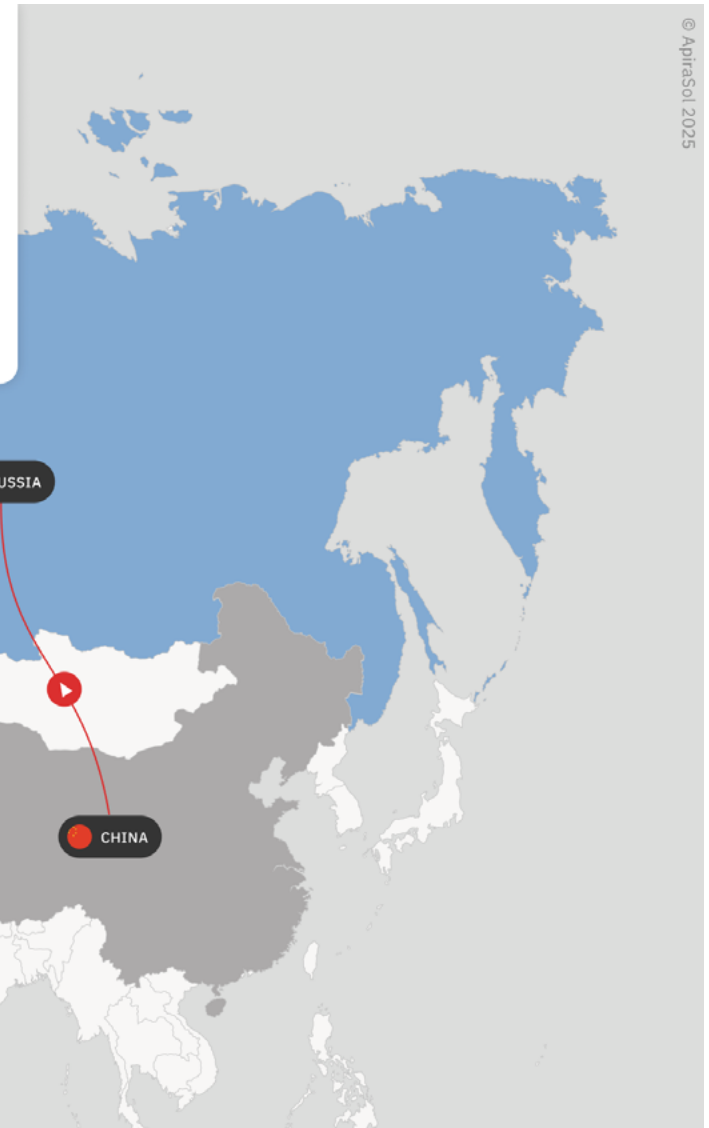
N/A

Total 2024 Value (USD)
1H 2025 Value (USD): N/A

Statistical Data Gap *

N/A

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



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RUSSIA

TRADE DATA

The 2024 trade data highlights robust activity in the Russian e-cigarette market, with nearly all shipments supplied from China and a wide range of brands and product types included. Russia’s e-cigarette supply network is extensive and diverse, reflecting a strong demand managed by numerous trading companies. The data demonstrates reliable reporting for most shipments, but the market’s size and variety may pose ongoing challenges for clear oversight and regulation.

Shipments:	1,650 Trade Shipments
Period:	January - December 2024
Origin Countries:	China: 99 %, Indonesia: 1 %
Origin Ports:	Not identified: 99 %, Batu Ampar: 1 %
Destination Countries:	Russia
Destination Ports:	Not identified: 87 %, St. Petersburg: 13 %
Products:	Electronic nicotine delivery systems, electronic cigarettes and vaping devices, disposable electronic personal vaporizers, nicotine-containing liquid for refilling electronic cigarettes, etc.
E-Cigarette Brands:	<i>>Lorem ipsum dolor amet, consectetur adipiscing elit. Sed ut elit, congue euismod. Nulla pellentesque non ante et at nisi non. Curabitur lacinia tunc non tristique enim gravida gravida. Phasellus rhoncus efficitur quam semper egestas etiam lacinia. Accumsan quam semper ultrices imperdiet convallis? dignismos neque condimentum cursus nulla scelerisque semper lames.</i>

RUSSIA

Mode of Transport:	Unknown: 76 %, Road: 18 %, Railway: 4 %, Air: 1 %, Sea: 1 %
Value declared:	320,775,540.77 USD (100 % of shipments)
Weight declared:	3,626,304.92 KG (98 % of shipments)
Number of exporters:	182
Number of importers:	158
Top Exporters:	<i>lorem ipsum dolor amet, consectetur adipiscing elit. Sed ut elit, tincidunt nunc tristique. Aenean lacinia accumsan.</i>
Top Importers:	<i>consequat quisque. Nulla pellentesque velit. Sed ut elit, tincidunt nunc tristique. Aenean lacinia accumsan.</i>
HS Codes declared in shipments:	<p>240412: Other products containing nicotine, intended for inhalation without combustion (972 shipments)</p> <p>854340: Electronic cigarettes and similar personal electric vaporising devices (660 shipments)</p> <p>240419: Other products intended for inhalation without combustion (18 shipments)</p>

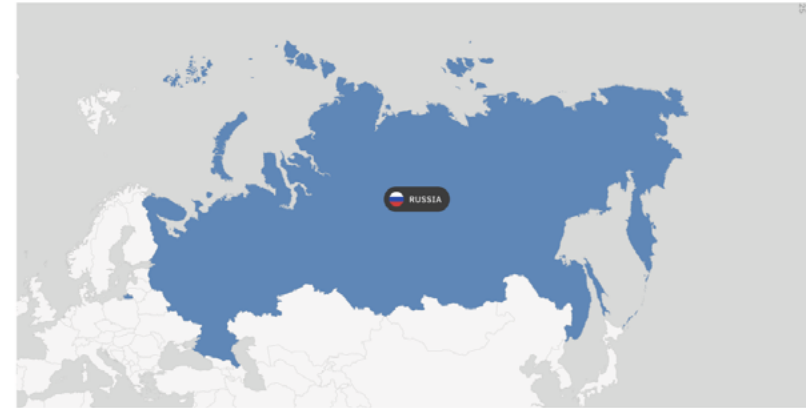


Shipments (Period FY 2024)

1,650
Quantity

320,775,540.77
Value (USD)

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



Destination Ports

- Not identified (87 %)
- St. Petersburg (13 %)



Origin Ports from China and Indonesia

- Not identified (99 %)
- Batu Ampar (1 %)

Mode of Transportation

Unknown: 76 %, Road: 18 %, Railway: 4 %, Air: 1 %, Sea: 1 %

E-Cigarette Products

Electronic nicotine delivery systems, electronic cigarettes and vaping devices, disposable electronic personal vaporizers, nicotine-containing liquid for refilling electronic cigarettes, etc.

Legal Brands at Time of Shipment

[Faded text listing legal brands at time of shipment]

[Faded text describing shipment details]

Top Importers

[Faded text listing top importers]

Top Exporters

[Faded text listing top exporters]

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

Russia faces persistent challenges with unregulated e-cigarette and nicotine product flows, driven by sophisticated production, widespread counterfeiting, and persistent smuggling from abroad. Despite increased enforcement and notable seizures, criminal groups continue to exploit weak points in logistics, labeling, and digital sales channels, highlighting the need for stronger traceability systems, coordinated policing, and ongoing legal reforms.

For example, Russian authorities in Siberia cracked down on a large-scale illegal e-cigarette smuggling ring involving unmarked brands like [REDACTED]. The products were smuggled from East Asia, disguised as toys and electronics, then distributed through fake local labels and Telegram-based sales networks. Police conducted searches in multiple regions, arrested several suspects, and continue to investigate wider distribution ties to Moscow and beyond.

These enforcement actions highlight the sophistication of illicit supply chains, frequent use of counterfeit labeling, and the role of online platforms in illegal e-cigarette sales across Russia.

- **Locations of Seizures:** St. Petersburg (large illegal factory raid), Omsk (customs seizure), multiple cities across Russia.

- **Products Seized:** E-cigarettes, e-liquids, heated tobacco products, snuff, chewing tobacco, and thousands of untagged/illegal tobacco items.
- **Brands Seized:** Mostly unmarked or counterfeit products; official reports do not consistently specify brands.
- **Methods:** Clandestine factories with industrial-scale equipment, hidden warehouses, cross-border smuggling, and market sales of unlabeled goods.
- **Enforcement:** Police and customs raids, criminal charges under Russian law, destruction of product and equipment, and fines for market violations.

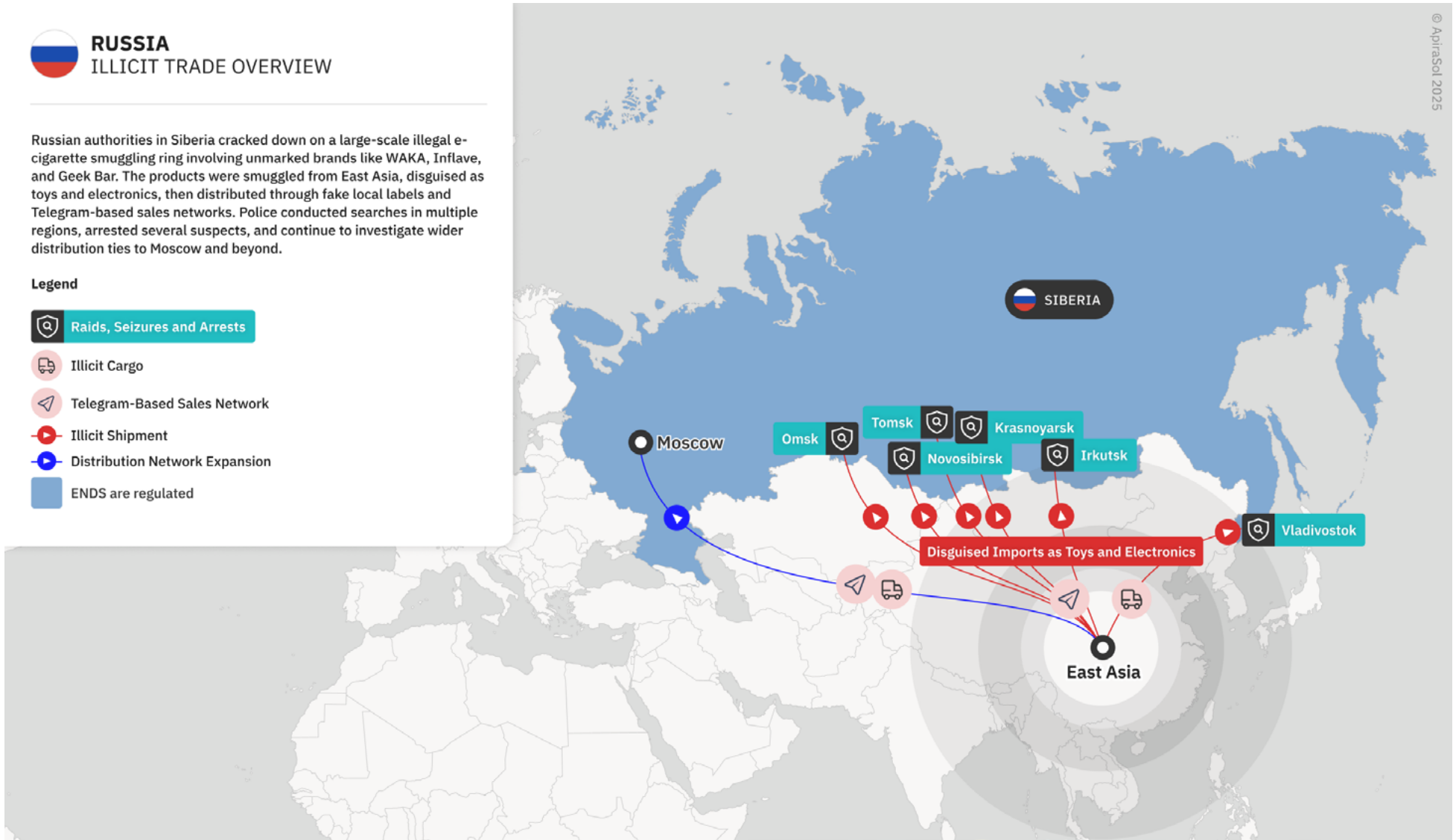


RUSSIA ILLICIT TRADE OVERVIEW

Russian authorities in Siberia cracked down on a large-scale illegal e-cigarette smuggling ring involving unmarked brands like WAKA, Inflave, and Geek Bar. The products were smuggled from East Asia, disguised as toys and electronics, then distributed through fake local labels and Telegram-based sales networks. Police conducted searches in multiple regions, arrested several suspects, and continue to investigate wider distribution ties to Moscow and beyond.

Legend

-  Raids, Seizures and Arrests
-  Illicit Cargo
-  Telegram-Based Sales Network
-  Illicit Shipment
-  Distribution Network Expansion
-  ENDS are regulated



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Russian police in Khakassia seized over 45,000 disposable e-cigarettes and nicotine products, worth up to \$12.4 million. The products, mainly from the brand WAKA, were smuggled from East Asia and disguised as plush toys and electronics. They were “legalized” with fake labels and sold via Telegram.

Russian Police Bust E-cigarette Smuggling Ring in Eastern Siberia, Worth \$12.4M

May 06, 2025

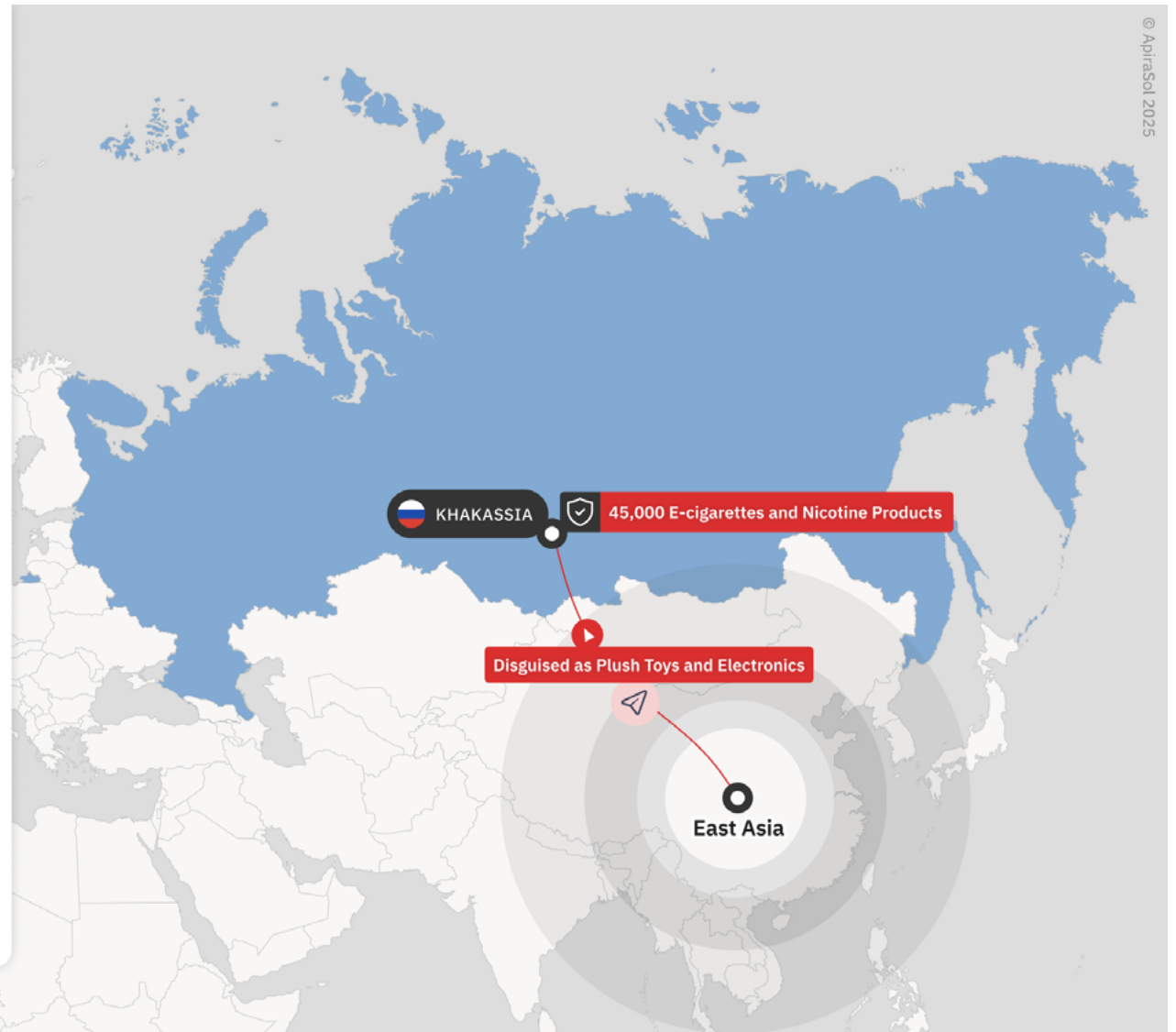


Legend

-  **Seizure**
-  Telegram-Based Sales Network
-  Illicit Shipment
-  ENDS are regulated

Source

https://www.2firsts.com/news/russian-authorities-seize-over-45000-illegal-e-cigarettes-in-smuggling-operation#google_vignette



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