

ApiraSol

E-CIGARETTES IN SAUDI ARABIA 2024/2025 – Q2

SUPPLY CHAIN INTELLIGENCE
APRIL 2026



Overview

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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 -
SAUDI ARABIA**

Summary

In 2024, China's declared e-cigarette exports to Saudi Arabia reached \$80.8 million, while Saudi Arabia's reported imports from China amounted to only \$11.1 million—a striking statistical gap of \$69.7 million. This substantial discrepancy is driven by several interrelated factors:

- **Regulatory Environment:** Saudi Arabia maintains strict standards for e-cigarette imports, including product registration, compliance checks, and evolving health regulations. However, uneven or inconsistent enforcement, along with regulatory changes, can lead to gaps in official recording and oversight.
- **Re-routing:** Goods are frequently re-routed through third countries or regional logistics hubs, obscuring their true origin and making it challenging to reconcile export and import figures.
- **Misdeclaration and evasion:** Exporters and importers may use misdeclaration, undervaluation, or incomplete labeling to reduce scrutiny, taxes, and duties, which distorts official trade statistics and conceals the real scale of market flows.
- **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 Saudi Arabia and its trading partners exacerbate discrepancies, making reconciliation of bilateral trade figures challenging.

- **Prevalence of Smuggling and Illicit Trade:** Enforcement news shows persistent smuggling and illicit supply chains, with authorities in Saudi Arabia intercepting shipments of illegal, unregistered, or high-nicotine e-cigarette products concealed within cargo, personal baggage, or disguised as different goods. Some operations have uncovered imports of illicit vaping products arriving through informal channels or poorly regulated free zones.

Overall, the 2024 trade data for e-cigarette flows between China and Saudi Arabia underscores the ongoing difficulties in achieving bilateral data harmonization, the impact of regulatory and logistical challenges, and the persistent risks posed by smuggling and evasion in the sector. Robust monitoring, improved data sharing, and coordinated enforcement remain essential to address the market's vulnerabilities and protect public health.

Regulatory Overview

Saudi Arabia enforces stringent regulations on e-cigarettes under its Anti-Smoking Law, issued by Royal Decree No. M/56 in 2015. Initially, e-cigarettes were banned outright, with the law defining smoking to include all forms of tobacco use, including electronic smoking systems. This ban covered importation, sale, and use, and remained in effect until 2019, when the Saudi Food and Drug

Authority (SFDA) began regulating e-cigarettes under strict controls.

These controls include mandatory health warning labels on all e-cigarette product packaging, covering at least 30% of the surface and must clearly communicate the risks associated with inhalation, ingestion, and skin contact with e-liquids. Packaging must also be child-resistant, shatterproof, and waterproof to ensure safety during handling and refilling. Under SFDA Technical Regulations, nicotine-containing cartridges or tanks must not exceed 2 ml, and refill containers are limited to 30 ml. E-liquids are prohibited from containing flavors such as cocoa, vanilla, coffee, tea, condiments, or sweets. Vapour products are regulated as tobacco in terms of taxation, advertising, and public use, meaning their promotion is heavily restricted—especially in media accessible to minors—and their use is confined to designated smoking areas. Importers are also required to obtain certificates of conformity from Saudi authorities before introducing batteries, devices, and e-liquids into the market.

In addition, age restrictions prohibit the sale of e-cigarette products to individuals under 18 years old, aligning with Saudi Arabia's broader tobacco control policies aimed at protecting youth from nicotine addiction.

A key regional development occurred on January 9, 2025, when the GCC Standardization Organization (GSO) Technical Committee

for Tobacco Products approved the final draft of a joint standard regulating liquids and products used in electronic alternatives to traditional tobacco. Expected to be adopted by May 2025, this standard will harmonize regulations across GCC countries and reinforce existing restrictions. Despite these measures, studies show rising e-cigarette use among young adults in Saudi Arabia, driven by flavor options and perceived reduced harm, highlighting the need for stronger public education and enforcement of age restrictions.

Statistical Data (China as Origin)

China's declared exports of e-cigarettes to Saudi Arabia in 2024 totaled \$80,817,000, while Saudi Arabia's declared imports from China reached \$11,115,000—creating a **discrepancy of approximately \$69.7 million**. The pronounced statistical gap is most likely the result of several converging factors: underreporting or misclassification, indirect shipments and transshipment, timing mismatches in customs recording, lack of transparency in customs data, evasion and illicit trade. Overall, this large discrepancy underscores ongoing transparency and harmonization challenges.

Total Value 2024:

- Total Exports from China 2024: \$80,817,000
- Total Imports from China 2024: \$11,115,000
- **Statistical Gap: \$69,702,000**

EXPORTS OF E-CIGARETTES FROM CHINA TO SAUDI ARABIA - 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	SAUDI ARABIA	63,445	35,223
24041990	Other products containing nicotine substitutes, intended for inhalation without combustion	CHINA	SAUDI ARABIA	63	3
24041910	Other products containing tobacco substitutes, intended for inhalation without combustion	CHINA	SAUDI ARABIA	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	SAUDI ARABIA	17,309	9,609
Total:				80,817	44,835

IMPORTS OF E-CIGARETTES TO SAUDI ARABIA 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)
24041231	Single-use flavored nicotine electronic cigarettes	CHINA	SAUDI ARABIA	4,514	N/A
24041211	Disposable cartridges containing tobacco, flavored	CHINA	SAUDI ARABIA	3,543	N/A
24041221	Flavored liquid or gel containers containing nicotine	CHINA	SAUDI ARABIA	762	N/A
24041232	Products containing nicotine, intended for inhalation without combustion (excl. containing . . .	CHINA	SAUDI ARABIA	3	N/A
24041212	Disposable cartridges containing tobacco, non-flavored	CHINA	SAUDI ARABIA	0	N/A
24041900	Products containing tobacco or nicotine substitutes, intended for inhalation without combustion . . .	CHINA	SAUDI ARABIA	0	N/A
85434030	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	SAUDI ARABIA	1,625	N/A
85434010	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	SAUDI ARABIA	543	N/A
85434020	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	SAUDI ARABIA	125	N/A
85434090	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	SAUDI ARABIA	0	N/A
Total:				11,115	-



SAUDI ARABIA STATISTICAL DATA



Exports from China to Saudi Arabia

80,817,000

Total 2024 Value (USD)
1H 2025 Value (USD): 44,835,000

Imports to Saudi Arabia from China

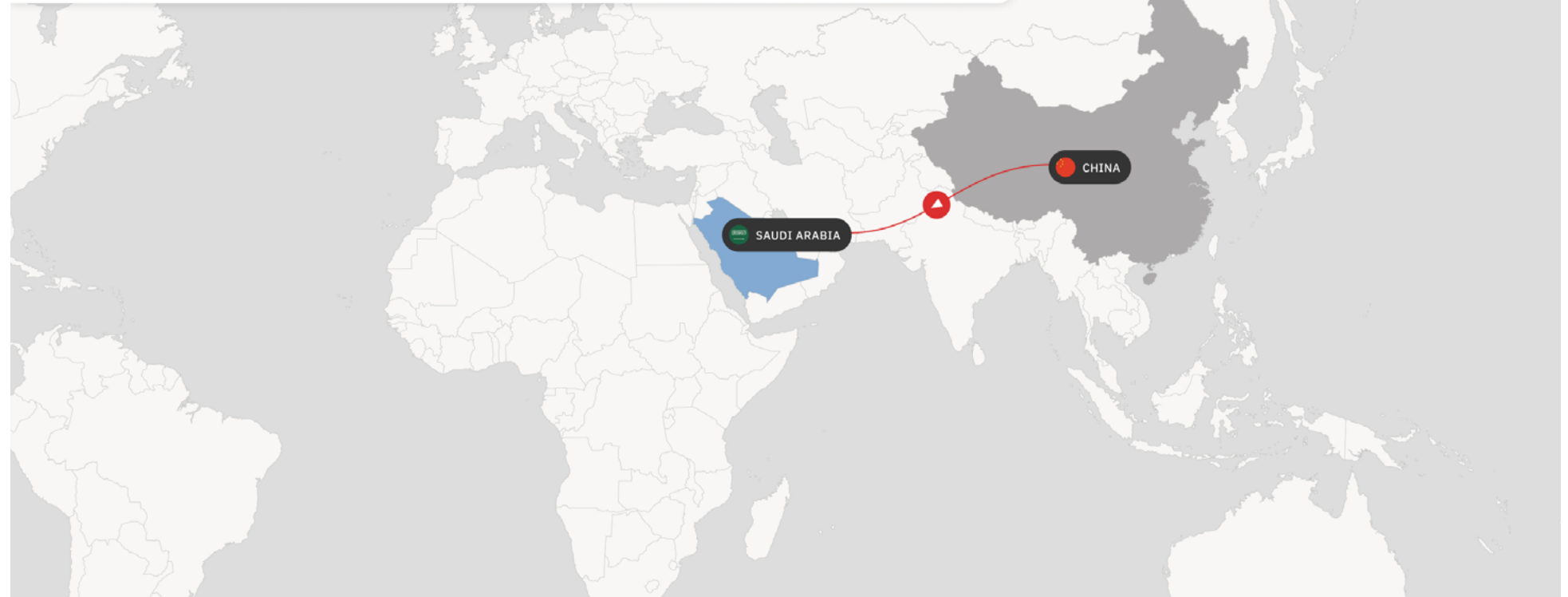
11,115,000

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

Statistical Data Gap *

69,702,000

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



SAUDI ARABIA

TRADE DATA (GLOBAL SHIPMENT DATA)

Trade shipment analysis between China and Saudi Arabia in 2024 shows consistent flows of e-cigarettes and vaping products, exclusively routed from China to Saudi ports by sea and involving a small number of exporters and importers. However, the meaningful assessment of this trade—and the ability to address gaps and irregularities—is severely limited by a lack of data visibility. Neither China, the main supplier, nor Saudi Arabia, the destination, make their customs data publicly accessible. This absence of transparency restricts effective tracking, reconciliation, and regulatory oversight, making it difficult for stakeholders to evaluate true market activity, identify compliance issues, or respond to evolving trade dynamics. Enhanced public disclosure of customs information remains crucial for improving oversight and informed decision-making in this sector.

Shipments:	14 Trade Shipments
Period:	January - December 2024
Origin Countries:	China: 100 %
Origin Ports:	Shekou 100%
Destination Countries:	Saudi Arabia
Destination Ports:	Dammam: 93 %, Jeddah: 7 %
Products:	Products containing nicotine intended for inhalation without combustion, electronic cigarettes and similar personal electric vaporisers, cartridges
E-Cigarette Brands:	
Mode of Transport:	Sea: 100 %

SAUDI ARABIA

Weight declared:	87,235.75 KG (100 % of shipments)
Number of exporters:	5
Number of importers:	3
Top Exporters:	[Redacted]
Top Importers:	[Redacted]
HS Codes declared in shipments:	240412: Other products containing nicotine, intended for inhalation without combustion (11 shipments) 854340: Electronic cigarettes and similar personal electric vaporising devices (3 shipments)



SAUDI ARABIA TRADE DATA



Shipments (Period FY 2024)

14

Quantity

Not declared

Value (USD)

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



Destination Ports

- Dammam (93 %)
- Jeddah (7 %)



Origin Ports from China

- Shekou (100 %)

Mode of Transportation

Sea: 100 %

E-Cigarette Products

Products containing nicotine intended for inhalation without combustion, electronic cigarettes and similar personal electric vaporisers, cartridges

Legal Brands at Time of Shipment

Top Importers

Top Exporters

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

Recent enforcement news and incident reports indicate active intervention by Saudi authorities targeting illegal e-cigarette products. Agencies have intercepted attempts to smuggle flavored e-cigarettes and cannabinoid-laced e-cigarette juice through major border crossings, such as Nuwaiseeb Port (Kuwait) and the Saudi-Bahrain causeway. Notably, a villa in Riyadh was raided, where six Chinese nationals were arrested for producing e-cigarettes with unidentified flavored liquids, illustrating that both cross-border smuggling and local production play a role in illicit trade.

Smuggling methods vary, with large quantities of flavored e-cigarettes concealed in private vehicles or disguised as everyday goods to evade detection. Trafficking tactics continue to evolve, as products frequently pass through multiple neighboring countries before entering Saudi Arabia. Expanding domestic production networks, often supported by organized operations and sophisticated equipment, demonstrate the local market's adaptability.

Social media platforms are increasingly used to report and discuss enforcement actions, contributing to greater public awareness of anti-smuggling efforts and related health risks. Saudi authorities have responded quickly, conducting inspections, coor-

inating raids, and taking legal action against offenders. Despite notable enforcement successes in intercepting smuggled and illegally produced e-cigarettes, persistent and adaptive trafficking tactics underscore the ongoing need for vigilance, intelligence sharing, and effective public communication to counter illicit trade in the region.

- **Locations of Seizures:** Nuwaiseeb border port with Kuwait.
Products Seized: 20,699 flavored e-cigarettes (each 60 ml).
- **Brands Seized:** Brands not specified in official reports; products identified by type (various flavored e-cigarettes).
- **Methods:** Concealed in a private vehicle by a traveler attempting to cross the border.
- **Enforcement:** Customs officers identified suspicious activity, conducted a search, discovered the hidden e-cigarettes, and initiated legal measures against the individual involved.



SAUDI ARABIA ILLCIT TRADE OVERVIEW

Saudi enforcement agencies have intercepted attempts to smuggle flavored e-cigarettes and cannabinoid-laced e-cigarette juice through border crossings such as Nuwaiseeb Port (Kuwait) and the Saudi-Bahrain causeway. Notably, a villa in Riyadh was raided, resulting in the arrest of six Chinese nationals producing e-cigarettes with unidentified flavored liquids. These cases highlight the use of both land borders and local production sites for illicit trade.

Legend



Raid



Interception



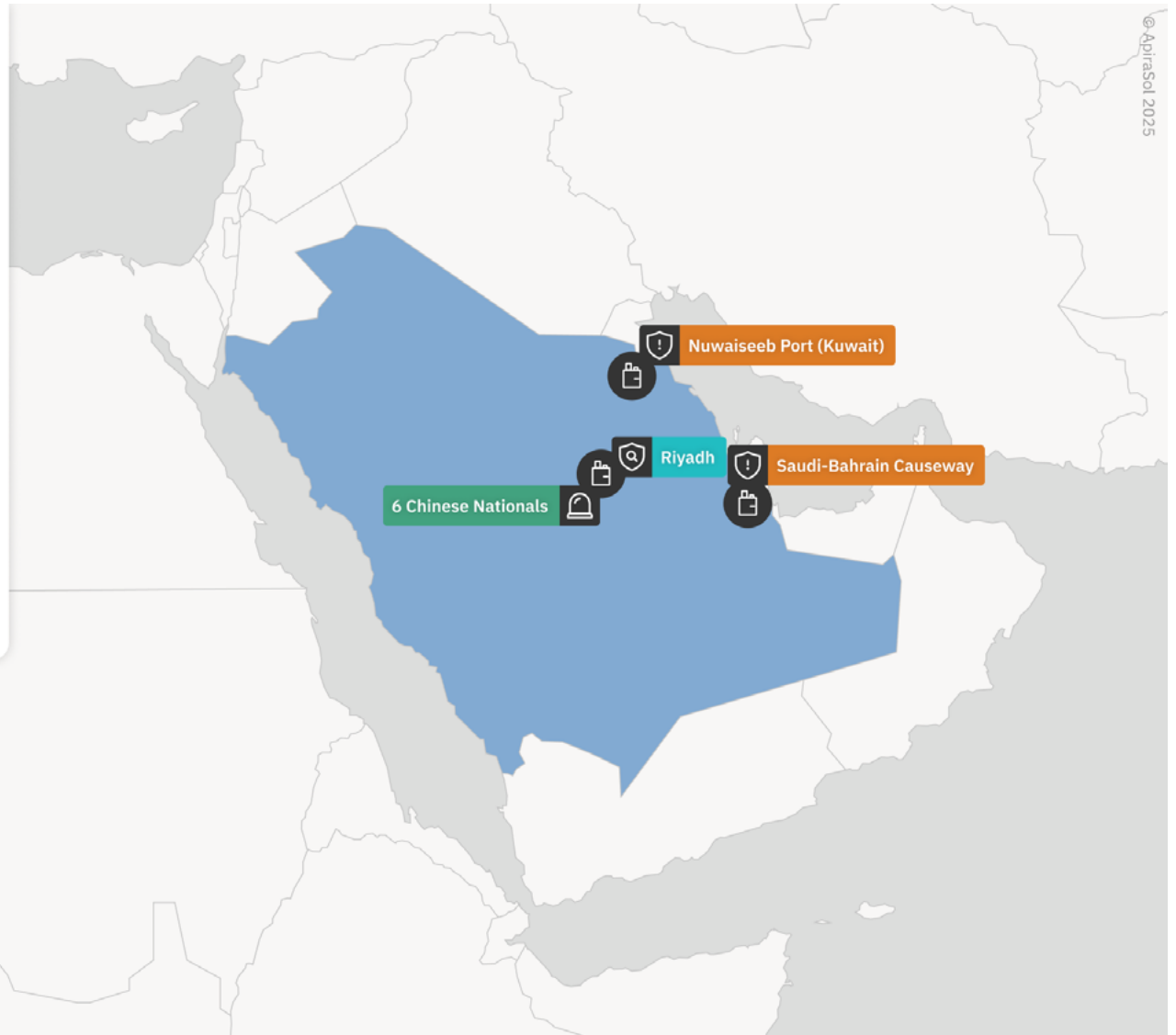
Arrest



Flavored E-Cigarettes, Cannabinoid-Laced E-cigarette Juice



ENDS are regulated





SAUDI ARABIA ENFORCEMENT NEWS

Kuwaiti customs foiled an attempt to smuggle 20,699 flavored e-cigarettes (each 60 ml) by car to Saudi Arabia at Nuwaiseeb port in February 2023, taking legal action against the traveler.

Smuggling attempt of 20,699 flavored e-cigarettes to Saudi Arabia foiled

18/02/2023

Arab Times

Share:



KUWAIT CITY, Feb 18: A traveler tried to smuggle 20,000 flavored e-cigs to Saudi Arabia with his car at Nuwaiseeb port. The customs men suspected the car and on searching found 20,699 various flavored e-cigarettes weighing 60 ml each. Legal measures have been taken.



Legend



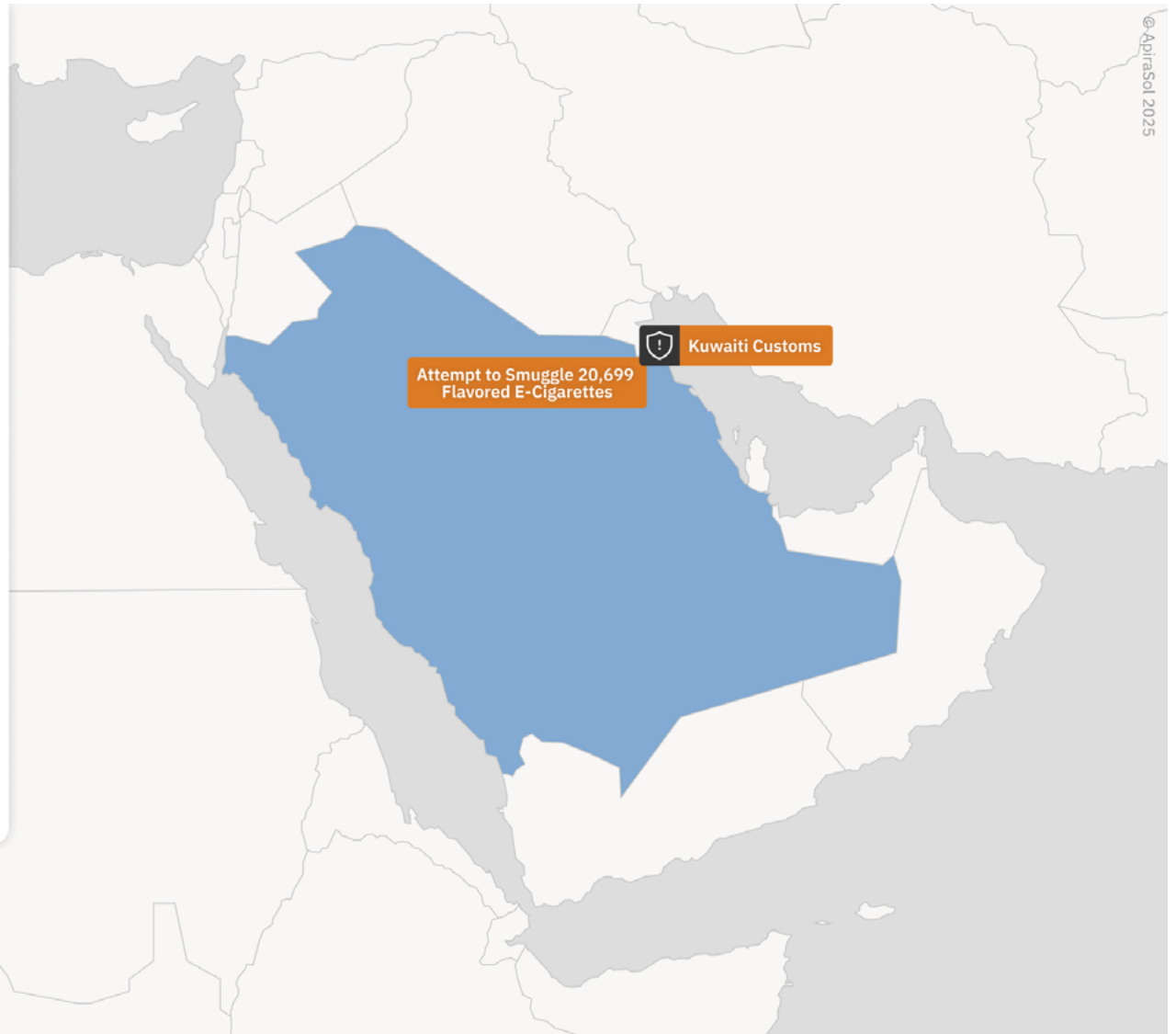
Interception



ENDS are regulated

Source

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