

ApiraSol

E-CIGARETTES IN VIETNAM 2024/2025 – Q2

SUPPLY CHAIN INTELLIGENCE
APRIL 2026

Overview

1. INTRODUCTION & METHODOLOGY

2. E-CIGARETTE TRADE - ASIA

3. E-CIGARETTE TRADE - VIETNAM

1

**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.

2

**E-CIGARETTE
TRADE - ASIA**

E-Cigarette Trade - Asia

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

The e-cigarette landscape across Asia is marked by a diverse and rapidly evolving regulatory environment. Countries like **India, Singapore, Taiwan, Thailand, Vietnam**, and **Hong Kong** have implemented strict bans on the import, sale, and use of e-cigarettes, citing public health concerns and youth protection. Others, such as **Australia, Malaysia, Indonesia** and the **Philippines**, have opted for regulated frameworks, allowing e-cigarettes under specific conditions—often with licensing, age restrictions, and product standards. Meanwhile, **China** and **South Korea** treat e-cigarettes as tobacco products, subjecting them to taxation, licensing, and safety regulations.

In many countries, there is a significant discrepancy between the value of e-cigarettes declared as exported from China and the value reported as imported by the destination country—**often with China’s export figures being much higher**. This statistical gap may indicate the **presence of illicit trade**, where products enter markets without being officially recorded or taxed.

However, in cases like **Singapore** and **Hong Kong**, the opposite trend is observed: declared imports from China exceed China’s reported exports. This suggests these locations may serve as transshipment hubs, where e-cigarettes—both legal and illicit—

are imported, stored, and re-exported to other countries in the region.

Illicit e-cigarette trade continues to rise across Asia despite regulatory measures. Euromonitor estimates illicit incidence to be at least 60% in Indonesia and Malaysia, and around 80% in South Korea and the Philippines—underscoring the scale and persistence of the problem across the region. Enforcement reports consistently identify China as the main source, with large volumes of unregistered, untaxed, flavored, and high-nicotine devices produced in southern China and smuggled into most neighboring countries.

While most seizures trace directly back to **China**, some cases involve other routes—such as products intercepted in **Indonesia, Singapore, Malaysia**, and **Thailand** coming through Southeast Asian countries, and shipments in **India** linked to Middle Eastern suppliers. These are few compared to the overwhelming volume of China-origin products dominating the market.

Authorities—including customs, health ministries, and anti-smuggling units—have intensified crackdowns, seizing millions of illegal devices and launching awareness campaigns. Yet enforcement gaps and strong consumer demand fuel a thriving underground market, increasingly tied to organized crime. Australia

illustrates how these dynamics can escalate: since 2023, authorities have reported multiple bombing incidents and violent attacks connected to criminal groups involved in illicit tobacco and vaping products. This trend suggests that the illicit e-cigarette trade is not only a regulatory concern but may also pose broader public safety risks as it intersects with organized crime and, in some cases, adulterated or drug laced products.



3

E-CIGARETTE TRADE - VIETNAM

Summary

A review of Vietnam’s official trade statistics for e-cigarettes in 2024 reveals pronounced discrepancies between its reported imports and China’s declared exports. China’s official export figures to Vietnam stand at \$34.4 million, yet Vietnam’s own records reflect only \$124,000 in imports—a staggering gap of approximately \$34 million.

Key factors contributing to this gap include:

- **Misdeclaration to avoid detection:** Several shipments containing pods and e-cigarette devices have been declared as cosmetics or phone accessories, making it difficult for Customs to apply risk identification criteria.
- **Re-routing:** E-cigarette shipments destined for Vietnam are frequently routed through cross-border and international transit zones or third countries, obscuring the origin and complicating customs tracking and detection.
- **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 Vietnam and its trading partners exacerbate discrepancies, making reconciliation of bilateral trade figures challenging.
- **Prevalence of Smuggling and Illicit Trade:** E-cigarettes often

enter Vietnam through illicit means, are misdeclared under different customs categories, or are routed via third countries to avoid scrutiny.

- **Local storage and distribution through informal channels:** Enforcement cases in Hanoi, Bac Ninh, and Da Nang show that products are often kept in small warehouses and labeled as “electronic accessories” to evade inspection.

Overall, the observed trade gap highlights Vietnam’s role not only as a destination for illicit e-cigarette products but also as a jurisdiction marked by substantial enforcement, regulatory, and recordkeeping challenges. The situation underscores the need for vigilant ongoing monitoring, enhanced trade data reconciliation, improved customs cooperation, and harmonized enforcement efforts between Vietnam and China. These measures are critical to address irregularities, supply chain risks, and the persistent inflow of restricted e-cigarette products.

Regulatory Overview

As of January 1, 2025, Vietnam has enacted one of the strictest e-cigarette regulatory frameworks in Southeast Asia, implementing a comprehensive nationwide ban on all aspects of vaping. Under Resolution 173/2024/QH15 passed by the National Assembly, the production, importation, distribution, sale, trade,

storage, transportation, and use of e-cigarettes and related components are now fully prohibited.

While Vietnam’s comprehensive ban on e-cigarettes prohibits their production, import, sale, and use, there are currently no specific penalties for these activities. However, enforcement is carried out through existing legal frameworks such as under Decree 144/2021/ND-CP, individuals using e-cigarettes may be fined between VND1 million and VND2 million (approximately \$38–\$77). For those involved in production or trade, Decree 98/2020/ND-CP allows fines ranging from VND1 million to VND100 million (\$38–\$3,800) for violations related to counterfeit and prohibited goods.

Statistical Data (China as Origin)

China’s declared exports of e-cigarettes to Vietnam in 2024 totaled \$34,365,651, while Vietnam’s declared imports from China reached \$124,000—creating a **discrepancy of approximately \$34 million**. This pronounced statistical gap can be attributed to Vietnam’s strict import controls, pervasive illicit trade practices, and the widespread use of non-official channels for product distribution. As a result, significant volumes of e-cigarette shipments are rerouted, misdeclared, or clandestinely imported to bypass regulatory oversight, leading to a substantial underrepresentation of actual trade flows within Vietnam’s official data. Notably, Chinese export statistics show that in the first and second quar-

ters of 2025, shipments to Vietnam still reached \$1,072,000, despite Vietnam’s comprehensive ban enacted in January 2025. This persistent flow underscores continued inflows via non-official channels.

Total Value 2024:

- Total Exports from China 2024: \$34,365,651
- Total Imports from China 2024: \$ 124,000
- **Statistical Gap: \$34,241,651**

EXPORTS OF E-CIGARETTES FROM CHINA TO VIETNAM - 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	VIETNAM	24,140	1,058
24041990	Other products containing nicotine substitutes, intended for inhalation without combustion	CHINA	VIETNAM	79	14
24041910	Other products containing tobacco substitutes, intended for inhalation without combustion	CHINA	VIETNAM	0	0
85434000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	VIETNAM	10,147	0
Total:				34,366	1,072

IMPORTS OF E-CIGARETTES TO VIETNAM 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)
24041210000	Products containing nicotine, intended for inhalation without combustion	CHINA	VIETNAM	N/A	N/A
24041910000	Products containing tobacco or nicotine substitutes, intended for inhalation without combustion . . .	CHINA	VIETNAM	N/A	N/A
85434000000	Electronic cigarettes and similar personal electric vaporizing devices	CHINA	VIETNAM	124	N/A
Total:				124	-

VIETNAM
STATISTICAL DATA



Exports from China to Vietnam

34,365,651

Total 2024 Value (USD)
1H 2025 Value (USD): 1,072,000

Imports to Vietnam from China

124,000

Total 2024 Value (USD)
1H 2025 Value (USD): 160,000

Statistical Data Gap *

34,241,651

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



© ApiraSol 2025

VIETNAM

TRADE DATA

The flow of e-cigarette shipments to Vietnam in 2024 is predominantly sourced from Indonesia and China, routed through major ports such as Cengkareng Soekarno Hatta and Hanoi, and involves recognized brands and assembly components. While a small group of exporters and importers facilitates these transactions, the presence of complete value and weight declarations suggests a degree of reporting integrity. However, actual market volumes may be underrepresented, considering regional patterns of diversion, informal trade, and discrepancies between declared and real-world e-cigarette flows.

Shipments:	84 Trade Shipments
Period:	January - December 2024
Origin Countries:	China: 29 %, Indonesia: 71 %
Origin Ports:	CNZZZ: 29 %, Cengkareng Soekarno Hatta U: 57 %, Batu Ampar: 2 %, Sekupang: 6 %
Destination Countries:	Vietnam
Destination Ports:	Hanoi: 63 %, VNHUGT: 29 %, Haiphong: 8 %
Products:	Electronic devices, pods, Electronic cigarette assembly components
E-Cigarette Brands:	Various brands and models
Mode of Transport:	Unknown: 70 %, Land: 29 %, Air: 1%
Value declared:	307,298.45 USD (100 % of shipments)
Weight declared:	40,568.14 KG (100 % of shipments)

VIETNAM

Number of exporters:	6
Number of importers:	6
Top Exporters:	[REDACTED]
Top Importers:	[REDACTED]
HS Codes declared in shipments:	<p>240419: Other products intended for inhalation without combustion (58 shipments)</p> <p>854340: Electronic cigarettes and similar personal electric vaporising devices (24 shipments)</p> <p>240412: Other products containing nicotine, intended for inhalation without combustion (2 shipments)</p>



Shipments (Period FY 2024)

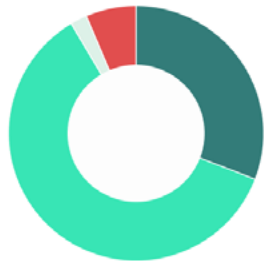
84 | **307,298.45**
Quantity | Value (USD)

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



Destination Ports

- Hanoi (63 %)
- VNHUGT (29 %)
- Haiphong (8 %)



Origin Ports from China and Indonesia

- CNZZZ (29 %)
- Cengkareng Soekarno Hatta U (57 %)
- Batu Ampar (2 %)
- Sekupang (6 %)

Mode of Transportation

Unknown: 70 %, Land: 29 %, Air: 1%

E-Cigarette Products

Electronic devices, pods, Electronic cigarette assembly components

Legal Brands at Time of Shipment

None

Top Importers

None

Top Exporters

None

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

Vietnamese authorities have conducted raids on e-cigarette shops, warehouses, and cafes in cities like Hanoi, Hai Phong, and Da Nang. Large quantities of e-cigarettes and accessories, often traced to China, have been seized. Smuggling operations frequently use social media sales and cross-border trafficking, with some shipments hidden in warehouses or declared as cosmetics.

These enforcement efforts have exposed widespread illicit activity and a lack of regulatory oversight, as many seized products are distributed through unlicensed businesses and unregulated supply chains. Persistent large-scale seizures highlight the market's reliance on informal logistics and the challenges faced by authorities in identifying and dismantling organized trafficking networks. Overall, these trends underscore the urgency for Vietnam to strengthen legal frameworks, improve monitoring systems, and expand cross-border cooperation to more effectively combat illicit e-cigarette trade and safeguard consumer safety.

- **Locations of seizures:** Raids in Halong, Hanoi, Taiping City, Bac Ninh.
- **Products seized:** Thousands to over 150,000 illegal e-cigarettes, e-juice, and accessories seized, mostly from Chinese suppliers.
- **Methods:** Goods sold through unlicensed stores and chain out-

- lets, hidden in warehouses, distributed via smuggling networks.
- **Enforcement:** Police shut stores, seized and destroyed stock, charged suspects—ongoing efforts highlight persistent illicit market activity despite the 2025 ban.



VIETNAM ILLCIT TRADE OVERVIEW

Vietnamese authorities have conducted raids on e-cigarette shops, warehouses, and cafes in cities like Hanoi, Hai Phong, and Da Nang. Large quantities of e-cigarettes and accessories, often traced to China, have been seized. Smuggling operations frequently use social media sales and cross-border trafficking, with some shipments hidden in warehouses or declared as cosmetics.

Legend



Raid



E-cigarette Shop



Warehouse



Cafe



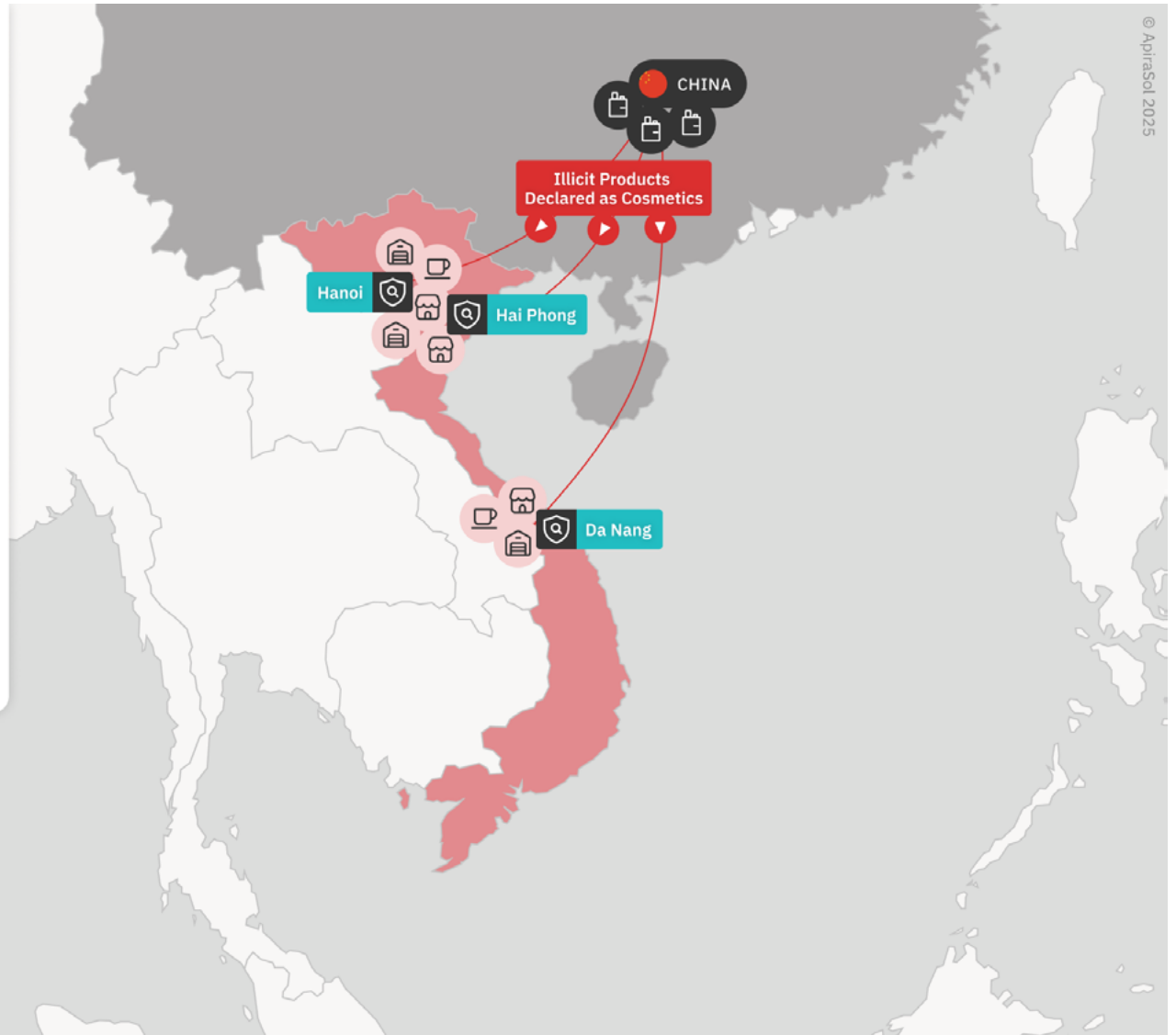
China-Made E-Cigarettes/Accessories



Illicit Shipment



ENDS are banned





VIETNAM ENFORCEMENT NEWS

Vietnamese authorities seized over 163,000 smuggled e-cigarette devices and nearly 10 tons of accessories—including major brands like FLUM PEBBLE, LOST MARY, GEEK BAR, and BAR9K—in Quang Ninh and Hai Phong, with all products lacking Vietnamese labels and proper documentation; many were labeled with foreign languages and made in China, indicating foreign origin.

Vietnam Authorities Seize Smuggled E-cigarette Products in Raid
Regulations by 2FIRSTS.ai Jun.11.2024



Legend



Seizure



ENDS are banned

Source

<https://www.2firsts.com/news/vietnam-authorities-seize-smuggled-e-cigarette-products-in-raid>



References

- [Euromonitor International: More than 75% of global e-vapor volume is driven by illicit market – The Media Pub News™](#)
- [Over 75% of global e-vapour volume is driven by illicit market: Euromonitor International - The Daily Brit](#)
- [Navigating the E-Vapour Market and the Growth of Illicit Products - Euromonitor.com](#)
- [Illicit e-vapour market booms - Tobacco Journal International](#)
- [Legal vs Illicit E-Vapour Products in the Middle East: A Closer Look - Euromonitor.com](#)
- [Market and legal information in the e-cigarette and vaping sector](#)
- [Tamarind Intelligence Podcast: The Illicit Vape Problem](#)
- [Episode 1: The Illicit Vape Problem - Tamarind Intelligence Podcast | Podcast on Spotify](#)
- [Enforcement tracker: authorities across globe break records in illicit vape seizures - ECigIntelligence](#)
- [Illicit Vape Market Undermines Global Tobacco Harm Reduction Progress - allAfrica.com](#)
- [Announcement of the State Tobacco Monopoly Administration \(No. 1 of 2022\) Administrative Measures for E-cigarettes Official Gazette of the State Council No. 18 of 2022 Chinese Government Website](#)
- [China-Admin.-Rules-for-E-Cigarette-Import-Export.pdf](#)
- [WHO report on the global tobacco epidemic, 2025: warning about the dangers of tobacco, June 2025](#)
- [Countries Banning E-Cigarette Sales | Ecigator](#)
- [Regulation E-Cigarettes | Tobacco Insider](#)
- [Analysis of Vape Bans and Regulatory Policies in Various Countries | Vape Observation](#)
- [China Customs Statistics Portal](#)
- [Trade Map \(International Trade Centre\)](#)
- [Viet Nam Resolution No. 173/2024/QH15 \(Official PDF\)](#)
- [Nghi định 144/2021/NĐ-CP – Administrative Sanctions in Security and Order](#)
- [Nghi định 98/2020/NĐ-CP – Administrative Sanctions in Commercial Activities](#)

Enforcement news sources

- [Illegal Sale of Vaping Products in Vietnam](#)
- [E-Cigarette Seizure in Taiping City, Vietnam](#)
- [The Concerning Lack of E-Cigarette Regulation in Vietnam](#)
- [Vietnam Seizes Illegal Chinese E-Cigarette Shipment in Local Warehouse](#)
- [Vietnamese Police Seize 7,866 Smuggled E-Cigarettes in Chain Store Raid](#)
- [Bac Ninh Police Seize a Large Cache of Electronic Cigarette Liquid Burners](#)
- [Vietnam Authorities Seize Smuggled E-Cigarette Products in Raid](#)
- [Vietnam Destroys Largest Batch of Illegal E-Cigarette Products](#)
- [Hanoi Cracks Down on Vape Smuggling, Seizes 500 Illegal Items](#)
- [Hanoi Police Bust 153,000 E-Cigarette Smuggling Ring, 14 Suspects Charged](#)
- [Global Illegal Vape Crackdown – July 2025](#)

Contact us

ApiraSol GmbH

Pappelallee 78

10437 Berlin, Germany

+49 3023 61 60 22

info@apirasol.com

www.apirasol.com