The race towards a smoke-free society

Assessing the progress and policies to reach less than 5% smoking prevalence by 2040

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Summary

The European Union and several other countries have set ambitious goals to combat smoking and have established future targets for reducing tobacco use or smoking prevalence. Europe's Beating Cancer Plan aims to lower tobacco use to less than 5% of the population by 2040. Similarly, the United States has set a target of reducing smoking prevalence to 6.1% or lower by 2030.

In this report, "smoke-free" is defined as having fewer than 5% of smokers within the population or within any demographic subgroup. Currently, the countries closest to achieving smoke-free status are Sweden, with 5.8% of the population smoking, and New Zealand, with 6.8% (see Table 1).

Table 1: Leaderboard 2023 for the race towards a smoke-free society

Share of daily smokers in different demographic groups in per cent

Country	Population	Men	Women	Young
Sweden	5.8	5.2	6.1	3.0
New Zealand	6.8	7.2	6.4	3.0
Norway	7.0	8.0	7.0	3.0
Canada	8.2	9.1	7.3	1.0
Australia	8.8	9.5	8.1	4.5
United States	10.8	12.5	9.2	7.0
United Kingdom	11.9	13.7	10.1	9.8
European Union	16.6	19.6	14.5	12.1

To achieve smoke-free status, the United States must reduce its smoking population by more than half, from the current level of 10.8%. The European Union faces an even greater challenge, needing to decrease the percentage of smokers by over 11 percentage points to meet its target.

In general, women as a subgroup are closer to achieving smoke-free status than men, and several countries have already reached smoke-free levels among young people. For example, the younger generation in Norway surpassed the 5% smoking threshold as early as 2015, while Sweden and Canada achieved the same milestone in 2018 (see Table 2).

Five countries—Sweden, New Zealand, Norway, Canada, and Hungary—are projected to become smoke-free no later than 2030. In contrast, most EU member states are unlikely to be smoke-free before 2040. Of the 27 EU countries, 19 are projected to miss the EU target of reducing tobacco use to less than 5% of the population, with 14 of them not expected to become smoke-free even by 2045. These results highlight the insufficiency of current EU policies to combat smoking to meet the Union's 2040 target.

By comparison, all non-EU countries included in the analysis—Norway, New Zealand, Canada, Australia, the United States, and the United Kingdom—are expected to become smoke-free no later than 2033.

Table 2: Scoreboard for when countries become smoke-free

Year when group become smoke-free

Country	Population	Men	Women	Young
Sweden	2024	2024	2025	2018
New Zealand	2025	2025	2025	2022
Norway	2026	2026	2026	2015
Canada	2028	2028	2027	2018
Australia	2031	2031	2032	2022
United States	2032	2032	2030	2025
United Kingdom	2033	2033	2031	2027
European Union	2045+	2045+	2045+	2038

The success of countries leading the race toward smoke-free status can be attributed to their historically more progressive policies. These include significantly higher cigarette taxes and policies that allow, or at least do not hinder, the use of alternative nicotine products. Higher prices and alternatives to smoking have proven effective in reducing smoking rates and have given these countries a clear advantage in achieving a smoke-free society.

Notably, in those countries projected to reach a smoke-free status within a near future, the number of young people currently using alternative nicotine products greatly outnumbers those who smoke. The opposite is true of countries likely to meet smoke-free status beyond 2045.

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1 Introduction

Under Europe's Beating Cancer Plan[1], the European Commission has set a goal of reducing tobacco use to less than 5% of the population by 2040. In 2023, approximately 16.6% of individuals in the European Union smoked daily, corresponding to an average annual decline 0.24 percentage points compared to a decade earlier.

If this rate of decline continues, the Commission's target could potentially be met by 2070 at the earliest. However, when considering the reduction in smoking prevalence between 2019 and 2023, the annual decline is only 0.15 percentage points per year. At this slower pace, the 5% target would likely not be achieved until around 2100. If other tobacco use is also considered, the target of 5% or less tobacco use would most likely not be achieved until well after turn of the next century.

Several countries have set a goal to become smoke-free or reduce smoking prevalence to a specific level by a target year. Sweden and New Zealand aim to achieve smoke-free status by 2025, while Australia has set a target of 2030.[2] Within the United Kingdom, England aims to be smoke-free by 2030, while Scotland targets a tobacco-free status by 2034.[3] The United States, through its Healthy People 2030 initiative, aims to significantly reduce smoking rates by 2030, with a current objective of achieving a smoking prevalence of 6.1% by that year.[4]

The purpose of this report

This report ranks 33 countries based on their progress toward achieving a smoke-free society as of 2023, given a definition of smoke-free as less than 5% daily smokers in the population. It also projects when these countries are expected to become smoke-free. Furthermore, the report provides insights into the current rankings of countries in their fight against smoking, exploring some of the main reasons why certain countries are on track to achieve their goal, while others are expected to fall short.

The countries included in the analysis are the European Union member states, Norway, the United Kingdom, Canada, the United States, Australia, and New Zealand. These countries are included due to the availability of consistently published governmental survey data on smoking behaviour, as well as their comparable levels of economic development.

[1] European Commission (2022).
[2] Folkhälsomyndigheten (2025), Ministry of Health (2025) and Department of Health and Aged Care (2023).
[3] Cabinet Office and Department of Health and Social Care (2019).
[4] U.S. Department of Health and Human Services (2025).

2 The race to a smoke-free future

Table 3 below presents daily smoking prevalence data for 33 countries and the European Union, broken down by the entire population, men, women, and young people[5]. The table also includes a ranking of all countries in the race toward a smoke-free society. This ranking reflects each country's current position based on the prevalence of smoking within its population.

No country has achieved their goal so far

As of 2023, no country has yet achieved the status of being smoke-free. However, Sweden leads the race, with only 5.8% of its population smoking. New Zealand ranks second at 6.8%, followed by Norway in third place at 7.0%.

In general, smoking is more prevalent among men than women. On average, 19.3% of men smoke in the countries included, compared to 13.2% of women. Notably, only 5.0% of Swedish men smoke daily, further underscoring Sweden's leading position.

Smoking is also less common among young people compared to older age groups. On average, 11.2% of young people in the analysed countries smoke, compared to 16.1% in the general population. Six countries stand out where the younger generation already can be considered smoke-free: Canada, Norway, Sweden, New Zealand, Denmark, and Australia.

A low smoking prevalence among young people offers a significant advantage for future reductions in smoking rates. If young individuals avoid smoking as they age, the number of smokers in older age groups will naturally decline, contributing to a long-term reduction in overall smoking prevalence.

To provide further insight, Table 1 categorises countries into four groups (A–D), based on their smoking prevalence.

A. Group A includes countries where less than 10% of the population smokes.
B. Group B encompasses countries with smoking rates between 10% and 15%.
C. Group C covers those with rates between 15% and 20%.
D. Group D consists of countries where more than 20% of the population smokes.

Group A countries. Less than 10% of the population smoke

Group A includes four Nordic countries alongside Canada, Australia, and New Zealand. Sweden leads not only in having the lowest overall smoking rates but also stands out for the lowest prevalences among both men and women.

A defining characteristic of Group A is the notably low percentage of young smokers. This is evident both when comparing the youth smoking rate to the total

[5] 'Young people' is defined as the age group 15-24 based on the European Union reporting standard. Some countries use different age groupings. In Canada 'Young people' is represented by the age group 15-19, in Norway by 16-24, in the UK by 18-24, and in the US by 18-34.

population within these countries and in contrast to the other groups. Norway's young population achieved smoke-free status as early as 2015, followed by Sweden and Canada in 2018, New Zealand and Australia in 2022, and Denmark in 2023.

Low smoking rates among young people indicate a minimal influx of new smokers into older age groups over time, which will likely result in a sustained decline in smoking prevalence among older generations in the future.

Another notable feature of Group A is the relative parity in smoking rates between men and women—a stark contrast to other groups, where smoking remains significantly more common among men.

Group B countries. 10-15% of the population smoke

Group B includes Ireland, the United Kingdom, the United States, the Benelux countries, Hungary, and Portugal. This group, on average, shows a higher smoking prevalence among men than women, with approximately 3.6 percentage points more men smoking than women.

On average, 10.3% of young people in these countries smoke, which is only 1.9 percentage points lower than the total population. This youth smoking rate is notably higher than that observed in Group A. As a result, the transition of smokers from younger to older age groups is only marginally reducing smoking prevalence among older generations. Consequently, the decline in smoking rates among older individuals in Group B is expected to be slower compared to Group A.

Group C countries. 15-20% of the population smoke

Group C comprises the four largest countries in the European Union—Germany, France, Spain, and Italy—along with five of the smallest member states. In these countries, the proportion of male smokers is significantly higher than that of female smokers, with an average gap of 4.6 percentage points.

Smoking among younger generations in Group C is considerably lower than among older age groups, aligning closely with the rates observed in Group B, at around 10%. This trend suggests that smoking prevalence among older generations in Group C will gradually decline over time as younger individuals age and continue to abstain from smoking.

Group D countries, more than 20% of the population smoke

Group D includes seven Eastern European countries, Greece, and Austria. This group is characterized by significantly higher smoking rates among men, women, and young people than in other groups. On average, 33.1% of men, 18.8% of women, and 19.6% of young individuals smoke daily.

The high smoking prevalence among youth poses a major challenge to achieving a smoke-free generation. As a result, the likelihood of countries in Group D attaining smoke-free status in the near future appears minimal.

Table 3: Leaderboard 2023 for the race towards a smoke-free society in the EU and other selected developed countries

Share of daily smokers in different demographic groups in per cent and country rank

Group	Country	Population	Men	Women	Young	Ranking
A <10%	Sweden	5.8	5.2	6.1	3.0	1
	New Zealand	6.8	7.2	6.4	3.0	2
	Norway	7.0	8.0	7.0	3.0	3
	Canada	8.2	9.1	7.3	1.0	4
	Finland	8.6	8.5	9.2	5.3	5
	Australia	8.8	9.5	8.1	4.5	6
	Denmark	9.7	9.4	9.7	4.2	7
B 10-15%	Ireland	10.7	9.4	12.0	11.4	8
	United States	10.8	12.5	9.2	7.0	9
	Luxembourg	10.8	12.4	8.8	7.0	10
	Belgium	11.1	13.8	8.7	6.2	11
	United Kingdom	11.9	13.7	10.1	9.8	12
	Netherlands	12.7	14.9	10.4	13.1	13
	Hungary	14.3	19.1	10.9	17.4	14
	Portugal	14.7	16.3	13.0	10.4	15
C 15-20%	Germany	15.4	17.4	13.6	6.5	16
	Malta	15.6	16.6	14.8	5.5	17
	Cyprus	16.0	18.2	13.7	12.2	18
	France	16.2	17.1	15.9	15.3	19
	Czechia	16.3	17.2	16.4	9.5	20
	European Union	**16.6**	**19.6**	**14.5**	**12.1**	
	Spain	16.8	16.8	16.1	14.8	21
	Italy	17.0	21.3	12.8	9.0	22
	Slovenia	17.3	20.5	13.4	9.4	23
	Estonia	18.3	25.4	12.1	6.7	24
D >20%	Slovakia	20.5	27.8	12.9	16.6	25
	Lithuania	20.9	31.4	11.9	9.5	26
	Greece	21.2	22.4	20.2	11.0	27
	Austria	22.7	27.3	18.3	20.7	28
	Poland	23.2	29.9	17.2	20.5	29
	Latvia	26.4	41.3	13.8	22.6	30
	Croatia	30.1	35.3	25.5	31.2	31
	Romania	31.3	37.1	25.8	24.4	32
	Bulgaria	34.0	45.6	24.0	20.5	33
	Average	**16.1**	**19.3**	**13.2**	**11.2**	

Note: 'Young people' is defined as the age group 15-24 based on the European Union reporting standard. Some countries use different age groupings–in Canada 'Young people' is represented by the age group 15-19, in Norway by 16-24, in the UK by 18-24, and in the US by 18-34.
Source: See the nicotine use prevalences references in list of references.

3 Sweden takes the lead

Table 4 and Table 5 below present the projected year when each included country is expected to achieve smoke-free status. These projections are provided for the total population, men, women, and three age groups[6]. The tables also include a ranking that reflects the order in which countries are expected to become smoke-free, based on the projected year the smoking prevalence in the population falls below 5%.

Method and reporting

For European Union member states, the smoking prevalence data is from surveys conducted by the European Commission.[7] This ensures comparability, as a standardised survey methodology is applied across all countries and over time. The EU has surveyed smoking behaviour in 2014, 2019 and 2023 in their Eurobarometer series. Additionally, smoking prevalence data is collected from national surveys in the other countries.

To estimate when countries become smoke-free, future smoking rates are projected by applying the average annual rate of decline observed between 2014 and 2023 to each subsequent year. This by starting with each country's smoking prevalence in 2023.[8]

A country is considered smoke-free in the year when its smoking prevalence drops below 5%. For example, in the United States, the annual rate of decline in smoking prevalence between 2014 and 2023 was -0.67 percentage points. In 2023, the smoking prevalence in the U.S. was 10.8%. Applying this annual decline, the smoking rate is projected to fall below 5% in 2032.

In contrast, the European Union's overall decline is slower, at -0.27 percentage points per year. This means the EU is not expected to achieve smoke-free status until sometime after 2045. Among EU member states, Hungary experienced the fastest decline in smoking prevalence, with a reduction of 1.3 percentage points per year during the same period. Meanwhile, Italy and Slovenia recorded the slowest declines, with annual reductions of just 0.04 and 0.08 percentage points, respectively.

In some EU member states, smoking prevalence has increased in certain demographic groups. For instance, among young people in Latvia, smoking rates rose by 0.33 percentage points annually. In such cases, the average rate of change for EU member states has been used instead. Additionally, the model accounts for the influx of fewer young smokers into older age groups, which is assumed to result in an accelerated rate of decline over time. This adjustment means that each year, the number of smokers decreases at a slightly faster pace. These modifications and assumptions are designed to create best-case scenarios for all countries, based on their current tobacco policies and trends observed in the analysed countries.

The tables are divided into three groups based on the year each country is projected to achieve smoke-free status for the total population: 2030 or earlier, 2031–2040,

[6] The age groups are as followed –Young: ages 15-24, Middle aged: ages 25-54, Older adults: ages 55+.
[7] European Commission (2024).
[8] The rate of reduction in smoking prevalence in the EU between 2019 and 2023 was slower than that between 2014 and 2019. This motivates choosing the annual rate of reduction between 2014 and 2019 to project future smoking rates, ensuring the estimation becomes a best-case scenario in this respect.

and After 2040. For countries in the "After 2040" group, those not expected to reach the 5% target by 2045 are reported as 2045+. No projections are made beyond 2045 or more than 20 years into the future.

This cutoff is based on the premise that failing to meet the target by 2045 highlights a significant gap between the country's current tobacco policy and the established goal. Addressing such a substantial discrepancy would require substantial policy changes regardless of the exact year the country is projected to become smoke-free after 2045. Therefore, specifying an exact year in these cases is considered unnecessary.

Sweden and New Zealand are likely already smoke-free

Five countries—Sweden, New Zealand, Norway, Canada, and Hungary—are projected to become smoke-free no later than 2030, see Table 4. Based on the projections starting with reported figures for 2023, Sweden is estimated to be smoke-free by 2024, while New Zealand is expected to reach this milestone in 2025. However, whether these projections hold true will only be confirmed when updated public data for 2024 and 2025 becomes available later this year and/or next year.

Hungary, historically known for its high smoking rates, has made remarkable progress. In 2014, Hungary's smoking prevalence was 25.8%. Since then, the country has significantly increased excise taxes on cigarettes and implemented various tobacco control measures, most notable are a significant addition of smoke-free areas and plain packaging.[9] By 2019, the smoking rate had dropped to 19.3%, and by 2023, it had fallen further to 14.3%. This represents an annual decline of -1.3 percentage points. As a result, Hungary has climbed from 14th place in 2023 to finishing, or becoming smoke-free, at 5th place by 2030.

The experience in the U.S. and the UK

The United States is projected to achieve smoke-free status by 2032. This can be interpreted as the country being on track with its Healthy People 2030 initiative, which aims to reduce smoking prevalence to less than 6.1% by 2030. Young Americans are expected to become smoke-free by 2025, while middle-aged Americans are projected to reach this milestone by 2035, and older adults by 2042. This disparity can be attributed to a substantial decrease in smoking among young people, approximating 1.6 percentage points annually over the past five years. In contrast, the annual decrease for older adults is less than 0.1 percentage points.

The trend in the United Kingdom is comparable, with the population projected to become smoke-free by 2033, young people by 2027, and older generations by 2042. The generational differences stem from the historical development of smoking prevalence. Since 2014, smoking among young people in the United Kingdom has fallen from 23.5% to 9.8% in 2023, representing an annual decrease of 1.4 percentage points. Among older adults, although smoking is less prevalent, the annual decrease has been only 0.1 percentage points, resulting in a drop from 9.8% in 2011 to 8.2% in 2023.

[9] European Commission (2025) and Tobacco Control Scale (2025).

Table 4: Scoreboard for when different age groups become smoke-free

Year when group become smoke-free and country rank

Countries smoke-free	Country	Population	Young	Middle aged	Older adults	Ranking
2030 or earlier	Sweden	2024	2018	2025	2029	1
	New Zealand	2025	2022	2026	2028	2
	Norway	2026	2015	2025	2033	3
	Canada	2028	2018	No data	No data	4
	Hungary	2030	2034	2032	2026	5
2031 - 2040	Australia	2031	2022	2032	2040	6
	Belgium	2032	2025	2036	2030	7
	United States	2032	2025	2035	2042	7
	Cyprus	2033	2030	2030	2045+	9
	Finland	2033	2024	2032	2034	9
	United Kingdom	2033	2027	2033	2042	9
	Denmark	2037	2023	2045+	2045+	12
	Netherlands	2037	2038	2034	2026	12
	Luxembourg	2039	2026	2038	2034	14
	Spain	2040	2045+	2034	2043	15
After 2040	Czechia	2041	2030	2037	2045+	16
	France	2043	2035	2043	2038	17
	Germany	2043	2026	2045+	2043	17
	Greece	2044	2031	2034	2045+	19
	Austria	2045+	2043	2045+	2045+	20
	Bulgaria	2045+	2045+	2045+	2045+	20
	Croatia	2045+	2045+	2045+	2045+	20
	Estonia	2045+	2025	2042	2045+	20
	European Union	**2045+**	**2038**	**2045+**	**2044**	
	Ireland	2045+	2045+	2036	2045+	20
	Italy	2045+	2031	2045+	2045+	20
	Latvia	2045+	2045+	2045+	2045+	20
	Lithuania	2045+	2032	2045+	2045+	20
	Malta	2045+	2024	2045+	2045+	20
	Poland	2045+	2043	2045+	2045+	20
	Portugal	2045+	2033	2045+	2037	20
	Romania	2045+	2045+	2045+	2045+	20
	Slovakia	2045+	2045+	2044	2045+	20
	Slovenia	2045+	2030	2045+	2045+	20

Note: The ranking reflects the order in which countries are expected to become smoke-free, based on the projected year the smoking prevalence in the population falls below 5%.
Source: Calculations by the author.

Understanding climbers and fallers over time

Cyprus stands out for its rapid progress, climbing from 18th place in 2023 to finishing at 9th place in 2033—a jump of nine positions in just a decade. An achievement most likely explained by the rapidly increased cigarette prices in Cyprus between 2014 and 2023, with a subsequent drop in smoking rates.

Finland, despite its relatively slow rate of decline in smoking prevalence, benefits from its currently low smoking rates. However, the country's slow progress causes Finland to drop from 5th place in 2023 to finishing at 9th place in 2033.

Worth noting is that Ireland demonstrates the same trend as Finland, but with a significantly slower decline in smoking prevalence over the last decade. Consequently, Ireland drops from 8th place in 2023 and fails to achieve the goal of becoming smoke-free before 2040 altogether.

The above observations may, to some extent, be explained by the fact that significantly higher prices and extensive tobacco control measures often are implemented simultaneously, resulting in rapid declines in smoking rates. This is achieved by reaping the low-hanging fruits: dissuading people from starting to smoke and causing price-sensitive and health-conscious smokers to quit or switch to alternatives. Over time, only hardcore smokers will remain, a group that is neither easily persuaded to quit or switch, nor particularly price sensitive.

In the case of Hungary and Cyprus, their development during the last decade may be explained by a situation where many smokers still can be relatively easily persuaded to quit through higher taxes on cigarettes and more extensive tobacco control measures, such as smoke-free areas.

Conversely, Finland and Ireland implemented higher taxes and control measures long before Hungary and Cyprus. Their relatively sluggish progress can then be interpreted as them now facing the challenge of decreasing smoking rates among the most hardcore smokers.

Most EU member states will not achieve their smoke-free goals

Most EU member states are unlikely to meet the EU target of reducing tobacco use to less than 5% before 2040. Of the 27 member states, 19 are projected to miss the goal, and 14 of these countries, along with the EU average, are not expected to become smoke-free, and thus tobacco-free, even by 2045.

This significant gap highlights a substantial discrepancy between the EU's set goals and the current tobacco policies applied by most member states. Only 8 out of 27 member states are projected to achieve the target, and only two—Sweden and Hungary—are expected to do so before 2030.[10]

Young, middle aged and older generations

Reducing smoking among younger populations is a key priority in the fight against smoking. This is mainly manifested in age limits, stricter age controls when selling, and smoke-free schools. Several countries had already achieved smoke-free status among their young populations prior to 2023. Based on current projections, the young age group is classified as smoke-free in nine countries as of 2025.

[10] In the case of Hungary, it is important to note that the drop in smoking prevalence among men between 2014 and 2023 is remarkable. The decline may level off in the future and the rate of decline may slow down.

Table 5: Scoreboard for when men and women become smoke-free

Year when group become smoke-free and rank

Countries smoke-free	Country	Population	Men	Women	Ranking
	Sweden	2024	2024	2025	1
	New Zealand	2025	2025	2025	2
2030 or earlier	Norway	2026	2026	2026	3
	Canada	2028	2028	2027	4
	Hungary	2030	2033	2029	5
	Australia	2031	2031	2032	6
	Belgium	2032	2037	2028	7
	United States	2032	2032	2030	7
	Cyprus	2033	2029	2045+	9
2031 - 2040	Finland	2033	2030	2045+	9
	United Kingdom	2033	2033	2031	9
	Denmark	2037	2035	2040	12
	Netherlands	2037	2042	2032	12
	Luxembourg	2039	2041	2033	14
	Spain	2040	2034	2045+	15
	Czechia	2041	2034	2045+	16
	France	2043	2040	2045+	17
	Germany	2043	2040	2045+	17
	Greece	2044	2036	2045+	19
	Austria	2045+	2045+	2045+	20
	Bulgaria	2045+	2045+	2045+	20
	Croatia	2045+	2045+	2045+	20
	Estonia	2045+	2045+	2042	20
	European Union	**2045+**	**2045+**	**2045+**	
After 2040	Ireland	2045+	2034	2045+	20
	Italy	2045+	2045+	2045+	20
	Latvia	2045+	2045+	2045+	20
	Lithuania	2045+	2045+	2043	20
	Malta	2045+	2042	2045+	20
	Poland	2045+	2045+	2045+	20
	Portugal	2045+	2037	2045+	20
	Romania	2045+	2045+	2045+	20
	Slovakia	2045+	2045+	2045+	20
	Slovenia	2045+	2045+	2045+	20

Note: The ranking reflects the order in which countries are expected to become smoke-free, based on the projected year the smoking prevalence in the population falls below 5%.
Source: Calculations by the author.

Most countries are expected to become smoke-free among the young before 2040. However, exceptions include Spain, Bulgaria, Croatia, Ireland, Latvia, Romania, and Slovakia, where smoking prevalence among the young is projected to remain above 5% even beyond 2045.

In general, older generations are expected to become smoke-free later due to slower declines in smoking rates among older age groups. In stark contrast to younger populations, older age groups in most countries will not achieve a smoke-free status before 2040. This indicates a significant disparity in the proportion of smokers in the future, where smoking will largely become associated with older age.

Smoke-free men and women

For countries projected to become smoke-free up to and including 2030, men and women are becoming smoke-free at approximately the same time, with differences typically spanning only a few years.

In countries becoming smoke-free between 2031 and 2040, men are instead likely to become smoke-free before women in several countries. This is despite men generally smoking more than women in these countries as of 2023. The faster decline in smoking rates among men during the period from 2014 to 2023 explains this trend.

A notable example is Cyprus, where men's smoking rates exceeded women's by 4.5 percentage points in 2023. However, between 2014 and 2023, men's smoking rates declined by 2.1 percentage points per year, while women's rates remained relatively stable, just below 14%. This difference between the sexes can to a small degree be explained by a larger uptake of vaping among men (3.2%) compared to women (1.7%) in 2023.

Across the 33 countries analysed, men are projected to become smoke-free before 2040 in 19 countries, compared to women, who are expected to achieve this status in only 12 countries.

4 The alternative path to success

Lessons from Sweden, Norway and New Zealand

Over the past decade, the share of smokers has decreased by approximately 5 percentage points in both Sweden and Norway. Simultaneously, the proportion of alternative nicotine users has risen by just over 5 percentage points. The trend in New Zealand during the same period has been even more pronounced, with an 8.2 percentage point drop in smoking rates and an 11.1 percentage point increase in the share of vapers.

This correlation between declining smoking rates and rising alternative nicotine use is more evident in younger age groups. For example, among young New Zealanders, the smoking rate fell by over 13 percentage points between 2015 and 2024, while the share of vapers increased by more than 21 percentage points. Currently, only 3.0% of young New Zealanders smoke, whereas 21.3% vape. This demonstrates a rapid substitution away from smoking, likely driven by the 57% real-term increase in New Zealand's cigarette prices during the last ten years.

In contrast, among New Zealanders aged 55–65, the smoking rate decreased by just under 5 percentage points, while vaping increased by a similar margin of just under 7 percentage points between 2015 and 2024. A comparable age-related pattern is evident in both Sweden and Norway. This trend can be attributed to younger people being more price-sensitive, more open to trying alternatives, and less attached to a specific type of nicotine product.

Overall, the decline in smoking rates in Sweden, Norway, and New Zealand is coupled with sharp increases in the use of alternative nicotine products. The development in New Zealand reflects a very fast convergence towards the nicotine use patterns observed in Sweden and Norway. This is largely due to the significant price increases on cigarettes in New Zealand, which have incentivised smokers to switch to e-cigarettes.

Lessons from the United States and the United Kingdom

As seen in Sweden, Norway, and New Zealand, there are similar generational differences in the uptake of alternative nicotine products, particularly e-cigarettes, in both the United States and the United Kingdom.

Among older Americans (aged 55+), the adoption of e-cigarettes remains negligible, with only around 1% using them. In contrast, usage among younger Americans has risen significantly, increasing by 4.7 percentage points to 12.9% between 2019 and 2023. This rise has been accompanied by a 6.3 percentage point drop in smoking rates during the same period, with only 7.0% of young Americans smoking in 2023. A similar trend among young people can be observed in the United Kingdom, but among older Britons both smoking and vaping prevalences has not changed at all during the last five years.

The key difference between Sweden and Norway compared to the United States and the United Kingdom lies in the historic availability of alternative nicotine products.

In the US and UK, far fewer less harmful alternatives were available until the introduction of e-cigarettes roughly a decade ago.

Compared to New Zealand, the difference is largely in the magnitude of cigarette price increases. Over the past decade, real cigarette prices have increased by approximately 28% in the US and 33% in the UK, compared to a dramatic 57% increase in New Zealand. Unlike New Zealand, where the larger increase seems to have motivated all age-groups to quit or switch to vaping, the price increases in the United States and the United Kingdom only succeeded to motivate younger smokers to switch to vaping, failing to sufficiently incentivise older generations to adopt safer alternatives.

Key factors to become smoke-free

The lessons outlined above become even clearer when grouping all the countries included in the analysis. Table 6 and Table 7 presented below characterises the countries based on when they are expected to become smoke-free. The countries are divided into the same three groups presented in Table 2 and 3, where the first group contains countries expected to be become smoke-free by 2030 or earlier. The second group contains countries that will become smoke-free between 2031-2040 and the third group countries that will become smoke-free after 2040.

The groups are then characterised in terms of the average price of cigarettes, alternative nicotine users (including users of snus, vape and nicotine pouches), and smokers. The change since 2014 is also included. Table 4 presents the prices and the user shares for the whole population, while table 5 presents the same figures for young people.

From Table 4, there are four key explanations for why some countries are projected to become smoke-free by 2030 or earlier.

1. Pricing policies

The countries leading the race toward smoke-free status have implemented significantly stronger cigarette excise tax policies compared to the other two groups. This is evident from the notably higher average cigarette price in 2023—€11.50 per pack—as well as the larger price increases over time. On average, cigarette prices in these countries have increased by €3.00 per pack since 2014, compared to €2.50 and €1.00 in the other two groups. As a result, cigarette prices in the leading countries are more than double those in countries projected not to achieve smoke-free status by 2040.

Table 6: Price of cigarettes and share of nicotine users

Euro per pack of 20 cigarettes in 2023 prices and percentage share of population

	Price (euro per pack)		Alternative nicotine users (% of population)		Share of smokers (% of population)	
Countries smoke-free at	change 2014-2023	2023	change 2014-2023	2023	change 2014-2023	2023
2030 or earlier	3.00	11.50	5.0	9.2	-7.4	8.3
2031-2040	2.50	9.30	2.9	3.3	-5.1	11.7
After 2040	1.00	5.50	2.3	2.3	-0.1	20.7

Source: Calculations by the author.

2. Availability of alternative nicotine products

The leading countries have also adopted policies that permit, or not hindered, the sales and use of alternative nicotine products. This provides smokers with additional options besides quitting nicotine entirely or continuing to smoke. Smokers in these countries can choose to switch to alternative nicotine products instead, which has contributed to the decline in smoking rates. Table 4 highlights this with a higher share of alternative nicotine product users in 2023 (9.2%), as well as a substantial increase in their use since 2014 (+5.0 percentage points). This rise in alternative product adoption correlates strongly with the decrease in smoking rates during the same period.

3. Steeper decline in smoking rates

Historically higher cigarette prices, combined with the availability of alternatives, have led to a significantly stronger decline in smoking prevalence between 2014 and 2023 in the leading countries. During this period, the share of smokers in these countries dropped by 7.4 percentage points, compared to just 0.1 percentage points in the countries not expected to become smoke-free until after 2040.

4. Lower initial smoking rates

The early adoption of policies to decrease smoking in the leading countries have resulted in a much lower share of smokers at the outset of the projections. In 2023, the smoking prevalence in these countries was just 8.3%, compared to 11.7% and 20.7% in the other two groups. This lower baseline means that the distance to achieving smoke-free status is significantly shorter.

The trends are clear among young people

The key factors driving smoke-free progress are particularly evident among the younger generation. In Table 5, the reported cigarette prices are the same as in Table 4, but the data focuses specifically on the share of alternative nicotine users and smokers among young people. Compared to the general population, young people show a much higher adoption of alternative nicotine products, with a faster increase in usage since 2014.

This suggests that alternative nicotine products have played a crucial role to dissuade young people from starting to smoke at all, while also enabling those young who do smoke to substitute cigarettes for other nicotine products.

Table 7: Price of cigarettes and share of nicotine users among young people

Euro per pack of 20 cigarettes in 2023 prices and share of young people

	Price (euro per pack)		Alternative nicotine users (% of young)		Smokers (% of young)	
Countries smoke-free at	change 2014-2023	2023	change 2014-2023	2023	change 2014-2023	2023
2030 or earlier	3.00	11.50	8.4	14.2	-6.1	5.3
2031-2040	2.50	9.30	6.9	7.1	-5.9	8.4
After 2040	1.00	5.50	4.6	4.6	-2.4	14.5

Note: 'Young people' is typically represented by the age group 15–24. However, in some cases, it also encompasses ages 16–24, 16–29, or 15–34, as in the case of the USA.
Source: Calculations by the author.

As a result, the smoking prevalence among young people is significantly lower compared to older generations. In the group of leading countries projected to

become smoke-free by 2030, the share of young smokers is almost three times lower than the share of alternative nicotine users—5.3% compared to 14.2%. Strikingly, the opposite trend is observed in countries unlikely to achieve smoke-free status by 2040—14.5% of the young smoke while only 4.6% use alternatives.

Alternatives pave the way

In summary, the countries projected to achieve smoke-free status by 2030 or earlier can largely be identified by their historically tobacco policies. These policies include raising cigarette taxes and allowing, or at least not hinder, the sale and use of alternative nicotine products. This combination has provided these countries with a clear advantage in reducing smoking rates and achieving smoke-free goals. This progress is particularly evident among young generations, where many in the leading countries are already smoke-free.

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