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# Abstract

This policy note analyses smoking prevalence and tobacco consumption patterns in Ukraine between 2018 and 2025, based on individual data from the nationally representative Omnibus survey conducted by the Kyiv International Institute of Sociology (KIIS). The study examines the effects of tax reforms (particularly since 2021) and the shock of Russia's full-scale invasion of Ukraine in 2022 on smoking dynamics, disaggregated by gender, age, region, educational-attainment level, income and occupation.

Results show that after a decade-long decline in smoking prevalence (from about 25-28% in 2010 to 20% in 2017), the war triggered a temporary surge (to 32%) in May 2022, followed by a gradual decrease (to 27%) by late 2024 and a renewed increase (to 31%) in early 2025.

Men continue to smoke two to three times more often than women, yet female daily smoking rates – especially in frontline-adjacent regions – have increased. Younger adults are shifting towards alternative products, such as e-cigarettes and heated tobacco products (HTPs), which together account for 15-20% of the tobacco products in use. Daily smoking is most common among military personnel, manual workers and the self-employed, while respondents with higher educational-attainment levels tend to use cheaper substitutes, including roll-your-own (RYO) tobacco.

Price analysis reveals strong socioeconomic differentiation: higher-income and urban consumers pay more for premium cigarettes and HTPs, while lower-income groups rely on inexpensive RYO products. Half of smokers reported they would quit or reduce consumption if tobacco prices doubled or their income fell by half, indicating substantial price sensitivity and the effectiveness of fiscal measures.

The findings highlight the need to integrate taxation and affordability policies with targeted wartime health interventions, improved monitoring of novel nicotine products, and stronger enforcement against illicit trade.

**Keywords:** tobacco, smoking, HTP, excise, taxation

**JEL classification:** H24, I18



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# 1. Introduction

Between 2018 and 2024, Ukraine intensified its tobacco control efforts. Excise taxes on cigarettes were raised annually, regulation of e-cigarette liquids was introduced, and the country began aligning its fiscal and regulatory framework with EU directives. These measures aimed to curb smoking prevalence by reducing the affordability of traditional cigarettes and limiting the spread of novel products. At the same time, national surveys and monitoring by non-governmental organisations (NGOs) provided a growing body of evidence on tobacco consumption, making it possible to track progress and inform policy decisions.

This trajectory was abruptly disrupted by the shock of Russia's full-scale invasion of Ukraine in February 2022. The war has created economic instability, displacement, stress and severe disruptions to production and distribution chains. Enforcement of regulations has weakened, and illicit trade expanded (Koshchuk et al. 2023), raising concerns that earlier public health gains could be undermined.

The Ukrainian tobacco market is dominated by international corporations: Philip Morris International (PMI), British American Tobacco (BAT), Japan Tobacco International (JTI) and Imperial Tobacco. Some of the well-known brands, as well as Ukraine's own national brands, are produced at the BAT-owned Pryluky Tobacco Factory and the PMI-owned Lviv Tobacco Factory, among others. Domestic factories are often key suppliers to the illicit cigarette market. For example, in 2022, the United Tobacco factory in Zhovti Vody (Dnipropetrovsk Oblast) was shut down due to involvement in illegal production. According to Kantar Ukraine (2025), the share of the illicit market in July 2025 was 15.4%. The main producers of illicit cigarettes were identified as the Vynnyky Tobacco Factory, Marshall Finest Tobacco/United Tobacco/VK Tobacco FZE, and Ukrainian Tobacco Production LLC.

As other sectors, Russia's war against Ukraine has impacted the tobacco-product production sector in Ukraine, such as with logistics disruptions, displacement of personnel, a sharp drop in legal cigarette production, and a surge in illicit trade. At the same time, most tobacco production facilities have remained in Ukraine and gradually resumed operations. The only plant that suspended production was PMI's factory in the Kharkiv region, but the company opened a new facility in the Lviv region in 2024. According to the State Statistics Service, in 2023, the volume of cigarette production in Ukraine was about 60 billion pieces. However, the legal tobacco market in Ukraine is experiencing a decline due to regulatory restrictions, excise policies and other factors (Sheikh et al. 2025).

Against this background, this report examines how smoking prevalence and consumption trends evolved in Ukraine during a period of both strengthened control measures and unprecedented external shocks. It looks at changes following the January 2021 tax reform and Russia's full-scale invasion in 2022, assessing their impact on overall and daily smoking, shifts towards novel products, and regional disparities. The analysis also situates Ukraine's experience within the wider European context to provide guidance for the next stage of tobacco control policy.

## 2. Data

The analysis is based on data collected via a nationally representative Omnibus survey conducted by the Kyiv International Institute of Sociology (KIIS) in May 2025 (KIIS 2025b), which included an extended module on smoking behaviour commissioned by the research team. This regular survey allows smoking trends to be tracked over time, and using its data ensures comparability with other statistics prepared by the KIIS for the NGO 'Zhyttia'. The smoking-behaviour questionnaire for the survey presented in this report was developed by the research team in cooperation with the KIIS. Of the 2,004 individuals surveyed, 1,973 provided responses regarding their smoking status, and 564 respondents reported currently smoking. The survey module was funded by the Vienna Institute for International Economic Studies (wiiw) and Bloomberg Philanthropies. The study focuses on cigarettes as the most common type of tobacco product, and it has a sufficient number of observations to warrant trustworthy estimates. However, the prevalence of other types of tobacco products is also reported for comparison purposes.

For cross-country comparison, the Eurobarometer dataset is used as the most up-to-date source for EU countries. Some methodological differences should be noted. For example, while the Eurobarometer surveys the population aged 15 and older, the KIIS' Omnibus survey covers respondents aged 18 and older. As a result, full alignment between the two datasets is not possible, but they do remain broadly comparable for policy analysis.

### 3. European context

In 2020, tobacco use<sup>1</sup> in Ukraine was close to the global average – 25.9% compared to 22.3% – according to the World Development Indicators (World Bank Group n.d.). However, with the onset of the full-scale invasion, this figure began to rise, peaking at 32% in May 2022 (according to surveys conducted by KIIS for the NGO 'Zhyttia').

EU country figures on combustible tobacco use come from the latest 2023 Eurobarometer (European Commission 2024), which surveys individuals aged 15 and older, whereas Ukrainian data are based on the 2025 KIIS Omnibus survey covering those aged 18 and above (KIIS 2025b). Figure 1 benchmarks Ukraine against EU27 smoking rates using the most recent comparable datasets. For cigarette smoking, Ukraine was at 22% in 2023 and 20% in 2025. This places Ukraine in the upper-middle range compared with EU member states and with the EU27 average (18%).

Use of e-cigarettes is lower overall, but Ukraine again sits above the European baseline: 5% in Ukraine versus an EU27 average of 3%. Ukraine's level is similar to those of Ireland and Lithuania and below those of the Baltic leaders, but it is clearly higher than those of the many countries clustered in the range of 1-2%. For heated tobacco products (HTPs), Ukraine stands out most with 6% – or roughly three times the EU27 average (2%) – which is the highest rate in the comparison.

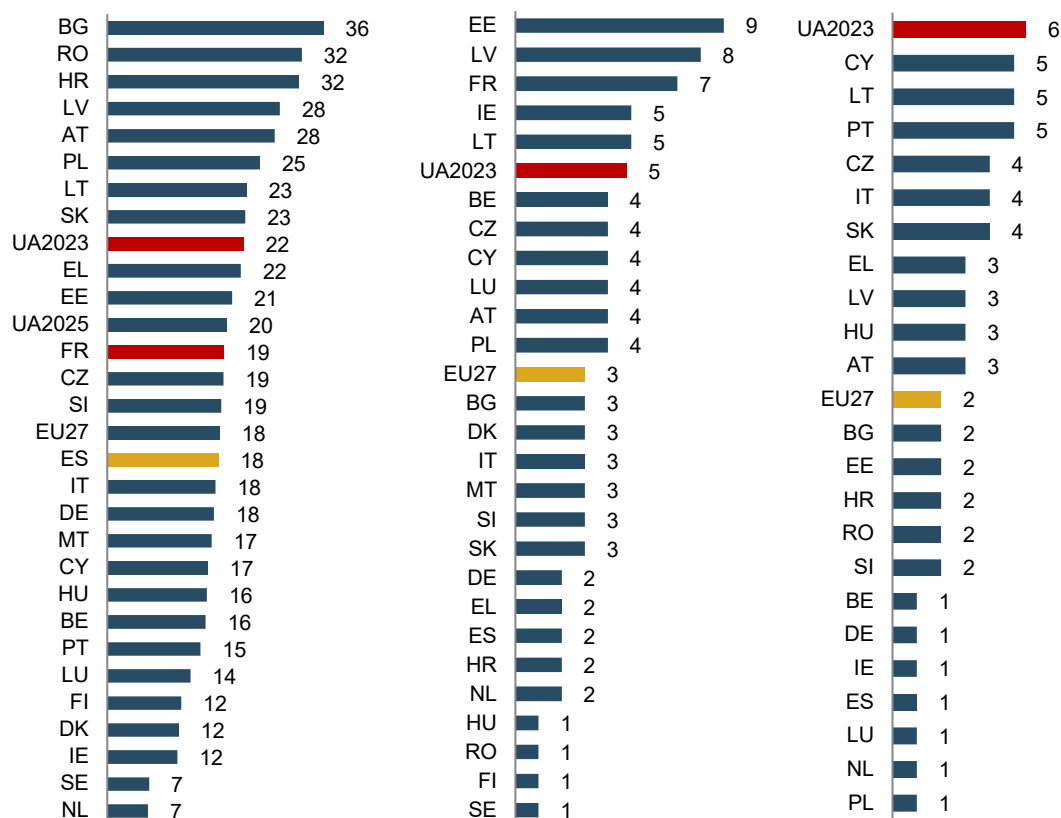
Another source of comparison is the Global Adult Tobacco Survey (GATS; WHO n.d.). Although the survey uses standardised methodology, one limitation is that data collection across countries takes place in different years, which complicates direct comparisons. In most European countries that participated in the GATS, smoking prevalence ranged between 20% and 38% of adults. The gender gap is present everywhere but varies in scale: from relatively narrow (Poland) to very wide (Ukraine, Kazakhstan).

The data do not fully cover Europe: Western and Northern European countries (e.g. Germany, France and Italy) did not take part in the GATS and rely on other surveys, such as the European Health Interview Study (EHIS; Eurostat n.d.) and the Eurobarometer.

The highest smoking rates among the listed countries were found in Greece (2013), where nearly four in 10 adults smoked (38.2%). Both male and female smoking rates were high: 51.2% for men and 25.7% for women. This is different from many Eastern European and Central Asian countries, where female smoking prevalence is significantly lower.

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<sup>1</sup> The figure represents the percentage of the population aged 15 years and over that currently uses any tobacco product (smoked and/or smokeless tobacco) on a daily or non-daily basis. Tobacco products include cigarettes, pipes, cigars, cigarillos, waterpipes (hookah, shisha), bidis, kretek, HTPs and all forms of smokeless (oral and nasal) tobacco. Tobacco products exclude e-cigarettes (which do not contain tobacco), 'e-cigars', 'e-hookahs', JUUL and 'e-pipes'. The rates are age-standardised to the WHO Standard Population.

**Figure 1 / Tobacco products prevalence in EU countries and Ukraine**

Note: 'UA2023' and 'UA2025' stand for 2023 and 2025 estimates for Ukraine, respectively.

Sources: European Commission (2024), KIIS (2023b); authors' calculations based on data from KIIS (2025b)

**Table 1 / Smoking prevalence according to the GATS**

| Country    | GATS survey years | Latest available year | Overall (%) | Men (%) | Women (%) |
|------------|-------------------|-----------------------|-------------|---------|-----------|
| Turkey     | 2008, 2012, 2016  | 2016                  | 31.6        | 44.1    | 19.2      |
| Ukraine    | 2010, 2017        | 2017                  | 22.8        | 39.6    | 8.8       |
| Kazakhstan | 2014, 2019        | 2019                  | 20.4        | 36.5    | 6.0       |
| Greece     | 2013              | 2013                  | 38.2        | 51.2    | 25.7      |
| Romania    | 2011              | 2011                  | 26.7        | 37.4    | 16.7      |
| Poland     | 2009/2010         | 2009/10               | 30.5        | 39.4    | 21.0      |

Sources: Global Adult Tobacco Surveys 2011-2019.

Turkey reported a smoking prevalence above 30% in 2016, and the gender gap was large (44.1% of men vs. 19.2% of women). By contrast, women's smoking prevalence in Poland was relatively high (21%).

Ukraine (2017) and Romania (2011) showed mid-range levels of smoking prevalence (22-27%). In Ukraine, only 8.8% of women smoked compared to nearly 40% of men, while women's prevalence was higher, at 16.7%, in Romania. Kazakhstan (2019) reported lower overall prevalence (20.4%), but the gender gap was the widest: men smoked over six times more often than women (36.5% vs. 6%).

## 4. Tobacco consumption prevalence and regulation changes

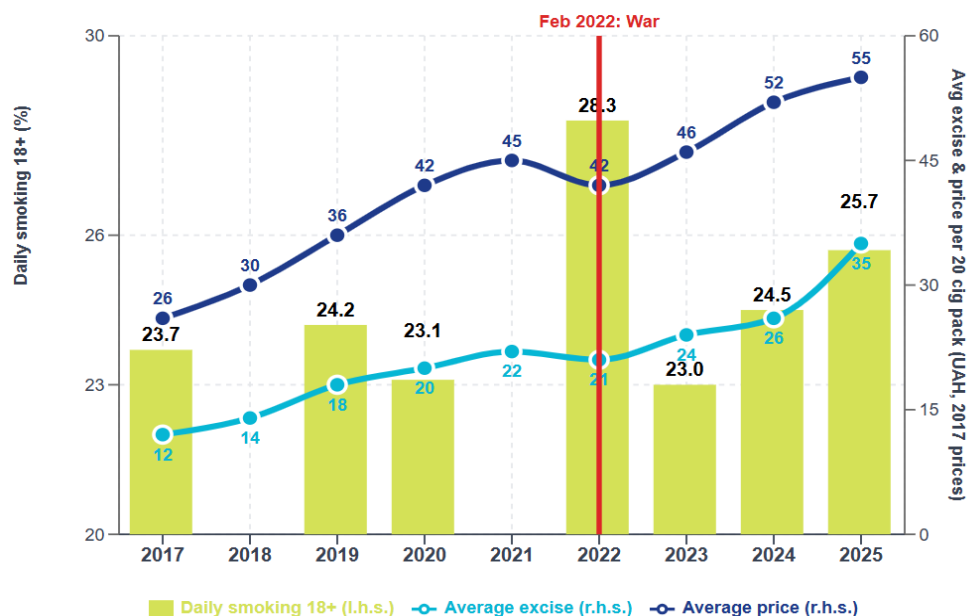
The GATS surveys show that there was a clear trend of decreasing smoking prevalence from 2010 to 2017 (WHO 2017). While about 25-28% of the adult population smoked in 2010, this figure was around 20% in 2017 (with a decrease of nearly one third among men and about one quarter among women).

At the same time, a significant share of smokers tried to quit during the previous 12 months, but the success rate remained low. Reduced tobacco availability due to rising prices/taxes, advertising restrictions, and the ban on smoking in public places were recognised as key factors behind the decline in prevalence. During this period, smoking was primarily concentrated among men (over 40% in 2010, compared to approximately 35% in 2017). Women smoked much less frequently, with the rate declining from roughly 9% to about 7%.

As Box 1 suggests, the introduction of new tobacco products and the war reversed this trend in Ukraine. Adult daily smoking remained in the mid-20% range – 23.7% in 2017 and 24.2% in 2019 – before surging to 28.3% in early 2022 during the invasion. Rates then fell back to 24.5% in 2024 and 25.7% in May 2025, remaining above pre-full-scale invasion levels. Data on prevalence are drawn from the KIIS' Omnibus surveys with around 2,000 observations (including the survey results presented in this report from KIIS (2025b)), which use a consistent methodology over time. The only major change was the shift from face-to-face interviews to computer-assisted telephone interviewing in 2020. Despite this adjustment, the results remain highly comparable across years.

Policy changes largely followed trends with a lag compared to market developments. On the one hand, starting in 2018, Ukraine implemented a multiyear excise escalator towards EU levels (+30% in 2018; +20% and then +9% more in 2019; +20% annually thereafter) on tobacco products, including cigarettes, cigars and cigarillos containing tobacco, homogenised or reconstituted tobacco, tobacco extracts and essence, and tobacco waste (Dauchy and Yavorskyi 2020). These changes contributed to lower rates of daily cigarette smoking (see Box 1). On the other hand, in 2021, e-liquids were taxed at 3,000 Ukrainian hryvnias (UAH) per litre with excise stamps, and HTPs were brought under the same tax structure as cigarettes. Before this, alternative products were taxed as 'other tobacco products' and could legally be sold to minors. Comprehensive e-cigarette rules were introduced in 2021, followed by HTP regulations in 2022, including bans on sales to minors, advertising restrictions, health warnings and smoke-free requirements. This means that e-cigarettes were available on the market without proper regulations for five years and HTPs for three-four years before regulations were put in place.

The war disrupted enforcement and contributed to the temporary surge in smoking. Additionally, currency devaluation and high inflation eroded real prices and taxes, making tobacco more affordable. In 2025, excises were rebased to euros with a glide path to EU minimum levels by 2028 (EUR 78/1,000 cigarettes; HTPs EUR 70/1,000 sticks; e-liquids EUR 300/L), and an electronic excise stamp pilot was launched.

**BOX 1 / UKRAINE TOBACCO POLICY TIMELINE, 2017-2025****Daily smoking rates, excise taxes, prices and regulatory changes****Key regulatory changes and excise tax development**

| Year | Event / regulatory change                                                                                                           | Excise growth | Minimum excise tax (MET) | HTP excise, per 1,000 | E-cig liquid excise, per liter |
|------|-------------------------------------------------------------------------------------------------------------------------------------|---------------|--------------------------|-----------------------|--------------------------------|
| 2018 | 7-year excise increase plan for 2018–2024 to reach min EU level, HTPs introduced on the market                                      | +30%          | UAH 773.2                | none                  | none                           |
| 2019 | Excise growth for cigarettes                                                                                                        | +20%+9%       | UAH 927.84–1,011.35      | none                  | none                           |
| 2020 | Sales of e-cigarettes to minors were banned                                                                                         | +20%          | UAH 1,213.61             | none                  | none                           |
| 2021 | Excise on e-liquids introduced<br>HTPs were taxed alongside cigarettes<br>Russian full-scale invasion of Ukraine                    | +20%          | UAH 1,456.33             | UAH 1,456.33          | UAH 3,000                      |
| 2022 | HTP regulations: sales to minors banned, advertising prohibited, health warnings on packaging<br>HTP use is banned in public places | +20%          | UAH 1,747.60             | UAH 1,747.60          | UAH 3,000                      |
| 2023 | Excise growth continues                                                                                                             | +20%          | UAH 2,097.12             | UAH 2,097.12          | UAH 10,000 (martial law)       |
| 2024 | Nicotine pouches/other oral nicotine become excisable                                                                               | +20%          | UAH 2,516.54             | UAH 2,516.54          | UAH 10,000 (martial law)       |
| 2025 | Tobacco excises linked to EUR, 2025–2028 glide path to reach min EU level<br>Electronic excise stamp test                           | +~50%         | EUR 78                   | EUR 70.4              | EUR 300                        |

**Note:** The significant increase in smoking prevalence in 2022 (from 23.1% in 2020 to 28.3%, a +22.5% increase) coincides with the Russian full-scale invasion of Ukraine in February 2022. Excise taxes and prices are shown in UAH at 2017 prices for comparability. Starting in 2025, excises are linked to EUR with a glide path to reach minimum EU levels by 2028.

Sources: Cigarette prices and inflation – State Statistics Service of Ukraine; Data on excises – Tax Code of Ukraine; Data on prevalence – KIIS Omnibus surveys, data taken from February–May surveys each year.

# 5. Current patterns of tobacco and nicotine products consumption

Table 2 presents summary statistics on the consumption of tobacco and nicotine products in the data. The sample includes 1,973 respondents with non-missing observations. Approximately 30.3% of individuals reported consuming a tobacco or nicotine product, while 25.7% reported using it on a daily basis. Cigarette smoking is the most prevalent form of tobacco use, with 19.7% of respondents self-identifying as daily or less frequent cigarette smokers daily.

By 2023, nearly half of the legal cigarette market (48.8%) consisted of mid- and premium-segment products, while economy brands accounted for about one third (32.4%; Jovanovikj et al. 2024).

**Table 2 / Summary statistics of tobacco and nicotine product consumption in Ukraine**

| Variable                    | Mean  | Daily consumption |
|-----------------------------|-------|-------------------|
| Consume any tobacco product | 30.3% | 25.7%             |
| Smoke cigarettes            | 19.7% | 15.5%             |
| Smoke HTPs                  | 4.8%  | 3.5%              |
| Smoke e-cigarettes          | 4.6%  | 3.7%              |
| Smoke hookah                | 1.9%  | 0.2%              |
| Use nicotine patches        | 0.3%  | n/a               |
| Smoke RYO cigarettes        | 3.1%  | n/a               |
| Number of observations      | 1,973 | 1,973             |

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b).

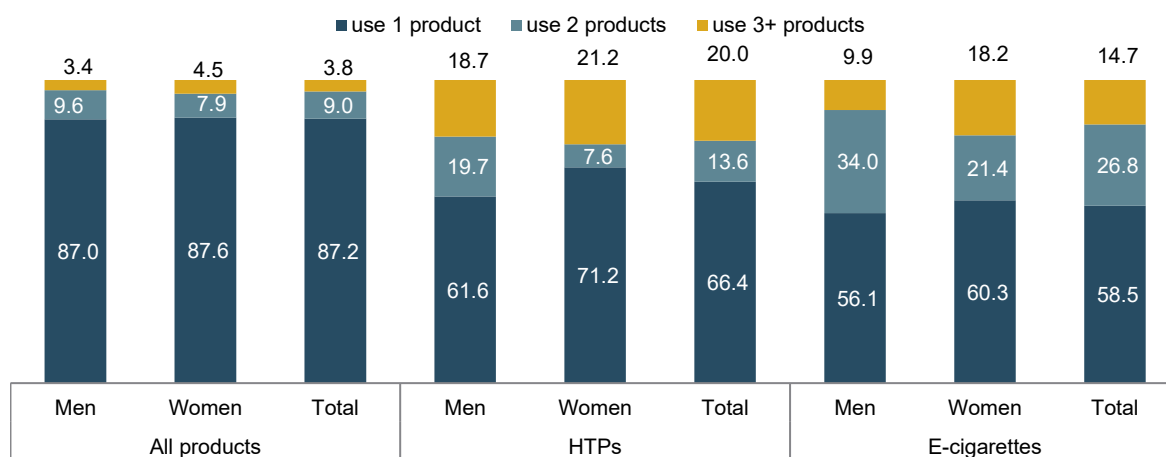
In line with global trends, the rising use of alternative tobacco products in Ukraine is threatening smoking cessation. Between March 2019 and February 2022, HTP sales rose 278% and cigarette sales declined (O'Dowd 2025). The nature of consumption is changing, as there is less daily cigarette smoking and more use of electronic products, especially among young people (Levytska and Bonkovska 2024).

HTPs and e-cigarettes are less prevalent but significant: 4.8% of respondents reported using HTPs and 4.6% reported using e-cigarettes, with 3.5% and 3.7%, respectively, indicating daily use (Table 2). Other forms of tobacco and nicotine use are less widespread. RYO tobacco is used by 3.1% of the sample, hookah use is reported by 1.9% of respondents, while nicotine patches are used by 0.3%. These figures highlight that while cigarette smoking remains the dominant form of tobacco consumption, alternative products (e.g. HTPs and e-cigarettes) are used by a non-negligible share of respondents.

The data show that the vast majority of users are single-product consumers (87.2% of all nicotine users; Figure 2), while poly-use (two or more products) is less common but still substantial (12.8%). This is notably lower compared to KIIS data from March 2025 (KIIS 2025a), where 21% of users reported using multiple products, perhaps indicating some variation in the sample. The most common product combinations include cigarettes with e-cigarettes or RYO tobacco or HTPs, as well as the combination of

e-cigarettes, HTPs and hookah. Combining multiple products is much more common among users of HTPs and electronic cigarettes: 34.6% of HTP users and 41.5% of e-cigarette users consume more than one product. This indicates that users of novel nicotine products tend to diversify rather than reduce their tobacco and nicotine consumption.

**Figure 2 / Multiple use of tobacco and nicotine products, % of smokers by gender**



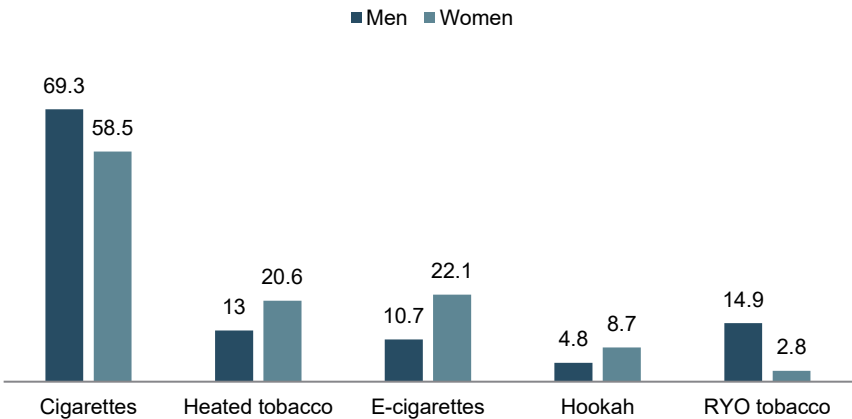
Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b).

# 6. Smoking by socioeconomic characteristics

## GENDER

The following analysis compares the prevalence of smoking in different socioeconomic dimensions. Gender-stratified analysis indicated a significantly higher prevalence among men (40.9%) compared with women (21.6%). In particular, cigarette smoking was more frequent among men (69.3% of all users) than among women (58.5%), whereas HTPs (13.0% vs 20.6%), e-cigarettes (10.7% vs. 22.1%) and hookah (4.8% vs 8.7%) were more commonly used by women (Figure 3). RYO tobacco use was markedly higher among men (14.9%) than among women (2.8%).

**Figure 3 / Tobacco and nicotine products prevalence, % of smokers by gender**



Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

The gender gap in Ukraine is always very noticeable: men smoke several times more often than women. Even with the overall decrease in smoking, the gap in overall smoking prevalence between men and women remains (i.e. the male smoking rate is always significantly higher overall and in terms of cigarette consumption). Gender differences can be due to social norms, cultural perceptions of smoking, roles in society, and economic or behavioural factors (KIIS 2024).

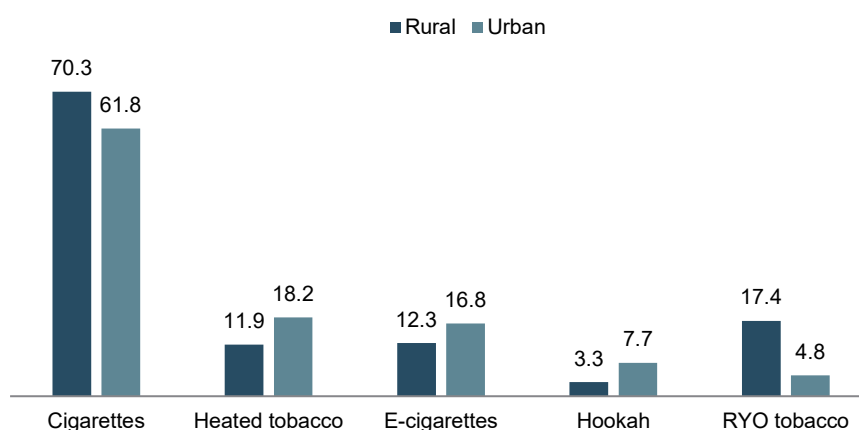
## AGE

Smoking prevalence generally declines with increasing age: 46.7% for those aged 18-29, 32.8% for those aged 30-44, 34.0% for those aged 45-59, and 15.4% for those aged 60 and over (Table 3). Research shows that older adult smokers try to quit less often than younger smokers, but when they do, they are more likely to succeed (National Council for Mental Wellbeing 2019). The youngest group exhibited the highest use of HTPs (33.2%), e-cigarettes (32.1%) and hookah (18.3%). In contrast, RYO tobacco use peaked in the group aged 60 and over (26.7%) despite their lowest overall smoking prevalence.

## URBAN VS. RURAL CONSUMPTION

Regional differences were observed, with prevalence highest in the South region of Ukraine (36.6%). Data from the East region should be interpreted with caution due to the overall lower number of observations (Table 3).

**Figure 4 / Tobacco and nicotine products prevalence, % of smokers in urban/rural dimension**



Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

**Table 3 / Tobacco and nicotine products prevalence in demographic dimensions, %**

| Category                  | General smoking | Cigarettes | HTPs | E-cigarettes | Hookah | RYO tobacco |
|---------------------------|-----------------|------------|------|--------------|--------|-------------|
| <b>Total population</b>   | 30.3            | 65.1       | 16.0 | 15.2         | 6.3    | 10.2        |
| <b>Sex</b>                |                 |            |      |              |        |             |
| Men                       | 40.9            | 69.3       | 13.0 | 10.7         | 4.8    | 14.9        |
| Women                     | 21.6            | 58.5       | 20.6 | 22.1         | 8.7    | 2.8         |
| <b>Age</b>                |                 |            |      |              |        |             |
| 18-29                     | 46.7            | 38.6       | 33.2 | 32.1         | 18.3   | 3.7         |
| 30-44                     | 32.8            | 69.7       | 17.5 | 15.3         | 5.4    | 6.5         |
| 45-59                     | 34.0            | 80.8       | 6.1  | 7.3          | 0      | 11.4        |
| 60+                       | 15.4            | 69.9       | 2.3  | 1.2          | 0      | 26.7        |
| <b>Region</b>             |                 |            |      |              |        |             |
| West                      | 28.4            | 58.9       | 20.0 | 18.1         | 5.6    | 9.0         |
| Centre                    | 29.5            | 65.7       | 16.6 | 13.5         | 4.2    | 13.8        |
| South                     | 36.6            | 69.4       | 12.1 | 15.2         | 11.5   | 8.7         |
| East                      | 24.0            | 67.5       | —    | —            | —      | —           |
| <b>Urban or rural</b>     |                 |            |      |              |        |             |
| Rural                     | 29.1            | 70.4       | 12.1 | 12.3         | 3.7    | 17.4        |
| Urban                     | 31.0            | 62.0       | 18.2 | 16.8         | 7.8    | 6.0         |
| <b>Type of settlement</b> |                 |            |      |              |        |             |
| Village                   | 29.6            | 67.7       | 10.2 | 13.1         | 1.6    | 18.7        |
| Township/small town       | 28.6            | 79.5       | 12.7 | 11.9         | 8.6    | 11.3        |
| Town 20k-99k              | 24.4            | 66.3       | 15.2 | 12.7         | 5.9    | 12.3        |
| City >100k                | 32.6            | 60.4       | 20.3 | 17.5         | 8.8    | 4.4         |

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

Urban residents had a slightly higher prevalence than rural residents (31.0% vs. 29.1%). Cigarette use predominated in rural areas (70.4% vs. 62.0%), whereas HTP (18.2% vs. 12.1%) and e-cigarette use (16.8% vs. 12.3%) were more frequent in urban settings (Figure 4). Across settlement types, smoking prevalence was lowest in towns with 20,000-99,999 inhabitants (24.4%), higher in villages (29.6%) and small towns (28.6%), and highest in cities with more than 100,000 residents (32.6%), indicating a U-shaped pattern between settlement size and smoking rates.

## OCCUPATION

Daily smoking shows the clearest divides across occupational groups (Table 4), which is a critical indicator for tobacco control. On average, 26% of adults smoke every day, but this masks sharp differences. Military personnel and police report the highest daily cigarette use, with almost one in three smoking daily (31.9%). Manual workers and the self-employed also stand out, with 26-27% smoking every day, underscoring the entrenched role of cigarettes in these groups. Clerical workers follow closely behind, with 21.9% daily use. By contrast, specialists/professionals and retirees show much lower daily prevalence – around 13% and 10%, respectively – though retirees rely more on cheaper RYO tobacco.

**Table 4 / Tobacco and nicotine products prevalence by occupation, %**

|                                  | N            | Any tobacco use | Cigarette smoker | HTP user     | E-cigarette user | RYO tobacco smoker | Smokes daily | Daily cigarette smoker | Daily HTP user | Daily e-cigarette user |
|----------------------------------|--------------|-----------------|------------------|--------------|------------------|--------------------|--------------|------------------------|----------------|------------------------|
| Manual/agricultural worker       | 212          | 0.392***        | 0.305***         | 0.054        | 0.029            | 0.020              | 0.340***     | 0.265***               | 0.045          | 0.025                  |
| Clerical worker                  | 154          | 0.361           | 0.262**          | 0.043        | 0.059            | 0.000**            | 0.322*       | 0.219**                | 0.043          | 0.059                  |
| Specialist/professional          | 427          | 0.273           | 0.153***         | 0.081***     | 0.040            | 0.013**            | 0.216**      | 0.128**                | 0.056***       | 0.026                  |
| Self-employed                    | 98           | 0.385*          | 0.275**          | 0.045        | 0.089**          | 0.024              | 0.368***     | 0.237**                | 0.045          | 0.064                  |
| Entrepreneur, bus. owner, farmer | 109          | 0.329           | 0.191            | 0.092**      | 0.048            | 0.026              | 0.279        | 0.102*                 | 0.088***       | 0.048                  |
| Military, law enforcement        | 68           | 0.486***        | 0.389***         | 0.051        | 0.111***         | 0.059              | 0.390**      | 0.319***               | 0.037          | 0.042                  |
| Homemaker                        | 119          | 0.359           | 0.244            | 0.030        | 0.045            | 0.061**            | 0.302        | 0.182                  | 0.012*         | 0.043                  |
| Retired                          | 677          | 0.181***        | 0.120***         | 0.005***     | 0.004***         | 0.053***           | 0.164***     | 0.100***               | 0.003***       | 0.003***               |
| Student                          | 44           | 0.459***        | 0.137            | 0.194***     | 0.326***         | 0.000              | 0.368**      | 0.033***               | 0.082**        | 0.317***               |
| Unemployed                       | 52           | 0.320           | 0.193            | 0.000*       | 0.026            | 0.035              | 0.201        | 0.185                  | 0.000          | 0.010                  |
| <b>Total</b>                     | <b>1,973</b> | <b>0.303</b>    | <b>0.197</b>     | <b>0.048</b> | <b>0.046</b>     | <b>0.031</b>       | <b>0.257</b> | <b>0.158</b>           | <b>0.035</b>   | <b>0.037</b>           |

Note: \* significant at 10%; \*\* significant at 5%; \*\*\* significant at 1% (based on t-test of means)

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

Among young people, the picture is different. Students smoke cigarettes daily at very low levels (3.3%), but this is offset by exceptionally high daily use of novel products: 31.7% report daily e-cigarette use, making vaping their dominant form of nicotine consumption. Entrepreneurs also use HTPs daily at an above-average rate (8.8%).

These findings indicate that daily cigarette smoking remains concentrated in traditional occupations (e.g. the military, manual workers and the self-employed), while daily use of novel products is increasingly concentrated among students and younger groups. Effective policy will need to combine strong measures against daily combustible use with targeted regulation of daily vaping and HTP use among youth.

Data from the U.S. Department of Defense Health Related Behaviors Survey (HRBS) show that the military has traditionally had a higher prevalence of smoking than the civilian population (Meadows et al. 2021). For example, in the 2011-2015 period, over 24% of military personnel smoked, compared to roughly 15% of civilians. The main factors contributing to this are stress, the 'smoking in the military' culture, and the availability of cigarettes in units (Meadows et al. 2021). With the number of military personnel in Ukraine increasing to around 880,000 in early 2025, this expansion is likely to have a long-term impact on smoking prevalence in the country (Slovoudilo.ua 2025).

## EDUCATION

Daily smoking shows a clear and consistent gradient by educational-attainment level (Table 5). Adults with secondary education or less are the most affected: more than one in three smoke daily (34.8%), and nearly one in five are daily cigarette users (19.6%). This group also shows elevated daily use of e-cigarettes (7.8%) and RYO tobacco (7.3%), suggesting a reliance on both traditional and cheaper alternatives.

Those with some tertiary or vocational education fall closer to the national average, with 26.0% smoking daily and 16.7% smoking cigarettes daily. Daily e-cigarette (3.4%) and HTP (4.0%) use are modest but non-negligible.

The lowest levels are found among those with higher education, where only 21.0% smoke daily and 13.7% smoke cigarettes daily. Daily use of e-cigarettes (2.1%) and RYO tobacco (1.7%) is significantly lower in this group than in less-educated groups.

Daily smoking is most common among less-educated adults, while those with higher education smoke less and use fewer alternatives.

**Table 5 / Tobacco and nicotine product prevalence in education dimensions, %**

|                        | Education         |                            |                  | Total |
|------------------------|-------------------|----------------------------|------------------|-------|
|                        | Secondary or less | Some /short-cycle tertiary | Higher education |       |
| Any tobacco use        | 0.409***          | 0.298                      | 0.258***         | 0.303 |
| Cigarette smoker       | 0.266***          | 0.195                      | 0.168***         | 0.197 |
| HTP user               | 0.051             | 0.045                      | 0.049            | 0.048 |
| E-cigarette user       | 0.089***          | 0.040                      | 0.031***         | 0.046 |
| RYO smoker             | 0.073***          | 0.024                      | 0.017***         | 0.031 |
| Daily smoking          | 0.348***          | 0.260                      | 0.210***         | 0.257 |
| Daily cigarette smoker | 0.196**           | 0.167                      | 0.137**          | 0.158 |
| Daily HTP user         | 0.025             | 0.040                      | 0.035            | 0.035 |
| Daily e-cigarette user | 0.078***          | 0.034                      | 0.021***         | 0.037 |

Note: \* significant at 10%; \*\* significant at 5%; \*\*\* significant at 1% (based on t-test of means)

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

## INCOME

Across the total population, smoking prevalence rose from 23.3% in the lowest income quartile (Q1) to 40.1% in the highest (Table 6).

Unexpectedly, higher income is associated with higher smoking prevalence overall, including higher consumption of cigarettes, HTPs and e-cigarettes. Cigarette smoking prevalence increased from 14.6% in Q1 to 24.1% in Q3. HTP product use increased from 1.2% in Q1 to 9.8% in Q4, and e-cigarettes consumption grew from 1.9% to 6.8%. RYO tobacco use showed the opposite pattern, falling from 6.0% in Q1 to 1.3% in Q4.

Among men, smoking prevalence was consistently high (37.5-43.0%), with no clear income gradient for cigarette consumption but with a clear income gradient for HTPs and e-cigarettes. In contrast, prevalence rose steadily among women, from 16.0% in Q1 to 37.8% in Q4 (Figure 5). HTP and e-cigarette use tended to increase with income for both sexes.

**Table 6 / Tobacco and nicotine products prevalence in income quartiles, %**

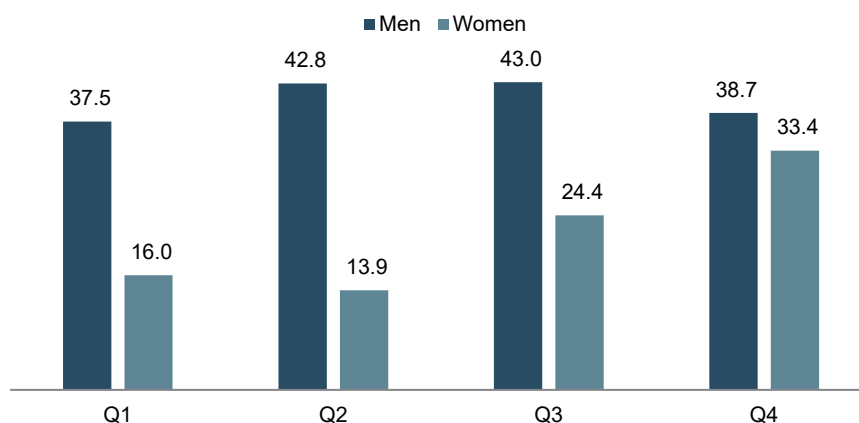
|                                           | All products | Cigarettes   | HTPs         | E-cigarettes | RYO tobacco  |
|-------------------------------------------|--------------|--------------|--------------|--------------|--------------|
| <b>4 quantiles of income – both sexes</b> |              |              |              |              |              |
| <b>Total</b>                              | <b>0.302</b> | <b>0.193</b> | <b>0.051</b> | <b>0.047</b> | <b>0.031</b> |
| Q1                                        | 0.233***     | 0.146***     | 0.012***     | 0.019***     | 0.060***     |
| Q2                                        | 0.253**      | 0.171        | 0.035        | 0.041        | 0.031        |
| Q3                                        | 0.323        | 0.214        | 0.061        | 0.063*       | 0.017*       |
| Q4                                        | 0.401***     | 0.241***     | 0.098***     | 0.068**      | 0.013**      |
| <b>4 quantiles of income – men</b>        |              |              |              |              |              |
| <b>Total</b>                              | <b>0.406</b> | <b>0.278</b> | <b>0.055</b> | <b>0.048</b> | <b>0.059</b> |
| Q1                                        | 0.401        | 0.239        | 0.014**      | 0.015*       | 0.168***     |
| Q2                                        | 0.362        | 0.260        | 0.036        | 0.005***     | 0.073        |
| Q3                                        | 0.426        | 0.311        | 0.070        | 0.071*       | 0.032**      |
| Q4                                        | 0.414        | 0.280        | 0.074*       | 0.067*       | 0.020***     |
| <b>4 quantiles of income – women</b>      |              |              |              |              |              |
| <b>Total</b>                              | <b>0.217</b> | <b>0.123</b> | <b>0.048</b> | <b>0.047</b> | <b>0.007</b> |
| Q1                                        | 0.160***     | 0.106        | 0.011***     | 0.020***     | 0.012        |
| Q2                                        | 0.195        | 0.124        | 0.035        | 0.061        | 0.008        |
| Q3                                        | 0.216        | 0.114        | 0.051        | 0.055        | 0.002        |
| Q4                                        | 0.378***     | 0.171*       | 0.142***     | 0.069        | 0.000        |

Note: \* significant at 10%; \*\* significant at 5%; \*\*\* significant at 1% (based on t-test of means)

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

Overall, higher income was linked to greater use of HTPs and e-cigarettes, and lower income to higher use of RYO tobacco. Cigarette smoking remained common across all income groups, but product preferences varied substantially with socioeconomic status.

**Figure 5 / Tobacco and nicotine products prevalence among men and women in four income quartiles**



Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

For the share of income spent on tobacco products, two indicators were measured. The first was what respondents reported as the share of their income that they spend on tobacco and nicotine products. The median estimate was 10%. The second indicator was calculated based on the number of purchases and the average sum of purchases reported. The median share based on the latter methodology was 10.9%. The fact that both indicators are close indicates that respondents are consistent in estimating the amount of their income spent on tobacco and nicotine products.

## 7. Prices

Unit value (i.e. cost per unit) comparisons are complicated by the small number of responses for certain products and the concentration of usage within specific groups. For example, HTPs and e-cigarettes are used more commonly by younger individuals and those with higher incomes, whereas the use of RYO tobacco is more prevalent among older individuals. Consequently, some groups have very few observations, limiting the reliability of comparisons across all categories.

Across the total sample, the unit value of tobacco products varied by product type, demographic group and socioeconomic characteristics (Table 7). Women reported paying slightly more than men for cigarettes (UAH 5.23 vs. 5.07) and HTPs (UAH 7.94 vs. 6.27), while the price of RYO tobacco was inexpensive, providing considerable savings for users, most of whom were men.

**Table 7 / Unit value of tobacco product**

| Category                     | Unit value |      |          | Number of observations |      |          |
|------------------------------|------------|------|----------|------------------------|------|----------|
|                              | Cigarettes | HTPs | RYO tob. | Cigarettes             | HTPs | RYO tob. |
| <b>Sex</b>                   |            |      |          |                        |      |          |
| Men                          | 5.07       | 6.27 | 0.7      | 235                    | 32   | 37       |
| Women                        | 5.23       | 7.94 | *        | 115                    | 29   | 4        |
| <b>Age</b>                   |            |      |          |                        |      |          |
| 18-29                        | 5.5        | 6.13 | *        | 39                     | 22   | 4        |
| 30-44                        | 5.49       | 7.75 | *        | 114                    | 27   | 5        |
| 45-59                        | 4.54       | 6.88 | 0.75     | 126                    | 10   | 14       |
| 60+                          | 5.24       | *    | 0.87     | 71                     | 2    | 18       |
| <b>Region</b>                |            |      |          |                        |      |          |
| West                         | 5.33       | 6.33 | *        | 70                     | 16   | 8        |
| Centre                       | 5.62       | 8.74 | 0.75     | 149                    | 27   | 21       |
| South                        | 4.57       | 6.1  | 0.44     | 107                    | 12   | 10       |
| East                         | 4.67       | *    | *        | 24                     | 6    | 2        |
| <b>Urban or rural</b>        |            |      |          |                        |      |          |
| Urban                        | 5.12       | 7.47 | 1.36     | 262                    | 51   | 21       |
| Rural                        | 5.08       | 5.47 | 0.52     | 88                     | 10   | 20       |
| <b>4 quantiles of income</b> |            |      |          |                        |      |          |
| Q1                           | 4.27       | *    | 0.74     | 52                     | 1    | 19       |
| Q2                           | 4.57       | *    | *        | 50                     | 6    | 8        |
| Q3                           | 5.1        | 6.12 | *        | 82                     | 17   | 4        |
| Q4                           | 5.65       | 6.86 | *        | 101                    | 26   | 5        |

Note: \* Insufficient number of observations for reliable analysis (fewer than 10 tobacco product users in a group)

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

By age, cigarette prices were relatively stable, except for a lower average among individuals aged 45-59 (UAH 4.54 per cigarette). For other tobacco products, the number of observations in certain age categories may be insufficient to support reliable comparisons.

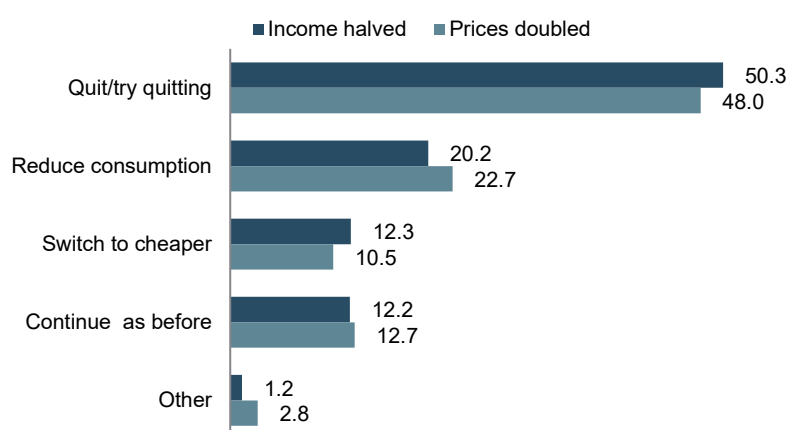
Regional differences were observed, with the highest cigarette prices in the Centre region (UAH 5.62) and the lowest in the South region (UAH 4.57). Urban residents paid more for HTPs than rural residents (UAH 7.47 vs. 5.47), while cigarette prices were similar in both settings.

Income-related trends were evident for cigarettes, with the lowest prices in the first income quartile (Q1; UAH 4.27) and the highest in the fourth (Q4; UAH 5.65). Prices for HTPs showed a similar upward pattern from Q1 to Q4 (UAH 5.75 vs. 6.86).

Overall, the data suggest that product prices vary systematically by demographic and socioeconomic factors, with higher-income groups and urban residents tending to purchase more expensive tobacco products, particularly HTPs.

Figure 6 shows that about half of smokers said they would quit or at least try to quit if their income were cut in half (50.3%) or if the price of tobacco products doubled (48.0%). Around one fifth (20.2%) would reduce consumption in the income-loss scenario, and 22.7% if prices doubled. Only about one in eight would continue smoking as before, with 12.2% saying so in case of lower income and 12.7% in response to higher prices. A similar share would switch to cheaper products if their income were cut in half (12.3%), and 10.5% would do so if prices doubled. For the 'Other' response category, the respective figures were 1.2% and 2.8%, and one of the most popular alternative options was to grow their own tobacco. Overall, the dominant expected response in both scenarios is an intention to quit or cut back on smoking, with a slightly stronger tendency to reduce consumption when prices rise.

**Figure 6 / Tobacco and nicotine products prevalence, responsiveness to affordability pressures, %**



Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

As for different demographic characteristics, the most common answer was to quit or try quitting. This answer was chosen by about 50% of all smokers across all demographic groups, showing that quitting is the response that people would consider most often when tobacco becomes less affordable.

Other reactions vary among different demographic groups. For instance, with a doubling of prices, 15.6% of men say they would continue smoking as before compared with just 8.1% of women, while

28.4% of women would reduce consumption versus 19.1% of men, suggesting that women are more responsive to affordability pressures.

Age differences are also clear. When income is lowered by half, 18- to 29-year-olds are much more likely to cut consumption (33.7%) and very unlikely to switch to cheaper products (3.4%). By contrast, 45- to 59-year-olds are more likely to switch to cheaper options (19.8%) than reduce consumption (15.6%).

Income plays a strong role in shaping reactions. Among the lowest-income smokers, 23.4% report they would switch to cheaper products, compared with just 7.8% among the highest-income group. Middle-income smokers tend to cut back on tobacco (28.2% in Q2, 20.4% in Q3 and Q4), while the share of higher-income smokers who plan to continue smoking as before increases (18.5%).

## 8. The impact of Russia's full-scale invasion of Ukraine on tobacco consumption

Section 4 showed that with the start of Russia's full-scale invasion of Ukraine in February 2022, smoking rates increased. A KIIS analysis from 2023 (based on a representative Omnibus survey, with around 2,000 respondents overall, including both smokers and non-smokers) found that after the start of the full-scale war, 42.3% of smokers reported no change in their tobacco or nicotine consumption, 40.2% said they began using somewhat or significantly more, and 12.6% reported using less or significantly less (KIIS 2023a).

In Ukraine, smoking patterns differ between oblasts located near the frontline (i.e. Donetsk, Dnipropetrovsk, Kharkiv, Kherson, Mykolaiv, Sumy and Zaporizhzhia), on the one hand, and the rest of the country, on the other (Table 8). Across the whole adult population, daily smoking is slightly more common in frontline-adjacent oblasts – 27.1% compared with 25.1% elsewhere (overall 25.7%). The difference is more marked for daily cigarette smoking, which reaches 18.6% in the frontline areas versus 14.7% in other regions (overall 15.8%; t-test for mean difference is significant at the 5% level). By contrast, daily use of HTPs is lower close to the frontline: 2.2% compared with 4.0% elsewhere (overall 3.5%; significant at 5%). Daily use of e-cigarettes shows little variation (overall 3.7%).

Among men, daily smoking is slightly lower near the frontline (33.7% vs. 36.0%), while daily cigarette smoking is a bit higher (23.3% vs. 21.9%). Daily HTP use is clearly lower (2.1% vs. 4.8%; 5% significance). For women, the differences are stronger. Daily smoking is 20.9% in frontline-adjacent areas versus 16.8% elsewhere (overall 17.9%). Daily cigarette smoking stands out at 14.2% in frontline oblasts compared with only 8.9% elsewhere (overall 10.4%; significant at 5%).

Overall, the data indicate that women living in frontline-adjacent oblasts smoke cigarettes daily at noticeably higher rates than women in other regions, while use of HTPs is consistently lower in these conflict-affected areas for both sexes. Daily e-cigarette use shows little regional difference.

**Table 8 / Tobacco and nicotine products prevalence with the impact of Russia's full-scale invasion, %**

|                        | Both sexes                 |         |       | Men                        |         |       | Women                      |         |       |
|------------------------|----------------------------|---------|-------|----------------------------|---------|-------|----------------------------|---------|-------|
|                        | Frontline-adjacent oblasts |         |       | Frontline-adjacent oblasts |         |       | Frontline-adjacent oblasts |         |       |
|                        | Yes                        | No      | Total | Yes                        | No      | Total | Yes                        | No      | Total |
| Smokes daily           | 0.271                      | 0.251   | 0.257 | 0.337                      | 0.360   | 0.352 | 0.209                      | 0.168   | 0.179 |
| Daily cigarette smoker | 0.186**                    | 0.147** | 0.158 | 0.233                      | 0.219   | 0.223 | 0.142**                    | 0.089** | 0.104 |
| Daily HTP user         | 0.022**                    | 0.040** | 0.035 | 0.021**                    | 0.048** | 0.039 | 0.024                      | 0.035   | 0.032 |
| Daily e-cigarette user | 0.034                      | 0.038   | 0.037 | 0.032                      | 0.030   | 0.030 | 0.037                      | 0.044   | 0.042 |

Note: \* significant at 10%; \*\* significant at 5%; \*\*\* significant at 1% (based on t-test of means)

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

Table 9 shows smoking prevalence for those with the status of internally displaced person (IDP). IDPs have higher rates of tobacco use overall compared to non-IDPs (36.8% vs. 29.0%) as well as higher rates of daily use (29.6% vs. 25.0%), with statistically significant differences. IDPs also have higher prevalence of HTP (7.7% vs. 4.3%) and e-cigarette use (7.1% vs. 4.1%).

**Table 9 / Tobacco and nicotine products prevalence and IDP status**

|                        | IDP      |          | Total |
|------------------------|----------|----------|-------|
|                        | No       | Yes      |       |
| Any tobacco use        | 0.290*** | 0.368*** | 0.303 |
| Cigarette smoker       | 0.194    | 0.212    | 0.197 |
| HTP user               | 0.043*** | 0.077*** | 0.048 |
| E-cigarette user       | 0.041**  | 0.071**  | 0.046 |
| RYO tobacco user       | 0.032    | 0.023    | 0.031 |
| Smokes daily           | 0.250*   | 0.296*   | 0.257 |
| Daily cigarette smoker | 0.158    | 0.159    | 0.158 |
| Daily HTP user         | 0.032    | 0.049    | 0.035 |
| Daily e-cigarette user | 0.033**  | 0.057**  | 0.037 |

Note: \* significant at 10%; \*\* significant at 5%; \*\*\* significant at 1% (based on t-test of means)

Source: authors' calculations based on the KIIS Omnibus survey of May 2025 (KIIS 2025b)

Looking forward, evidence from other conflict-affected settings suggests that post-war tobacco control strategies should integrate mental health interventions. For example, a study from the Republic of Georgia (Roberts et al. 2013) found strong associations between nicotine dependence, post-traumatic stress disorder (PTSD) and depression among civilians affected by conflict. This indicates that programmes addressing PTSD and depression may indirectly reduce nicotine dependence, and that joint approaches targeting both mental health and tobacco use could be particularly effective in post-war Ukraine.

## 9. Conclusions

Ukraine's experience between 2018 and 2025 highlights both the effectiveness and the vulnerability of tobacco control measures under conditions of major external shocks. Steady tax increases and regulatory tightening were successful in driving down smoking prevalence through 2021, supported by a predictable excise escalator, alignment with EU legislation, and the introduction of comprehensive regulations for novel nicotine products. These measures improved the policy environment and reduced tobacco affordability, contributing to declining smoking rates.

Russia's full-scale invasion of Ukraine in 2022 temporarily reversed these gains. Economic disruption, population displacement, weakened enforcement and heightened stress drove a sudden surge in smoking prevalence, particularly daily cigarette use. Although prevalence fell again after the initial shock, rates have remained above pre-war levels, suggesting a lasting behavioural shift. Levytska and Bonkovska (2024) underline the importance of maintaining active tobacco control and providing cessation support during wartime.

Social and behavioural patterns have also shifted. The gender gap remains wide, yet female smoking rates have risen in conflict-affected (i.e. frontline-adjacent) regions. Military mobilisation is another important factor, as armed forces personnel have the highest daily smoking rates and their numbers have expanded dramatically during the war.

Tobacco product use has diversified: younger populations, students and professionals are moving rapidly towards electronic and heated-tobacco products, while daily cigarette smoking remains concentrated among older, less-educated and lower-income groups as well as among manual workers and the self-employed.

Income affects product choice. Higher-income groups tend to use HTPs and e-cigarettes, while lower-income groups rely on cheaper RYO or economy cigarettes. Price and income remain powerful deterrents as well: roughly half of smokers report they would quit or try to quit and, additionally, around 20% of them would cut down if prices doubled, underscoring the effectiveness of fiscal policy as a public health instrument.

The findings highlight the need to further improve taxation and affordability policies and to integrate them with future tobacco control strategies, which should focus on high-risk and vulnerable groups – including youth, military personnel and women in frontline regions.

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