

Monitoring Sales: Nicotine Pouch Trends

This report highlights trends from February 2019 to September 2024.

What's the Bottom Line?

- Nicotine pouches contain a powder made of nicotine, flavorings, and other ingredients. The powder dissolves in the mouth, and nicotine is absorbed through the gums and lining of the mouth. Nicotine is an addictive chemical that is especially dangerous for youth, young adults, and pregnant people.
- Nicotine pouch sales in the United States are rapidly increasing. Surges occurred during 2023 and 2024.
- Nearly all nicotine pouches sold in the United States are non-tobacco flavored. Most are mint-flavored.
- States with flavor bans have seen slower increases in nicotine pouch sales. States with flavor restrictions are dominated by products marketed as smooth/original but likely contain sweeteners and products which provide a cooling sensation and contain sweeteners without a characterizing flavor.^{1,2}

Background

- No tobacco product is safe, including nicotine pouches.³
- In 2024, 1.8% of middle and high school students (480,000 youth) used nicotine pouches in the past month.⁴ Pouch use increased by more than 60% between 2022 and 2024 among U.S. middle and high school students.⁵
- Nicotine pouches were the second most commonly used tobacco product among youth in 2024, behind e-cigarettes.
- Two states, California and Massachusetts, prohibit the sale of flavored tobacco products, including nicotine pouches.

Key Findings

- Nicotine pouch sales increased by 183.7% between September 2022 and September 2024. The increase between 2022-2024 was larger than earlier increases.
- Most nicotine pouches sold in the United States are non-tobacco flavored. As of September 2024, mint flavor accounts for 59.2% of sales, followed by other flavors (e.g., fruits, candy, drinks) at 23.6%, and flavors marketed as clear/uncharacterized but which provide a cooling sensation at 8.2%.
- California experienced a 94.2% increase in nicotine pouch sales between September 2022 and September 2024, compared to 241.3% in New York and 267.2% in Rhode Island.

1. Jabba, S. V., Erythropel, H. C., Woodrow, J. G., Anastas, P. T., O'Malley, S., Krishnan-Sarin, S., Zimmerman, J. B., & Jordt, S. E. (2023). Synthetic cooling agent in oral nicotine pouch products marketed as 'Flavour-Ban Approved'. Tobacco control, tc-2023-058035. Advance online publication. <https://doi.org/10.1136/tc-2023-058035>

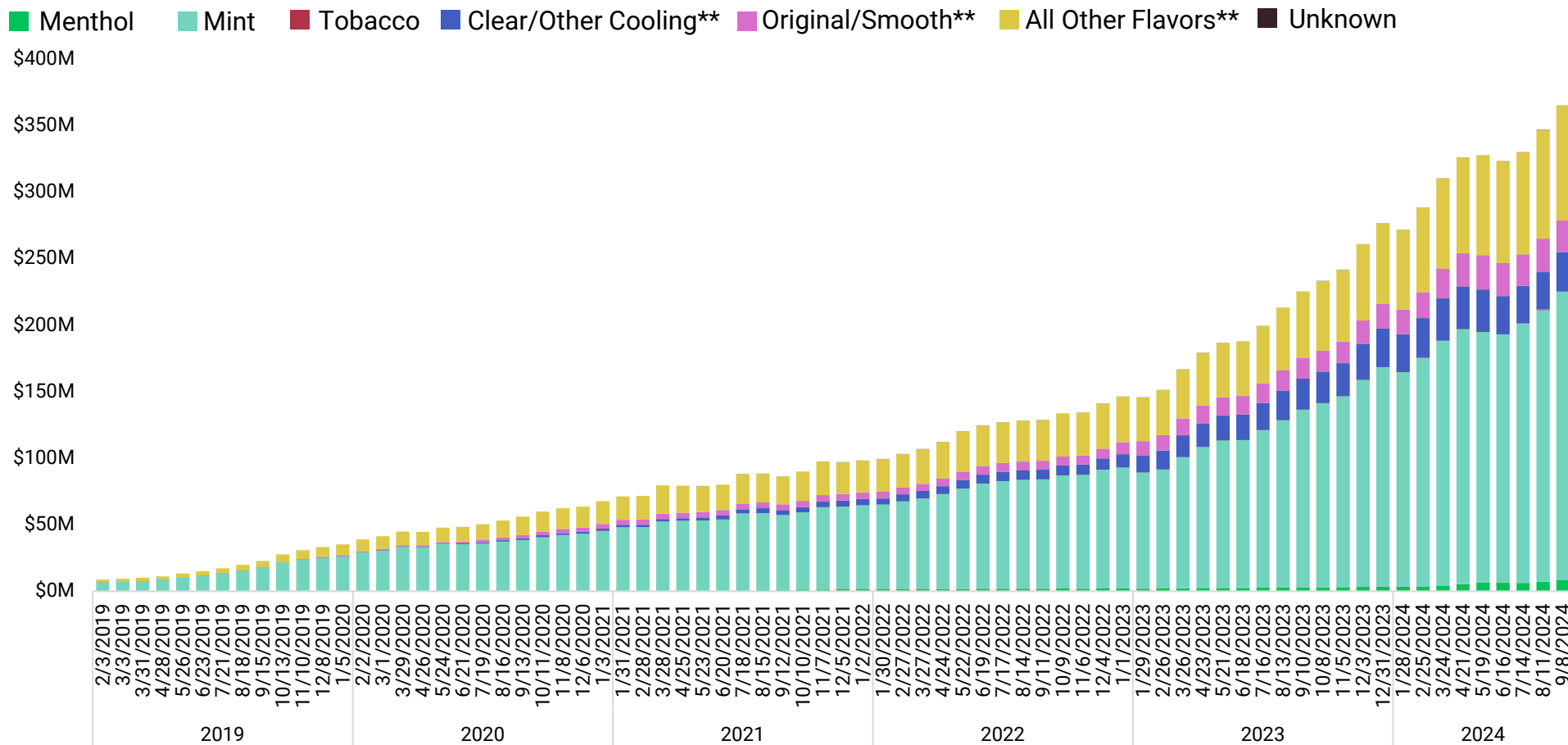
2. Jabba, S. V., Silinski, P., Yang, A. Y., Ouyang, W., & Jordt, S. E. (2024). Artificial Sweeteners in US-Marketed Oral Nicotine Pouch Products: Correlation with Nicotine Contents and Effects on Product Preference. bioRxiv : the preprint server for biology, 2024.01.26.577472. <https://doi.org/10.1101/2024.01.26.577472>

3. Centers for Disease Control and Prevention. (2024, September 17). *Nicotine pouches*. Centers for Disease Control and Prevention. <https://www.cdc.gov/tobacco/nicotine-pouches/index.html>

4. Jamal A, Park-Lee E, Birdsey J, et al. Tobacco Product Use Among Middle and High School Students – National Youth Tobacco Survey, United States, 2024. MMWR Morb Mortal Wkly Rep 2024;73:917–924. DOI: <http://dx.doi.org/10.15585/mmwr.mm7341a2>.

5. Park-Lee E, Ren C, Cooper M, Cornelius M, Jamal A, Cullen KA. Tobacco Product Use Among Middle and High School Students – United States, 2022. MMWR Morb Mortal Wkly Rep 2022;71:1429–1435. DOI: <http://dx.doi.org/10.15585/mmwr.mm7145a1>.

Figure 1. Total Nicotine Pouch Dollar Sales, by Flavor, United States



*Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods. Total number of pouches sold calculated based on information provided in scanner data and represents individual pouches sold within a can.
 **Clear/Other Cooling include products with flavor names such as clear, clear ice, or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Zyn Chill, Oeo Clear). Original/smooth includes products with flavor names such as smooth or original which likely contain artificial sweeteners (e.g. Zyn Smooth, On! Original, Zyn Original). All Other Flavors category includes fruit, clove/spice, chocolate, alcoholic drink (such as wine, cognac, or other cocktails), candy/desserts/other sweets, or some other flavor.

Trends of Pouch Dollar Sales by Flavor from 9/11/2022 to 09/08/2024

Total nicotine pouch dollar sales increased from \$128.7 million to \$365.0 million (+183.7%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$325.3 thousand; unit share increased from 0% to 0.1%.

Menthol-flavored nicotine pouch dollar sales increased from \$1.9 million to \$8.5 million (+348.3%); unit share increased from 1.5% to 2.3%.

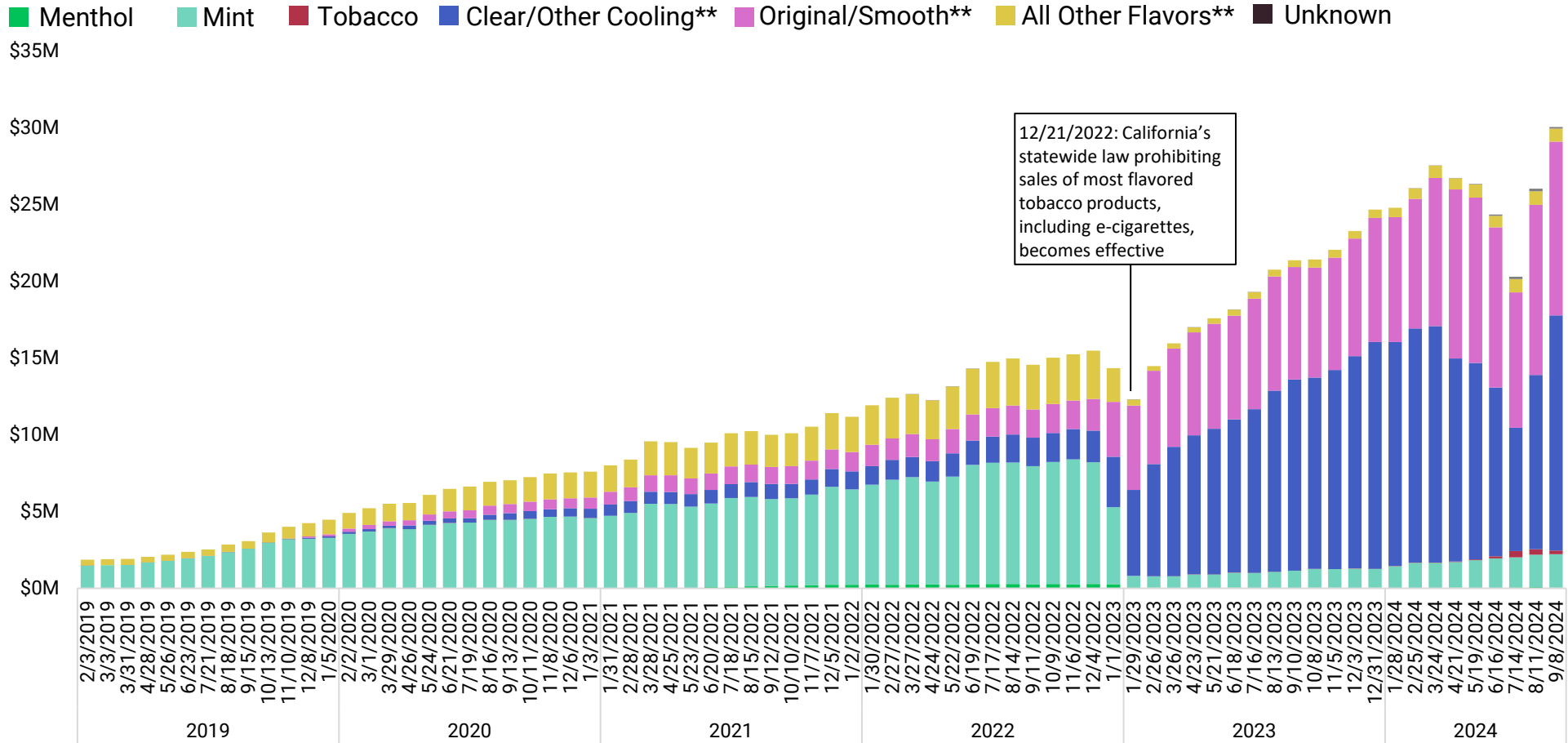
Mint-flavored nicotine pouch dollar sales increased from \$82.1 million to \$216.2 million (+163.5%); unit share decreased from 63.8% to 59.2%.

All other-flavored nicotine pouch dollar sales increased from \$30.7 million to \$86.3 million dollars (+181.2%); unit share decreased from 23.9% to 23.6%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$7.4 million to \$29.8 million (+303.9%); unit share increased from 5.7% to 8.2%.

Original/Smooth nicotine pouch dollar sales increased from \$6.6 million to \$23.6 million (+257.6%); unit share increased from 5.1% to 6.5%.

Figure 2. Total Nicotine Pouch Dollar Sales, by Flavor, California



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Trends of Pouch Dollar Sales by Flavor from 9/11/2022 to 09/08/2024

Total nicotine pouch dollar sales increased from \$14.6 million to \$30.1 million (+106.4%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$231.3 thousand; unit share increased from 0% to 0.8%.

Menthol-flavored nicotine pouch dollar sales decreased from \$265.2 thousand to \$39.5 thousand (-85.1%); unit share decreased from 1.8% to 0.1%.

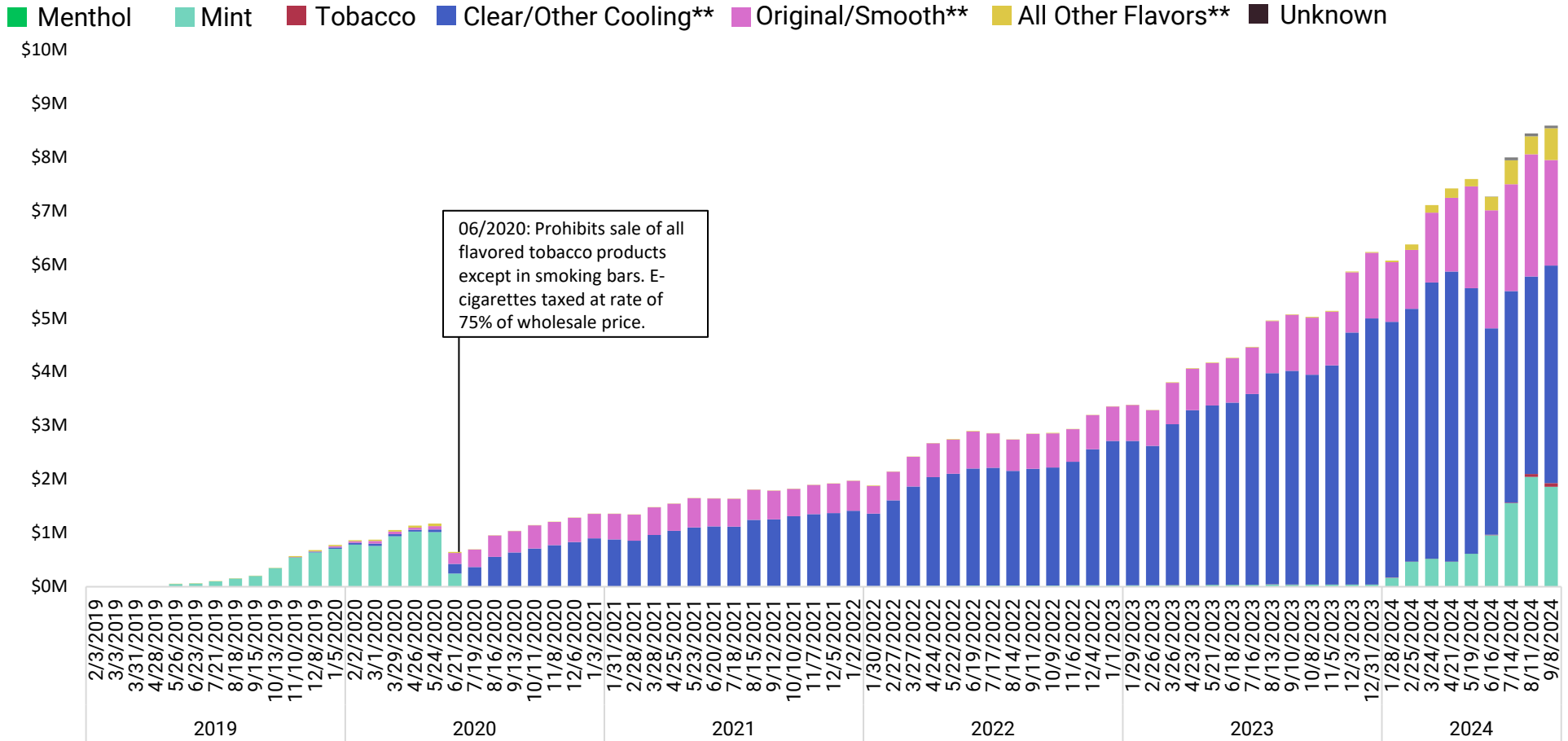
Mint-flavored nicotine pouch dollar sales decreased from \$7.7 million to \$2.2 million (-71.6%); unit share decreased from 52.8% to 7.3%.

All other-flavored nicotine pouch dollar sales decreased from \$2.9 million to \$841.9 thousand (-71.1%); unit share decreased from 20.0% to 2.8%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$1.9 million to \$15.3 million (+724.3%); unit share increased from 12.8% to 51.0%.

Original/Smooth nicotine pouch dollar sales increased from \$1.8 million to \$11.3 million (+516.6%); unit share increased from 12.6% to 37.6%.

Figure 3. Total Nicotine Pouch Dollar Sales, by Flavor, Massachusetts



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Trends of Pouch Dollar Sales by Flavor from 9/11/2022 to 09/08/2024

Total nicotine pouch dollar sales increased from \$2.9 million to \$8.6 million (+201.1%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$65.4 thousand; unit share increased from 0% to 0.8%.

Menthol-flavored nicotine pouch dollar sales increased from \$0.3 thousand to \$2.8 thousand (+986.9%); unit share increased from 0.01% to 0.03%.

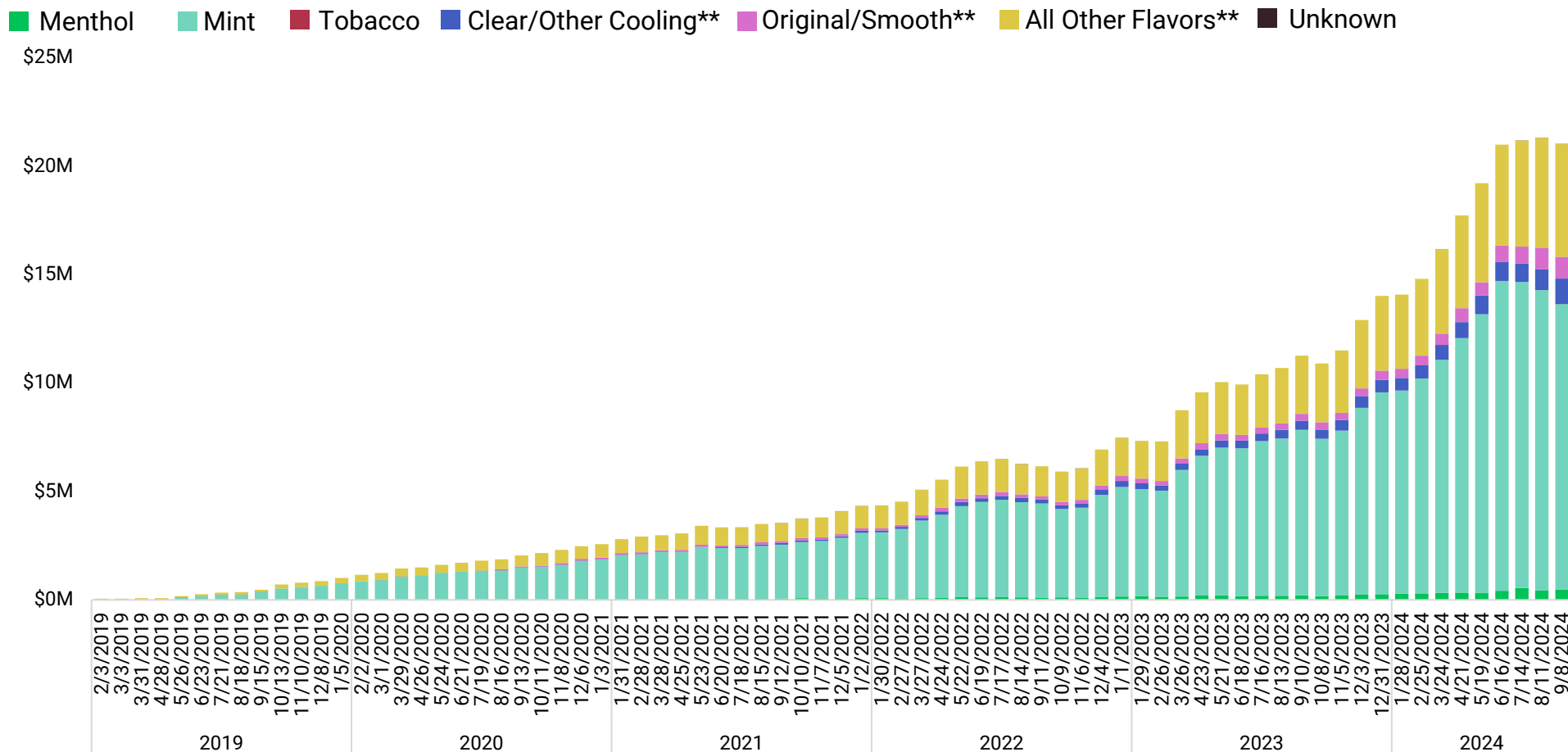
Mint-flavored nicotine pouch dollar sales increased from \$21.8 thousand to \$1.9 million (+8430.2%); unit share increased from 0.8% to 21.7%.

All other-flavored nicotine pouch dollar sales increased from \$7.0 thousand to \$589.0 thousand (+8329.3%); unit share increased from 0.2% to 6.9%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$2.2 million to \$4.1 million (+86.6%); unit share decreased from 76.2% to 47.2%.

Original/Smooth nicotine pouch dollar sales increased from \$650.2 thousand to \$2.0 million (+202.3%); unit share increased from 22.8% to 22.9%.

Figure 4. Total Nicotine Pouch Dollar Sales, by Flavor, New York



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Trends of Pouch Dollar Sales by Flavor from 9/11/2022 to 09/08/2024

Total nicotine pouch dollar sales increased from \$6.2 million to \$21.0 million (+241.3%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$60; unit share remained 0%.

Menthol-flavored nicotine pouch dollar sales increased from \$108.9 thousand to \$481.4 thousand (+341.9%); unit share increased from 1.8% to 2.3%.

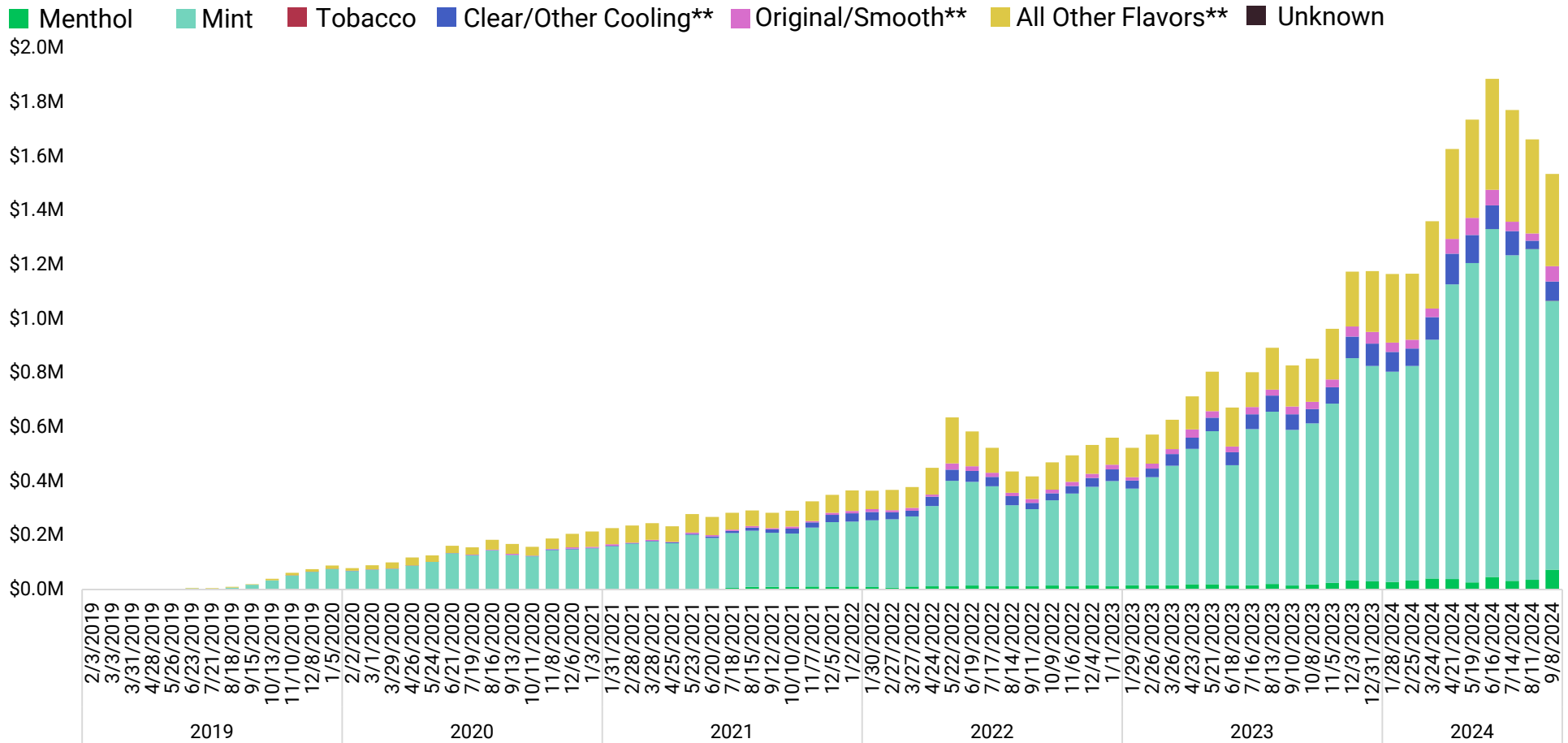
Mint-flavored nicotine pouch dollar sales increased from \$4.3 million to \$13.2 million (+203.5%); unit share decreased from 70.4% to 62.6%.

All other-flavored nicotine pouch dollar sales increased from \$1.4 million to \$5.2 million (+275.7%); unit share increased from 22.5% to 24.8%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$186.0 thousand to \$1.2 million (+531.4%); unit share increased from 3.0% to 5.6%.

Original/Smooth nicotine pouch dollar sales increased from \$141.1 thousand to \$994.1 thousand (+604.6%); unit share increased from 2.3% to 4.7%.

Figure 5. Total Nicotine Pouch Dollar Sales, by Flavor, Rhode Island



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Trends of Pouch Dollar Sales by Flavor from 9/11/2022 to 09/08/2024

Total nicotine pouch dollar sales increased from \$418.0 thousand to \$1.5 million (+267.2%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$0.2 thousand; unit share increased from 0% to 0.01%.

Menthol-flavored nicotine pouch dollar sales increased from \$11.9 thousand to \$73.0 thousand (+511.7%); unit share increased from 2.9% to 4.8%.

Mint-flavored nicotine pouch dollar sales increased from \$284.8 thousand to \$993.1 thousand (+248.6%); unit share decreased from 68.1% to 64.7%.

All other-flavored nicotine pouch dollar sales increased from \$83.8 thousand to \$340.6 thousand (+306.4%); unit share increased from 20.0% to 22.2%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$23.2 thousand to \$71.4 thousand (+208.1%); unit share decreased from 5.5% to 4.7%.

Original/Smooth nicotine pouch dollar sales increased from \$14.2 thousand to \$56.4 thousand (+296.4%); unit share increased from 3.4% to 3.7%.