

Changes in U.S. and State Cigarette Sales Following Flavored Tobacco Sales Restrictions (2019-2024)

What's the Bottom Line?

- Cigarette sales have declined substantially during the past 6 years. Sales have declined more in states with comprehensive laws that prohibit the sale of most flavored tobacco products, including flavored e-cigarettes and menthol cigarettes.
- Cigarette sales declined in states with laws prohibiting the sale of flavored e-cigarettes only, but these declines were more modest than the declines in states with comprehensive flavored tobacco restrictions.

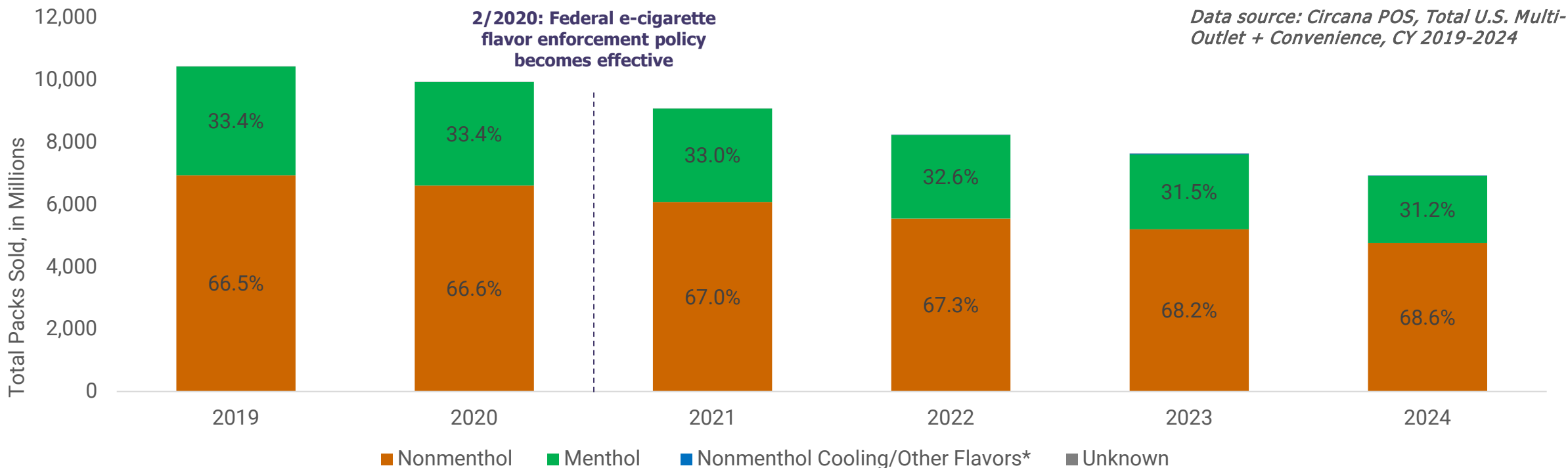
Background

- This brief describes cigarette sales trends in the total U.S. and in states with flavored tobacco sales restrictions during the period before and after policy implementation.
- California and Massachusetts prohibit the sale of most non-tobacco flavored tobacco products, including menthol cigarettes and flavored e-cigarettes.
- Additional states, including New York and Rhode Island, have laws that prohibit the sale of flavored e-cigarettes, but do not prohibit the sale of other flavored tobacco products.
- Data in this brief is based on custom research by CDC Foundation using Circana, LLC retail POS.

Key Findings

- Sales of cigarettes have consistently declined since 2019 in the U.S. overall, as well as in states with flavored tobacco sales restrictions.
- In Massachusetts and California, which have comprehensive flavor restrictions, cigarette sales declined more than in New York and Rhode Island, which only prohibit the sale of flavored e-cigarettes.
- States that only prohibited flavored e-cigarettes did not experience any long-term increases in cigarette sales. In New York, cigarette sales declines were even greater in the years following a law prohibiting flavored e-cigarette sales than the year before. In Rhode Island, menthol cigarette sales increased temporarily during the first year after the flavored e-cigarette restriction, but sales have since resumed historic declines.
- The tobacco industry has introduced new products that circumvent and undermine flavor restriction policies. Monitoring retail scanner data is therefore crucial to inform policy implementation.

Figure 1. Cigarette Pack Sales by Flavor, United States, 2019-2024



Data source: Circana POS, Total U.S. Multi-Outlet + Convenience, CY 2019-2024

2/2020: Federal e-cigarette flavor enforcement policy becomes effective

*Nonmenthol Cooling/Other Flavors include products confirmed by chemical testing to contain synthetic cooling ingredients, such as WS-3 or WS-23, and/or other flavorants, such as ethylvanillin.

**Change in units is presented for Nonmenthol Cooling/Other Flavors sales instead of annual percentage change as sales were zero or almost zero in years prior to 2023.

Year (% change YOY)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total Sales	-4.8%	-8.5%	-9.3%	-7.3%	-9.2%
• Menthol sales	-4.9%	-9.7%	-10.2%	-10.6%	-10.0%
• Nonmenthol sales	-4.7%	-8.0%	-8.8%	-6.2%	-8.5%
• Nonmenthol Cooling/Other Flavors* sales	--	--	--	+25.8 million packs**	-13.2 million packs**

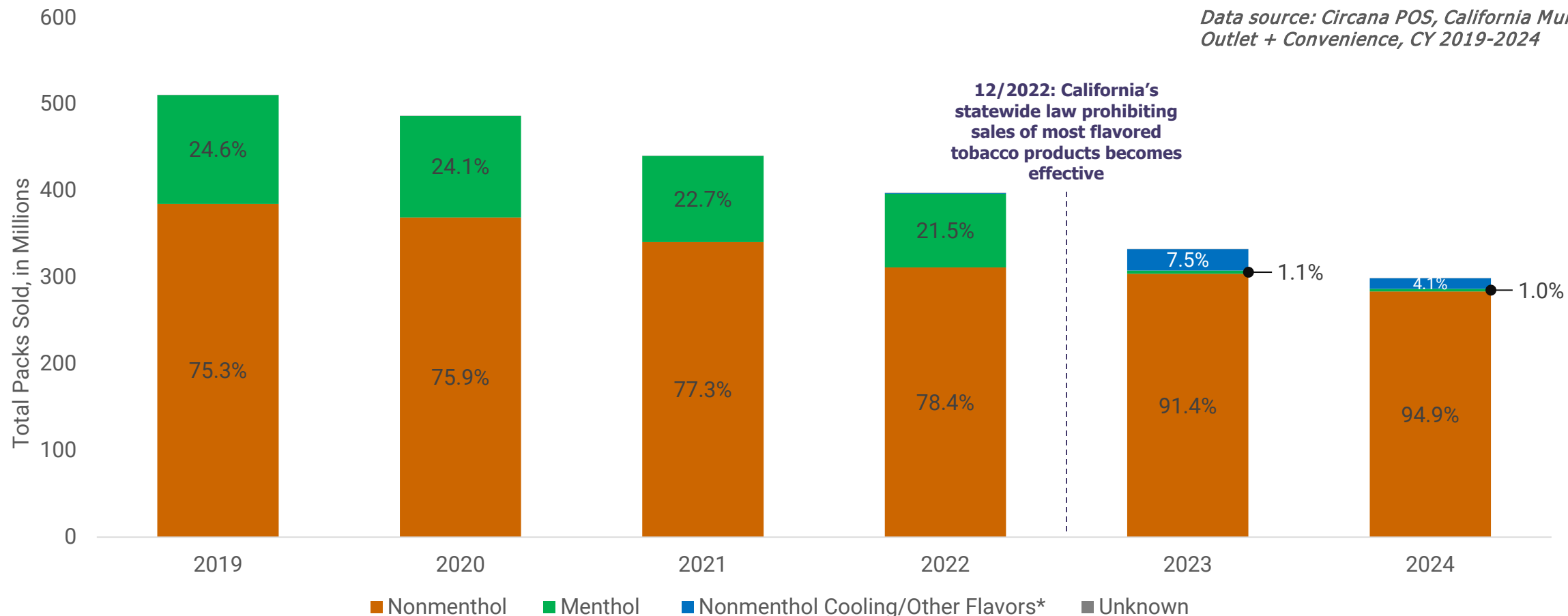
Year over Year (YOY) Percentage Changes in Cigarette Pack Sales During 2019-2024

- Sales of cigarette packs consistently declined in total U.S. during 2019-2024.
- In 2020, FDA prioritized regulatory enforcement on prefilled e-cigarette pods/cartridges in flavors other than tobacco and menthol. Additionally, states began restricting the sale of flavored e-cigarettes. These actions did not stop the historical downward trend in cigarette sales. Total cigarette sales decreased by between 4.8%-9.2% during 2019-2024.
- In 2023, unit share of Nonmenthol Cooling/Other Flavors cigarette sales was 0.3%.

Trends in Cigarette Pack Sales During 2023-2024

- In 2024, 6.9 billion cigarette packs were sold in total U.S., a 9.2% decline from the same period in 2023.
 - The percentage decrease in menthol sales was greater than nonmenthol sales (10.0% vs. 8.5%).
- Unit share of menthol cigarettes was 31.5% in 2023 and 31.2% in 2024.

Figure 2. Cigarette Pack Sales by Flavor, California, 2019-2024



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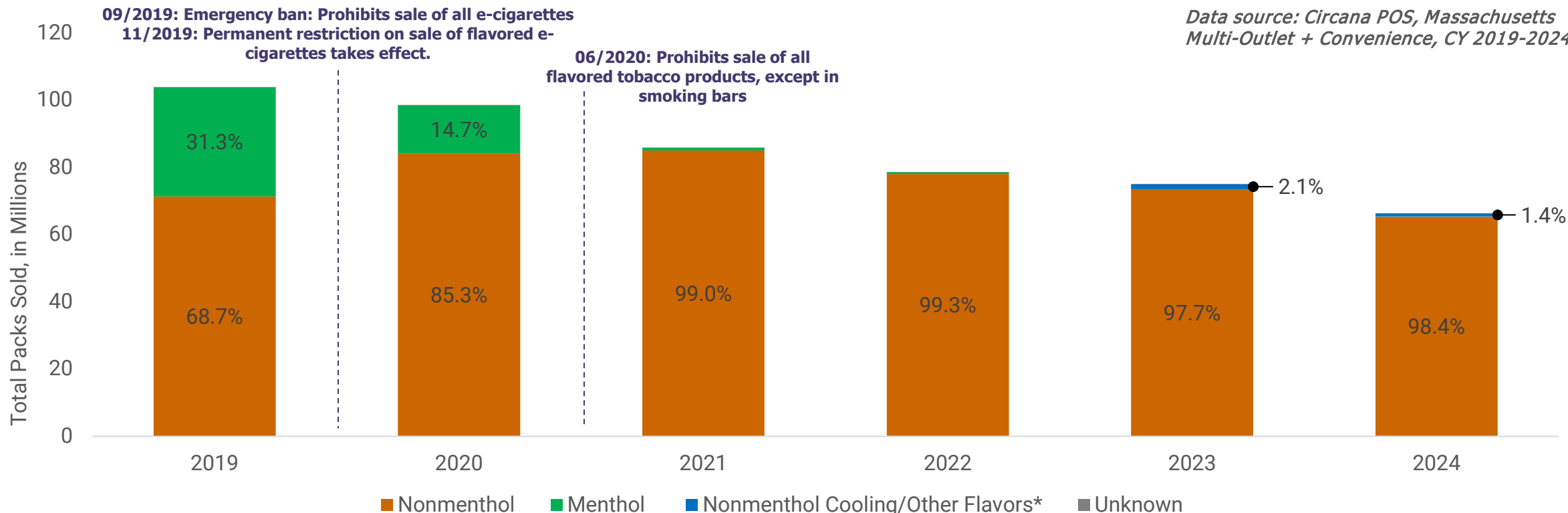
**Change in units is presented for Nonmenthol Cooling/Other Flavors sales instead of annual percentage change as sales were zero or almost zero in years prior to 2023.

Year (% change YOY)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total Sales	-4.7%	-9.5%	-9.8%	-16.3%	-10.1%
• Menthol sales	-6.9%	-14.9%	-14.5%	-95.5%	-21.5%
• Nonmenthol sales	-4.0%	-7.7%	-8.6%	-2.4%	-6.7%
• Nonmenthol Cooling/Other Flavors* sales	--	--	--	+24.1 million packs**	-12.6 million packs**

Percentage Changes in Cigarette Pack Sales During 2019-2024

- Sales of cigarette packs consistently declined year-over-year in California during 2019-2024. The percentage decrease ranged from -4.7% in 2019-2020 to -16.3% in 2022-2023.
- During the 24-month period (January 2023-December 2024) following the flavored tobacco sales restriction, total cigarette sales decreased by 24.6% (206.3 million packs) compared to the previous 24-month period; menthol cigarette sales decreased by 96.3% (178.3 million packs) while nonmenthol cigarette sales decreased by 9.9% (64.3 million packs).
- In 2023 and 2024 combined, 37.0 million packs of cigarettes marketed as nonmenthol but which contain nonmenthol coolants or other flavorants were sold in California, comprising a unit share of 5.9% over the two-year period. These sales offset 20.4% of the decline in menthol cigarettes over the two-year period (178.3 million units).

Figure 3. Cigarette Pack Sales by Flavor, Massachusetts, 2019-2024



Circana Massachusetts Multi-Outlet + Convenience

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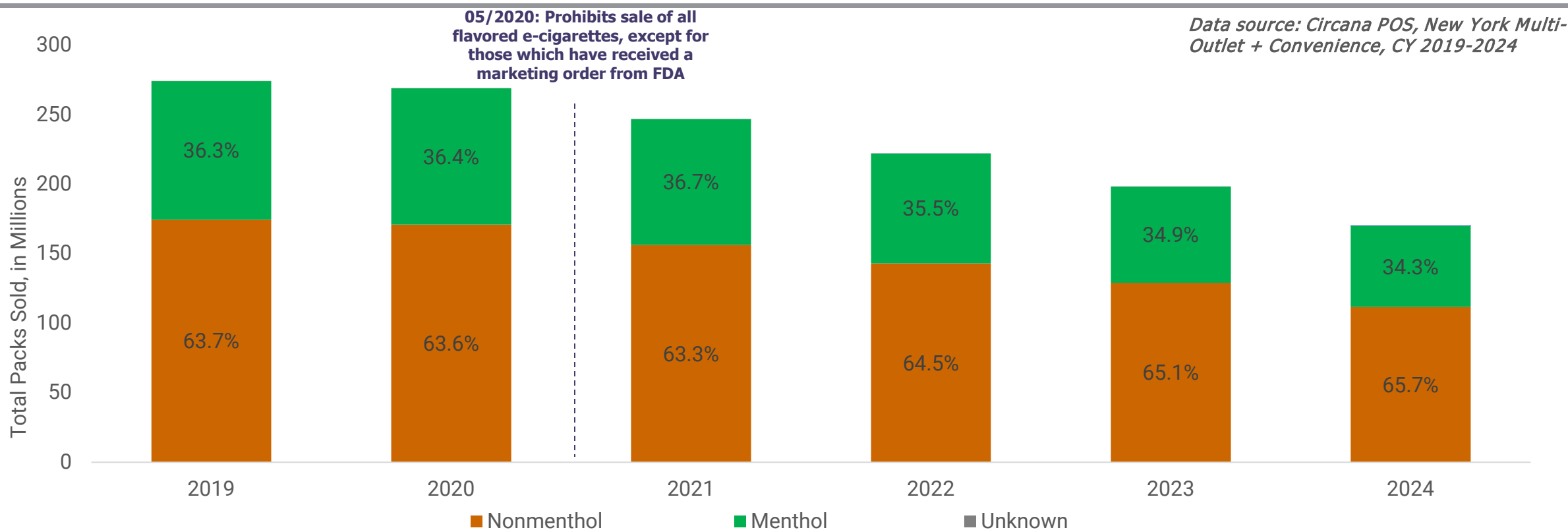
**Change in units is presented for Nonmenthol Cooling/Other Flavors sales instead of annual percentage change as sales were zero or almost zero in years prior to 2023.

Year (% change YOY)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total Sales	-5.1%	-12.9%	-8.5%	-4.5%	-11.6%
• Menthol sales	-55.5%	-94.3%	-32.0%	-72.8%	-20.7%
• Nonmenthol sales	+17.8%	+1.2%	-8.3%	-6.0%	-11.0%
• Nonmenthol Cooling/Other Flavors* sales	--	--	--	+1.5 million packs**	-634.8 thousand packs**

Percentage Changes in Cigarette Pack Sales During 2019-2024

- Sales of cigarette packs consistently declined in Massachusetts during 2019-2024. This decline was greater after Massachusetts restricted the sale of flavored tobacco products, including menthol cigarette sales in June 2020.
- During the 12-month period (July 2020-June 2021) following the flavored tobacco sales restriction, total cigarette sales decreased by 17.2% (18.5 million packs) compared to the previous 12-month period; menthol cigarette sales decreased by 97.1% (31.6 million packs) while nonmenthol cigarette sales increased by 17.5% (13.1 million packs) (data not shown).
- Unit share of menthol cigarettes was 0.2% in 2024. However, newly marketed cigarettes containing nonmenthol coolants or other flavorants sold 912.9 thousand packs with a unit share of 1.4% by year-end.

Figure 4. Cigarette Pack by Flavor, New York, 2019-2024



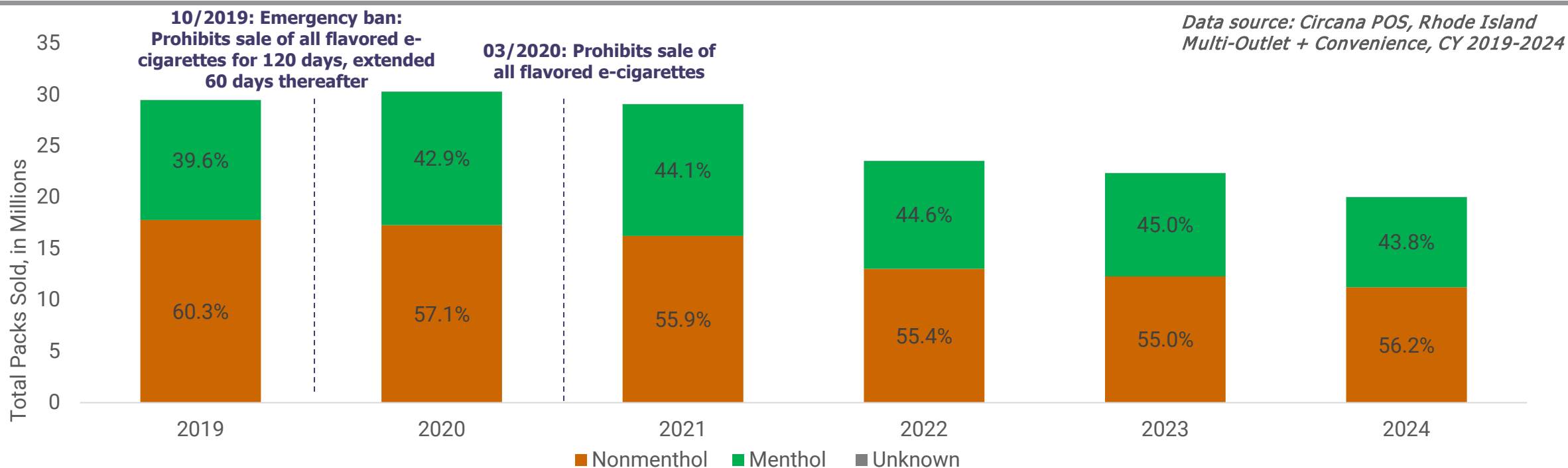
Year (% change YOY)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total Sales	-1.9%	-8.2%	-10.1%	-10.7%	-14.3%
• Menthol sales	-1.6%	-7.6%	-12.8%	-12.3%	-15.7%
• Nonmenthol sales	-2.0%	-8.6%	-8.4%	-9.8%	-13.5%
• Nonmenthol Cooling/Other Flavors* sales	--	--	--	--	--

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Percentage Changes in Cigarette Pack Sales During 2019-2024

- Sales of cigarette packs consistently declined in New York during 2019-2024.
- During the 12-month period (June 2020-May 2021) following New York’s restriction on the sale of flavored e-cigarettes, total cigarette sales decreased by 3.5% (9.6 million packs) compared to the previous 12-month period; menthol cigarette sales decreased by 3.2% (3.2 million packs) and nonmenthol cigarette sales decreased by 3.7% (6.4 million packs) (data not shown).
- Greater decreases in both menthol and nonmenthol cigarette sales were observed in years after the e-cigarette flavor restriction (2021 and onward).
- During 2019-2024, the proportion of cigarette sales that were menthol flavored ranged from a high of 36.7% in 2021 to a low of 34.3% in 2024.

Figure 5. Cigarette Pack Sales by Flavor, Rhode Island, 2019-2024



Year (% change YOY)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total Sales (% change YOY)	+2.8%	-4.0%	-19.0%	-5.1%	-10.4%
• Menthol sales	+11.1%	-1.2%	-18.2%	-4.2%	-12.8%
• Nonmenthol sales	-2.7%	-6.2%	-19.7%	-5.8%	-8.5%
• Nonmenthol Cooling/Other Flavors* sales	--	--	--	--	--

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Percentage Changes in Cigarette Pack Sales During 2019-2024

- Overall, during 2019-2024, total cigarette pack sales decreased by 32.1% (9.4 million packs).
- From January 2020 to October 2020, following Rhode Island's flavored e-cigarette restrictions (effective October 2019), total cigarette sales increased by 2.7% (613.2 thousand packs) compared to a similar 10-month period prior to policy implementation (January 2019-October 2019) following the policy's implementation; menthol cigarette sales increased by 10.0% (903.7 thousand packs) while nonmenthol cigarette sales decreased by 2.1% (290.7 thousand packs) (data not shown).
 - While this temporary increase may reflect cross-border sales from Massachusetts, the decline in menthol cigarette sales in Massachusetts during the same period (10.5 million packs) was 12 times larger than the increase in Rhode Island (903.7 thousand packs).
- Since 2021, both menthol and nonmenthol cigarette sales have been decreasing in Rhode Island. From 2021 to 2024, total pack sales decreased by 31.1%.