

Changes in E-Cigarette and Cigarette Sales Following Statewide Flavored Tobacco Bans: An Analysis by Policy Comprehensiveness

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Funding provided by the Bloomberg Initiative to Reduce Tobacco Use through the CDC Foundation with a grant from Bloomberg Philanthropies. The findings and conclusions in this report are those of the authors and do not necessarily represent the official position of the CDC Foundation.

	Tobacco Industry	E-cigarette & nicotine product industry (excluding pharma)	Pharma Industry
The work being presented has received funding or other means of support from any of the following sources:	No	No	No
Any of the authors have received funding (including consultancy) from any of the following sources in the past 5 years:	No	No	No

Background

Flavored e-cigarettes' popularity among U.S. youth and young adults led several states to ban some or all flavored tobacco products. Massachusetts was the first, banning flavored e-cigarettes in September 2019 and all flavored tobacco products, including menthol, in June 2020. Similarly, California banned all flavored tobacco products in December 2022. New York and Rhode Island implemented less comprehensive bans on flavored e-cigarettes only, exempting other tobacco products, in October 2019 and May 2020, respectively. This study assesses changes in e-cigarette and cigarette sales in states with comprehensive versus non-comprehensive statewide flavor restrictions, compared to states without such restrictions.

Methodology

E-cigarette and cigarette sales data were based on custom research by the CDC Foundation using Circana LLC retail point-of-sale data (Multi Outlet + Convenience) for the period from January 2019 to June 2024. E-cigarette sales were measured in milligrams of nicotine sold; cigarette sales were measured in packs of 20 cigarettes each. Sales per capita in the second quarter of 2024 were compared to sales during the quarter prior to policy implementation, relative to control states (CS).

Figure 1: E-cigarette Sales Per capita

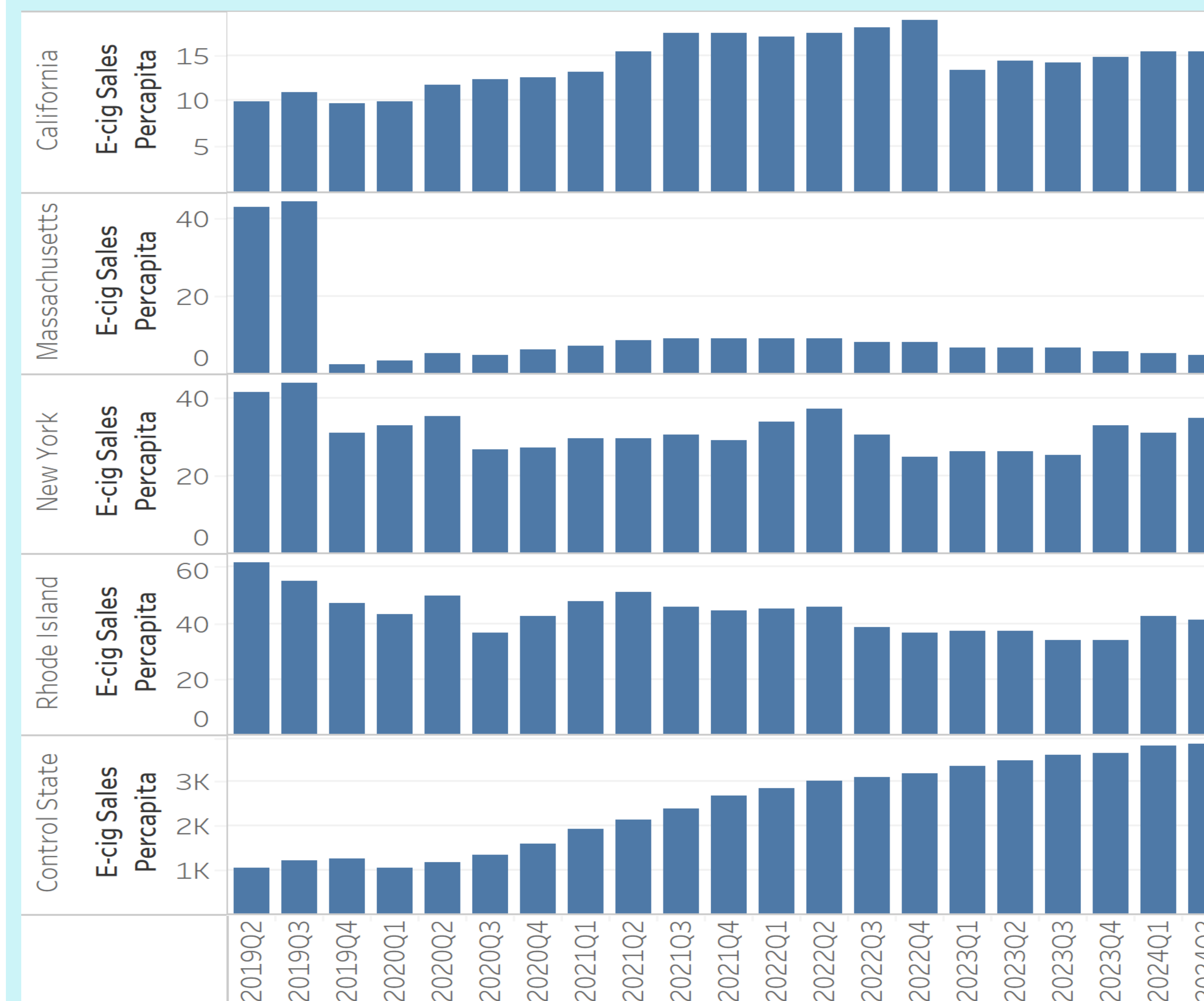
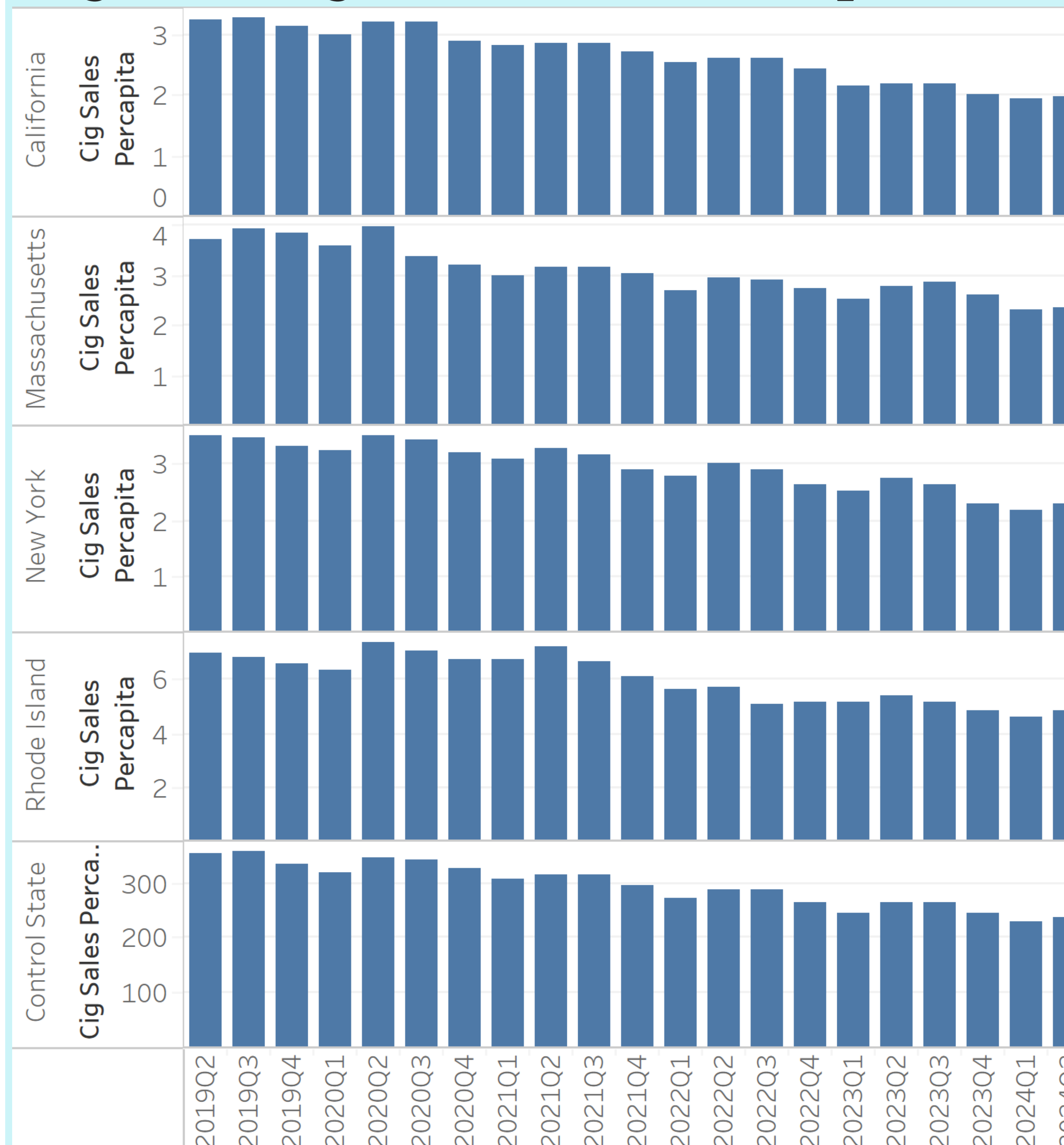


Figure 2: Cigarette Sales Per capita



Results

Changes in E-cigarettes Sales

- Comprehensive flavor restrictions in California and Massachusetts were associated with declines of 18.5% (vs. +21.2% in CS) and 89.2% (vs. +224.1% in CS), respectively, in quarterly e-cigarette sales per capita.
- E-cigarette-only flavor restrictions in New York and Rhode Island were associated with declines of 1.4% (vs. +233.0% in CS) and 24.9% (vs. +224.1% in CS), respectively, in quarterly e-cigarette sales per capita.

Changes in Cigarette Sales

- Comprehensive flavor restrictions in California and Massachusetts were associated with declines of 18.6% (vs. -10.2% in CS) and 40.4% (vs. -33.9% in CS), respectively, in quarterly cigarette sales per capita.
- E-cigarette-only flavor restrictions in New York and Rhode Island were associated with a decline of -35.3% (vs. -31.6% in Cs) and 30.7% (vs. -32.9% in CS), respectively, in quarterly cigarette sales per capita.

Conclusion

- Comprehensive policies that prohibit all flavored products, including menthol cigarettes, are associated with a reduction in both total e-cigarette and cigarette sales.
- States with stronger enforcement, such as Massachusetts, experienced greater declines in sales.
- While comprehensive policies lead to larger sales declines, e-cigarette-only flavor bans are associated with a decline in e-cigarette sales and do not appear to increase cigarette sales, on average.