

Monitoring Sales: Nicotine Pouch Trends

This report highlights trends from February 2020 to April 2025.

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, particularly since 2023.
- Nearly all nicotine pouches sold in the United States are non-tobacco flavored. Most are mint-flavored.
- Nicotine pouch sales in states with flavor restrictions on nicotine pouches are dominated by 1) products marketed as smooth/original but likely contain sweeteners, and 2) 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 Between 2022⁵ and 2024, pouch use increased by more than 60.0% among U.S. middle and high school students.
- 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 tobacco products with flavors (other than tobacco flavor), including nicotine pouches.
- States with flavor restrictions on nicotine pouches have a vastly different mix of flavors sold compared to states without flavor restrictions on nicotine pouches.
- On January 16, 2025, FDA announced the authorization of 20 flavored Zyn products, including Zyn Chill and Zyn Smooth, which FDA determined have a characterizing flavor.⁶

Key Findings

- Total monthly nicotine pouch sales increased by 207.0% between January 2023 and April 2025.
- Few nicotine pouches sold in the United States are tobacco flavored. As of April 2025, mint flavor accounts for 62.1% of sales, followed by other flavors (e.g., fruits, candy, drinks) at 23.2%, and flavors marketed as smooth/original at 10.6%.
- In Massachusetts, nicotine pouch sales are dominated by products marketed as smooth/original, which likely contain sweeteners, and by products which provide a cooling sensation and contain sweeteners. In California, which now prohibits the sale of products with a distinguishable cooling sensation, nicotine pouch sales are dominated by products marketed as smooth/original. In states without flavor restrictions on nicotine pouches, mint and all other flavors (e.g., fruits, candy, drinks) are the most commonly sold flavors.

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* 2025;34:106–110. <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>

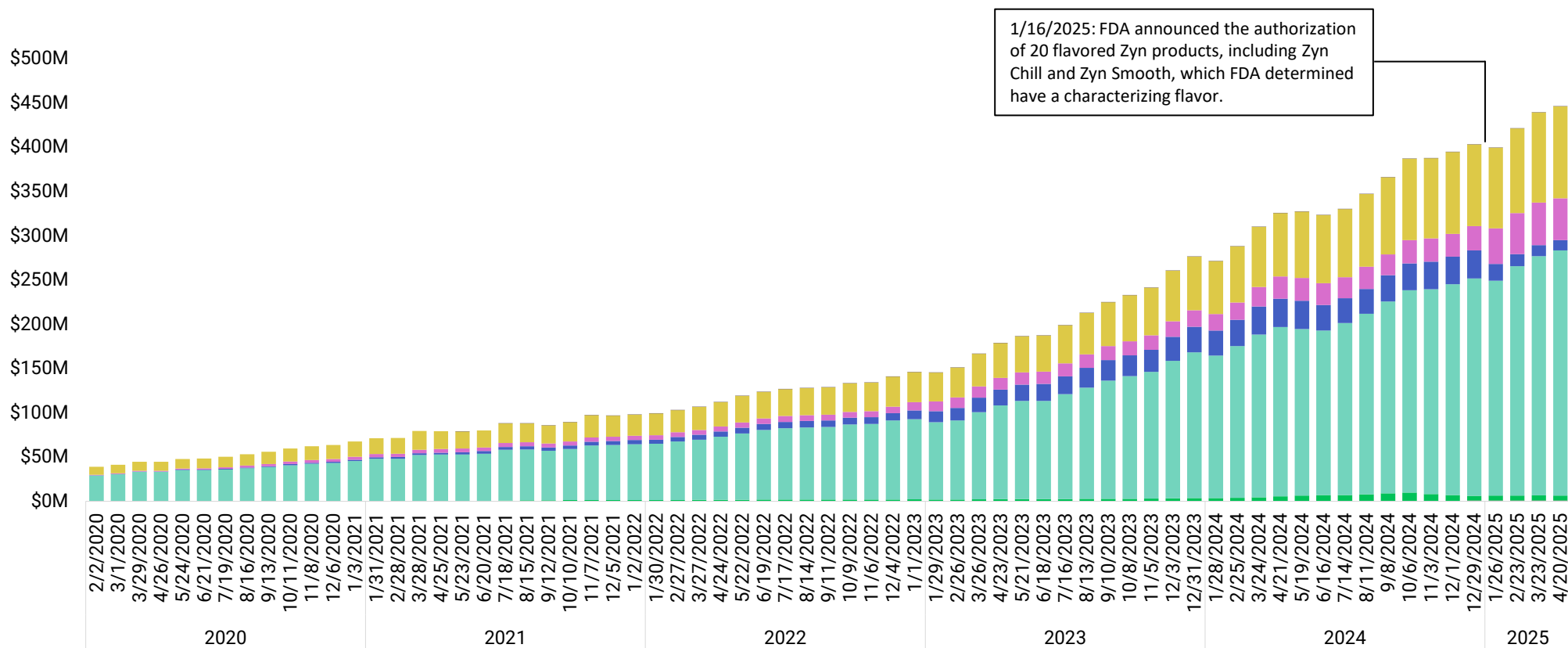
4. Jamal A, Park-Lee E, Birdsey J, et al. Tobacco Product Use Among Middle and High School Students – National Youth Tobacco Survey, United States, 2024. *MMWR Morb Mortal Wkly Rep* 2024;73:917–924. <http://dx.doi.org/10.15585/mmwr.mm7341a2>

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. <http://dx.doi.org/10.15585/mmwr.mm7145a1>

6. U.S. Food and Drug Administration. (2025, January 16). FDA authorizes marketing of 20 ZYN nicotine pouch products after extensive scientific review [Press release]. U.S. Department of Health and Human Services. <https://www.fda.gov/news-events/press-announcements/fda-authorizes-marketing-20-zyn-nicotine-pouch-products-after-extensive-scientific-review>

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

Tobacco Menthol Mint Clear/Other Cooling** Original/Smooth** All Other Flavors** Unknown



*Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods.

**Clear/Other Cooling includes 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 Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 4/20/2025

Total nicotine pouch dollar sales increased from \$145.5 million to \$446.8 million (+207.0%).

Tobacco-flavored nicotine pouch dollar sales increased from \$1.0 thousand to \$794.3 thousand (+75.7k%); dollar share increased from 0.0% to 0.2%.

Menthol-flavored nicotine pouch dollar sales increased from \$1.9 million to \$5.5 million (+187.5%); dollar share decreased from 1.3% to 1.2%.

Mint-flavored nicotine pouch dollar sales increased from \$87.4 million to \$277.3 million (+217.3%); dollar share increased from 60.0% to 62.1%.

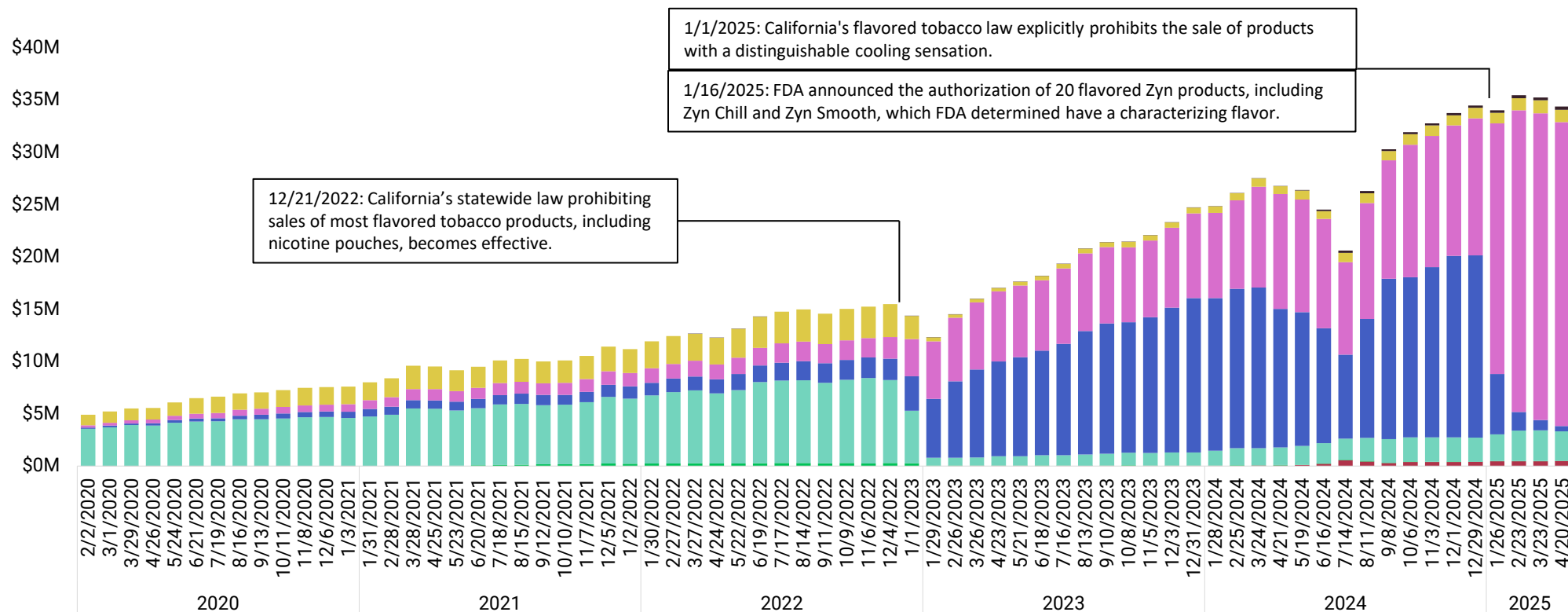
Clear/other cooling-flavored nicotine pouch dollar sales decreased from \$12.5 million to \$11.6 million (-6.5%); dollar share decreased from 8.6% to 2.6%.

Original/Smooth nicotine pouch dollar sales increased from \$11.1 million to \$47.3 million (+328.3%); dollar share increased from 7.6% to 10.6%.

All other-flavored nicotine pouch dollar sales increased from \$32.7 million to \$103.8 million dollars (+217.2%); dollar share increased from 22.5% to 23.2%.

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

■ Tobacco ■ Menthol ■ Mint ■ Clear/Other Cooling** ■ Original/Smooth** ■ All Other Flavors** ■ Unknown



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**Clear/Other Cooling includes 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 Nicotine Pouch Dollar Sales by Flavor from 12/4/2022 to 4/20/2025, Following California's Flavored Tobacco Restriction

Total nicotine pouch dollar sales increased from \$15.5 million to \$34.4 million (+122.0%).

In November 2024, California's Department of Justice began notifying certain manufacturers that their products with distinguishable cooling sensations would be explicitly prohibited by changes to California's flavored tobacco law, beginning January 1, 2025. **Clear/other cooling** flavored nicotine pouch sales decreased 97.1% from December 2024 to April 2025, while **smooth/original** flavor increased 121.6%.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$492.2 thousand; dollar share increased from 0.0% to 1.4%.

Menthol-flavored nicotine pouch dollar sales decreased from \$278.7 thousand to \$11.1 thousand (-96.0%); dollar share decreased from 1.8% to 0.03%.

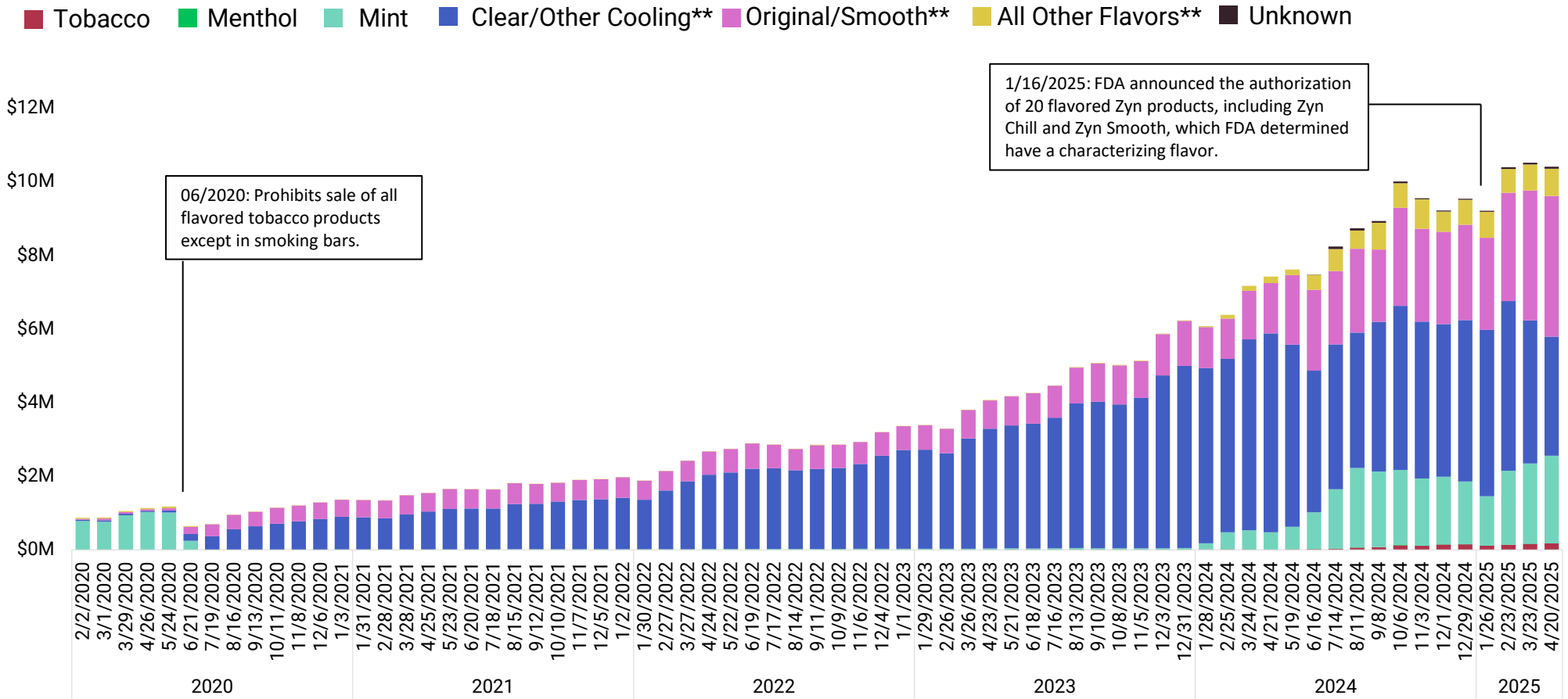
Mint-flavored nicotine pouch dollar sales decreased from \$7.9 million to \$2.8 million (-64.5%); dollar share decreased from 51.3% to 8.2%.

Clear/other cooling-flavored nicotine pouch dollar sales decreased from \$2.1 million to \$508.5 thousand (-75.2%); dollar share decreased from 13.3% to 1.5%.

Original/Smooth nicotine pouch dollar sales increased from \$2.1 million to \$29.1 million (+1,311.0%); dollar share increased from 13.3% to 84.5%.

All other-flavored nicotine pouch dollar sales decreased from \$3.2 million to \$1.2 million (-62.2%); dollar share decreased from 20.3% to 3.5%.

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



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**Clear/Other Cooling includes 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 Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 4/20/2025

Total nicotine pouch dollar sales increased from \$3.4 million to \$10.4 million (+206.8%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$175.3 thousand; dollar share increased from 0.0% to 1.7%.

Menthol-flavored nicotine pouch dollar sales increased from \$0.4 thousand to \$2.0 thousand (+375.5%); dollar share remained 0.0%.

Mint-flavored nicotine pouch dollar sales increased from \$26.9 thousand to \$2.4 million (+8,734.3%); dollar share increased from 0.8% to 22.8%.

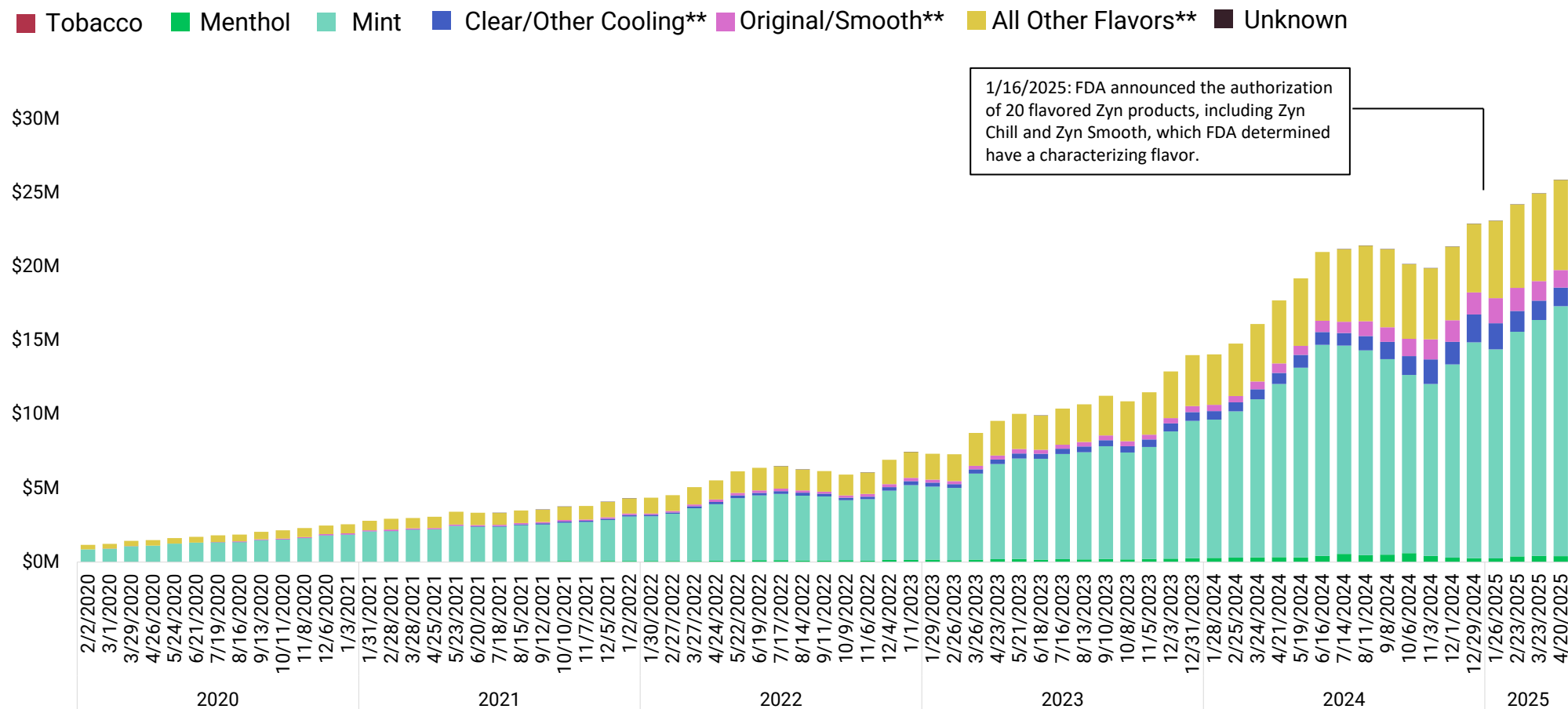
Clear/other cooling-flavored nicotine pouch dollar sales increased from \$2.7 million to \$3.2 million (+20.4%); dollar share decreased from 79.3% to 31.1%.

Original/Smooth nicotine pouch dollar sales increased from \$667.0 thousand to \$3.8 million (+472.3%); dollar share increased from 19.7% to 36.7%.

All other-flavored nicotine pouch dollar sales increased from \$7.3 thousand to \$741.2 thousand (+10k%); dollar share increased from 0.2% to 7.1%.

Retail sales data are based on custom research by the CDC Foundation using Circana retail POS (Multi-Outlet + Convenience). According to Circana, new product coding is managed to consistently meet or exceed releasing products that cover a minimum of 95.5% of total dollar sales at any given time. Coding and releasing of new products are prioritized based on significance of dollar sales to continually comply with capturing at least 95.5% of total dollar sales in each period. Financial support was provided by Bloomberg Philanthropies through a grant to the CDC Foundation.

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



*Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods.

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Trends of Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 4/20/2025

Total nicotine pouch dollar sales increased from \$7.3 million to \$25.9 million (+252.7%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$0.3 thousand; dollar share remained 0.0%.

Menthol-flavored nicotine pouch dollar sales increased from \$160.4 thousand to \$406.2 thousand (+153.2%); dollar share decreased from 2.2% to 1.6%.

Mint-flavored nicotine pouch dollar sales increased from \$4.9 million to \$16.9 million (+241.6%); dollar share decreased from 67.5% to 65.4%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$263.3 thousand to \$1.3 million (+381.2%); dollar share increased from 3.6% to 4.9%.

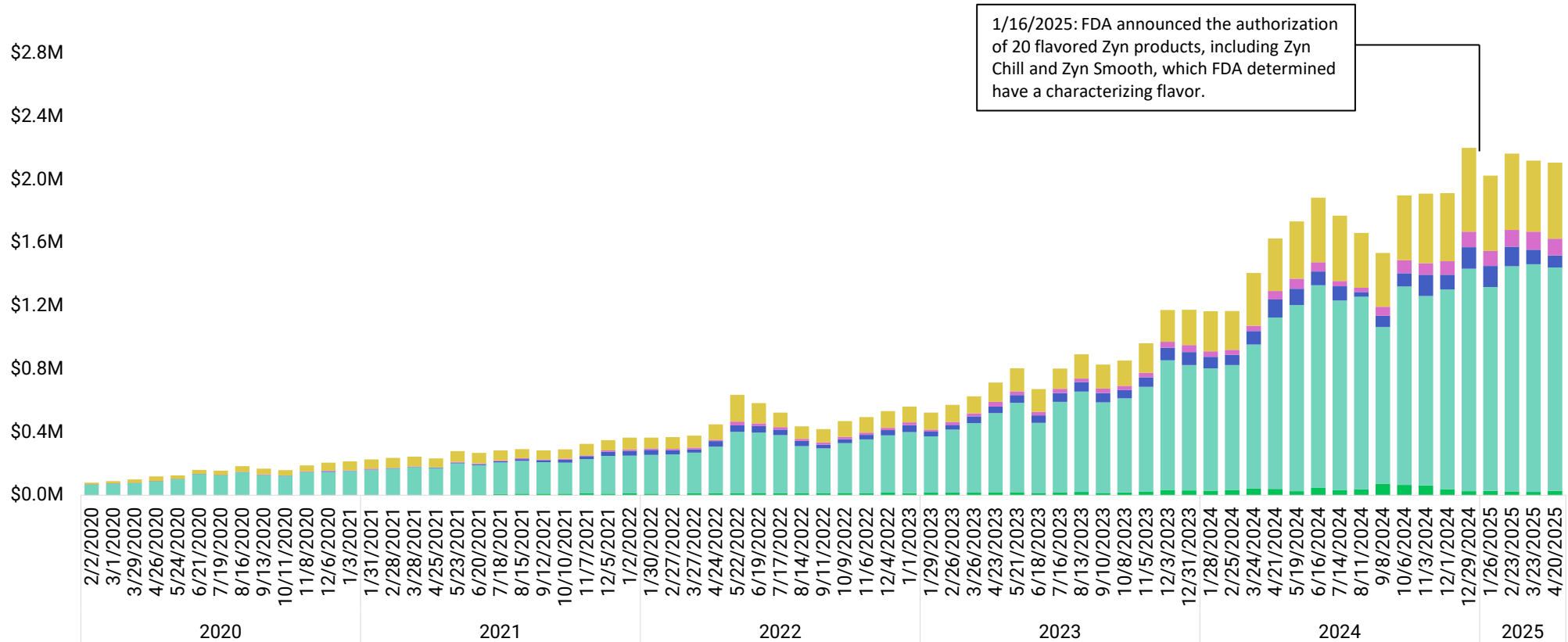
Original/Smooth nicotine pouch dollar sales increased from \$212.5 thousand to \$1.2 million (+459.3%); dollar share increased from 2.9% to 4.6%.

All other-flavored nicotine pouch dollar sales increased from \$1.7 million to \$6.1 million (+248.9%); dollar share decreased from 23.8% to 23.6%.

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

■ Tobacco ■ Menthol ■ Mint ■ Clear/Other Cooling** ■ Original/Smooth** ■ All Other Flavors** ■ Unknown



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Trends of Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 4/20/2025

Total nicotine pouch dollar sales increased from \$522.9 thousand to \$2.1 million (+303.0%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$15; dollar share remained 0.0%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$30.2 thousand to \$76.5 thousand (+153.4%); dollar share decreased from 5.8% to 3.6%.

Menthol-flavored nicotine pouch dollar sales increased from \$16.0 thousand to \$27.2 thousand (+70.1%); dollar share decreased from 3.1% to 1.3%.

Original/Smooth nicotine pouch dollar sales increased from \$12.6 thousand to \$105.8 thousand (+739.6%); dollar share increased from 2.4% to 5.0%.

Mint-flavored nicotine pouch dollar sales increased from \$356.4 thousand to \$1.4 million (+297.0%); dollar share decreased from 68.2% to 67.2%.

All other-flavored nicotine pouch dollar sales increased from \$107.7 thousand to \$482.6 thousand (+348.1%); dollar share increased from 20.6% to 22.9%.

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