

Monitoring E-Cigarette Sales: National Trends

This report highlights trends from February 2019 to September 2025.

Notice of Brief Formatting and Revision to Previous Data Estimates

- For the best viewing experience, please open this PDF in Google Chrome. Some features or formatting may not display correctly in other browsers or PDF viewers.
- The data in this brief have been updated to capture new e-cigarette products coded by Circana (formerly IRI). Historical sales estimates may differ from previous briefs.

Federal Regulatory Actions

- In February 2020, the U.S. Food and Drug Administration (FDA) began prioritizing enforcement of existing regulations against prefilled e-cigarette cartridges in flavors other than tobacco and menthol. This prioritization did not apply to e-liquid bottles or single-use disposable e-cigarettes.
- FDA began issuing marketing denial orders for flavored e-cigarette products as of August 26, 2021.
- As of January 2026, FDA has authorized 39 e-cigarette products to be marketed in the U.S.¹ These are the only products that may lawfully be sold in the U.S.
- Beginning April 14, 2022, FDA had the authority to regulate products containing nicotine from any source, including synthetic nicotine.

Key Findings

Total E-Cigarettes:

- During the 6-month period ending on September 7, 2025, the total number of e-cigarette products sold in the U.S. reached 6,889 products,² of which 6,432 (93.4%) were disposable e-cigarettes.
- From February 2, 2020, to September 7, 2025, total monthly e-cigarette unit sales increased by 16.9% (15.5 million units to 18.1 million units); and non-tobacco-flavored e-cigarette sales (mint, menthol, clear/other cooling and other flavors) increased by 28.8% (11.1 million units to 14.3 million units). By September 7, 2025, non-tobacco-flavored e-cigarette sales accounted for 79.0% of total unit sales.
- From February 2, 2020, to September 7, 2025, the total amount of e-cigarette nicotine sold per month increased by 189.2% (2.7 billion to 7.7 billion milligrams). This increase was 11.2 times greater than the 16.9 increase in standardized unit sales. (Units of e-cigarettes are not adjusted to account for variations in unit size. Milligrams of nicotine sold, on the other hand, accounts for recent increases in the amount of e-liquid contained in disposable e-cigarettes.)
- The top 10 brands during the period spanning July 13, 2025, through September 7, 2025, were (in descending order of dollar sales) Vuse, JUUL, Geek Bar Pulse, Breeze Smoke, RAZ, NJOY, Breeze Prime, HQD, Loon Maxx and Lava Plus. The top 5 brands and top 10 brands accounted for 72.9% and 81.6% of total dollar sales, respectively.
- Geek Bar Pulse and RAZ, ranked among the top five brands nationally in this data brief, contain product models considered “smart” vapes (vapes that incorporate technologies such as digital screens, animations, interactive notifications and power level/usage indicators).³
- The 2024 National Youth Tobacco Survey (NYTS) found that 7.8% (1.21 million) of high school and 3.5% (410,000) of middle school students currently used e-cigarettes. Among those who currently used e-cigarettes, 87.6% used flavored e-cigarettes.⁴

Flavored Disposable E-Cigarettes:

- From February 2, 2020, to September 7, 2025, disposable e-cigarette sales increased by 154.4% (4.0 million units to 10.2 million units); their unit share increased from 26.0% to 56.5% of total e-cigarette sales. As of September 7, 2025, 91.7% of disposable e-cigarette unit sales were of non-tobacco flavors.
- Among youth who used e-cigarettes in 2024, 55.6% used disposable e-cigarettes (NYTS).⁴

Menthol-flavored E-Cigarettes:

- From February 2, 2020, to September 7, 2025, overall menthol-flavored e-cigarette sales increased by 10.4% (5.1 million units to 5.6 million units). Menthol-flavored cartridge sales increased by 3.4% (4.7 million units to 4.9 million units). As of September 7, 2025, menthol-flavored e-cigarette sales accounted for 31.0% of the overall e-cigarette market and 62.3% of the prefilled cartridge market.
- Among youth who used flavored e-cigarettes in 2024, 15.1% used menthol flavor (NYTS).⁴

Relevant Issues

- During 2020–2025, additional flavored tobacco products continued to be marketed (e.g., flavored cigars) or entered the market (e.g., nicotine pouches).
- Following California’s prohibition of flavored tobacco product sales in December 2022, sales of products branded as clear, clear ice and unflavored, likely containing non-menthol synthetic cooling agents, increased (e.g., Flum Pebble Clear, EB Design BC5000 Clear). These products are categorized as Clear/Other Cooling in this data brief.
- The e-cigarette or vaping product use-associated lung injury (EVALI) outbreak in late 2019 and COVID-19 pandemic may have affected e-cigarette sales.

Conclusion

- Restrictions that exempt certain flavors and product types likely shift sales to the products and flavors that remain on the market. Policies that prohibit the sale of all flavored tobacco products, including flavored e-cigarettes, reduce tobacco product sales and use of tobacco products.⁵

1. U.S. Food and Drug Administration. Searchable Tobacco Products Database. <https://www.accessdata.fda.gov/scripts/searchtobacco/> (accessed January 15, 2026).

2. Number of e-cigarette products is counted as the number of unique UPCs (Universal Product Codes) in Circana data. Packaging differences (e.g., differing number of cartridges, multi-packs) can result in new UPCs.

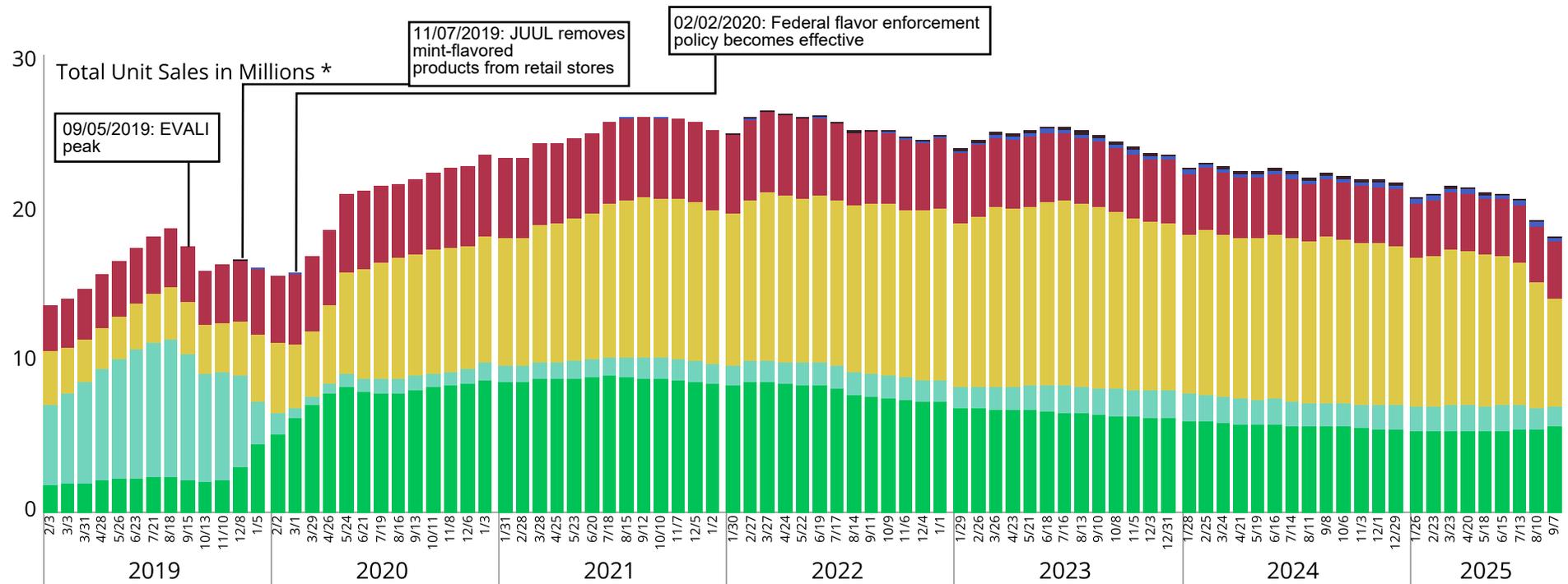
3. Bertrand A, Diaz MC, Goyette R, et al. Tracking technology changes of e-cigarettes: characteristics and capabilities of new smart vape devices. *Tobacco Control* Published Online First: 17 August 2024. doi: 10.1136/tc-2024-058862

4. Park-Lee E, Jamal A, Cowan H, et al. Notes from the Field: E-Cigarette and Nicotine Pouch Use Among Middle and High School Students — United States, 2024. *MMWR Morb Mortal Wkly Rep* 2024;73:774–778

5. U.S. Department of Health and Human Services. *Eliminating tobacco-related disease and death: addressing disparities—A report of the Surgeon General*. Atlanta (GA): U.S. Department of Health and Human Services, Centers for Disease Control and Prevention, National Center for Chronic Disease Prevention and Health Promotion, Office on Smoking and Health; 2024.

Figure 1. National E-Cigarette Unit Sales by Flavor

■ Menthol
 ■ Mint
 ■ All Other Flavors †
 ■ Tobacco-Flavored
 ■ Clear/Other Cooling †
 ■ Unknown



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

† "All other flavors" category includes fruit, clove/spice, chocolate, alcoholic drink (e.g., wine, cognac or other cocktails), candy/desserts/other sweets, some other flavor; "clear/other cooling" category includes products with flavor names such as clear, clear ice or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Flum Pebble Clear, EB Design BC5000 Clear) and which observe an increase in sales following California's flavored tobacco product sales restrictions beginning December 2022.

Trends of Unit Sales by Flavor Following FDA's Flavor Enforcement Policy

From 2/2/2020 to 9/7/2025, unless otherwise specified

Total monthly e-cigarette sales increased from 15.5 million to 18.1 million (+16.9%).

Tobacco-flavored e-cigarette sales decreased from 4.4 million to 3.7 million (-16.2%); unit share decreased from 28.3% to 20.3%.

Non-tobacco-flavored e-cigarette sales increased from 11.1 million to 14.3 million (+28.8%); unit share increased from 71.7% to 79.0%.

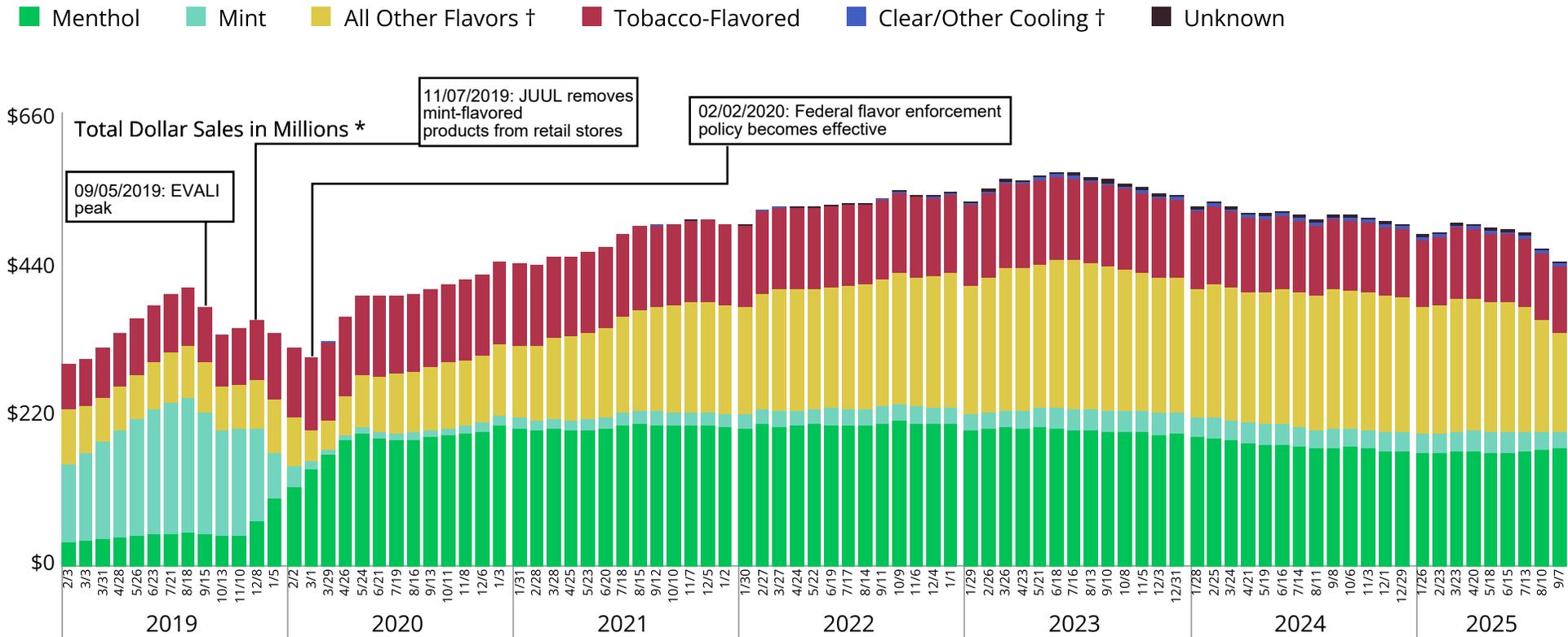
Menthol-flavored e-cigarette sales increased from 5.1 million to 5.6 million (+10.4%); unit share decreased from 32.9% to 31.0%.

Mint-flavored e-cigarette sales decreased from 1.4 million to 1.3 million (-6.6%); unit share decreased from 9.1% to 7.2%.

Other-flavored e-cigarette sales increased from 4.6 million to 7.1 million (+55.0%); unit share increased from 29.7% to 39.3%.

Between 12/4/2022 and 9/7/2025 clear/other cooling flavored e-cigarette sales increased from 84.1 thousand to 244.8 thousand (+190.9%); unit share increased from 0.3% to 1.4%.

Figure 2. National E-Cigarette Dollar Sales by Flavor



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024).
 † "All other flavors" category includes fruit, clove/spice, chocolate, alcoholic drink (e.g., wine, cognac or other cocktails), candy/desserts/other sweets, some other flavor; "clear/other cooling" category includes products with flavor names such as clear, clear ice or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Flum Pebble Clear, EB Design BC5000 Clear) and which observe an increase in sales following California's flavored tobacco product sales restrictions beginning December 2022.

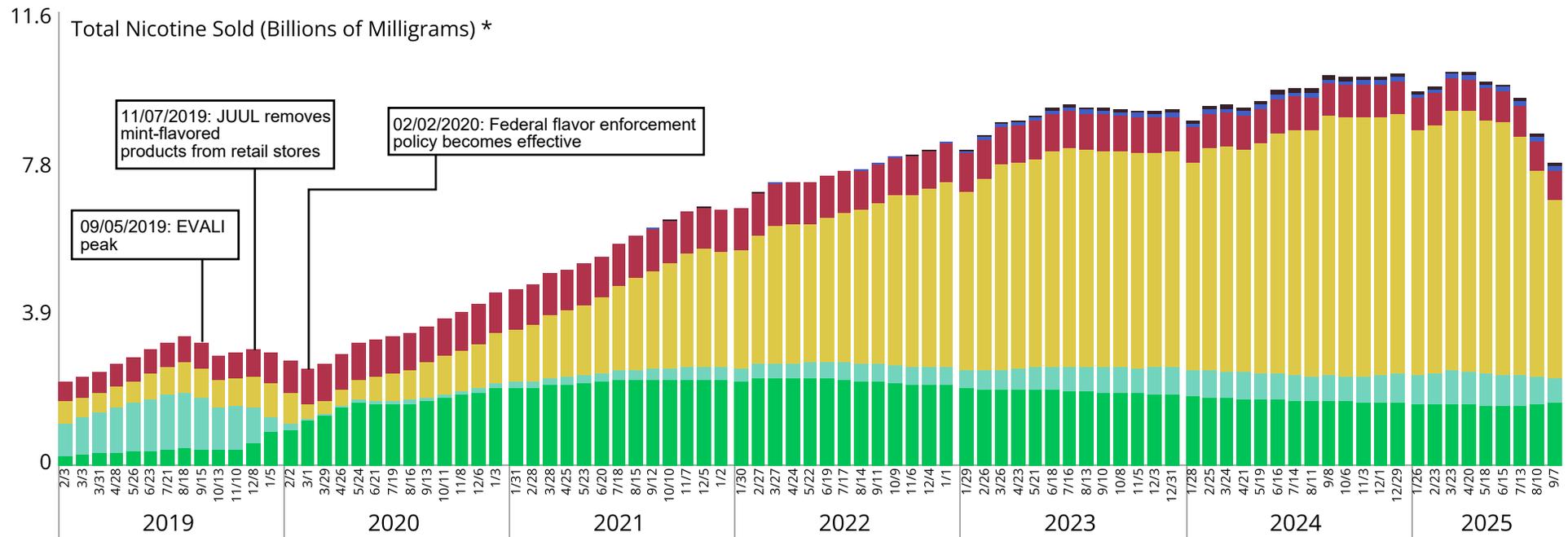
Trends of Dollar Sales by Flavor Following FDA's Flavor Enforcement Policy

From 2/2/2020 to 9/7/2025, unless otherwise specified

- Total monthly e-cigarette sales increased from \$317.2 million to \$443.4 million (+39.8%).
- Mint-flavored e-cigarette sales decreased from \$31.0 million to \$24.2 million (-21.8%); dollar share decreased from 9.8% to 5.5%.
- Tobacco-flavored e-cigarette sales decreased from \$99.4 million to \$96.9 million (-2.6%); dollar share decreased from 31.3% to 21.8%.
- Other-flavored e-cigarette sales increased from \$72.0 million to \$143.0 million (+98.7%); dollar share increased from 22.7% to 32.3%.
- Non-tobacco-flavored e-cigarette sales increased from \$217.7 million to \$343.6 million (+57.8%); dollar share increased from 68.7% to 77.5%.
- Between 12/4/2022 and 9/7/2025 clear/other cooling flavored e-cigarette sales increased from \$1.4 million to \$4.0 million (+187.0%); dollar share increased from 0.3% to 0.9%.
- Menthol-flavored e-cigarette sales increased from \$114.7 million to \$172.4 million (+50.3%); dollar share increased from 36.2% to 38.9%.
- Differences between trends in unit sales and dollar sales could be due, in part, to inflation and the recent increase in large-format disposable e-cigarettes that allow for thousands of puffs. Higher price per device of large-format disposable e-cigarettes might account for declines in unit sales without comparable declines in dollar sales.

Figure 3. National Trends: Total Nicotine Sold (in Milligrams) by Flavor of E-Cigarette

■ Menthol
 ■ Mint
 ■ All Other Flavors †
 ■ Tobacco-Flavored
 ■ Clear/Other Cooling †
 ■ Unknown



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Total nicotine sold (mg) was calculated for each product by multiplying the e-liquid volume (mL) by the nicotine concentration (mg/mL) and the unit sales, then summing the results across all e-cigarette products sold.

† "All other flavors" category includes fruit, clove/spice, chocolate, alcoholic drink (e.g., wine, cognac or other cocktails), candy/desserts/other sweets, some other flavor; "clear/other cooling" category includes products with flavor names such as clear, clear ice or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Flum Pebble Clear, EB Design BC5000 Clear) and which observe an increase in sales following California's flavored tobacco product sales restrictions beginning December 2022.

Trends of Total Nicotine Sold (in Milligrams) by Flavor of E-Cigarette Following FDA's Flavor Enforcement Policy

From 2/2/2020 to 9/7/2025, unless otherwise specified

Following FDA's flavor enforcement policy, the total amount of e-cigarette nicotine sold per month increased from 2.7 billion to 7.7 billion milligrams (+189.2%). This increase was 11.2 times greater than the 16.9% increase in standardized unit sales.

The total amount of nicotine sold in tobacco-flavored e-cigarettes decreased from 820.3 million to 753.1 million milligrams (-8.2%); share of nicotine sold decreased from 30.6% to 9.7%.

The total amount of nicotine sold in non-tobacco-flavored e-cigarettes increased from 1.9 billion to 6.9 billion milligrams (+272.4%); share of nicotine sold increased from 69.4% to 89.3%.

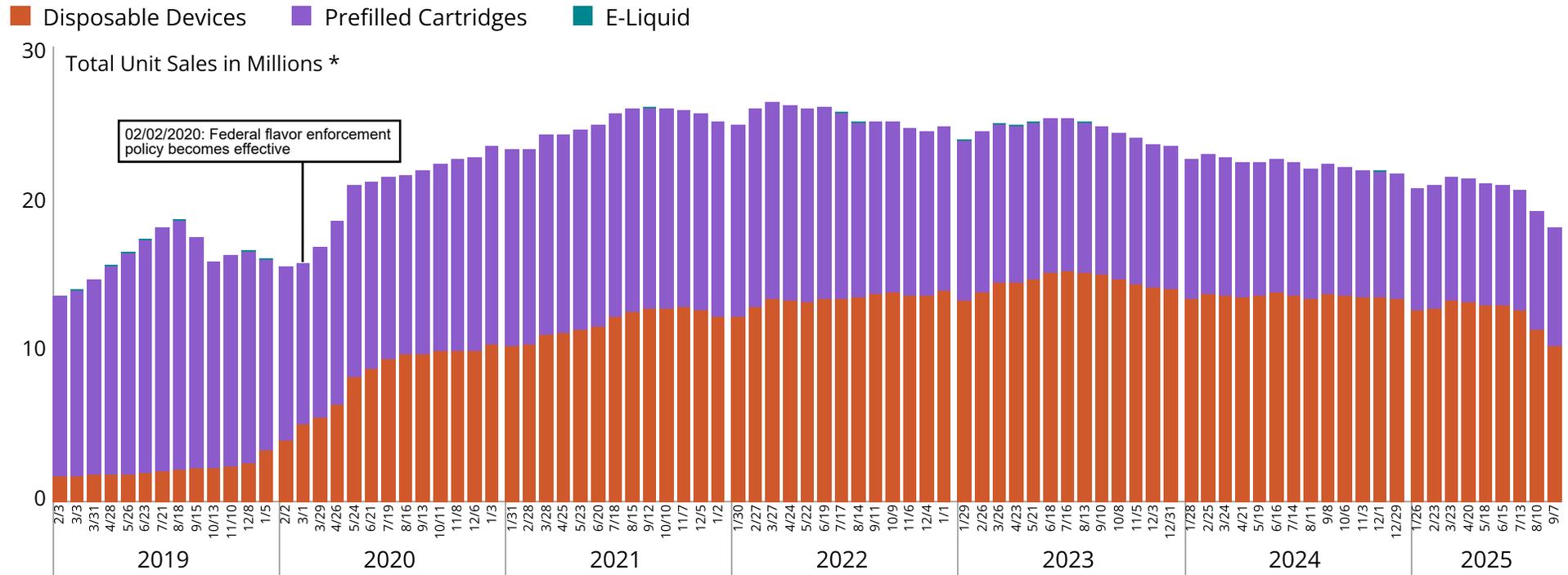
The total amount of nicotine sold in menthol-flavored e-cigarettes increased from 908.1 million to 1.6 billion milligrams (+76.0%); share of nicotine sold decreased from 33.9% to 20.6%.

The total amount of nicotine sold in mint-flavored e-cigarettes increased from 186.0 million to 648.3 million milligrams (+248.5%); share of nicotine sold increased from 6.9% to 8.4%.

The total amount of nicotine sold in all other-flavored e-cigarettes increased from 763.2 million to 4.6 billion milligrams (+498.5%); share of nicotine sold increased from 28.5% to 59.0%.

Between 12/4/2022 and 9/7/2025 the total amount of nicotine sold in clear/other cooling flavored e-cigarettes increased from 30.2 million to 105.8 million milligrams (+250.7%); share of nicotine sold increased from 0.4% to 1.4%.

Figure 4. National E-Cigarette Unit Sales by Product Type



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

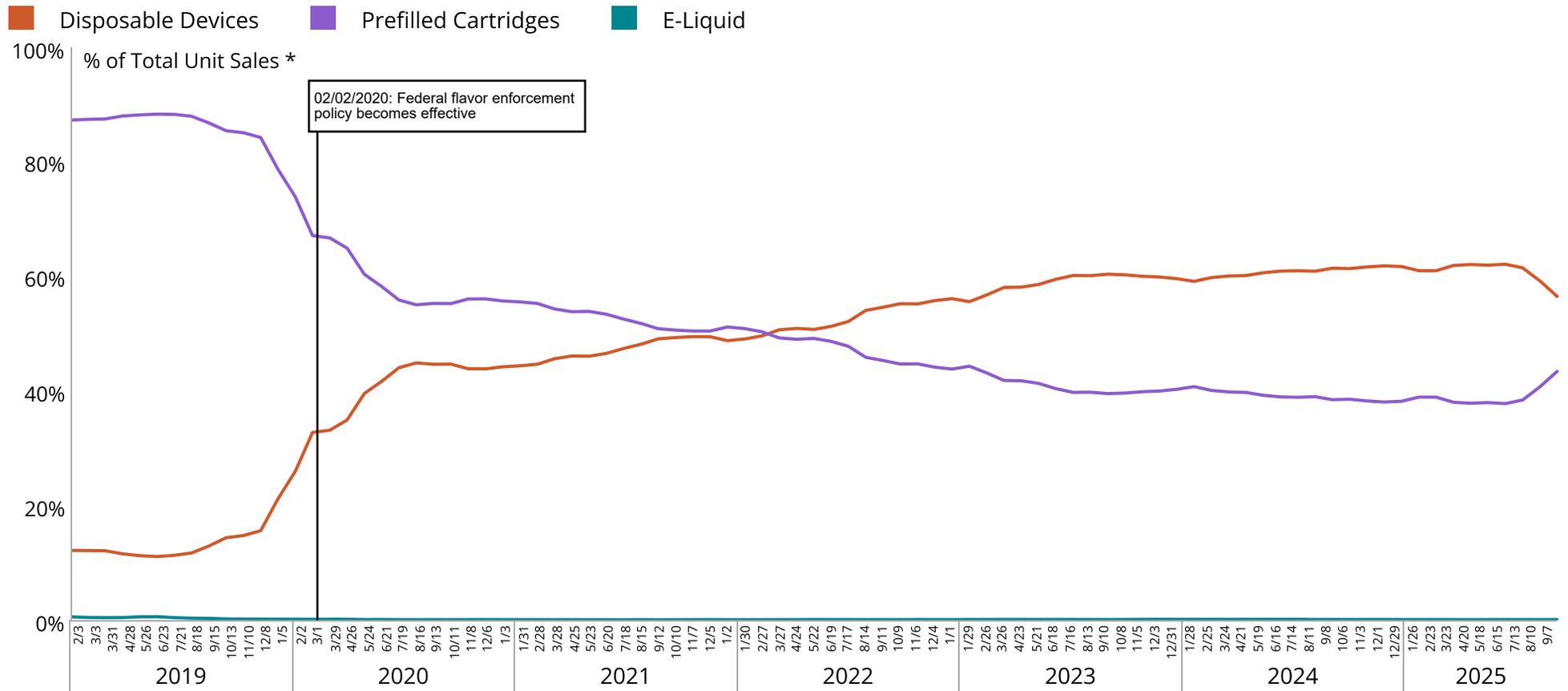
Trends of Unit Sales by Product Following FDA’s Flavor Enforcement Policy

From 2/2/2020 to 9/7/2025

Sales of disposable devices increased from 4.0 million to 10.2 million (+154.4%); unit share increased from 26.0% to 56.5%.

Sales of prefilled cartridges decreased from 11.5 million to 7.9 million (-31.3%); unit share decreased from 73.9% to 43.4%.

Figure 5. National E-Cigarette Unit Share by Product Type



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

Trends of Unit Share by Product Following FDA’s Flavor Enforcement Policy

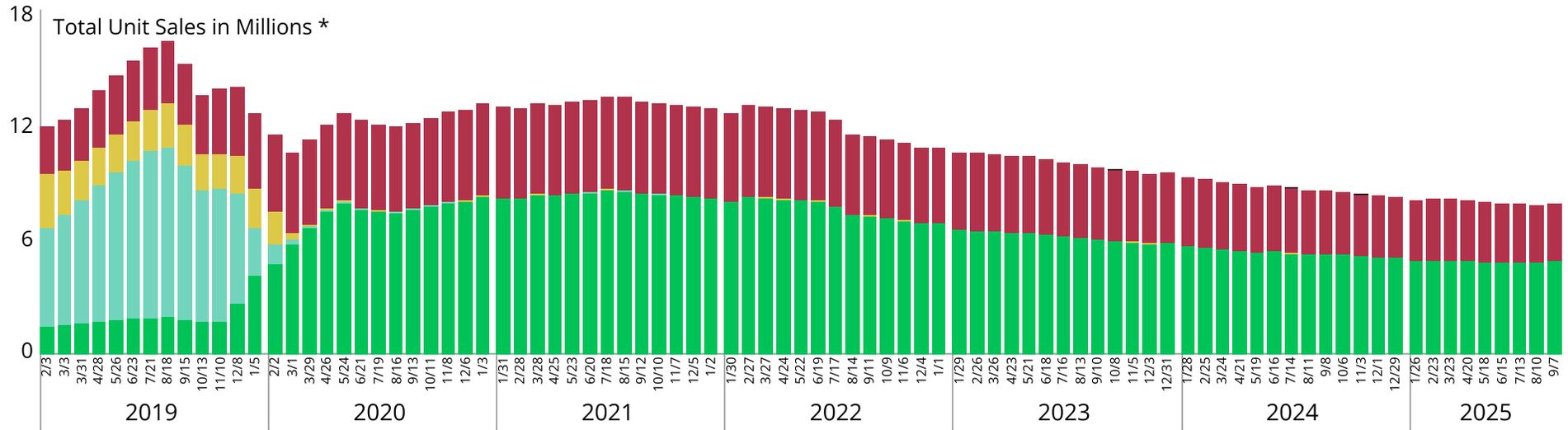
From 2/2/2020 to 9/7/2025

- Unit share of disposable devices increased from 26.0% to 56.5%.
- Unit share of prefilled cartridges decreased from 73.9% to 43.4%.

Figure 6. National E-Cigarette Unit Sales by Product Type and Flavor

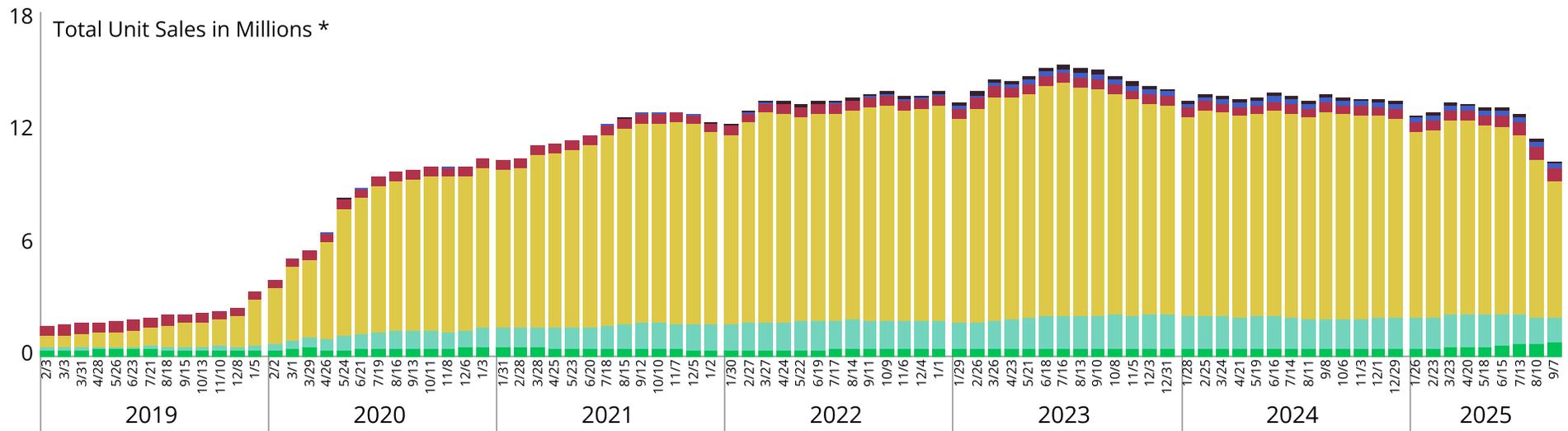
Prefilled Cartridges

■ Menthol
 ■ Mint
 ■ All Other Flavors †
 ■ Tobacco-Flavored
 ■ Clear/Other Cooling †
 ■ Unknown



Disposable Devices

■ Menthol
 ■ Mint
 ■ All Other Flavors †
 ■ Tobacco-Flavored
 ■ Clear/Other Cooling †
 ■ Unknown

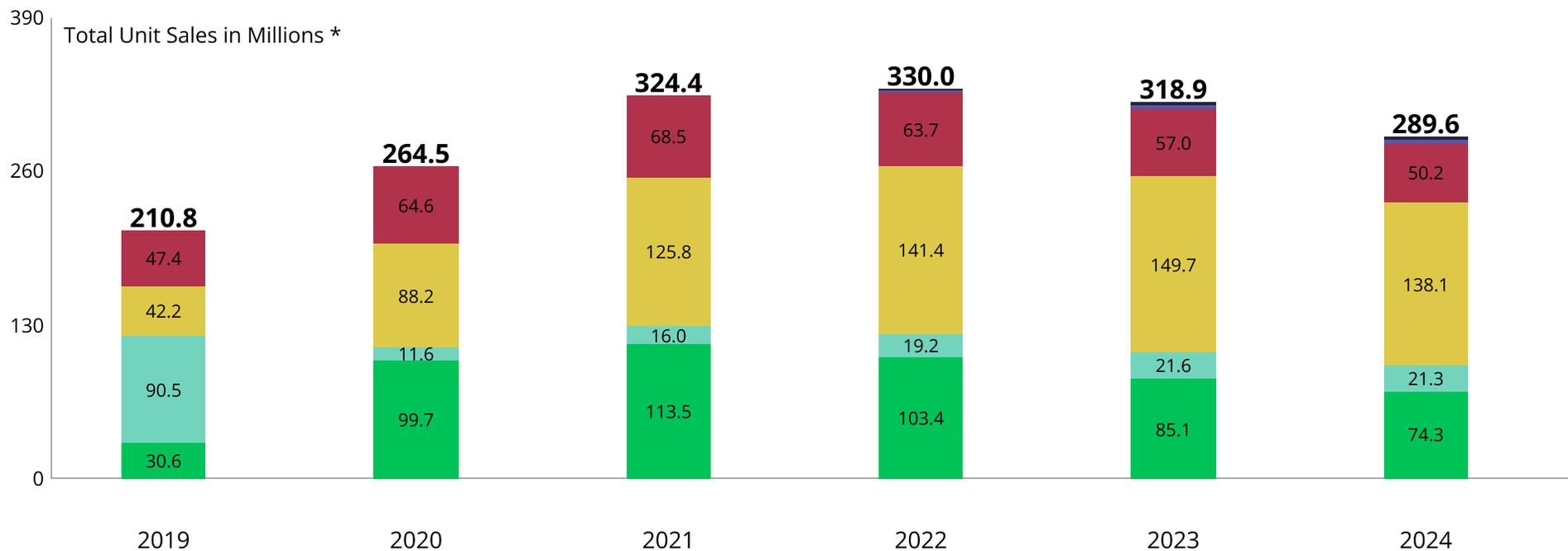


* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

† "All other flavors" category includes fruit, clove/spice, chocolate, alcoholic drink (e.g., wine, cognac or other cocktails), candy/desserts/other sweets, some other flavor; "clear/other cooling" category includes products with flavor names such as clear, clear ice or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Flum Pebble Clear, EB Design BC5000 Clear) and which observe an increase in sales following California's flavored tobacco product sales restrictions beginning December 2022.

Figure 7. National E-Cigarette Unit Sales By Flavor, Annual Estimates

■ Menthol
 ■ Mint
 ■ All Other Flavors †
 ■ Tobacco-Flavored
 ■ Clear/Other Cooling †
 ■ Unknown



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

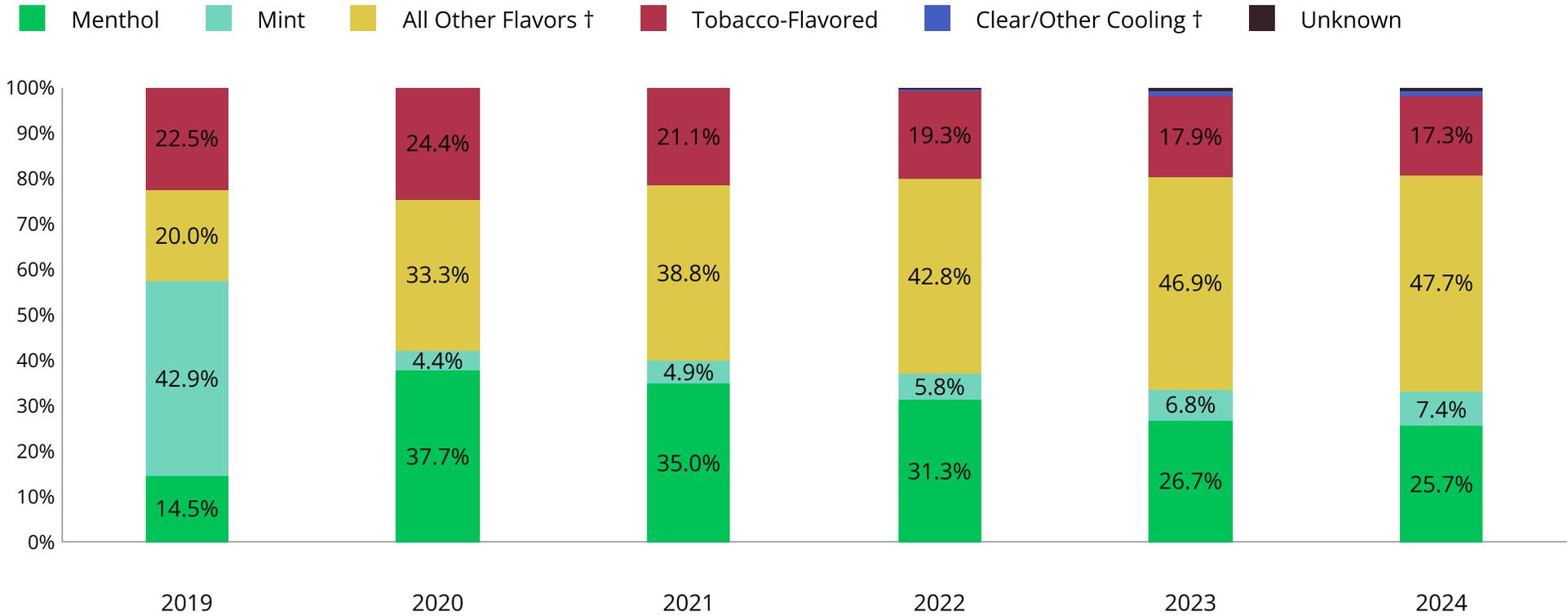
† "All other flavors" category includes fruit, clove/spice, chocolate, alcoholic drink (e.g., wine, cognac or other cocktails), candy/desserts/other sweets, some other flavor; "clear/other cooling" category includes products with flavor names such as clear, clear ice or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Flum Pebble Clear, EB Design BC5000 Clear) and which observe an increase in sales following California's flavored tobacco product sales restrictions beginning December 2022.

Unit Sales Annual Trends by Flavor

From 2023 to 2024

- Annual total e-cigarette unit sales decreased from 318.9 million to 289.6 million (-9.2%).
- Unit sales of tobacco-flavored e-cigarettes decreased from 57.0 million to 50.2 million (-12.0%).
- Unit sales of non-tobacco-flavored e-cigarettes decreased from 259.2 million to 237.0 million (-8.6%).
- Unit sales of menthol-flavored e-cigarettes decreased from 85.1 million to 74.3 million (-12.7%).
- Unit sales of mint-flavored e-cigarettes decreased from 21.6 million to 21.3 million (-1.3%).
- Unit sales of other-flavored e-cigarettes decreased from 149.7 million to 138.1 million (-7.7%).
- Unit sales of clear/other cooling flavored e-cigarettes increased from 2.8 million to 3.3 million (+16.3%).

Figure 8. Annual Unit Share of National E-Cigarette Unit Sales by Flavor



† "All other flavors" category includes fruit, clove/spice, chocolate, alcoholic drink (e.g., wine, cognac or other cocktails), candy/desserts/other sweets, some other flavor; "clear/other cooling" category includes products with flavor names such as clear, clear ice or unflavored, which likely contain non-menthol synthetic cooling agents (e.g., Flum Pebble Clear, EB Design BC5000 Clear) and which observe an increase in sales following California's flavored tobacco product sales restrictions beginning December 2022.

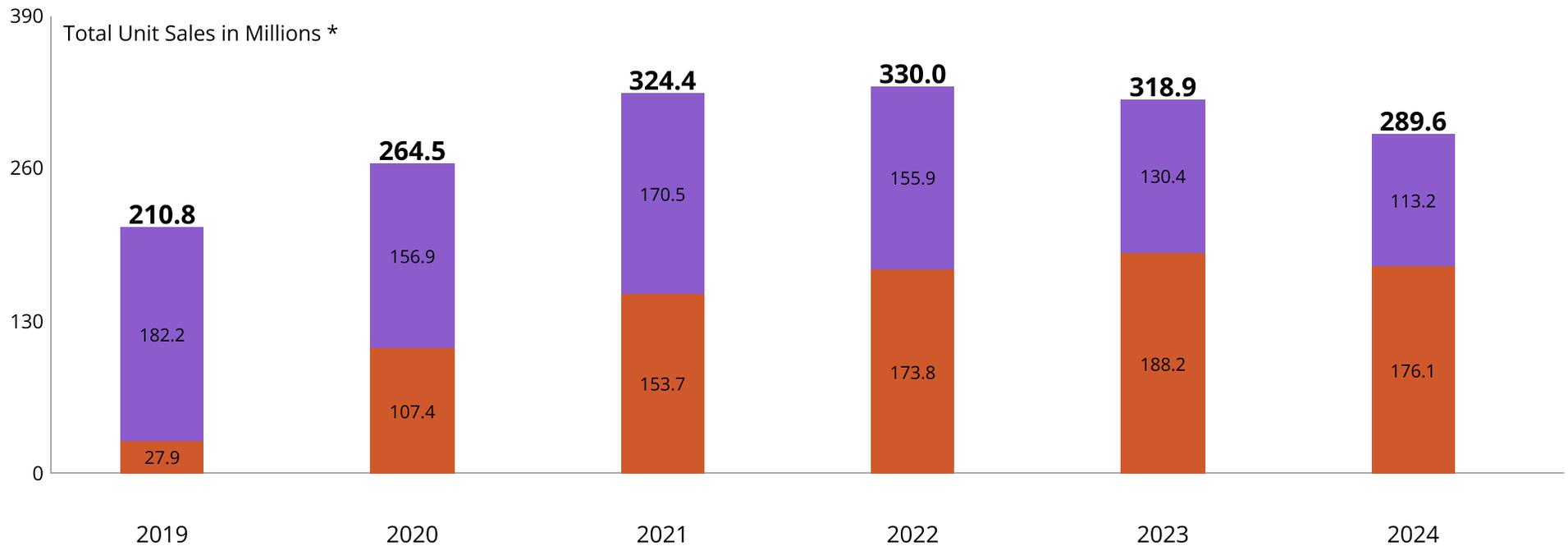
Unit Share Annual Trends by Flavor

From 2023 to 2024

- Unit share of tobacco-flavored e-cigarette sales decreased from 17.9% to 17.3%.
- Unit share of non-tobacco-flavored e-cigarette sales increased from 81.3% to 81.8%.
- Unit share of menthol-flavored e-cigarette sales decreased from 26.7% to 25.7%.
- Unit share of mint-flavored e-cigarette sales increased from 6.8% to 7.4%.
- Unit share of other-flavored e-cigarette sales increased from 46.9% to 47.7%.
- Unit share of clear/other cooling flavored e-cigarette sales increased from 0.9% to 1.1%.

Figure 9. National E-Cigarette Unit Sales By Product Type, Annual Estimates

■ Disposable Devices
 ■ Prefilled Cartridges
 ■ E-Liquid



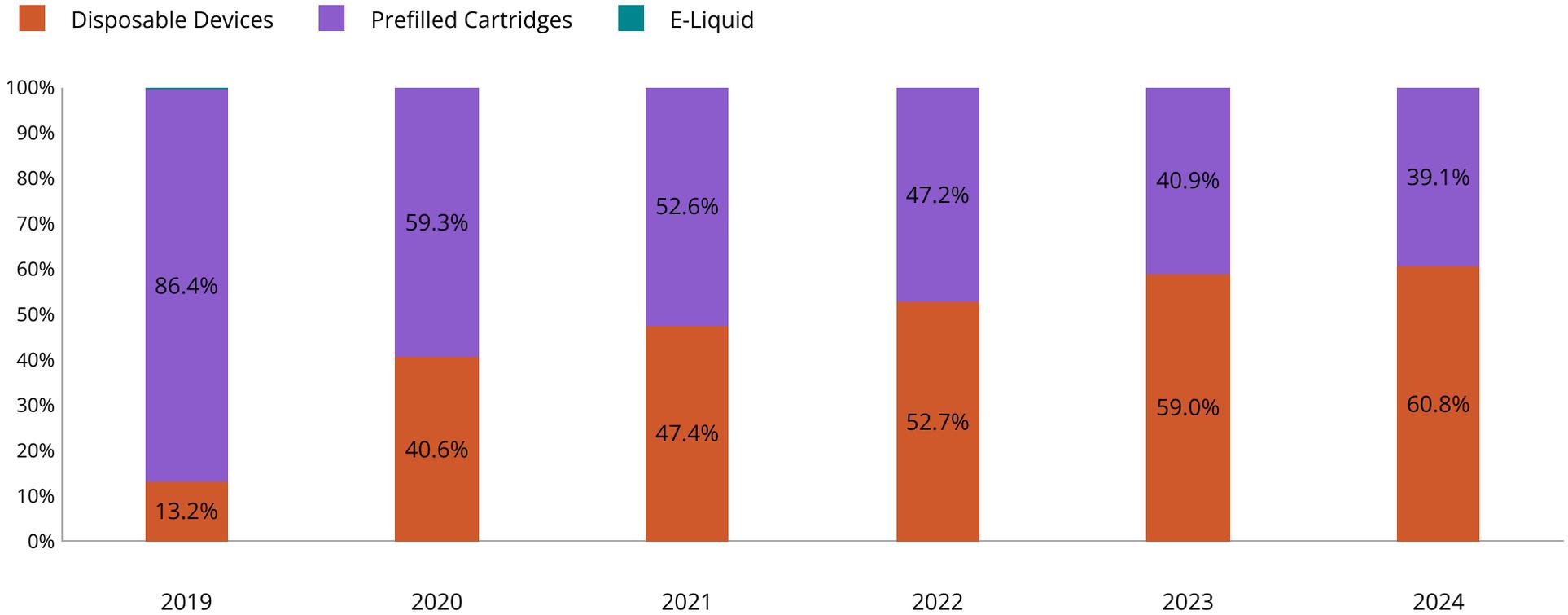
* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

Unit Sales Annual Trends by Product

From 2023 to 2024

- Total e-cigarette unit sales decreased from 318.9 million to 289.6 million (-9.2%).
- Unit sales of disposable e-cigarettes decreased from 188.2 million to 176.1 million (-6.4%).
- Unit sales of prefilled cartridges decreased from 130.4 million to 113.2 million (-13.2%).

Figure 10. Annual Unit Share of National E-Cigarette Unit Sales by Product Type



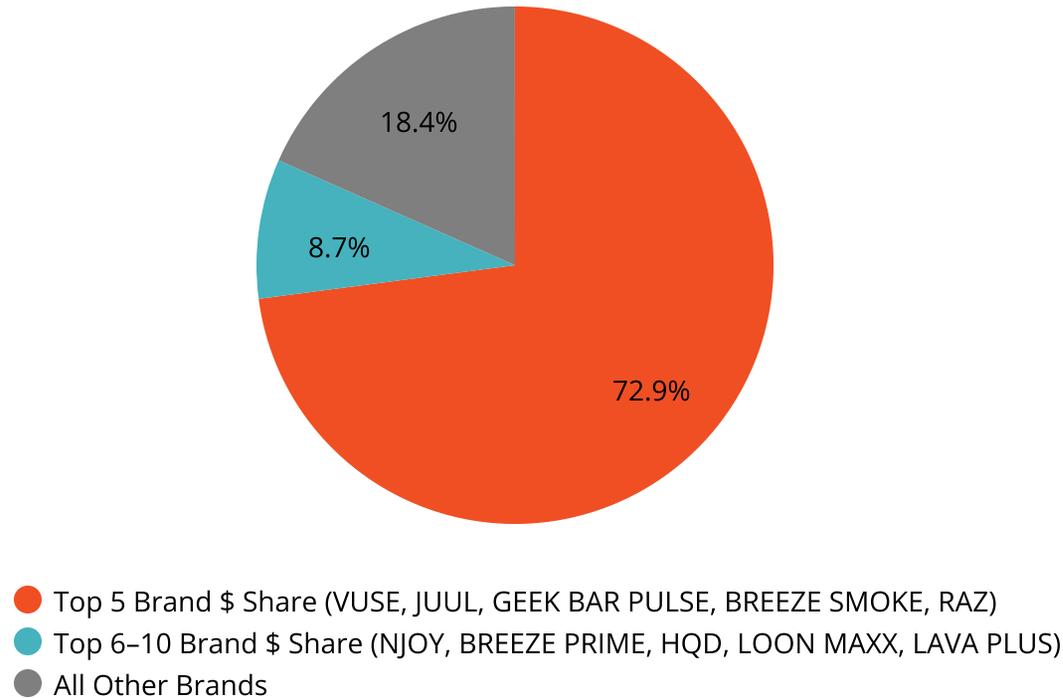
Unit Share Annual Trends by Product

From 2023 to 2024

- Unit share of disposable e-cigarette sales increased from 59.0% to 60.8%.
- Unit share of prefilled cartridge e-cigarette sales decreased from 40.9% to 39.1%.

Figure 11. Dollar Market Share of Top Brands **

Percent Total Market (Dollar) Share (Circana Syndicated Category: Electronic Smoking Devices)



* Sales data do not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; e-cigarette accessories and devices sold without e-liquids were excluded (1.5% of total dollar sales in 2024). Unit sales were standardized to reflect the most common package size for each product type. A standardized unit was equal to five prefilled cartridges, one disposable device or one e-liquid bottle.

** Brands included here are presented as they are described within Circana data (therein labelled BrandFranchiseName); the CDC Foundation has not performed additional aggregation. Some brands (such as Vuse) may aggregate several product lines, whereas others (such as Breeze) may be listed separately.

Dollar share by top brand aggregates

From 7/13/2025 to 9/7/2025

The top 10 brands were (in descending order of dollar sales) VUSE, JUUL, GEEK BAR PULSE, BREEZE SMOKE, RAZ, NJOY, BREEZE PRIME, HQD, LOON MAXX and LAVA PLUS.

The top 5 brands and top 10 brands accounted for 72.9% and 81.6% of dollar sales, respectively.