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Changes in U.S. and State Cigarette Sales Following Flavored Tobacco Sales Restrictions (2019–2025)

What's the Bottom Line?

- Cigarette sales have declined substantially during the past seven 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 have also declined in states with laws restricting the sale of flavored e-cigarettes only, but these declines were more modest than the declines in states with comprehensive flavored tobacco restrictions.

Background

- Menthol flavoring in cigarettes makes it easier to start and harder to stop smoking.[1] Menthol cigarettes are the highest selling flavored tobacco product in the U.S.[2]
- This brief describes cigarette sales trends in the total U.S. and in states with flavored tobacco sales restrictions during the periods 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 restrict the sale of most flavored e-cigarettes, but do not restrict the sale of other flavored tobacco products.

[1] Centers for Disease Control and Prevention. (2024, May 15). Menthol tobacco products. https://www.cdc.gov/tobacco/menthol-tobacco/index.html

[2] Custom analysis by the CDC Foundation using Circana POS, Total U.S. Multi-Outlet and Convenience data. In 2024, menthol cigarette sales alone were $18.7 billion in Circana's channels, exceeding *total* dollar sales for any other tobacco product category.

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.
- There was a greater decline in cigarette sales in Massachusetts and California, which have comprehensive flavor restrictions, than in New York and Rhode Island, which only restrict the sale of flavored e-cigarettes.
- States that only restrict flavored e-cigarettes did not experience any long-term increases in cigarette sales. Cigarette sales in New York and Rhode Island declined from 2020 to 2025.
- 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.

Disclosure: The data in this brief have been updated to capture new products coded by Circana. Historical sales estimates may differ from previous briefs.

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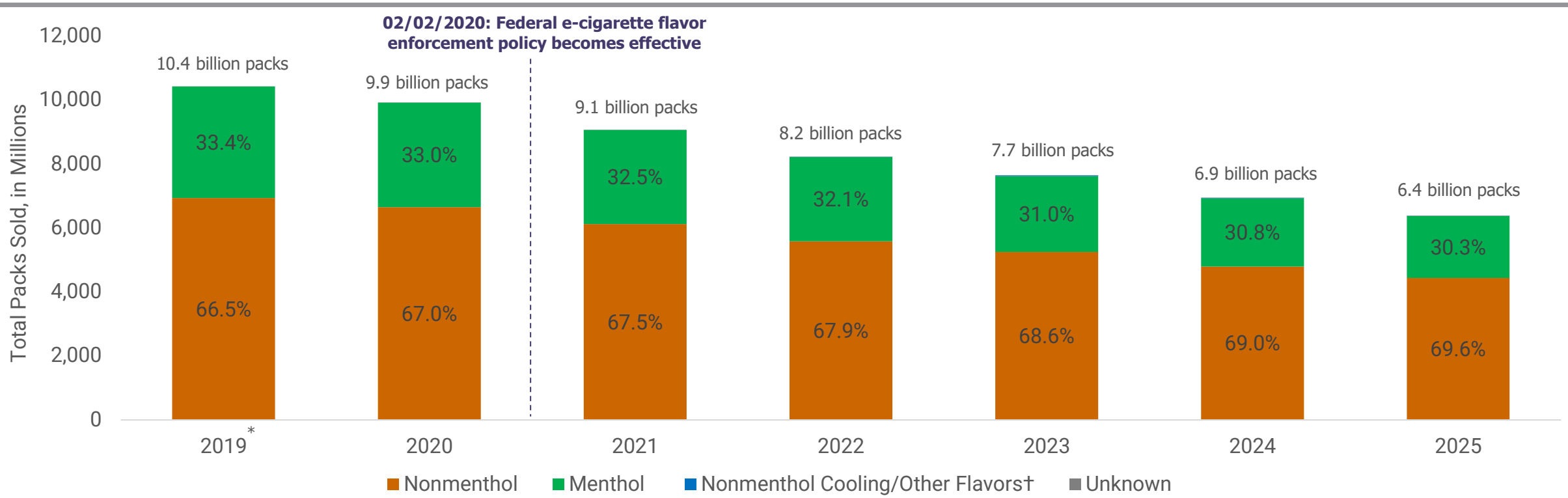
Figure 1. Cigarette Pack Sales by Flavor, United States, 2019–2025



*2019 data are no longer maintained or updated by Circana (formerly IRI) to reflect the current market coverage. These historic estimates are provided on a separate projection for additional context.
†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.

Year Over Year % Change	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025	% change 2019–2025
Total Sales	-4.8%	-8.6%	-9.3%	-7.0%	-9.2%	-8.2%	-38.9%
• Menthol sales	-6.2%	-9.9%	-10.3%	-10.1%	-10.0%	-9.5%	-44.5%
• Nonmenthol sales	-4.1%	-7.9%	-8.8%	-6.0%	-8.6%	-7.4%	-36.0%
• Nonmenthol Cooling/Other Flavors† sales	--	--	+0.7 million packs‡	+25.7 million packs‡	-13.0 million packs‡	-13.0 million packs%‡	+0.3 million packs‡

‡Change in units is presented for Nonmenthol Cooling/Other Flavors for 2021–2022 as sales were zero or almost zero in years prior to 2022, annual percentage change is presented for subsequent years.

Percentage Changes in Cigarette Pack Sales During 2019–2025

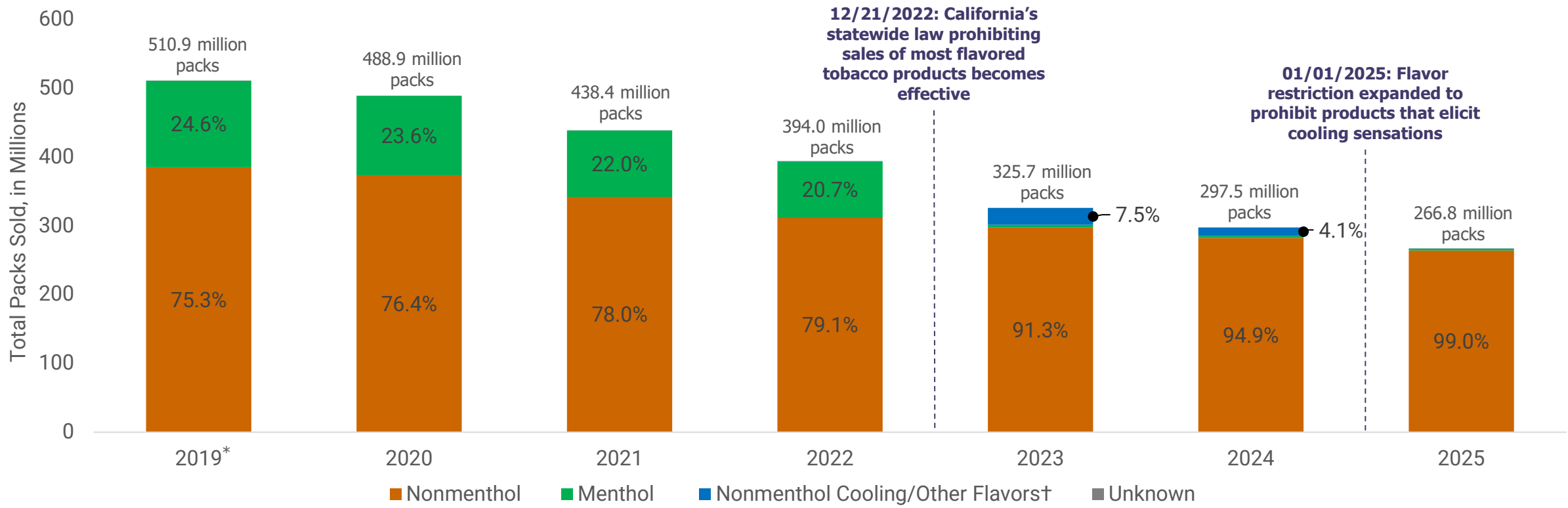
- Sales of cigarette packs consistently declined in the United States during 2019–2025. Overall, during 2019–2025, total cigarette pack sales decreased by 38.9% (4.1 billion packs).
- In 2020, FDA prioritized regulatory enforcement to restrict the marketing of prefilled e-cigarette pods/cartridges in flavors other than tobacco and menthol. Additionally, some states began restricting the sale of some or all flavored e-cigarettes. These actions did not impact the historical downward trend in cigarette sales. Total cigarette sales decreased by between 4.8%–9.3% per year during 2019–2025.

Trends in Cigarette Pack Sales During 2024–2025

- In 2025, 6.4 billion cigarette packs were sold in the United States, an 8.2% decline from the same period in 2024.
- The percentage decrease in menthol sales was greater than nonmenthol sales (9.5% vs. 7.4%).
- Unit share of menthol cigarettes was 30.8% in 2024 and 30.3% in 2025.

All estimates and analyses in this data brief are based on custom research by the CDC Foundation using Circana retail POS (Multi-Outlet and Convenience). Financial support was provided by Bloomberg Philanthropies through a grant to the CDC Foundation. 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. To account for the remaining share, Circana applies projection algorithms that ensure the released data are representative of both total U.S. and state-level sales.

Figure 2. Cigarette Pack Sales by Flavor, California, 2019–2025



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Year Over Year % Change	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025	% change 2022–2025
Total Sales	-4.3%	-10.3%	-10.1%	-17.3%	-8.7%	-10.3%	-32.3%
• Menthol sales	-8.4%	-16.4%	-15.3%	-95.3%	-24.5%	-14.9%	-97.0%
• Nonmenthol sales	-3.0%	-8.5%	-8.9%	-4.6%	-5.0%	-6.5%	-15.3%
• Nonmenthol Cooling/Other Flavors† sales	--	--	+0.7 million packs‡	+23.9 million packs‡	-12.3 million packs‡	-11.9 million packs‡	-0.4 million packs‡

‡Change in units is presented for Nonmenthol Cooling/Other Flavors for 2021–2022 as sales were zero or almost zero in years prior to 2022, annual percentage change is presented for subsequent years.

Percentage Changes in Cigarette Pack Sales During 2019–2025

- Sales of cigarette packs consistently declined year-over-year in California during 2019–2025. The percentage decrease ranged from -4.3% in 2019–2020 to -17.3% in 2022–2023. Overall, during 2019–2025, total cigarette pack sales decreased by 47.8% (244.1 million packs).
- During the 12 months (January–December 2023) following the flavored tobacco sales restriction, total cigarette sales decreased by 17.3% (68.2 million packs) compared to the previous 12 months; menthol cigarette sales decreased by 95.3% (77.9 million packs) while nonmenthol cigarette sales decreased by 4.6% (14.2 million packs).
- Annual sales of cigarettes marketed as nonmenthol, but which contained nonmenthol coolants or other flavorants, peaked at 24.5 million packs in 2023. After California's restriction was expanded to prohibit products that elicit cooling sensations, sales of these products declined to less than 300,000 packs (0.1% of all packs) in 2025—a 98.8% decrease from 2023.

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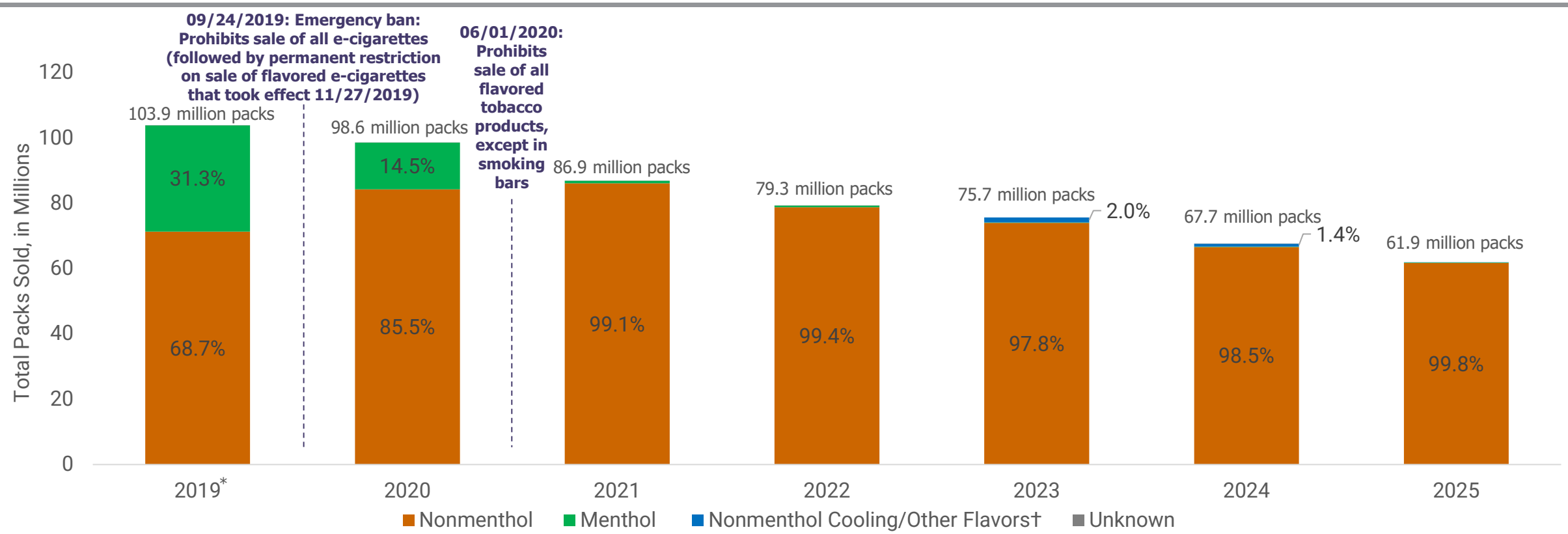
Figure 3. Cigarette Pack Sales by Flavor, Massachusetts, 2019–2025



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Year Over Year % Change	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025	% change 2019–2025
Total Sales	-5.0%	-11.9%	-8.8%	-4.6%	-10.6%	-8.6%	-40.4%
• Menthol sales	-55.9%	-94.7%	-38.1%	-70.2%	-18.5%	+1.7%	-99.6%
• Nonmenthol sales	+18.2%	+2.2%	-8.5%	-6.1%	-10.0%	-7.3%	-13.4%
• Nonmenthol Cooling/Other Flavors† sales	--	--	--	+1.5 million packs‡	-0.6 million packs‡	-0.9 million packs‡	+ <0.1 million packs‡

‡Change in units is presented for Nonmenthol Cooling/Other Flavors for 2022–2023 as sales were zero or almost zero in years prior to 2023, annual percentage change is presented for subsequent years.

Percentage Changes in Cigarette Pack Sales During 2019–2025

- Sales of cigarette packs consistently declined in Massachusetts during 2019–2025. This decline was greater after Massachusetts restricted the sale of flavored tobacco products, including menthol cigarette sales, in June 2020. Overall, during 2019–2025, total cigarette pack sales decreased by 40.4% (42.0 million packs).
- During the 12 months (July 2020–June 2021) following the flavored tobacco sales restriction, total cigarette sales decreased by 16.6% (17.8 million packs) compared to the previous 12 months; menthol cigarette sales decreased by 97.2% (31.5 million packs) while nonmenthol cigarette sales increased by 18.3% (13.7 million packs) (data not shown).
- Unit share of menthol cigarettes has remained low, roughly 0.2% of pack sales since 2023. Meanwhile, newly marketed cigarettes containing nonmenthol coolants or other flavorants continue to drop, with 1,902 packs sold in 2025.

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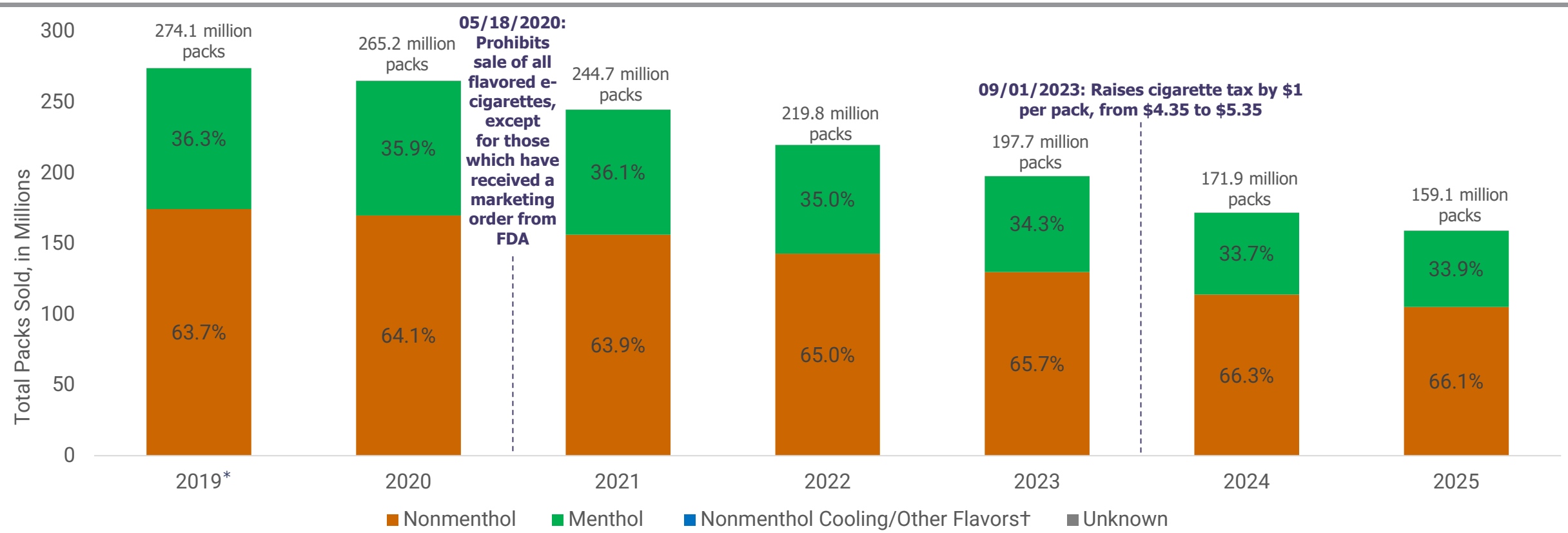
Figure 4. Cigarette Pack Sales by Flavor, New York, 2019–2025



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†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.

Year Over Year % Change	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025	% change 2019–2025
Total Sales	-3.2%	-7.7%	-10.2%	-10.0%	-13.1%	-7.4%	-42.0%
• Menthol sales	-4.3%	-7.2%	-13.1%	-11.9%	-14.5%	-7.0%	-45.9%
• Nonmenthol sales	-2.6%	-8.0%	-8.6%	-9.0%	-12.3%	-7.7%	-39.7%
• Nonmenthol Cooling/Other Flavors† sales	--	--	--	--	10 packs‡	4 packs‡	N/A

‡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.

Percentage Changes in Cigarette Pack Sales During 2019–2025

- Sales of cigarette packs consistently declined in New York during 2019–2025. Overall, during 2019–2025, total cigarette pack sales decreased by 42.0% (115.0 million packs).
- 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 4.3% (11.5 million packs) compared to the previous 12-month period; menthol cigarette sales decreased by 4.9% (4.8 million packs) and nonmenthol cigarette sales decreased by 3.9% (6.7 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).
- Over the last seven years, the share of menthol packs sold has remained roughly one third of pack sales.

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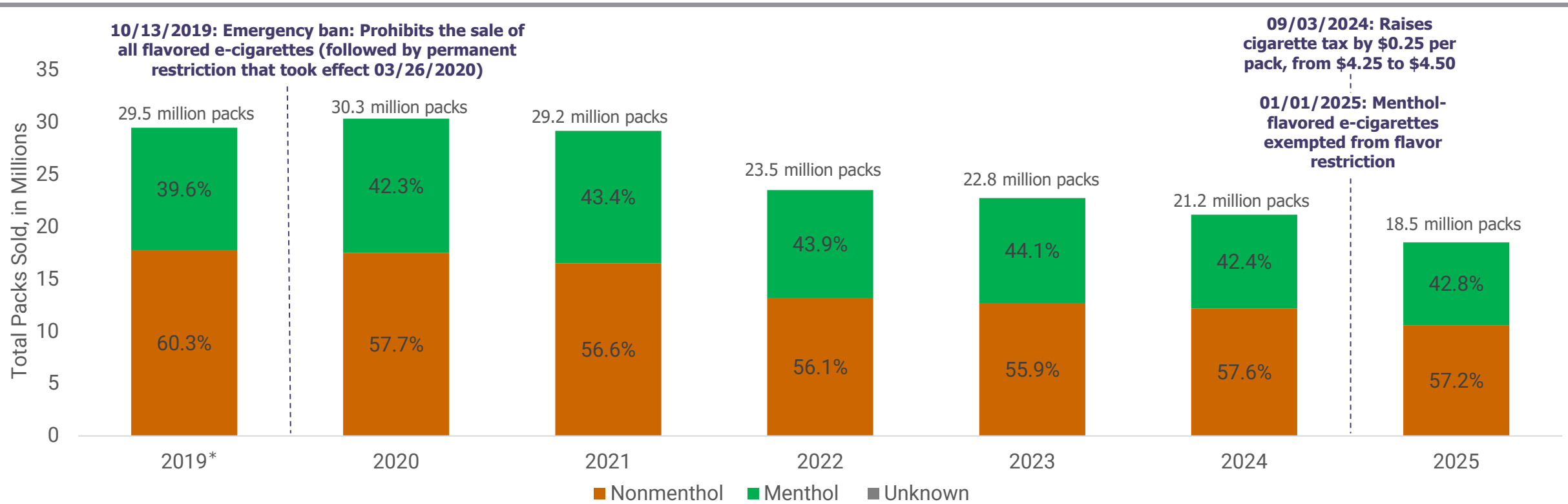
Figure 5. Cigarette Pack Sales by Flavor, Rhode Island, 2019–2025



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Year Over Year % Change	2019–2020	2020–2021	2021–2022	2022–2023	2023–2024	2024–2025	% change 2019–2025
Total Sales	+3.0%	-3.8%	-19.4%	-3.2%	-7.0%	-12.6%	-37.2%
• Menthol sales	+9.8%	-1.2%	-18.6%	-2.8%	-10.5%	-11.8%	-32.2%
• Nonmenthol sales	-1.5%	-5.7%	-20.0%	-3.6%	-4.2%	-13.1%	-40.4%
• Nonmenthol Cooling/Other Flavors† sales	--	--	--	--	--	--	N/A

Percentage Changes in Cigarette Pack Sales During 2019–2025

- Overall, during 2019–2025, total cigarette pack sales decreased by 37.2% (10.9 million packs).
- From January 2020 to October 2020, following Rhode Island's flavored e-cigarette restrictions (effective October 2019), total cigarette sales increased by 2.2% (562.3 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 8.5% (847.3 thousand packs) while nonmenthol cigarette sales decreased by 1.9% (285.3 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 (13.3 million packs) was 15 times larger than the increase in Rhode Island (847.3 thousand packs).
- Since 2021, both menthol and nonmenthol cigarette sales have been decreasing in Rhode Island. From 2021 to 2025, total pack sales decreased by 36.6%.

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