

Monitoring Sales: Nicotine Pouch Trends

This report highlights data from February 2020 to December 2025.*

What's the Bottom Line?

- Nicotine pouch sales in the United States are rapidly increasing, particularly since 2023.
- Nicotine pouches are sold in a variety of flavors that are appealing to both youth and adults;¹ most U.S. sales are mint flavored products and very few are tobacco flavored.
- Nicotine pouch sales in states that restrict the sale of flavored nicotine pouches are dominated by 1) products marketed as smooth or original but likely contain sweeteners and 2) products which provide a cooling sensation and contain sweeteners.^{2,3}

Background

- No tobacco product is safe, including nicotine pouches.¹
- 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.⁴ Nicotine is an addictive chemical that is especially dangerous for youth, young adults and pregnant people.¹
- In 2025, 2.3% of U.S. high school students and 0.9% of middle school students currently used nicotine pouches.⁵ Data from the [TEEN+ Study](#) suggest current use of nicotine pouches by youth and young adults increased nearly fourfold, between 2022 and 2025, to 3.5%.⁶
- Nicotine pouches were the second most commonly used tobacco product among youth in 2025, behind e-cigarettes.⁵
- Two states, California and Massachusetts, prohibit the sale of most tobacco products with flavors (other than tobacco flavor), including nicotine pouches.
- In 2025, the Food and Drug Administration authorized 26 nicotine pouch products from PMI (Zyn) and Altria (on! PLUS).⁷ FDA has determined that Zyn Chill and Zyn Smooth have a characterizing flavor.⁸

Key Findings

- Total U.S. monthly nicotine pouch sales increased by 269.2% between January 2023 and December 2025.
- Most nicotine pouches sold in the United States are not tobacco-flavored. As of December 2025, mint flavor accounts for 58.8% of sales, followed by other flavors (e.g., fruits, candy, drinks) at 25.2% and flavors marketed as smooth or original at 9.7%.
- In Massachusetts, nicotine pouch sales are dominated by products marketed as smooth or original, which likely contain sweeteners, and by products which provide a cooling sensation and contain sweeteners.
- In California, which now prohibits the sale of tobacco products with a distinguishable cooling sensation, nicotine pouch sales are dominated by products marketed as smooth or original.
- In states without sales restrictions on flavored nicotine pouches, mint and all other flavors (e.g., fruits, candy, drinks) are the most commonly sold flavors.

1. Centers for Disease Control and Prevention. (2024, September 17). *Nicotine pouches*. Centers for Disease Control and Prevention. <https://www.cdc.gov/tobacco/nicotine-pouches>

2. Jabba, S. V., Erythropel, H. C., Woodrow, J. G., Anastas, P. T., O'Malley, S., Krishnan-Sarin, S., Zimmerman, J. B., & Jordt, S. E. (2025). Synthetic cooling agent in oral nicotine pouch products marketed as 'Flavour-Ban Approved.' *Tobacco Control*, 34(1), 106–110. <https://doi.org/10.1136/tc-2023-058035>

3. Jabba, S. V., Silinski, P., Yang, A. Y., Ouyang, W., & Jordt, S. E. (2026). Artificial Sweeteners in US-Marketed Oral Nicotine Pouch Products: Correlation with Nicotine Contents and Effects on Product Preference. *Nicotine and Tobacco Research*, 28(2), 223-229. <https://doi.org/10.1093/ntr/ntae293>

4. Robichaud, M.O., Seidenberg, A.B., Byron, M.J. Tobacco companies introduce 'tobacco free' nicotine pouches. (2020) *Tobacco Control*. 29:e145 - e146 <https://doi.org/10.1136/tobaccocontrol-2019-055321>

5. Bover Manderski MT, Tomaino M, Torres Alvarez R, Meza R, Delvevo CD. Tobacco Product Use among Middle and High School Students – National Youth Tobacco Survey, United States, 2025. CRST-CAsToR Data Brief, 26 March 2026. <https://tobaccocrst.org/data-briefs>

6. CDC Foundation (2025, September). *Monitoring tobacco product use among youth and young adults in the U.S.: TEEN+ Data Brief, Issue 2* [PDF]. Tobacco Epidemic Evaluation Network. <https://tobaccoevaluation.org/wp-content/uploads/2025/09/Tobacco-Epidemic-Evaluation-Network-Data-Brief-Issue-2.pdf>

7. U.S. Food and Drug Administration (2025, December 19). Nicotine Pouch Products Authorized by FDA. U.S. Department of Health and Human Services. <https://www.fda.gov/tobacco-products/market-and-distribute-tobacco-product/nicotine-pouch-products-authorized-fda>

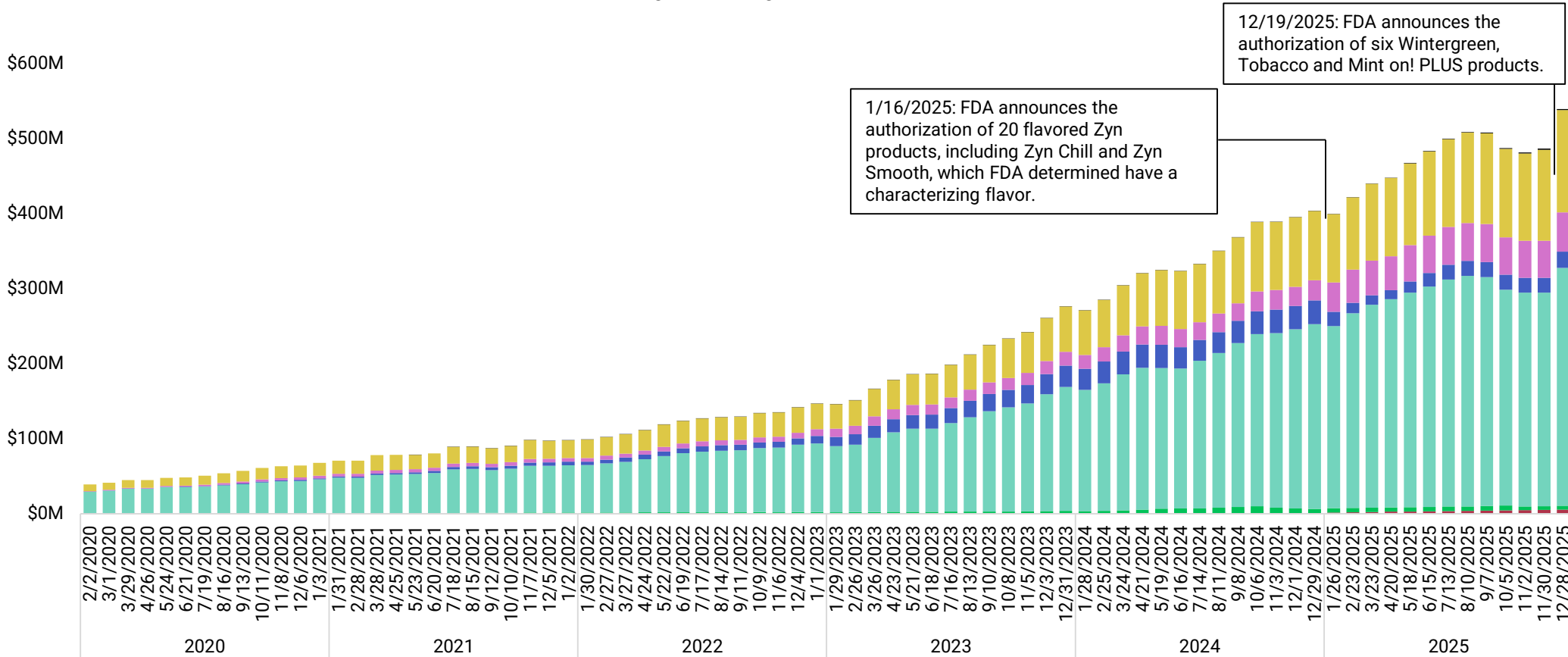
8. U.S. Food and Drug Administration (2025, January 19). Marketing Granted Orders – Swedish Match USA. [Marketing Granting Order]. U.S. Department of Health and Human Services. [MGO Ltr SMUSA_PM593-PM612_Zyn_MM_DD_2024_Redacted.pdf](https://www.fda.gov/oc/foia/SMUSA_PM593-PM612_Zyn_MM_DD_2024_Redacted.pdf)

*The data in this brief have been updated to capture new nicotine pouch products coded by Circana (formerly IRI). Historical sales estimates may differ from previous briefs.

Retail sales data are based on custom research by the CDC Foundation using Circana retail Point of Sale (Multi-Outlet and Convenience). Financial support was provided by Bloomberg Philanthropies through a grant to the CDC Foundation. The findings and conclusions in this report are those of the authors and do not necessarily represent the official position of 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 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) and that FDA considers to be flavored. All Other Flavors includes fruit, clove/spice, chocolate, alcoholic drink (such as wine, cognac or other cocktails), candy/desserts or some other flavor, as well as combinations of two or more flavors. The tobacco flavor category includes some products that are titled "Smooth" which are marketed as tobacco with a smooth flavor. Original/Smooth includes products that are not marketed as having a characterizing flavor but likely contain sweeteners, and which the FDA considers flavored.

Trends of Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 12/28/2025

Total nicotine pouch dollar sales increased from \$146.1 million to \$539.5 million (+269.2%).

Tobacco-flavored nicotine pouch dollar sales increased from \$1.5 thousand to \$5.2 million (+358.6k%); dollar share increased from 0.0% to 1.0%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$12.3 million to \$21.7 million (+76.0%); dollar share decreased from 8.4% to 4.0%.

Menthol-flavored nicotine pouch dollar sales increased from \$1.9 million to \$5.4 million (+176.3%); dollar share decreased from 1.3% to 1.0%.

Original/Smooth nicotine pouch dollar sales increased from \$11.0 million to \$52.4 million (+376.2%); dollar share increased from 7.5% to 9.7%.

Mint-flavored nicotine pouch dollar sales increased from \$88.0 million to \$317.2 million (+260.3%); dollar share decreased from 60.2% to 58.8%.

All other-flavored nicotine pouch dollar sales increased from \$32.8 million to \$136.2 million dollars (+314.9%); dollar share increased from 22.5% to 25.2%.

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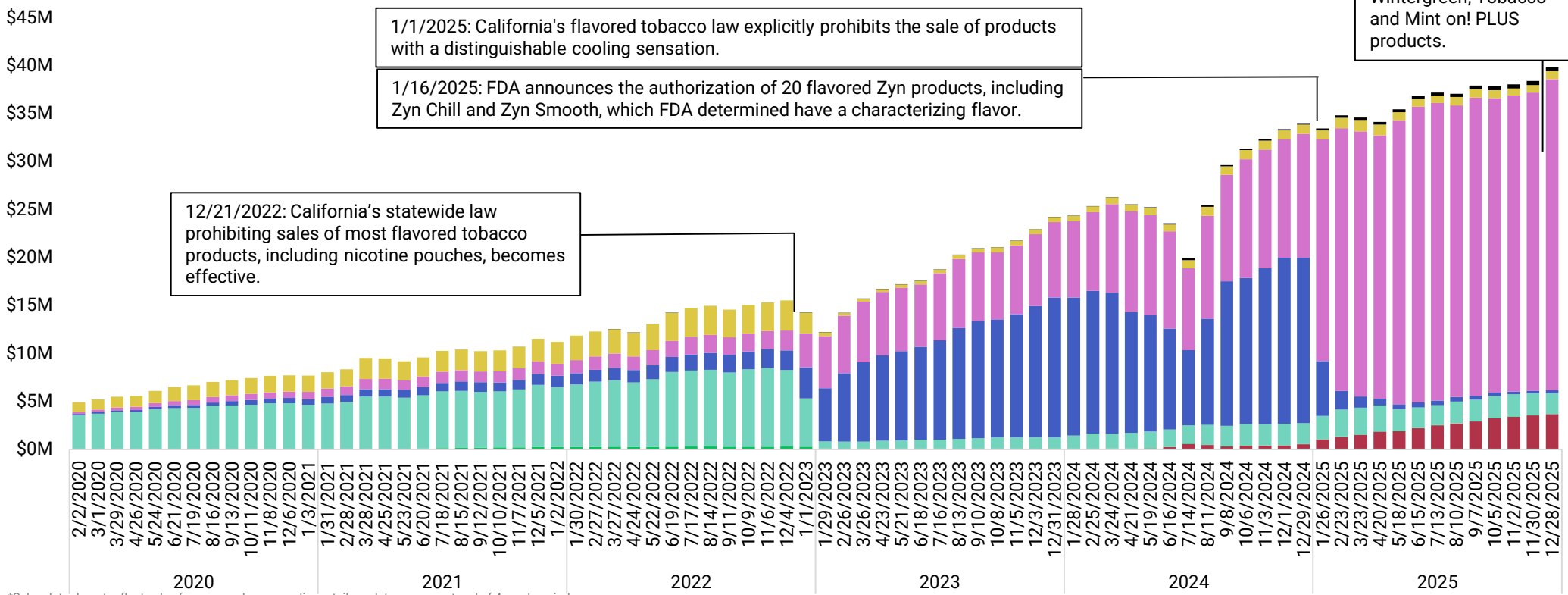
Figure 2. Total Nicotine Pouch Dollar Sales, by Flavor, California

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

12/19/2025: FDA announces the authorization of six Wintergreen, Tobacco and Mint on! PLUS products.

1/1/2025: California's flavored tobacco law explicitly prohibits the sale of products with a distinguishable cooling sensation.
 1/16/2025: FDA announces the authorization of 20 flavored Zyn products, including Zyn Chill and Zyn Smooth, which FDA determined have a characterizing flavor.

12/21/2022: California's statewide law prohibiting sales of most flavored tobacco products, including nicotine pouches, becomes effective.



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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) and that FDA considers to be flavored. All Other Flavors includes fruit, clove/spice, chocolate, alcoholic drink (such as wine, cognac or other cocktails), candy/desserts or some other flavor, as well as combinations of two or more flavors. The tobacco flavor category includes some products that are titled "Smooth" which are marketed as tobacco with a smooth flavor. Original/Smooth includes products that are not marketed as having a characterizing flavor but likely contain sweeteners, and which the FDA considers flavored.

Trends of Nicotine Pouch Dollar Sales by Flavor from 12/4/2022 to 12/28/2025, Following California's Flavored Tobacco Sales Restriction

Total nicotine pouch dollar sales increased from \$15.5 million to \$39.8 million (+156.8%), which was lower than the Total U.S. increase.

In November 2024, California's Department of Justice notified certain manufacturers that changes to California's flavored tobacco law clarified that their products with cooling sensations were prohibited, beginning January 1, 2025. From December 2024 to December 2025, **clear/other cooling** flavored nicotine pouch sales decreased 98.0% (\$17.2 million to \$340.2 thousand), while **smooth/original** flavor increased 151.0% (\$12.9 million to \$32.4 million).

Mint-flavored nicotine pouch dollar sales decreased from \$8.0 million to \$2.1 million (-73.2%); dollar share decreased from 51.5% to 5.4%.
 Clear/other cooling-flavored nicotine pouch dollar sales decreased from \$2.1 million to \$340.2 thousand (-83.5%); dollar share decreased from 13.3% to 0.9%.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$3.7 million; dollar share increased from 0.0% to 9.2%.

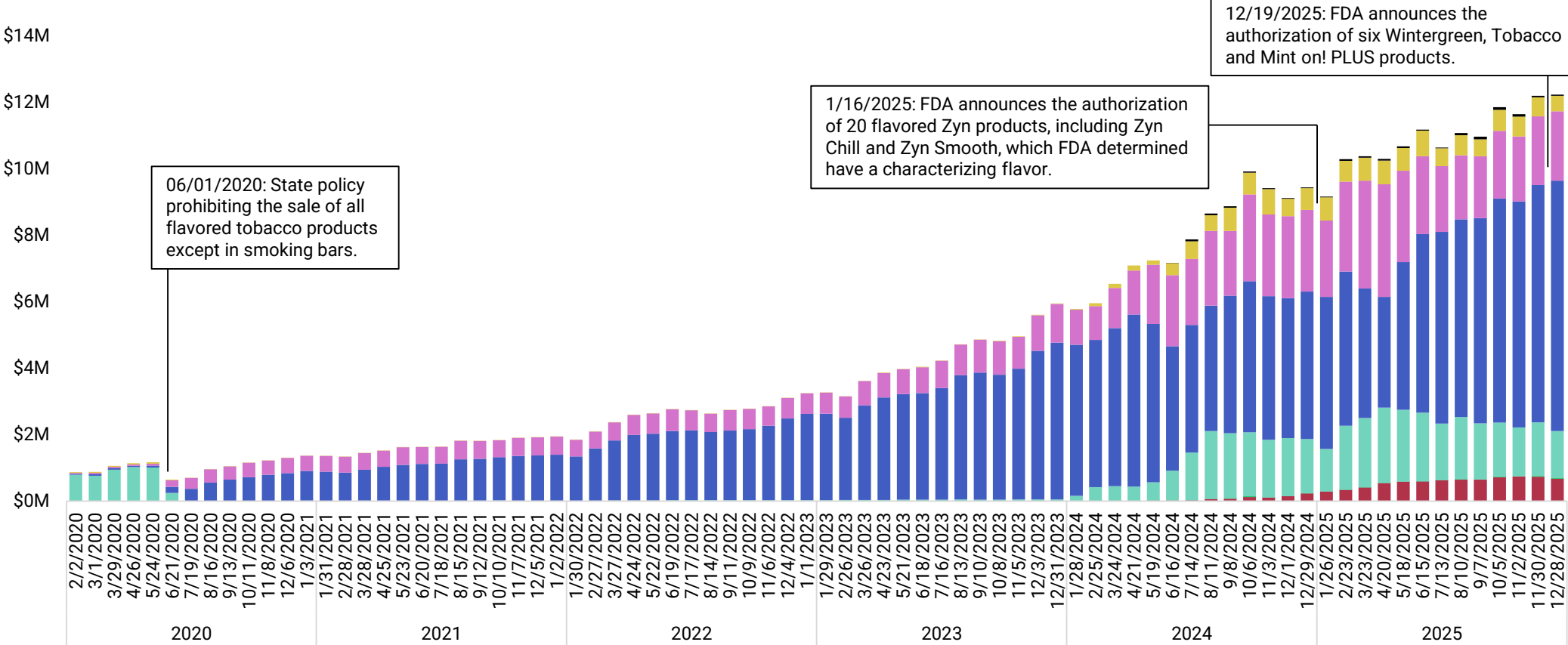
Original/Smooth nicotine pouch dollar sales increased from \$2.1 million to \$32.4 million (+1,464.9%); dollar share increased from 13.4% to 81.4%.

Menthol-flavored nicotine pouch dollar sales decreased from \$274.3 thousand to \$21.4 thousand (-92.2%); dollar share decreased from 1.8% to 0.1%.

All other-flavored nicotine pouch dollar sales decreased from \$3.1 million to \$840.7 thousand (-73.1%); dollar share decreased from 20.1% to 2.1%.

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

■ 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 12/28/2025

Total nicotine pouch dollar sales increased from \$3.3 million to \$12.2 million (+273.9%).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$671.2 thousand; dollar share increased from 0.0% to 5.5%.

Menthol-flavored nicotine pouch dollar sales increased from \$0.4 thousand to \$32.6 thousand (+7,683.4%); dollar share increased from 0.0% to 0.3%.

Mint-flavored nicotine pouch dollar sales increased from \$26.6 thousand to \$1.4 million (+5,144.2%); dollar share increased from 0.8% to 11.4%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$2.6 million to \$7.5 million (+190.2%); dollar share decreased from 79.5% to 61.7%.

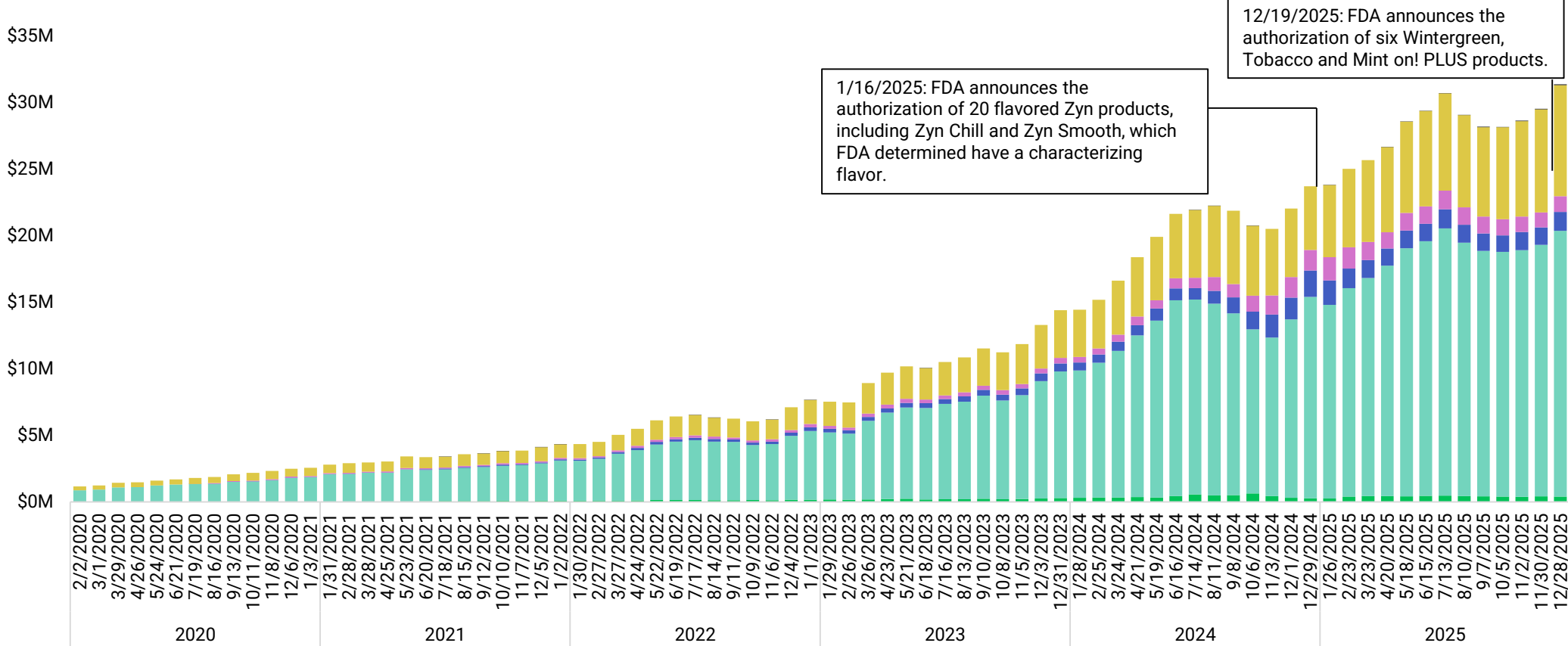
Original/Smooth nicotine pouch dollar sales increased from \$636.6 thousand to \$2.1 million (+227.6%); dollar share decreased from 19.5% to 17.1%.

All other-flavored nicotine pouch dollar sales increased from \$8.1 thousand to \$468.9 thousand (+5,704.3%); dollar share increased from 0.2% to 3.8%.

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

■ 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 12/28/2025

Total nicotine pouch dollar sales increased from \$7.5 million to \$31.4 million (+317.2%).

New York does not restrict the sale of flavored nicotine pouches in the state.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$10.6 thousand; dollar share remained 0.0%.

Menthol-flavored nicotine pouch dollar sales increased from \$161.6 thousand to \$377.7 thousand (+133.7%); dollar share decreased from 2.1% to 1.2%.

Mint-flavored nicotine pouch dollar sales increased from \$5.0 million to \$20.0 million (+295.9%); dollar share decreased from 67.1% to 63.7%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$274.4 thousand to \$1.4 million (+414.0%); dollar share increased from 3.7% to 4.5%.

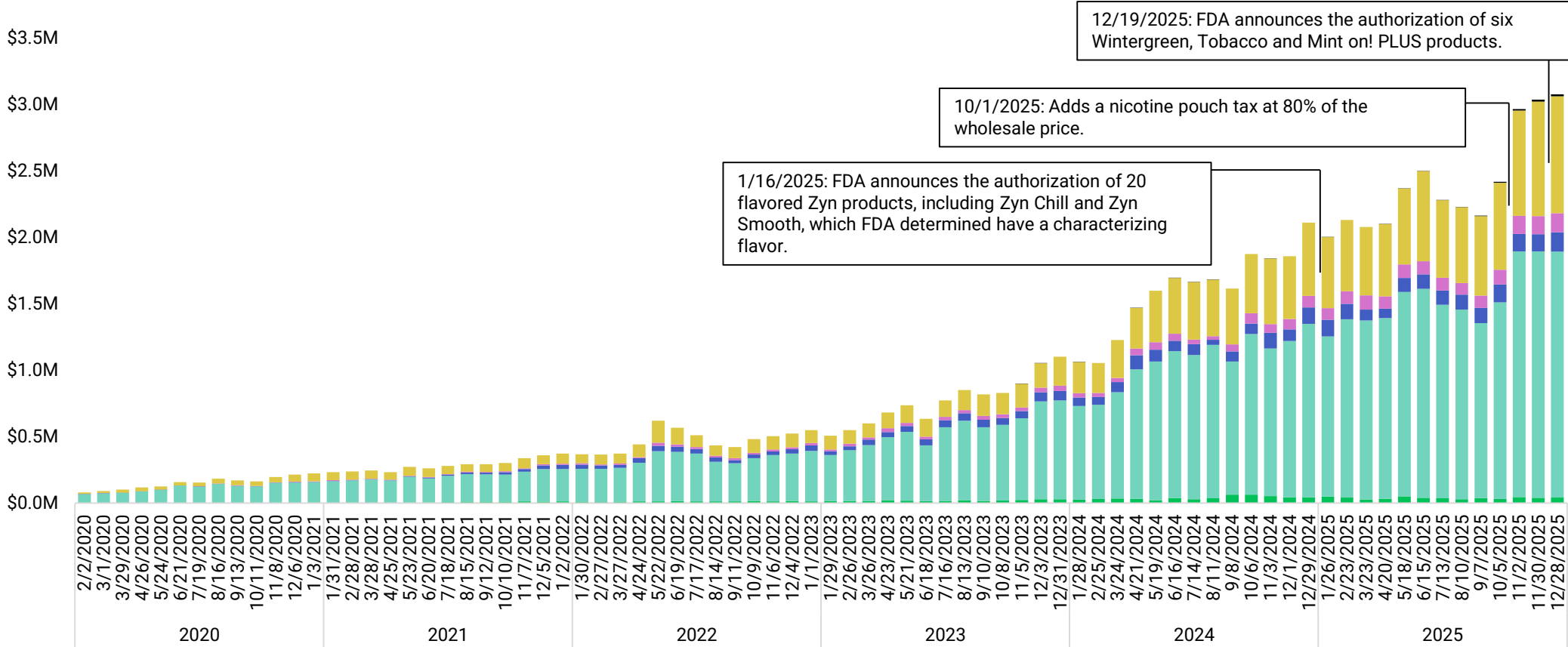
Original/Smooth nicotine pouch dollar sales increased from \$220.2 thousand to \$1.2 million (+442.1%); dollar share increased from 2.9% to 3.8%.

All other-flavored nicotine pouch dollar sales increased from \$1.8 million to \$8.3 million (+359.5%); dollar share increased from 24.1% to 26.6%.

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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 12/28/2025

Total nicotine pouch dollar sales increased from \$506.5 thousand to \$3.1 million (+507.3%).

Rhode Island does not restrict the sale of flavored nicotine pouches in the state.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$1.2 thousand; dollar share remained 0.0%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$29.1 thousand to \$146.4 thousand (+402.3%); dollar share decreased from 5.8% to 4.8%.

Menthol-flavored nicotine pouch dollar sales increased from \$15.4 thousand to \$39.0 thousand (+153.0%); dollar share decreased from 3.0% to 1.3%.

Original/Smooth nicotine pouch dollar sales increased from \$12.5 thousand to \$142.5 thousand (+1,040.8%); dollar share increased from 2.5% to 4.6%.

Mint-flavored nicotine pouch dollar sales increased from \$345.0 thousand to \$1.9 million (+436.8%); dollar share decreased from 68.1% to 60.2%.

All other-flavored nicotine pouch dollar sales increased from \$104.5 thousand to \$880.0 thousand (+742.5%); dollar share increased from 20.6% to 28.6%.

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