Monitoring E-Cigarette Sales: National Trends

This report highlights trends from February 2019 to March 2026.

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. Since February 2020, sales of disposable e-cigarettes have increased markedly.
- FDA began issuing marketing denial orders for flavored e-cigarette products as of August 26, 2021.
- As of May 2026, FDA has authorized 45 e-cigarette products to be marketed in the United States.[1] Only these products may be lawfully be sold in the United States.
- 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 March 22, 2026, the total number of e-cigarette products sold in tracked Circana retail sales channels in the United States reached 6,957 products,[2] of which 6,548 (94.1%) were disposable e-cigarettes.
- From February 2, 2020, to March 22, 2026, total monthly e-cigarette unit sales increased by 18.3% (15.5 million units to 18.3 million units); non-tobacco-flavored e-cigarette sales (mint, menthol, clear/other cooling and other flavors) increased by 31.2% (11.1 million units to 14.6 million units). By March 22, 2026, non-tobacco-flavored e-cigarette sales accounted for 79.4% of total unit sales.
- From February 2, 2020, to March 22, 2026, the total amount of e-cigarette nicotine sold per month increased by 206.6% (2.7 billion to 8.2 billion milligrams). This increase was 11.3 times greater than the 18.3% 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 increases in nicotine strength and the amount of e-liquid in recent disposable e-cigarettes).
- The top 10 purchased brands from January 25, 2026, to March 22, 2026, were (in descending order of dollar sales) Vuse, JUUL, Geek Bar Pulse, Breeze Smoke, Foger Switch Pro, Breeze Prime, RAZ, NJOY, HQD and Loon Maxx. The top 5 brands and top 10 brands accounted for 72.0% and 79.9% of total dollar sales, respectively.
- Geek Bar Pulse, Foger Switch Pro and RAZ, which ranked among the top ten 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 2025 National Youth Tobacco Survey (NYTS) found that 7.1% (1.13 million) of high school and 2.6% (300,000) of middle school students currently used e-cigarettes. Among those who currently used e-cigarettes, 89.4% used flavored e-cigarettes.[4,5]

Flavored Disposable E-Cigarettes:

- From February 2, 2020, to March 22, 2026, disposable e-cigarette sales increased by 163.1% (4.0 million units to 10.6 million units); their unit share increased from 25.9% to 57.7% of total e-cigarette sales. As of March 22, 2026, 91.6% of disposable e-cigarette unit sales were of non-tobacco flavors.
- Among youth who used e-cigarettes in 2025, 66.3% used disposable e-cigarettes (NYTS).[5]

Menthol-flavored E-Cigarettes:

- From February 2, 2020, to March 22, 2026, overall menthol-flavored e-cigarette sales increased by 11.3% (5.1 million units to 5.7 million units). Menthol-flavored cartridge sales increased by 2.3% (4.7 million units to 4.8 million units). As of March 22, 2026, menthol-flavored e-cigarette sales accounted for 30.9% of the overall e-cigarette market and 62.6% of the prefilled cartridge market.
- Among youth who used flavored e-cigarettes in 2025, 15.5% used menthol flavor (NYTS).[5]

Relevant Issues

- During 2020–2026, 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.[6]

1. U.S. Food and Drug Administration. Searchable Tobacco Products Database. https://www.accessdata.fda.gov/scripts/searchtobacco/ (accessed May 10, 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. Bover Manderski MT, Tomaino M, Torres Alvarez R, Meza R, Delnevo 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-brief
5. CDC Foundation analysis of NYTS 2025 data.
6. 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.

Retail sales data 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. 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 is representative of both total U.S. and state-level sales.

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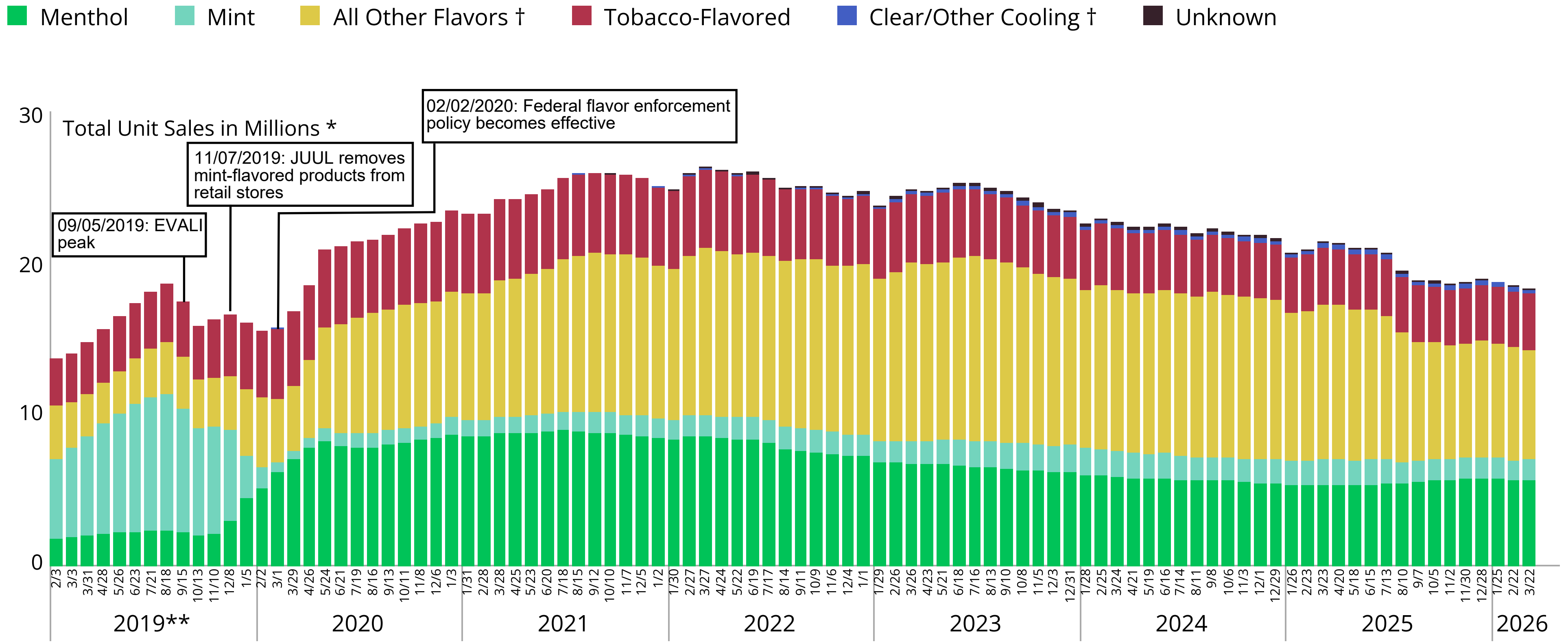
Figure 1. National E-Cigarette Unit Sales by Flavor



* 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 (1.4% of total dollar sales in 2025). 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.

** Sales estimates from 2019 reflect preserved data from custom CDC Foundation analyses using archived Circana data that are no longer updated or included in Circana's current sales projections.

† "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 3/22/2026, unless otherwise specified

- Total monthly e-cigarette sales increased from 15.5 million to 18.3 million (+18.3%).
- Tobacco-flavored e-cigarette sales decreased from 4.4 million to 3.7 million (-16.4%); unit share decreased from 28.3% to 20.0%.
- Non-tobacco-flavored e-cigarette sales increased from 11.1 million to 14.6 million (+31.2%); unit share increased from 71.7% to 79.4%.
- Menthol-flavored e-cigarette sales increased from 5.1 million to 5.7 million (+11.3%); unit share decreased from 32.9% to 30.9%.
- Mint-flavored e-cigarette sales decreased from 1.404 million to 1.399 million (-0.4%); unit share decreased from 9.1% to 7.6%.
- Other-flavored e-cigarette sales increased from 4.6 million to 7.2 million (+57.1%); unit share increased from 29.7% to 39.4%.
- Between 12/4/2022 and 3/22/2026 clear/other cooling flavored e-cigarette sales increased from 84.1 thousand to 280.2 thousand (+233.0%); unit share increased from 0.3% to 1.5%.

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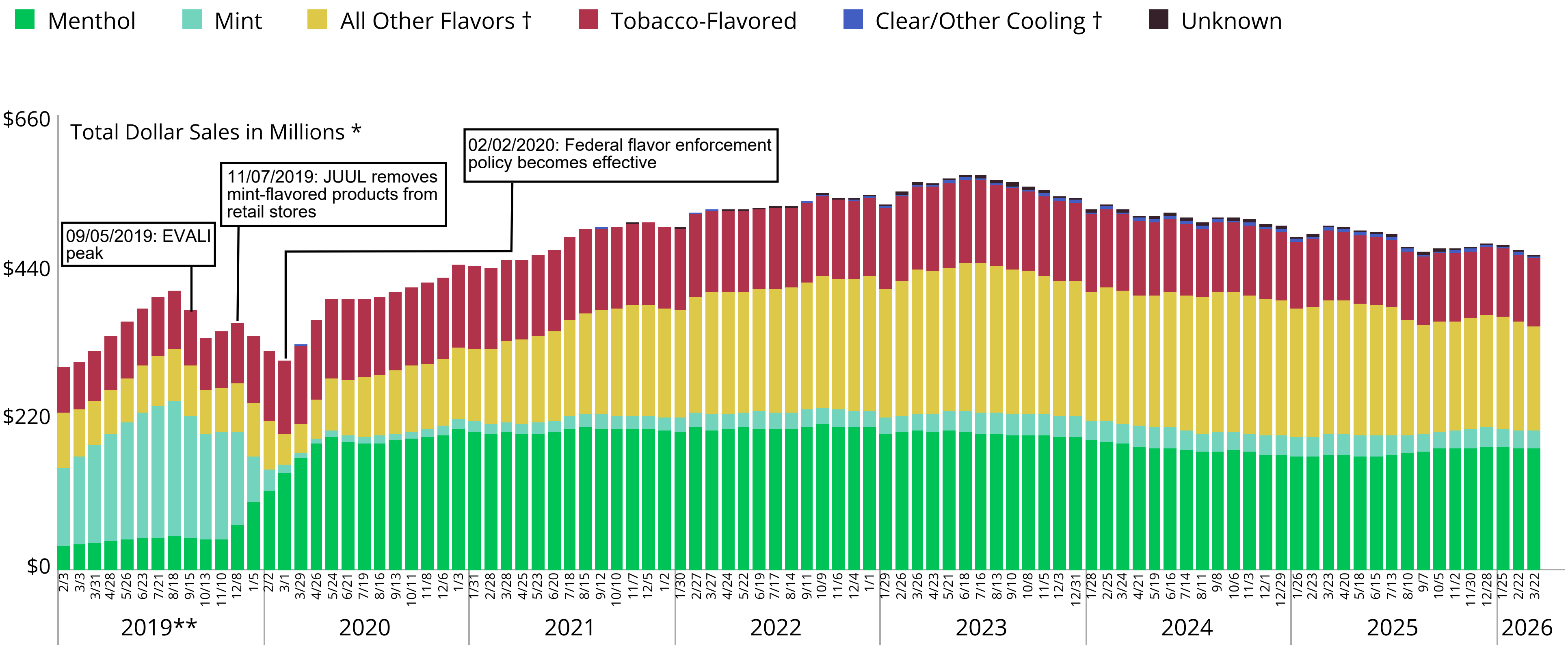
Figure 2. National E-Cigarette Dollar Sales by Flavor



* 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 (1.4% of total dollar sales in 2025).
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Trends of Dollar Sales by Flavor Following FDA's Flavor Enforcement Policy

From 2/2/2020 to 3/22/2026, unless otherwise specified

- Total monthly e-cigarette sales increased from $317.2 million to $458.1 million (+44.4%).
- Tobacco-flavored e-cigarette sales decreased from $99.4 million to $97.6 million (-1.9%); dollar share decreased from 31.3% to 21.3%.
- Non-tobacco-flavored e-cigarette sales increased from $217.7 million to $358.3 million (+64.6%); dollar share increased from 68.7% to 78.2%.
- Menthol-flavored e-cigarette sales increased from $114.7 million to $177.5 million (+54.7%); dollar share increased from 36.2% to 38.7%.
- Mint-flavored e-cigarette sales decreased from $31.0 million to $26.0 million (-16.0%); dollar share decreased from 9.8% to 5.7%.
- Other-flavored e-cigarette sales increased from $72.0 million to $150.8 million (+109.6%); dollar share increased from 22.7% to 32.9%.
- Between 12/4/2022 and 3/22/2026 clear/other cooling flavored e-cigarette sales increased from $1.4 million to $4.1 million (+191.0%); dollar share increased from 0.3% to 0.9%.
- 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.

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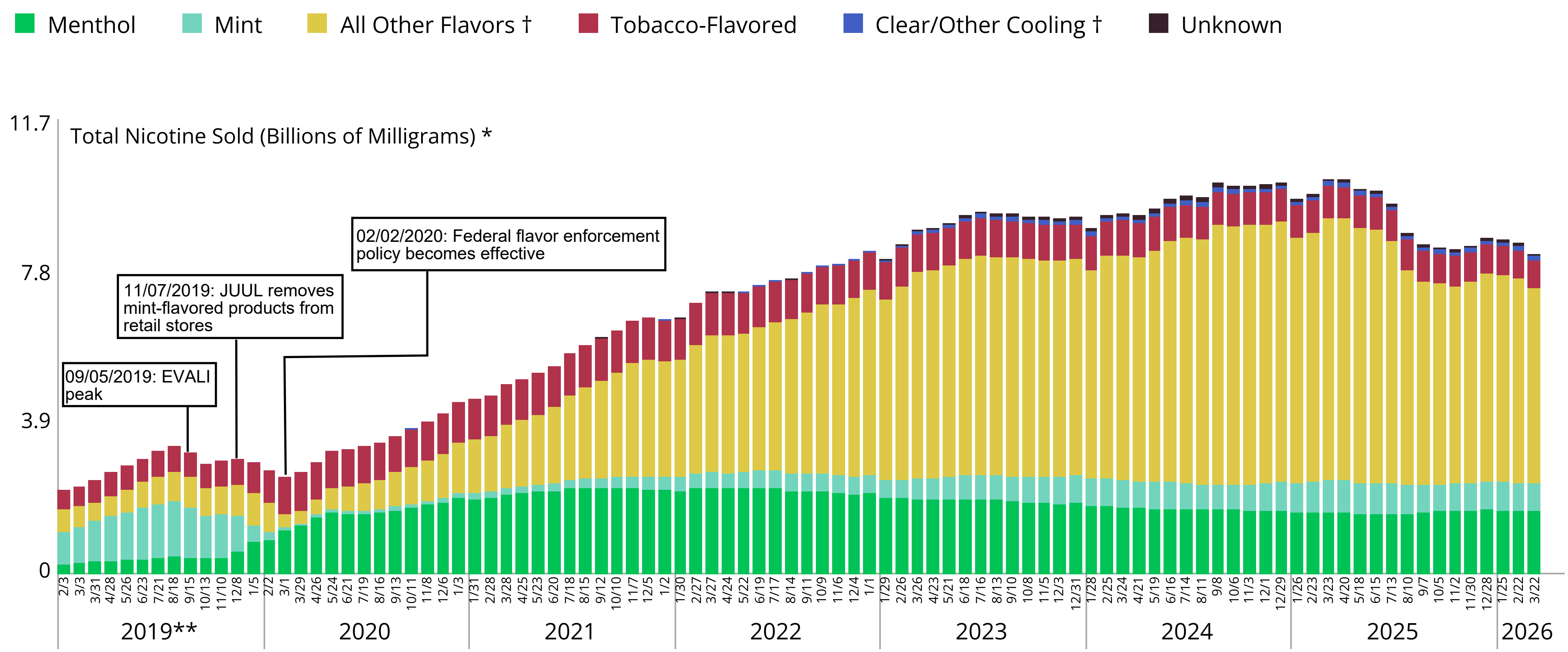
Figure 3. National Trends: Total Nicotine Sold (in Milligrams) by Flavor of E-Cigarette



* 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 (1.4% of total dollar sales in 2025). 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.

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

From 2/2/2020 to 3/22/2026, unless otherwise specified

The total amount of e-cigarette nicotine sold per month increased from 2.7 billion to 8.2 billion milligrams (+206.6%). This increase was 11.3 times greater than the 18.3% increase in standardized unit sales.

The total amount of nicotine sold in tobacco-flavored e-cigarettes decreased from 841.5 million to 737.2 million milligrams (-12.4%); share of nicotine sold decreased from 31.3% to 8.9%.

The total amount of nicotine sold in non-tobacco-flavored e-cigarettes increased from 1.8 billion to 7.4 billion milligrams (+302.6%); share of nicotine sold increased from 68.7% to 90.2%.

The total amount of nicotine sold in menthol-flavored e-cigarettes increased from 891.8 million to 1.6 billion milligrams (+81.4%); share of nicotine sold decreased from 33.2% to 19.6%.

The total amount of nicotine sold in mint-flavored e-cigarettes increased from 186.9 million to 709.1 million milligrams (+279.4%); share of nicotine sold increased from 7.0% to 8.6%.

The total amount of nicotine sold in all other-flavored e-cigarettes increased from 765.6 million to 5.0 billion milligrams (+552.5%); share of nicotine sold increased from 28.5% to 60.6%.

Between 12/4/2022 and 3/22/2026 the total amount of nicotine sold in clear/other cooling flavored e-cigarettes increased from 30.2 million to 106.6 million milligrams (+253.4%); share of nicotine sold increased from 0.4% to 1.3%.

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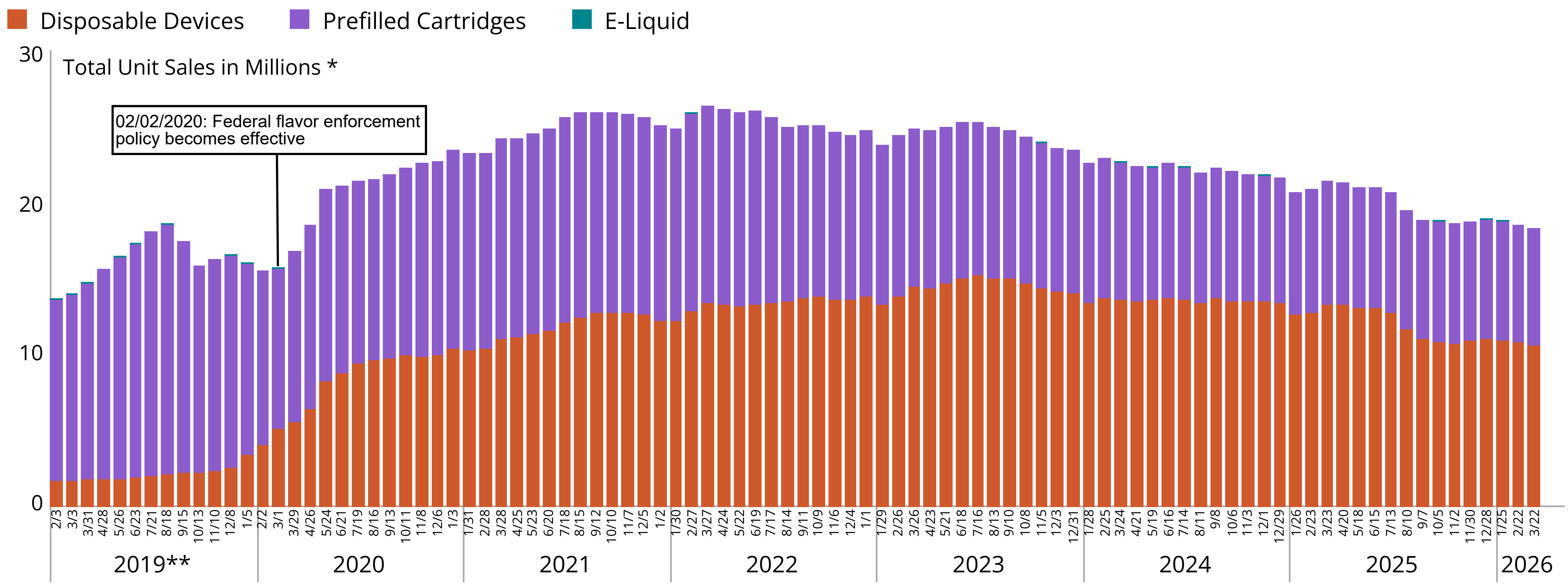
Figure 4. National E-Cigarette Unit Sales by Product Type



* 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 (1.4% of total dollar sales in 2025). 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.

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

From 2/2/2020 to 3/22/2026

- Sales of disposable devices increased from 4.0 million to 10.6 million (+163.1%); unit share increased from 25.9% to 57.7%.
- Sales of prefilled cartridges decreased from 11.5 million to 7.7 million (-32.4%); unit share decreased from 73.9% to 42.2%.

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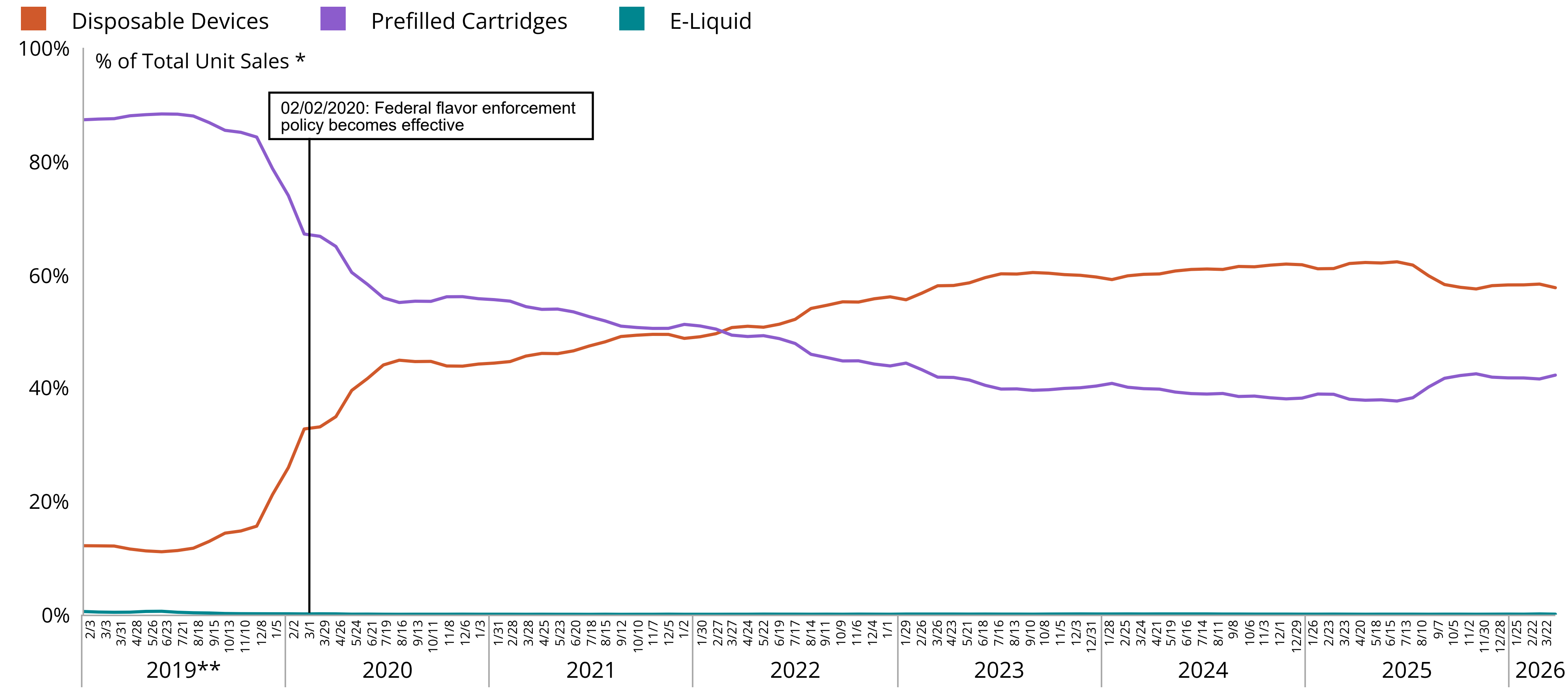
Figure 5. National E-Cigarette Unit Share by Product Type



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

From 2/2/2020 to 3/22/2026

- Unit share of disposable devices increased from 25.9% to 57.7%.
- Unit share of prefilled cartridges decreased from 73.9% to 42.3%.

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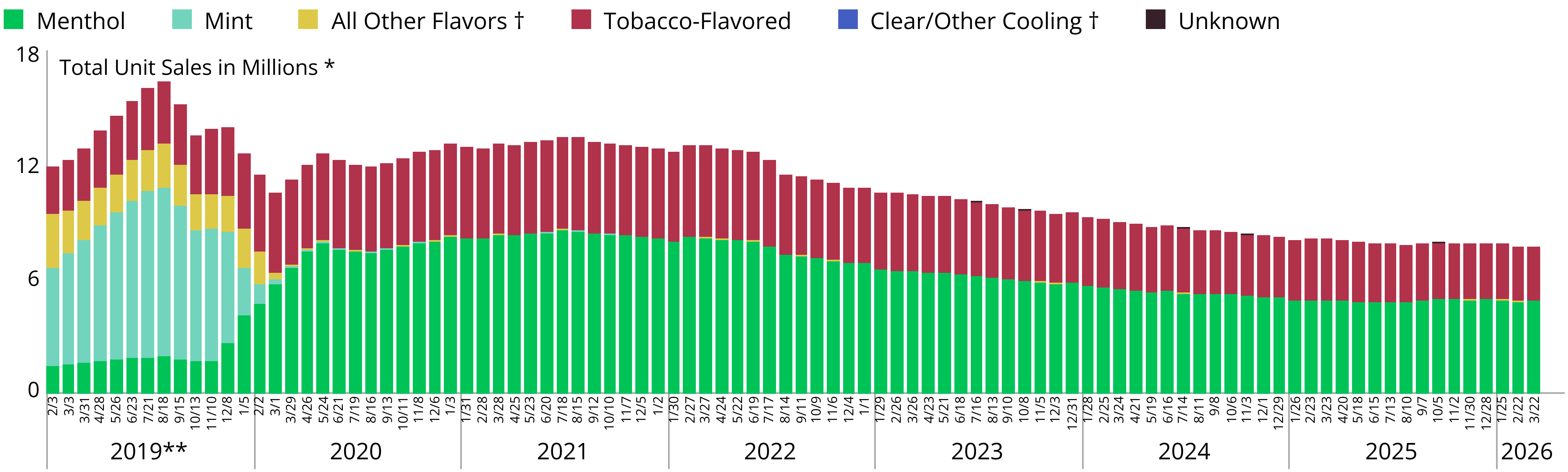
Figure 6. National E-Cigarette Unit Sales by Product Type and Flavor

Prefilled Cartridges



Disposable Devices

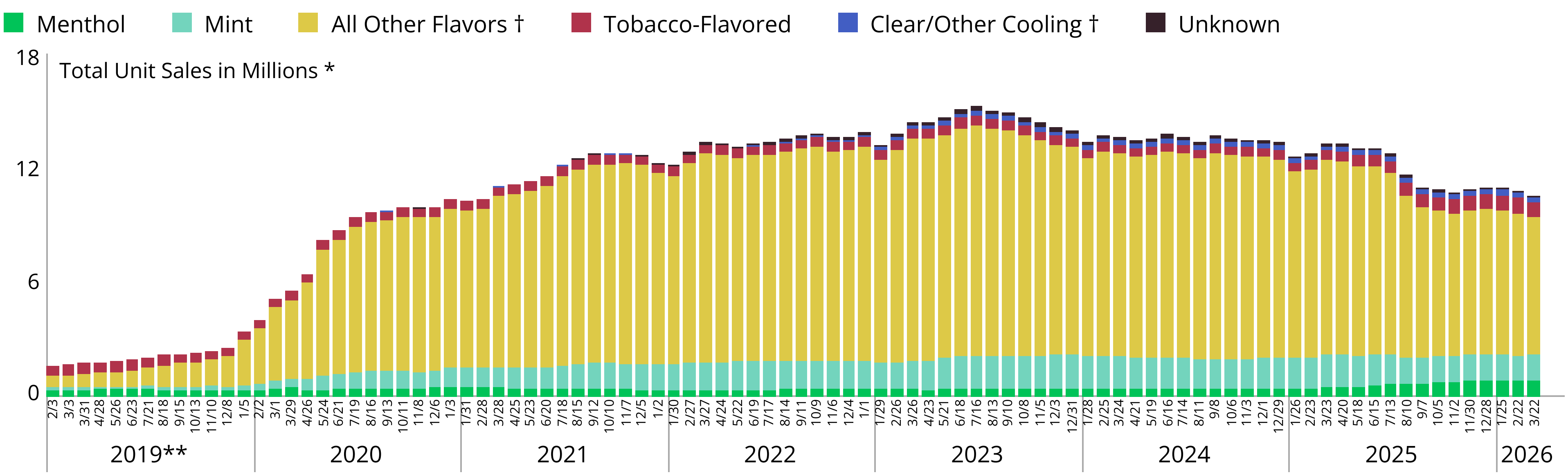


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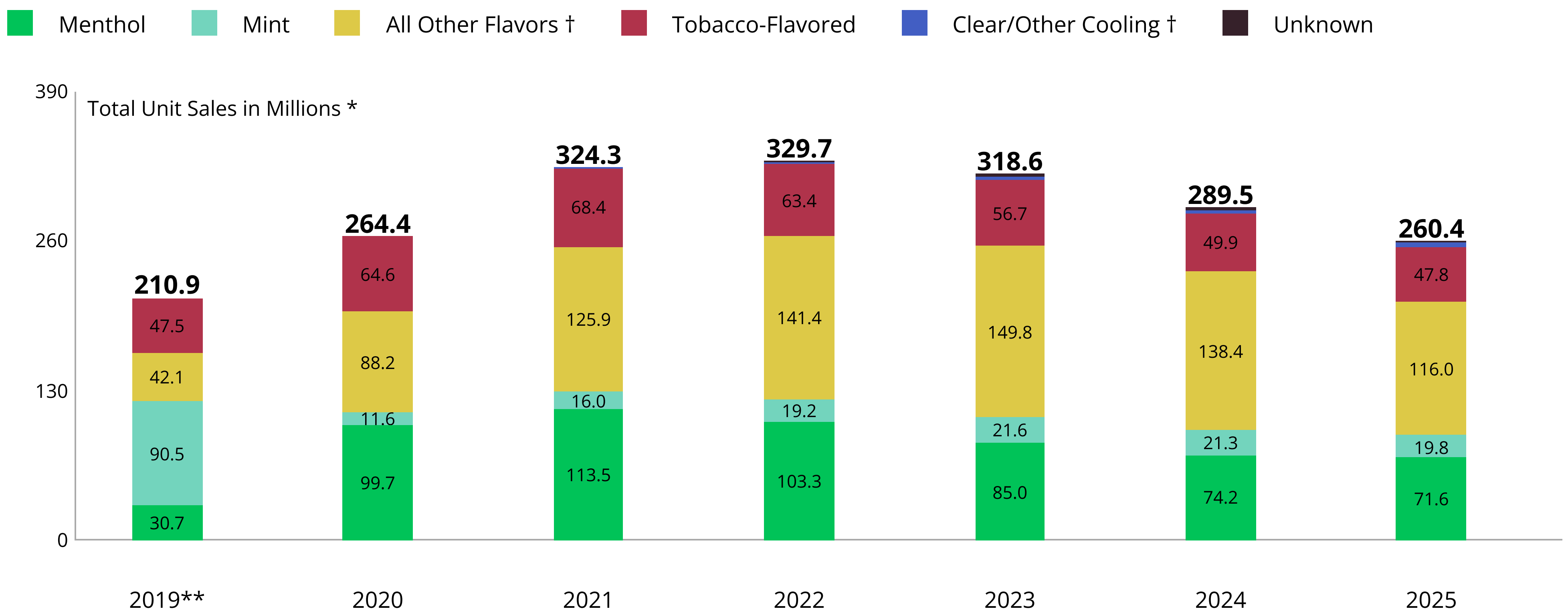
Figure 7. National E-Cigarette Unit Sales By Flavor, Annual Estimates



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Unit Sales Annual Trends by Flavor

From 2024 to 2025

- Annual total e-cigarette unit sales decreased from 289.5 million to 260.4 million (-10.1%).
- Unit sales of tobacco-flavored e-cigarettes decreased from 49.9 million to 47.8 million (-4.1%).
- Unit sales of non-tobacco-flavored e-cigarettes decreased from 237.2 million to 210.9 million (-11.1%).
- Unit sales of menthol-flavored e-cigarettes decreased from 74.2 million to 71.6 million (-3.5%).
- Unit sales of mint-flavored e-cigarettes decreased from 21.3 million to 19.8 million (-7.0%).
- Unit sales of other-flavored e-cigarettes decreased from 138.4 million to 116.0 million (-16.1%).
- Unit sales of clear/other cooling flavored e-cigarettes increased from 3.3 million to 3.4 million (+3.3%).

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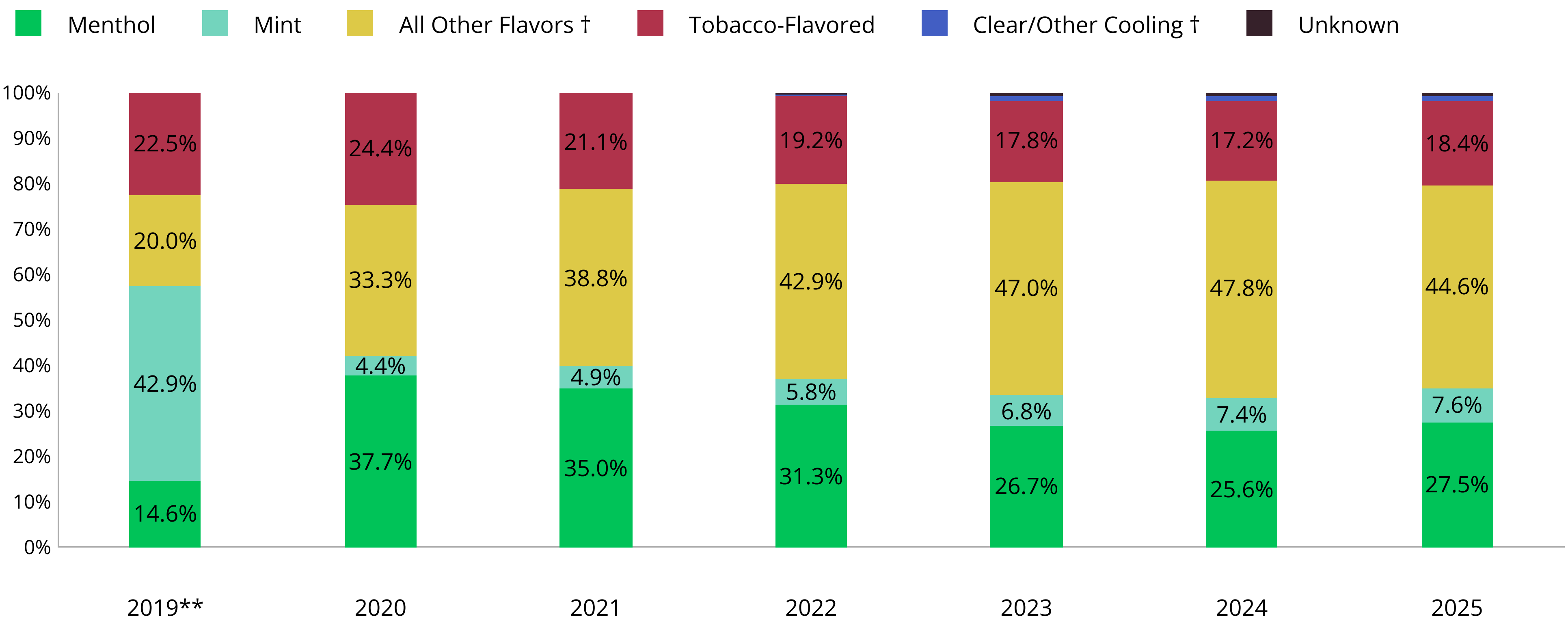
Figure 8. Annual Unit Share of National E-Cigarette Unit Sales by Flavor



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Unit Share Annual Trends by Flavor

From 2024 to 2025

- Unit share of tobacco-flavored e-cigarette sales increased from 17.2% to 18.4%.
- Unit share of non-tobacco-flavored e-cigarette sales decreased from 81.9% to 81.0%.
- Unit share of menthol-flavored e-cigarette sales increased from 25.6% to 27.5%.
- Unit share of mint-flavored e-cigarette sales increased from 7.4% to 7.6%.
- Unit share of other-flavored e-cigarette sales decreased from 47.8% to 44.6%.
- Unit share of clear/other cooling flavored e-cigarette sales increased from 1.1% to 1.3%.

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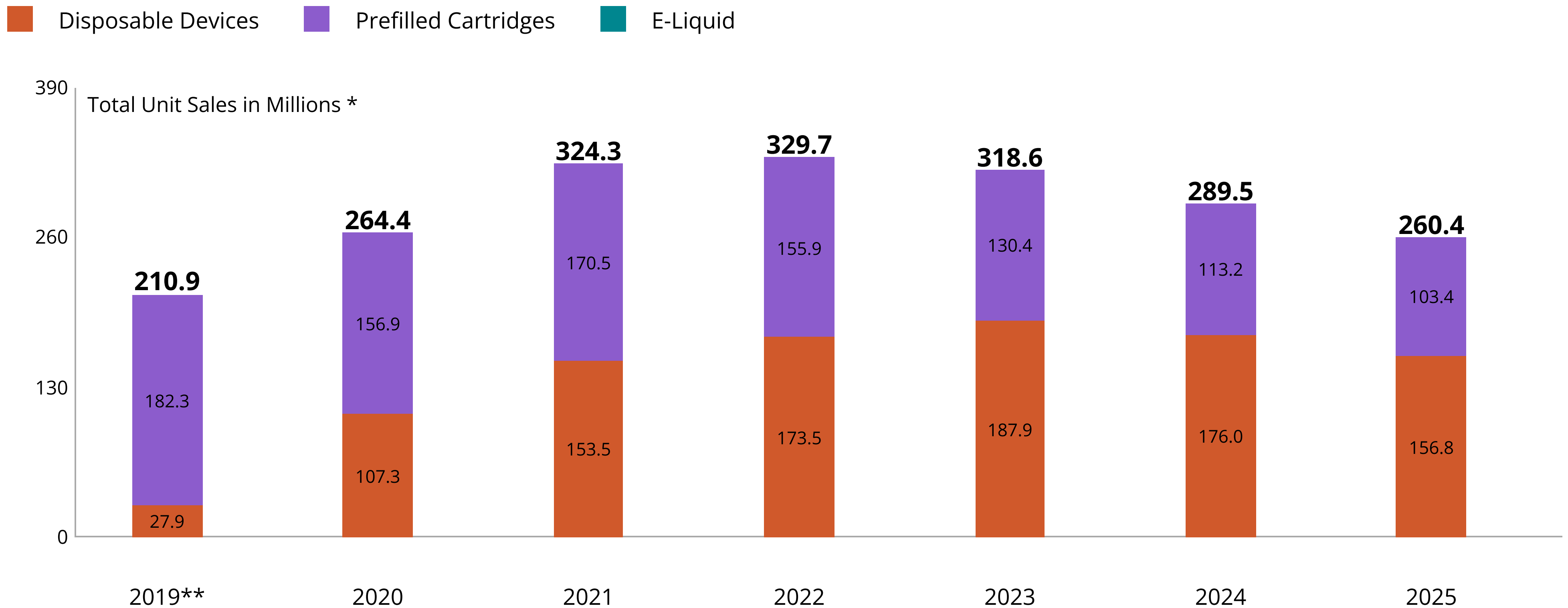
Figure 9. National E-Cigarette Unit Sales By Product Type, Annual Estimates



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Unit Sales Annual Trends by Product

From 2024 to 2025

- Total e-cigarette unit sales decreased from 289.5 million to 260.4 million (-10.1%).
- Unit sales of disposable e-cigarettes decreased from 176.0 million to 156.8 million (-10.9%).
- Unit sales of prefilled cartridges decreased from 113.2 million to 103.4 million (-8.7%).

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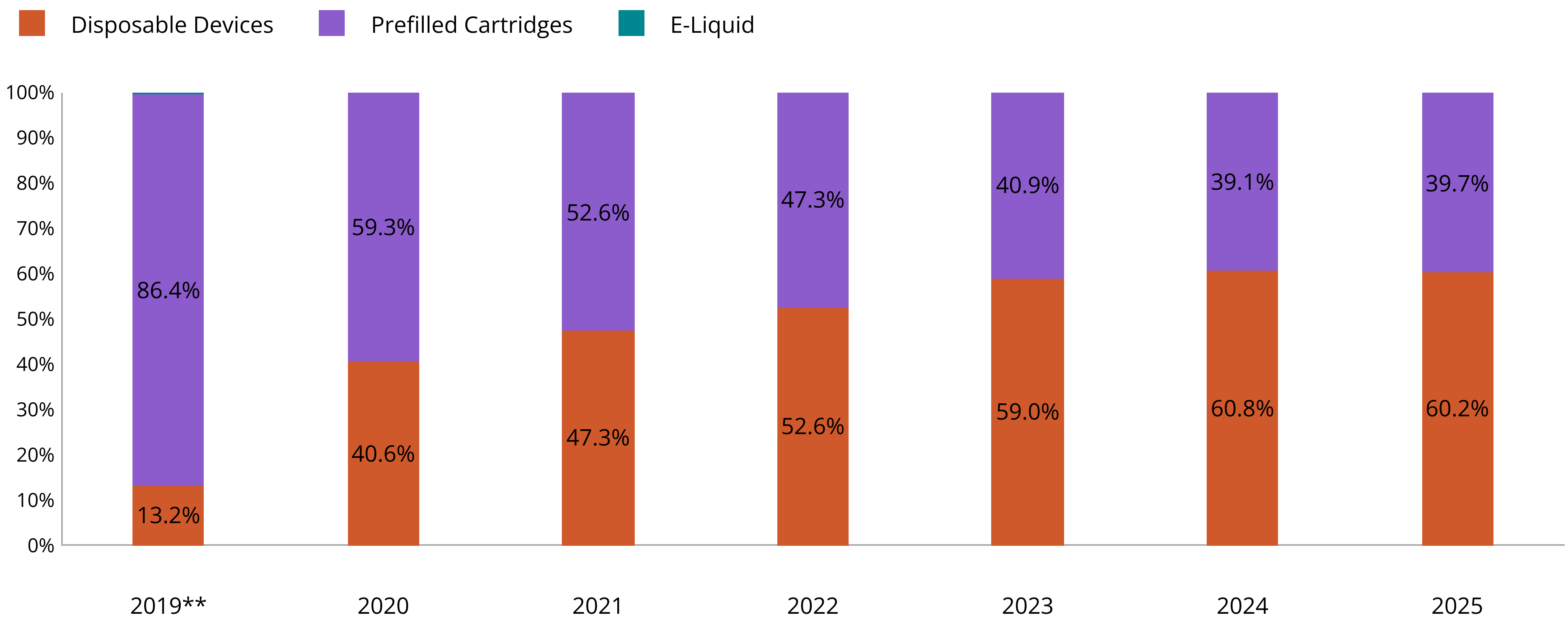
Figure 10. Annual Unit Share of National E-Cigarette Unit Sales by Product Type*



* 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 (1.4% of total dollar sales in 2025). 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.

** Sales estimates from 2019 reflect preserved data from custom CDC Foundation analyses using archived Circana data that are no longer updated or included in Circana's current sales projections.

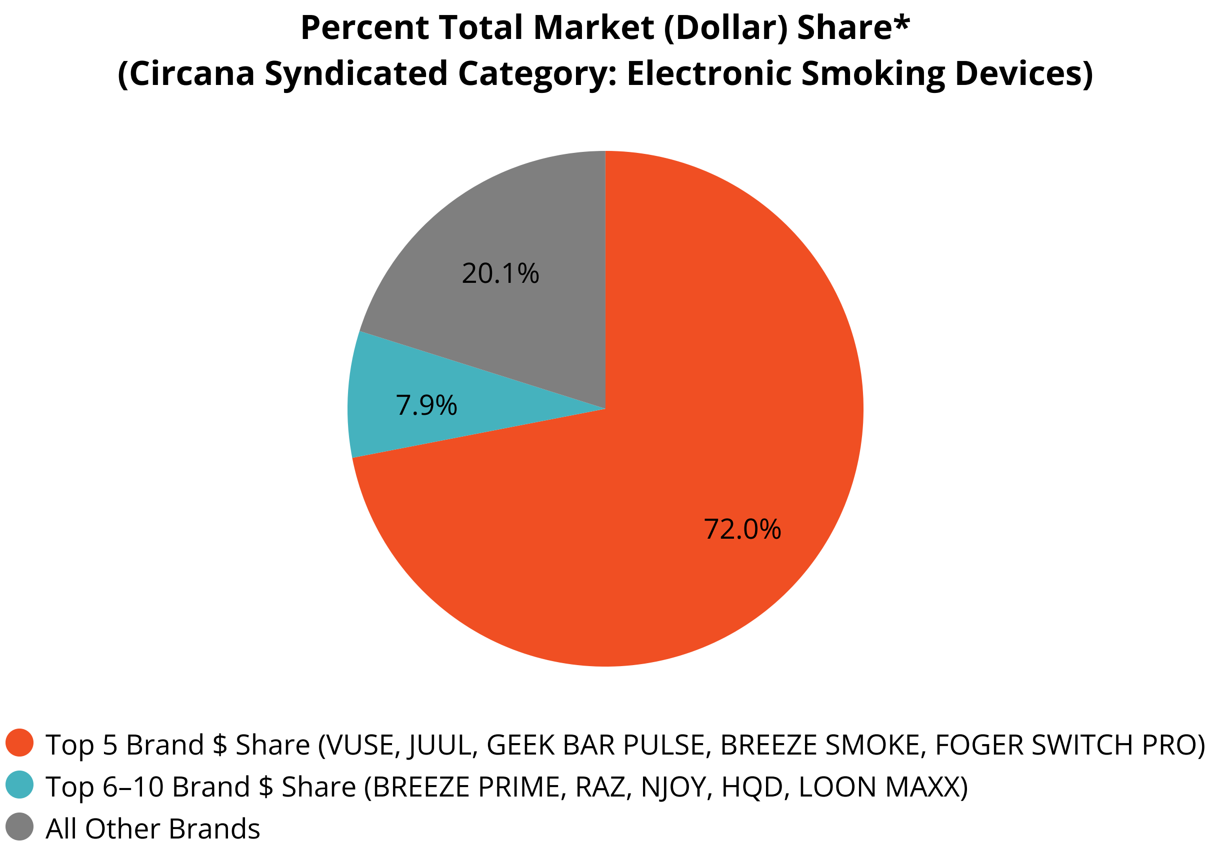
Unit Share Annual Trends by Product

From 2024 to 2025

- Unit share of disposable e-cigarette sales decreased from 60.8% to 60.2%.
- Unit share of prefilled cartridge e-cigarette sales increased from 39.1% to 39.7%.

Retail sales data 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. 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 is representative of both total U.S. and state-level sales.

Figure 11. Dollar Market Share of Top Brands **



* 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 (1.4% of total dollar sales in 2025). 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 1/25/2026 to 3/22/2026

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

The top 5 brands and top 10 brands accounted for 72.0% and 79.9% of dollar sales, respectively.

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