

Monitoring Sales: Nicotine Pouch Trends

This report highlights data through May 2026.*

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 youth and young adults.¹ In states that restrict the sale of flavored nicotine pouches, most remaining sales are for 1) products marketed as smooth or original but likely contain sweeteners and 2) products which provide a cooling sensation and may contain sweeteners.^{2,3}

Background

- No tobacco product is safe, including nicotine pouches.⁴
- 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
- Findings from the 2025 National Youth Tobacco Survey indicate that 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 product among middle and high school students in 2025 behind e-cigarettes.⁵
- 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 (FDA) authorized 26 nicotine pouch products from PMI (Zyn, n=20) and Altria (on! PLUS, n=6).⁷ FDA has determined that Zyn Chill and Zyn Smooth have a characterizing flavor.⁸ Internal CDC Foundation analysis found that 41.3% of dollar sales were for unauthorized products in May 2026.

- In 2026, FDA authorized PMI to market those same 20 Zyn products with one specific modified risk claim.⁹ FDA also stated that it does not intend to prioritize enforcement for nicotine pouch products that do not have premarket authorization, as long as those products have marketing applications pending with FDA.¹⁰

Key Findings

- Total U.S. monthly nicotine pouch sales increased by 319.3% between January 2023 and May 2026.
- As of May 2026, mint flavor accounts for 59.8% of total U.S. sales, followed by other flavors (e.g., fruits, candy, drinks) at 24.7% and flavors marketed as smooth or original at 9.1%.
- In Massachusetts, nicotine pouch sales are dominated by products which provide a cooling sensation and contain sweeteners, and by products marketed as smooth or original, which likely 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 "other flavors" (e.g., fruits, candy, drinks) are the most commonly sold flavors.
- In May 2026, the average price per pouch was \$0.33 nationally.

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2. Jabba, S. V., Erythropel, H. C., Woodrow, J. G., et al., (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., et al., (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. Park-Lee, E., Dutra, L., Cowan, H., et al., (2026). Tobacco product use among middle and high school students in the United States: National Youth Tobacco Survey, 2025. *Nicotine & Tobacco Research*, ntag116. <https://doi.org/10.1093/ntr/ntag116>

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, January 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 16). *Marketing Granted Orders – Swedish Match USA*. [Marketing Granting Order]. U.S. Department of Health and Human Services. <https://www.fda.gov/tobacco-products/market-and-distribute-tobacco-product/nicotine-pouch-products-authorized-fda>

9. U.S. Food and Drug Administration (2026, June 30). *FDA Authorizes 20 ZYN Nicotine Pouches to Be Marketed with Specific Modified Risk Claim*. U.S. Department of Health and Human Services. <https://www.fda.gov/tobacco-products/market-and-distribute-tobacco-product/nicotine-pouch-products-authorized-fda>

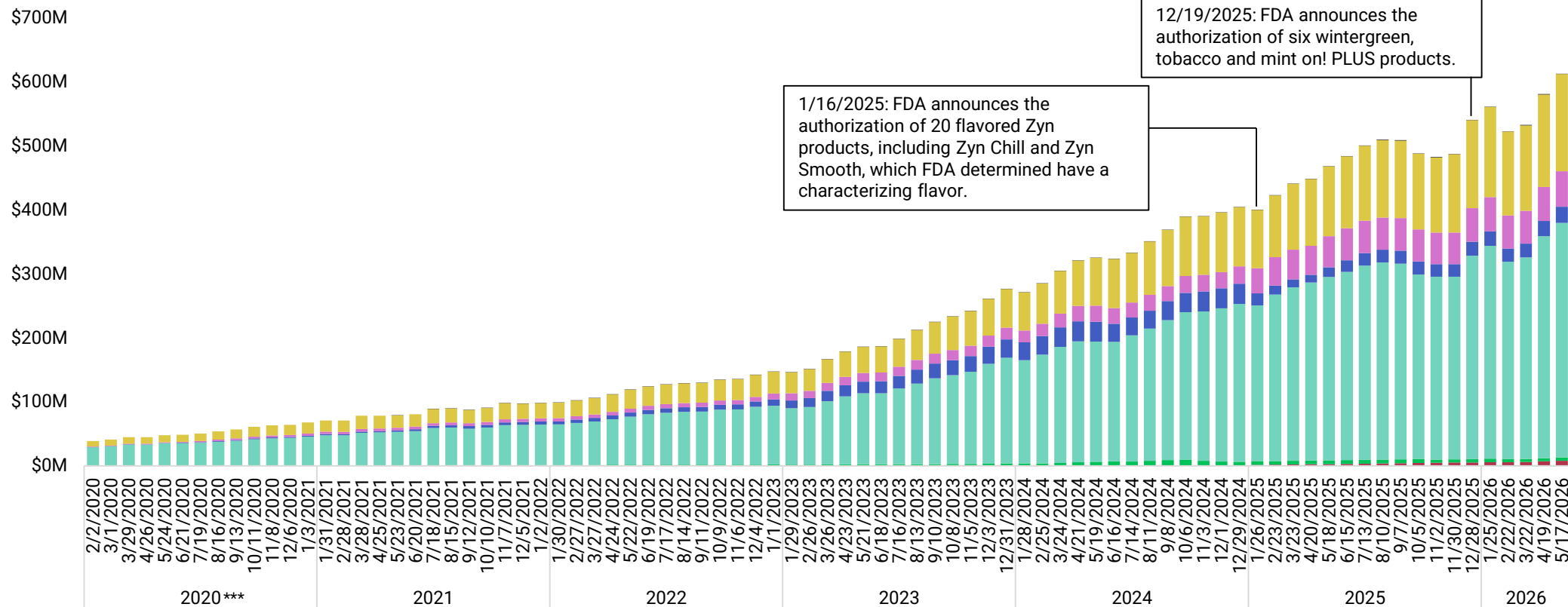
10. U.S. Food and Drug Administration (2026, May 8). *FDA Issues Guidance on Enforcement Priorities for Unauthorized ENDS and Nicotine Pouch Products*. U.S. Department of Health and Human Services. <https://www.fda.gov/tobacco-products/market-and-distribute-tobacco-product/nicotine-pouch-products-authorized-fda>

*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 and sweeteners (e.g., Zyn Chill, Oeo Clear). Original/Smooth includes products with flavor names such as smooth or original which likely contain sweeteners (e.g., Zyn Smooth, On! Original, Zyn Original) and that FDA considers to be flavored; this category does not include products titled "Smooth" or "Original" which are tobacco-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.

***Sales estimates from 2020 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.

Trends of Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 5/17/2026

Total nicotine pouch dollar sales increased from \$146.2 million to \$612.9 million (+319.3%). In May 2026, the average price per pouch was \$0.33.

Tobacco-flavored nicotine pouch dollar sales increased from \$1.0 thousand to \$8.0 million (+772.2k%); dollar share increased from 0.0% to 1.3%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$12.3 million to \$25.0 million (+103.1%); dollar share decreased from 8.4% to 4.1%.

Menthol-flavored nicotine pouch dollar sales increased from \$1.9 million to \$5.1 million (+162.4%); dollar share decreased from 1.3% to 0.8%.

Original/Smooth nicotine pouch dollar sales increased from \$11.0 million to \$55.8 million (+407.2%); dollar share increased from 7.5% to 9.1%.

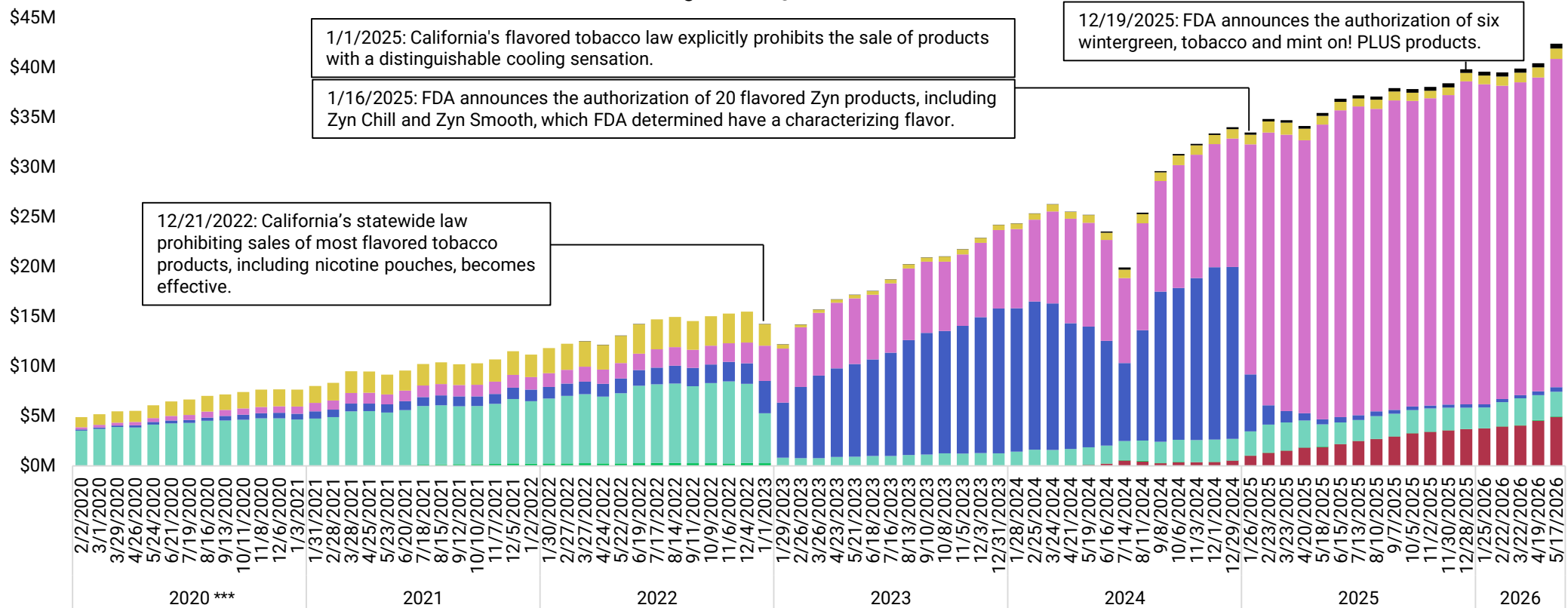
Mint-flavored nicotine pouch dollar sales increased from \$88.1 million to \$366.7 million (+316.5%); dollar share decreased from 60.2% to 59.8%.

All other-flavored nicotine pouch dollar sales increased from \$32.9 million to \$151.7 million dollars (+361.6%); dollar share increased from 22.5% to 24.7%.

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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



*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 and sweeteners (e.g., Zyn Chill, Oeo Clear). Original/Smooth includes products with flavor names such as smooth or original which likely contain sweeteners (e.g. Zyn Smooth, On! Original, Zyn Original) and that FDA considers to be flavored; this category does not include products titled "Smooth" or "Original" which are tobacco-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.

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Trends of Nicotine Pouch Dollar Sales by Flavor from 12/4/2022 to 5/17/2026, Following California's Flavored Tobacco Sales Restriction

Total nicotine pouch dollar sales increased from \$15.5 million to \$42.4 million (+173.5%). In May 2026, the average price per pouch was \$0.39.

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 May 2026, **clear/other cooling** flavored nicotine pouch sales decreased 97.3% (\$17.2 million to \$463.9 thousand), while **original/smooth** flavor increased 155.4% (\$12.9 million to \$33.0 million).

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$4.9 million; dollar share increased from 0.0% to 11.6%.

Menthol-flavored nicotine pouch dollar sales decreased from \$274.3 thousand to \$59.9 thousand (-78.2%); dollar share decreased from 1.8% to 0.1%.

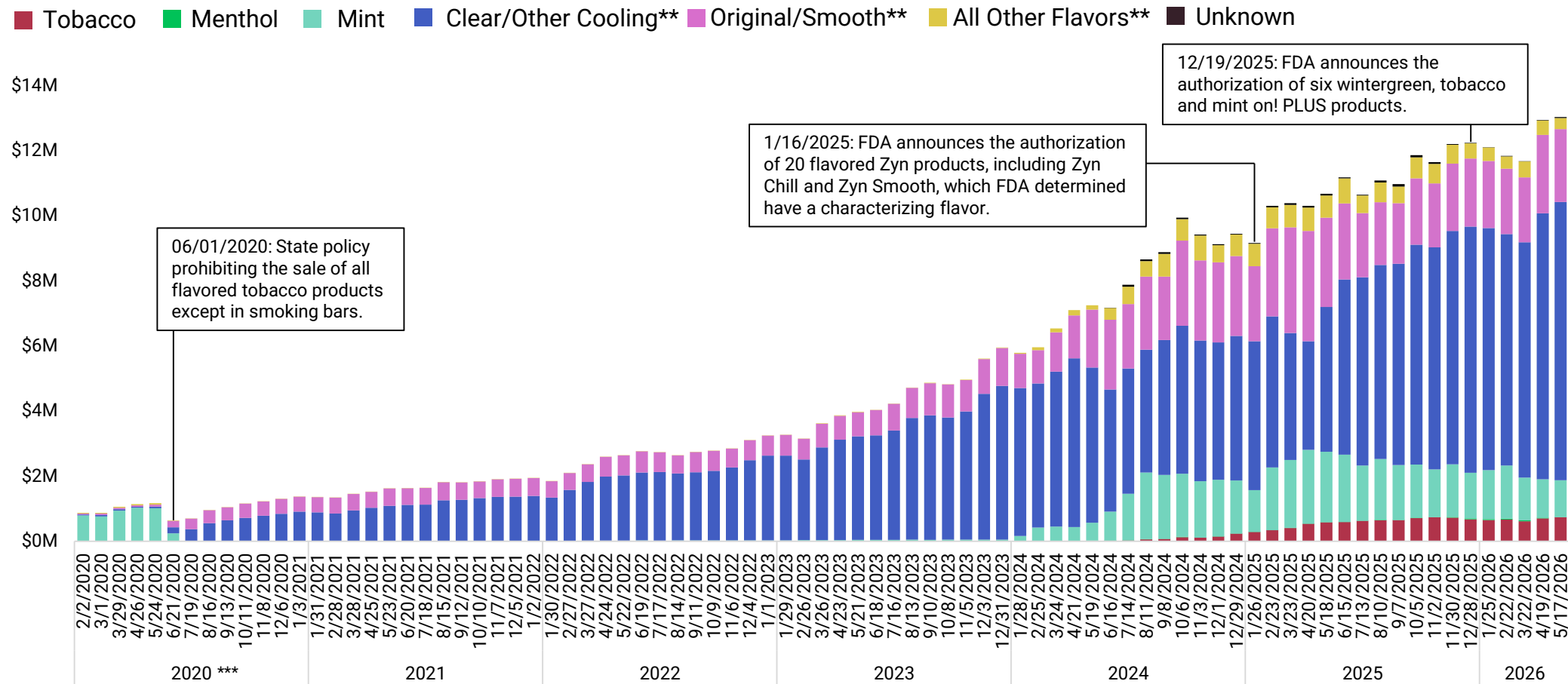
Mint-flavored nicotine pouch dollar sales decreased from \$8.0 million to \$2.5 million (-69.1%); dollar share decreased from 51.5% to 5.8%.

Clear/other cooling-flavored nicotine pouch dollar sales decreased from \$2.1 million to \$463.9 thousand (-77.4%); dollar share decreased from 13.3% to 1.1%.

Original/Smooth nicotine pouch dollar sales increased from \$2.1 million to \$33.0 million (+1,492.5%); dollar share increased from 13.4% to 77.8%.

All other-flavored nicotine pouch dollar sales decreased from \$3.1 million to \$1.1 million (-66.3%); dollar share decreased from 20.1% to 2.5%.

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



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Trends of Nicotine Pouch Dollar Sales by Flavor from 1/29/2023 to 5/17/2026

Total nicotine pouch dollar sales increased from \$3.3 million to \$13.0 million (+298.2%). In May 2026, the average price per pouch was \$0.41.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$735.2 thousand; dollar share increased from 0.0% to 5.6%.

Menthol-flavored nicotine pouch dollar sales increased from \$0.4 thousand to \$4.5 thousand (+982.3%); dollar share remained 0.0%.

Mint-flavored nicotine pouch dollar sales increased from \$27.3 thousand to \$1.1 million (+4,040.0%); dollar share increased from 0.8% to 8.7%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$2.6 million to \$8.6 million (+229.0%); dollar share decreased from 79.4% to 65.6%.

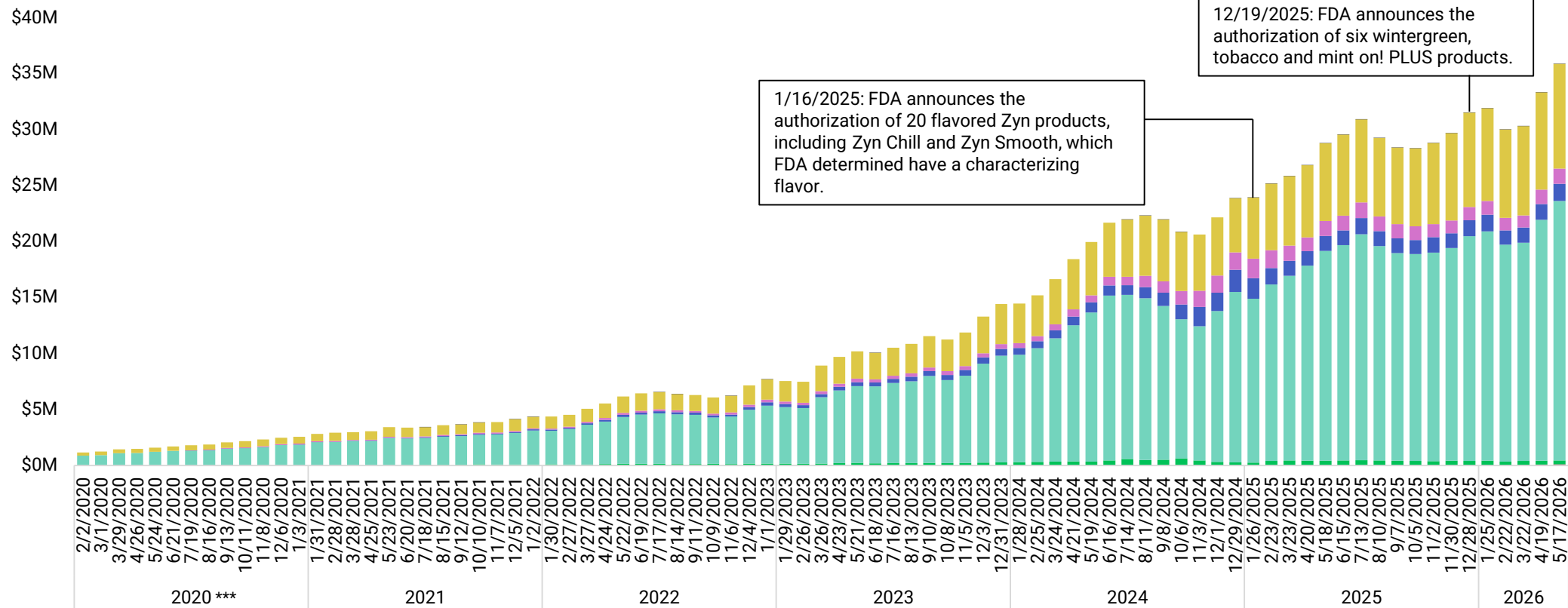
Original/Smooth nicotine pouch dollar sales increased from \$636.6 thousand to \$2.2 million (+251.4%); dollar share decreased from 19.5% to 17.2%.

All other-flavored nicotine pouch dollar sales increased from \$8.4 thousand to \$344.6 thousand (+3,991.2%); dollar share increased from 0.3% to 2.6%.

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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 5/17/2026

Total nicotine pouch dollar sales increased from \$7.5 million to \$35.7 million (+377.1%). In May 2026, the average price per pouch was \$0.33.

New York does not have a statewide restriction on the sale of flavored nicotine pouches.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$81.0 thousand; dollar share increased from 0.0% to 0.2%.

Menthol-flavored nicotine pouch dollar sales increased from \$161.6 thousand to \$357.8 thousand (+121.4%); dollar share decreased from 2.1% to 1.0%.

Mint-flavored nicotine pouch dollar sales increased from \$5.0 million to \$23.2 million (+359.1%); dollar share decreased from 67.1% to 64.6%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$274.4 thousand to \$1.5 million (+455.3%); dollar share increased from 3.7% to 4.2%.

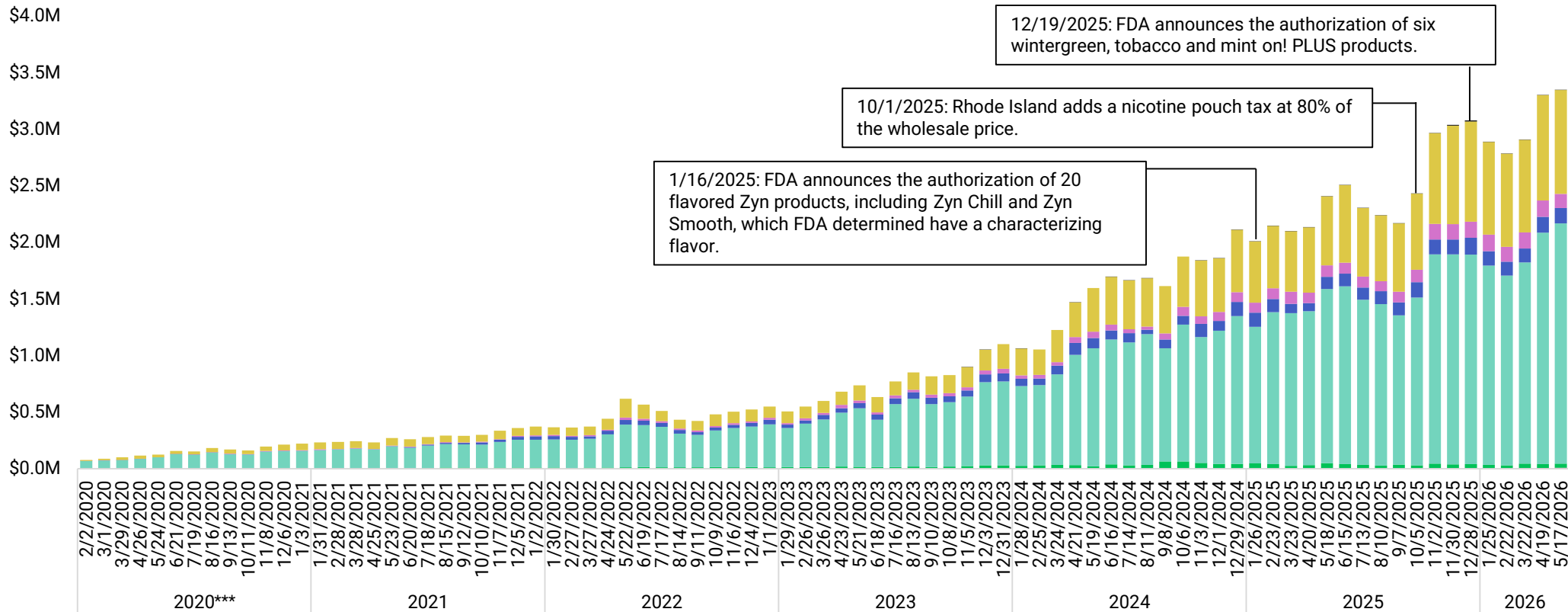
Original/Smooth nicotine pouch dollar sales increased from \$220.2 thousand to \$1.4 million (+520.7%); dollar share increased from 2.9% to 3.8%.

All other-flavored nicotine pouch dollar sales increased from \$1.8 million to \$9.4 million (+416.0%); dollar share increased from 24.1% to 26.1%.

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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 5/17/2026

Total nicotine pouch dollar sales increased from \$506.5 thousand to \$3.3 million (+561.0%). In May 2026, the average price per pouch was \$0.55.

The average unit price of one nicotine pouch increased from \$0.32 during the four weeks ending 9/7/2025 to \$0.54 during the four weeks ending 11/2/2025 (+70.6%)

Rhode Island does not have a statewide restriction on the sale of flavored nicotine pouches.

Tobacco-flavored nicotine pouch dollar sales increased from \$0 to \$8.5 thousand; dollar share increased from 0.0% to 0.3%.

Clear/other cooling-flavored nicotine pouch dollar sales increased from \$29.1 thousand to \$135.3 thousand (+364.4%); dollar share decreased from 5.8% to 4.0%.

Menthol-flavored nicotine pouch dollar sales increased from \$15.4 thousand to \$37.2 thousand (+140.9%); dollar share decreased from 3.0% to 1.1%.

Original/Smooth nicotine pouch dollar sales increased from \$12.5 thousand to \$125.0 thousand (+900.1%); dollar share increased from 2.5% to 3.7%.

Mint-flavored nicotine pouch dollar sales increased from \$345.0 thousand to \$2.1 million (+515.4%); dollar share decreased from 68.1% to 63.4%.

All other-flavored nicotine pouch dollar sales increased from \$104.5 thousand to \$918.6 thousand (+779.5%); dollar share increased from 20.6% to 27.4%.

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