Monitoring Sales: National Trends

This report highlights trends from February 2019 to June 2024.

Notice of Updated Format and Revision to Previous Data Estimates

- In conjunction with the forthcoming release of our new project website – Tobacco Monitoring – this brief has an updated layout and color scheme.
- The data in this brief have been updated to capture new e-cigarette products coded by Circana. Historical sales may differ from previous briefs.

Federal Regulatory Actions

- In February 2020, 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 September 9, 2021.
- On April 15, 2022, FDA was granted authority to regulate products containing nicotine from any source, including synthetic nicotine.

Key Findings

Total e-cigarettes:

- During the 6-month period ending on June 16 , 2024, the total number of e-cigarette products sold in the U.S. has reached 6,287 products; of which 92.8% were disposable e-cigarettes.[1]
- From February 2, 2020, to June 16, 2024, total e-cigarette unit sales increased by 34.7% (15.7 million units to 21.1 million units); and non-tobacco flavored e-cigarette sales (mint, menthol, clear/other cooling and other flavors) increased by 51.5% (11.2 million units to 17.0 million units). By June 16, 2024, non-tobacco flavored e-cigarette sales accounted for 80.6% of total unit sales.
- The top ten brands during the period spanning April 21, 2024, through June 16, 2024, were (in descending order of dollar sales) Vuse, JUUL, Geek Bar Pulse, Breeze Smoke, NJOY, RAZ, HQD, Loon Maxx, Breeze Prime, and Juicy Bar. The top five brands and top ten brands accounted for 69.1% and 78.2% of total dollar sales, respectively.
- Geek Bar Pulse and RAZ, newly ranked among the top 10 brands nationally as of this data brief, contain product models considered smart vapes (vapes that incorporate technologies such as digital screens, 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.[2]

Flavored Disposable e-cigarettes:

- From February 2, 2020, to June 16, 2024, disposable e-cigarette sales increased by 201.3% (4.1 million units to 12.3 million units); their unit share increased from 26.0% to 58.1% of total e-cigarette sales. As of June 16, 2024, 77.8% of disposable sales were of flavors other than tobacco, mint, menthol, and clear/other cooling.
- Among youth who used e-cigarettes in 2024, 55.6% used disposable e-cigarettes (NYTS).[2]

Menthol flavored e-cigarettes:

- From February 2, 2020, to June 16, 2024, overall menthol-flavored e-cigarette sales increased by 11.2% (5.2 million units to 5.7 million units), including a 11.4% increase in menthol-flavored cartridge sales (4.8 million units to 5.3 million units). As of June 16, 2024, menthol-flavored e-cigarette sales accounted for 27.2% of the overall e-cigarette market and 60.6% of the prefilled cartridge market.
- Among youth who used flavored e-cigarettes in 2024, 15.1% used menthol flavor (NYTS).[2]

Relevant Issues

- The e-cigarette or vaping product use-associated lung injury (EVALI) outbreak in late 2019 and COVID-19 pandemic may have affected sales.
- During 2020-2024, additional flavored tobacco products continued to be marketed, such as flavored cigars; or entered the market, such as nicotine pouches.
- Units of e-cigarettes are not adjusted to account for variations in unit size. Large-format disposable e-cigarettes that allow for thousands of "puffs" are now available. Declines in unit sales may not signify declines in prevalence of use or consumption.
- 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 for the purposes of this data brief.

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 all non-tobacco flavored e-cigarettes, including flavored disposable e-cigarettes and menthol-flavored prefilled cartridges, reduce e-cigarette sales and may reduce youth access and use of e-cigarettes.

1. Number of e-cigarette products is counted as the number of unique UPCs (Universal Product Code) in Circana data.
2. 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.
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.

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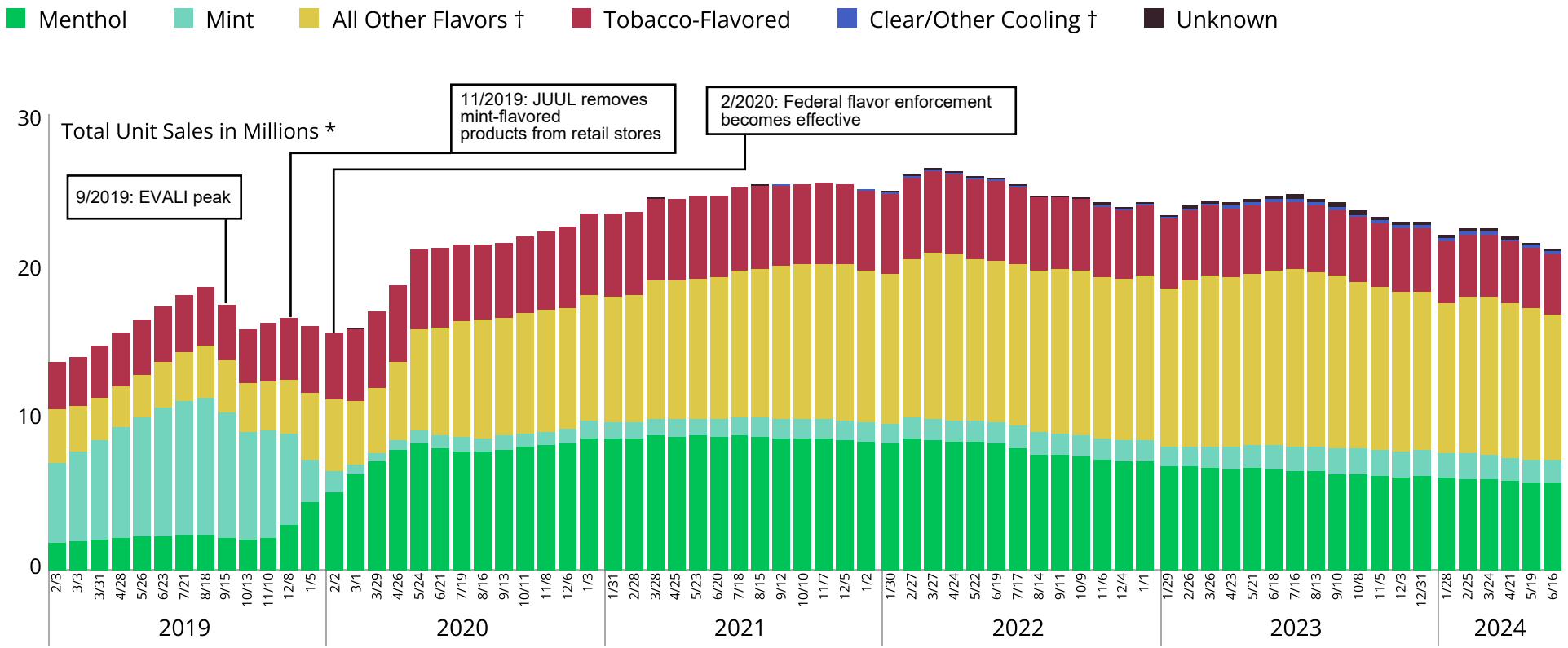
Figure 1. National E-Cigarette Unit Sales by Flavor



* 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 (9.5% of total dollar sales in 2022). 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 (such as wine, cognac, or other cocktails), candy/desserts/other sweets, some other flavor; Clear/Other Cooling include 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)

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

From 2/2/2020 to 6/16/2024, unless otherwise specified

Total monthly e-cigarette sales increased from 15.7 to 21.1 million units (+34.7%).

Tobacco-flavored e-cigarette sales decreased from 4.4 million to 3.9 million (-11.6%); unit share decreased from 28.3% to 18.6%.

Non-tobacco-flavored e-cigarette sales increased from 11.2 million to 17.0 million (+51.5%); unit share increased from 71.7% to 80.6%.

Menthol-flavored e-cigarette sales increased from 5.2 million to 5.7 million (+11.2%); unit share decreased from 32.9% to 27.2%.

Mint-flavored e-cigarette sales increased from 1.4 million to 1.5 million (+5.3%); unit share decreased from 9.0% to 7.1%.

Other-flavored e-cigarette sales increased from 4.6 million to 9.6 million (+106.2%); unit share increased from 29.6% to 45.3%.

Between 12/4/2022 and 6/16/2024 clear/other cooling flavored e-cigarette sales increased from 73.5 thousand to 210.2 thousand (+185.9%); unit share increased from 0.5% to 1.0%.

California's decline in e-cigarette sales between December 2022 and 6/16/2024 represents 13.6% (i.e., 382 thousand units out of 2803.4 thousand units) of the decline in national e-cigarette sales that occurred during this period.

Between 12/4/2022 and 6/16/2024, California's monthly e-cigarette total unit sales decreased from 831.3 thousand to 449.2 thousand (-46.0%) following enforcement of flavored e-cigarette restrictions.

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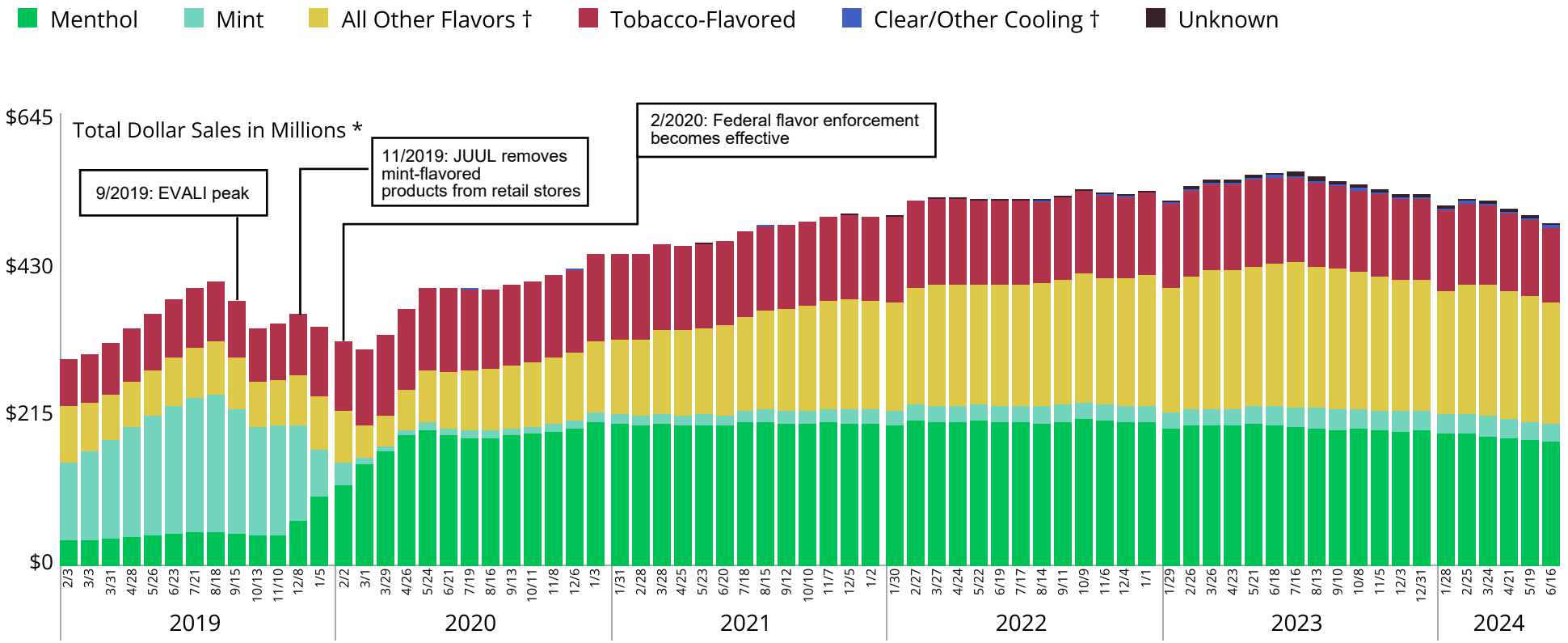
Figure 2. National E-Cigarette Dollar Sales by Flavor



* 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 (9.5% of total dollar sales in 2022). 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 (such as wine, cognac, or other cocktails), candy/desserts/other sweets, some other flavor; Clear/Other Cooling include 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)

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

From 2/2/2020 to 6/16/2024, unless otherwise specified

Total monthly e-cigarette dollar sales increased from 320.5 to 488.9 million dollars (+52.5%).

Tobacco-flavored e-cigarette dollar sales increased from 100.4 million to 106.8 million (+6.4%); dollar share decreased from 31.3% to 21.8%.

Non-tobacco-flavored e-cigarette dollar sales increased from 220.1 million to 378.7 million (+72.1%); dollar share increased from 68.7% to 77.5%.

Menthol-flavored e-cigarette dollar sales increased from 116.1 million to 176.5 million (+52.1%); dollar share decreased from 36.2% to 36.1%.

Mint-flavored e-cigarette dollar sales decreased from 31.2 million to 25.6 million (-17.9%); dollar share decreased from 9.7% to 5.2%.

Other-flavored e-cigarette dollar sales increased from 72.7 million to 173.1 million (+138.2%); dollar share increased from 22.7% to 35.4%.

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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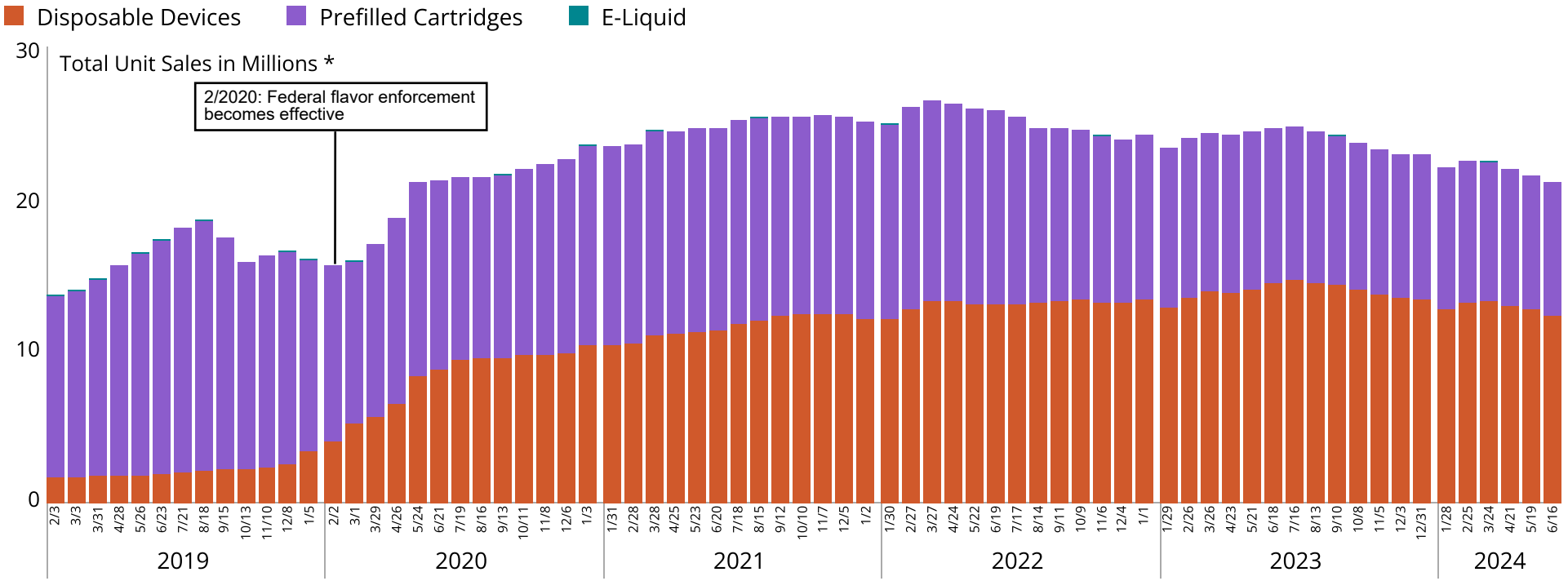
Figure 3. National E-Cigarette Unit Sales by Product Type



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

From 2/2/2020 to 6/16/2024, unless otherwise specified

- Sales of prefilled cartridges decreased from 11.6 to 8.8 million units (-23.8%).
- Sales of disposable devices increased from 4.1 to 12.3 million units (+201.3%).

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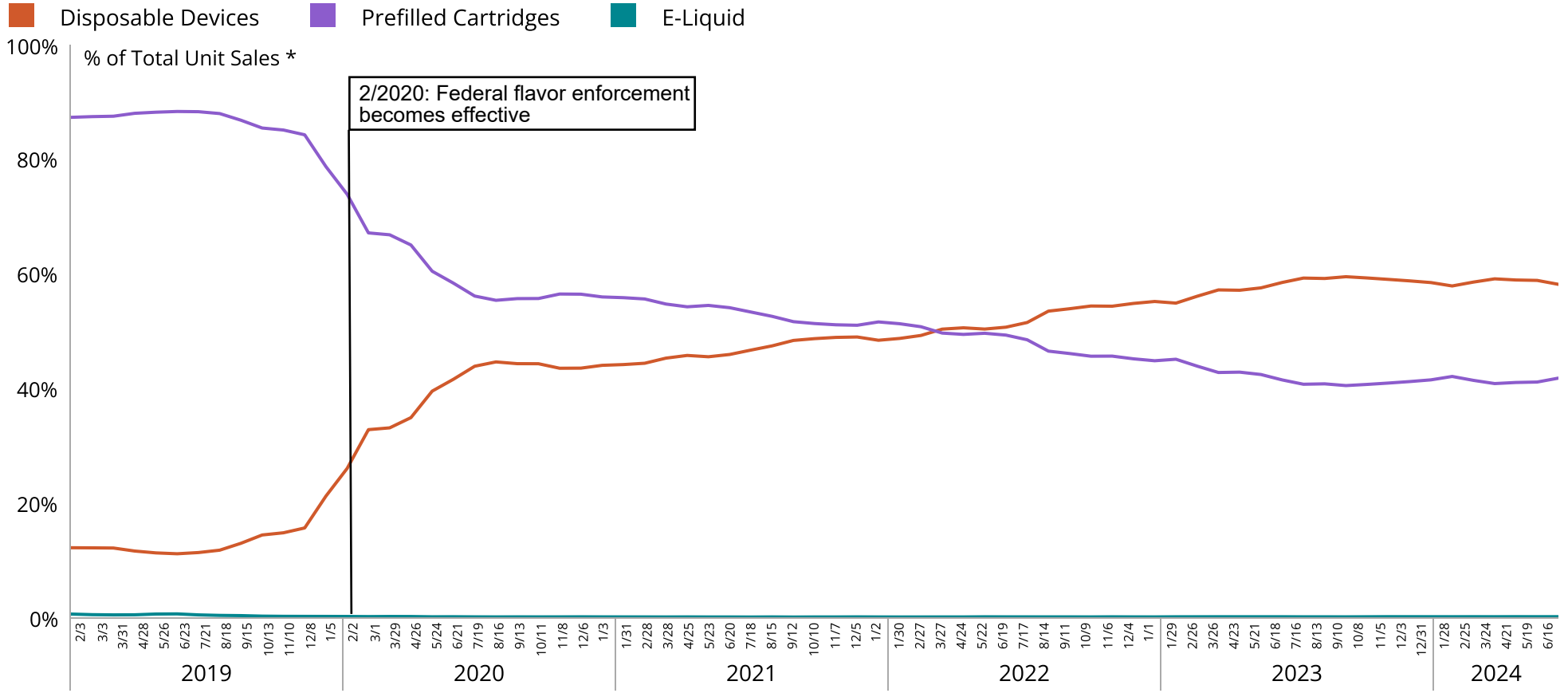
Figure 4. National E-Cigarette Unit Share by Product Type



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

From 2/2/2020 to 6/16/2024, unless otherwise specified

- Unit share of disposable devices increased from 26.0% to 58.1%.
- Unit share of prefilled cartridges decreased from 73.9% to 41.8%.

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Figure 5. National E-Cigarette Unit Sales by Product Type and Flavor

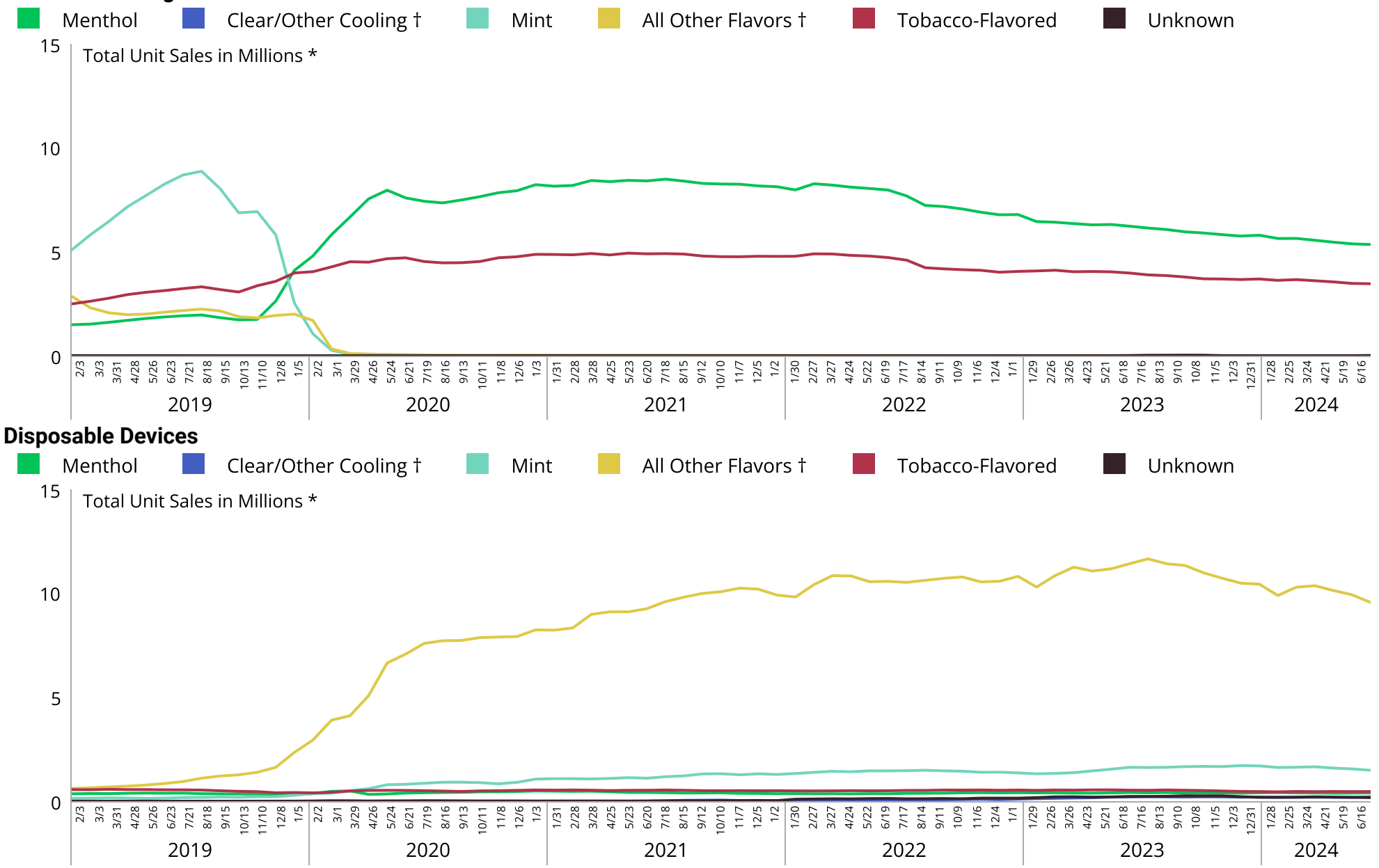

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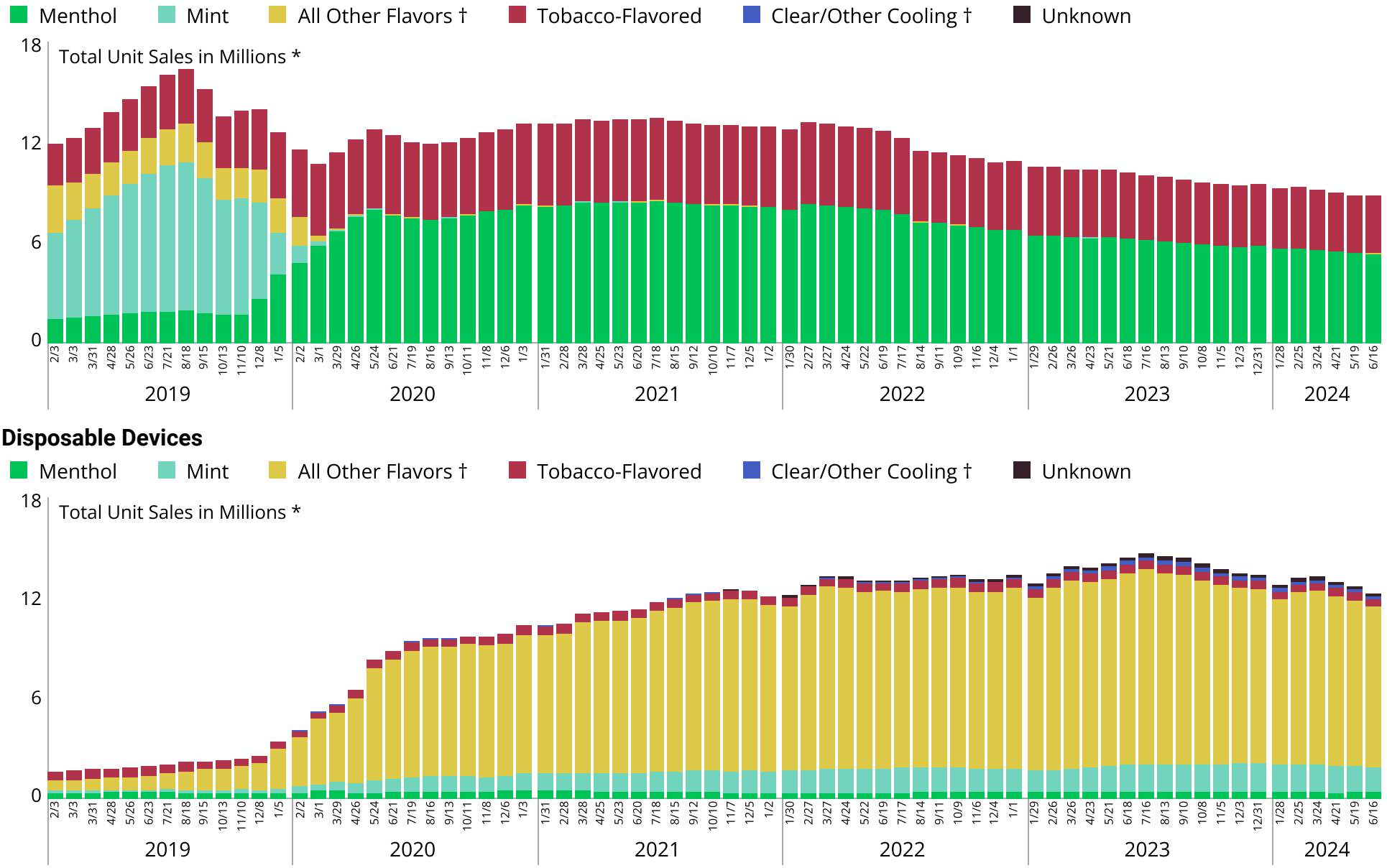
Figure 6. National E-Cigarette Unit Sales by Product Type and Flavor



* 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 (9.5% of total dollar sales in 2022). 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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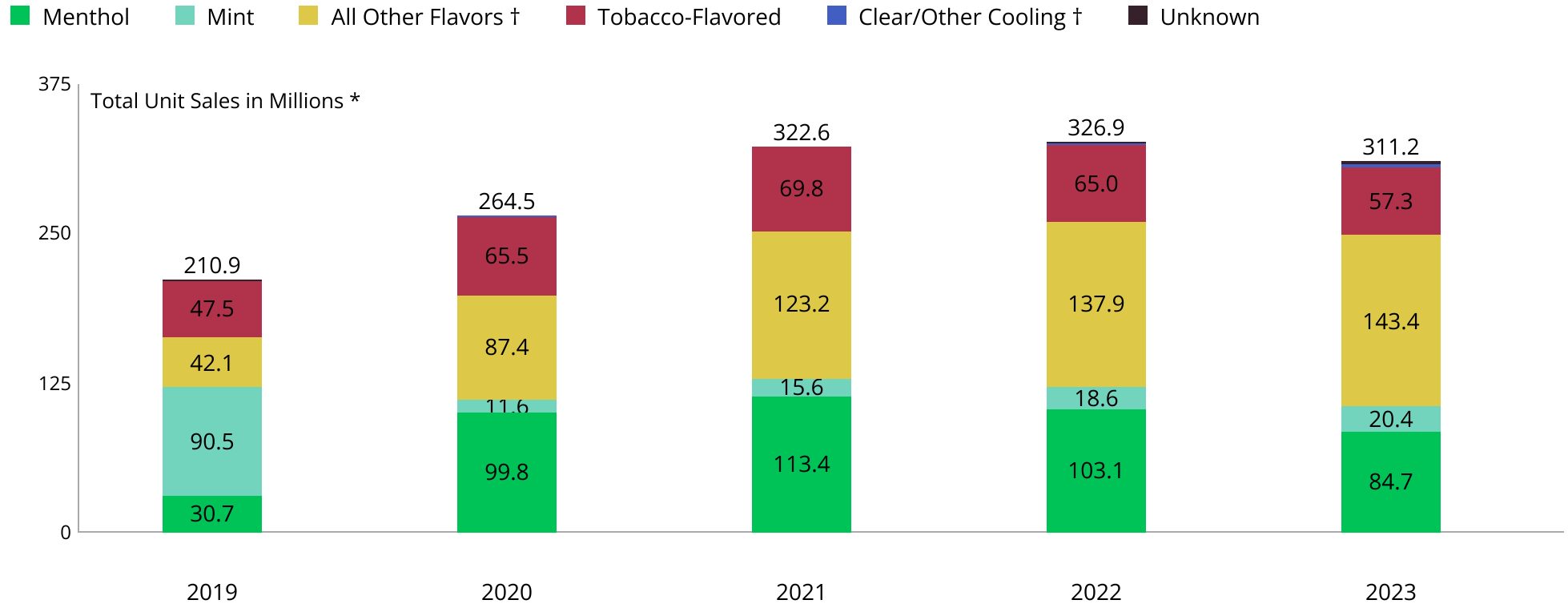
Figure 7. National E-Cigarette Unit Sales By Flavor, Annual Estimates



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Unit Sales Annual Trends by Flavor, Annual Aggregates

From 2022 to 2023, unless otherwise specified

Annual total e-cigarette unit sales decreased from 326.9 to 311.2 million units (-4.8%).

Unit sales of tobacco-flavored e-cigarettes decreased from 65.0 to 57.3 million units (-11.8%).

Unit sales of non-tobacco-flavored e-cigarettes decreased from 260.3 to 250.9 million units (-3.6%).

Unit sales of menthol-flavored e-cigarettes decreased from 103.1 to 84.7 million units (-17.8%).

Unit sales of mint-flavored e-cigarettes increased from 18.6 to 20.4 million units (+9.8%).

Unit sales of other-flavored e-cigarettes increased from 137.9 to 143.4 million units (+4.0%).

Unit sales of clear/other cooling flavored e-cigarettes increased from 0.7 to 2.4 million units (+224.4%).

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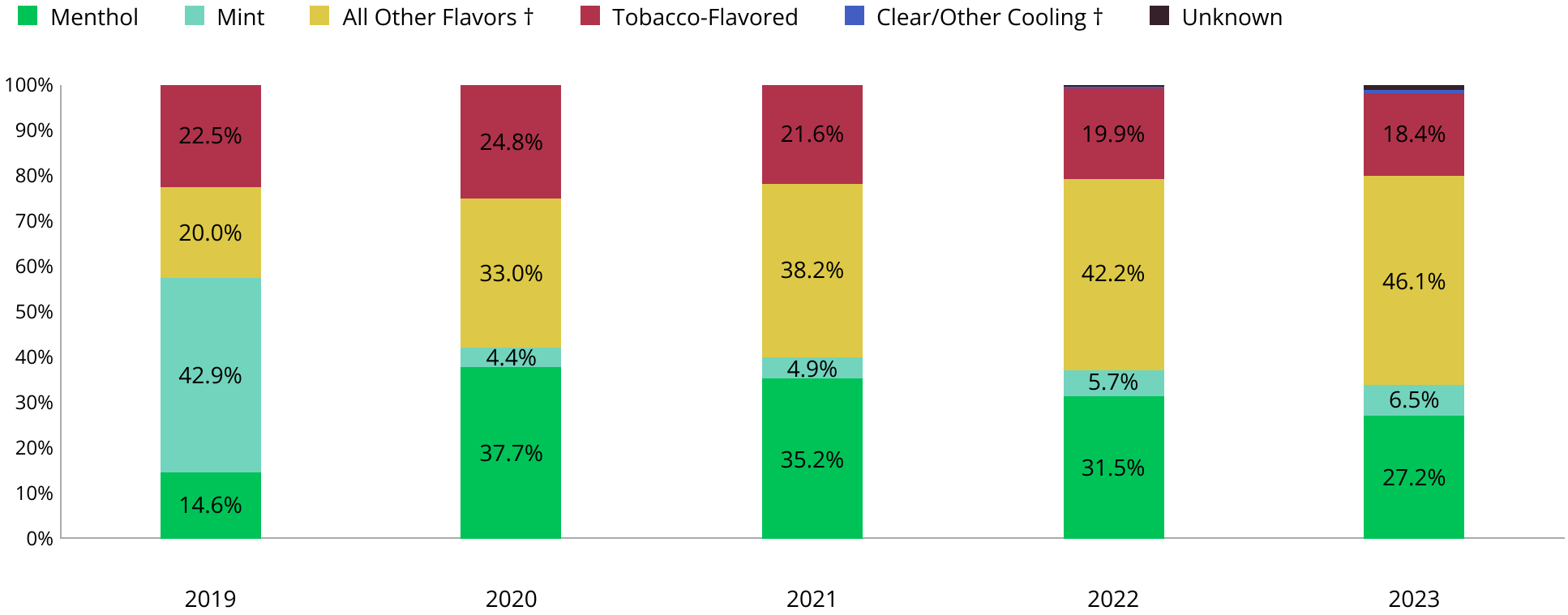
Figure 8. Annual Unit Share of National E-Cigarette Unit Sales by Flavor



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Unit Share Annual Trends by Flavor, Annual Aggregates

From 2022 to 2023, unless otherwise specified

- Unit share of tobacco-flavored e-cigarette sales decreased from 19.9% to 18.4% (-1.5%).
- Unit share of non-tobacco-flavored e-cigarette sales increased from 79.6% to 80.6% (+1.0%).
- Unit share of menthol-flavored e-cigarette sales decreased from 31.5% to 27.2% (-4.3%).
- Unit share of mint-flavored e-cigarette sales increased from 5.7% to 6.5% (+0.9%).
- Unit share of other-flavored e-cigarette sales increased from 42.2% to 46.1% (+3.9%).
- Unit share of clear/other cooling flavored e-cigarette sales increased from 0.2% to 0.8% (+0.5%).

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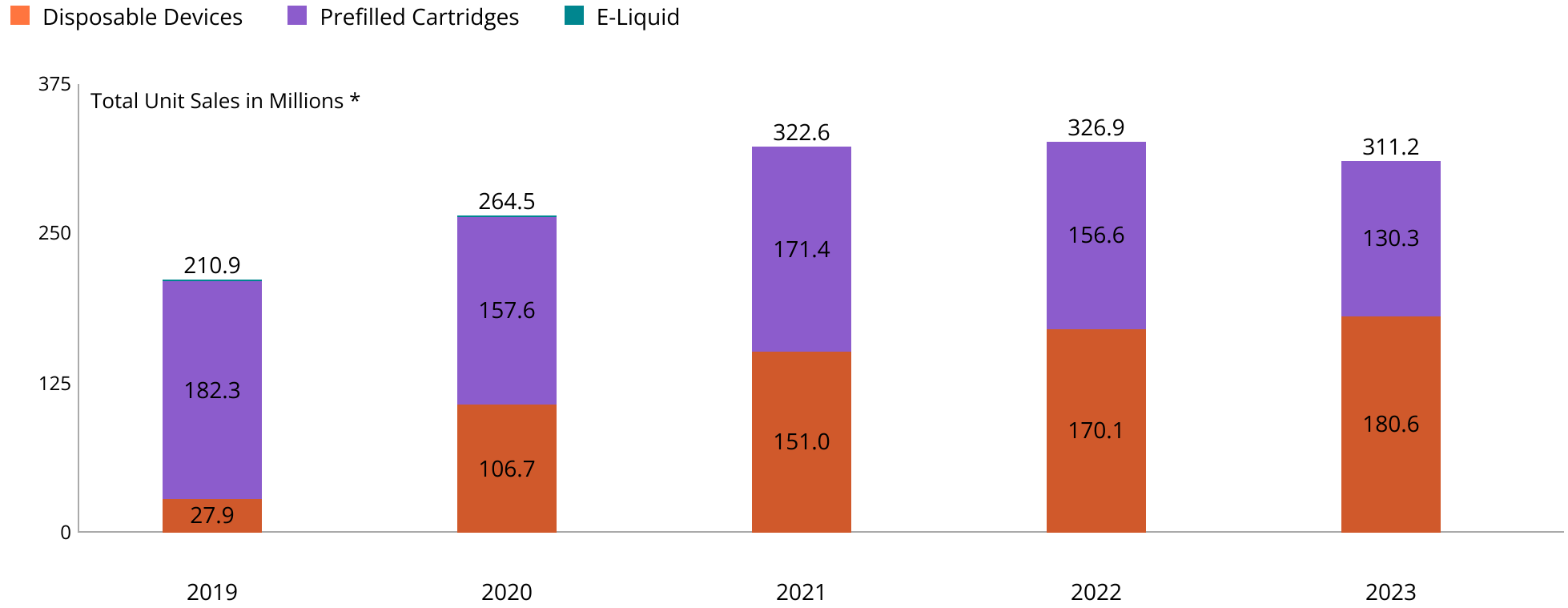
Figure 9. National E-Cigarette Unit Sales By Product Type, Annual Estimates



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Unit Sales Annual Trends by Product, Annual Aggregates

From 2022 to 2023, unless otherwise specified

Total monthly e-cigarette unit sales decreased from 326.9 to 311.2 million units (-4.8%).

Unit sales of prefilled cartridge e-cigarettes decreased from 156.6 to 130.3 million units (-16.8%).

Unit sales of disposable e-cigarettes increased from 170.1 to 180.6 million units (+6.2%).

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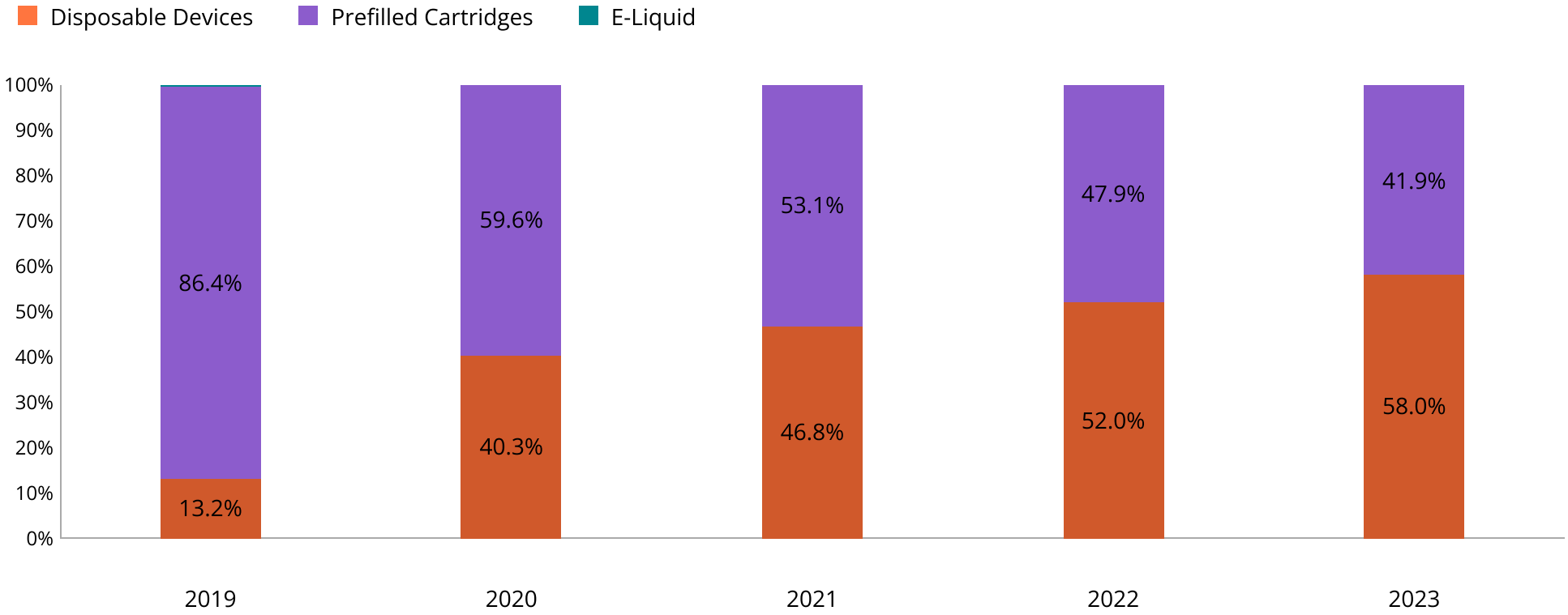
Figure 10. Annual Unit Share of National E-Cigarette Unit Sales by Product type



Unit Share Annual Trends by Product, Annual Aggregates

From 2022 to 2023, unless otherwise specified

- Unit share of prefilled cartridge e-cigarette sales decreased from 47.9% to 41.9% (-6.0%).
- Unit share of disposable e-cigarette sales increased from 52.0% to 58.0% (+6.0%).

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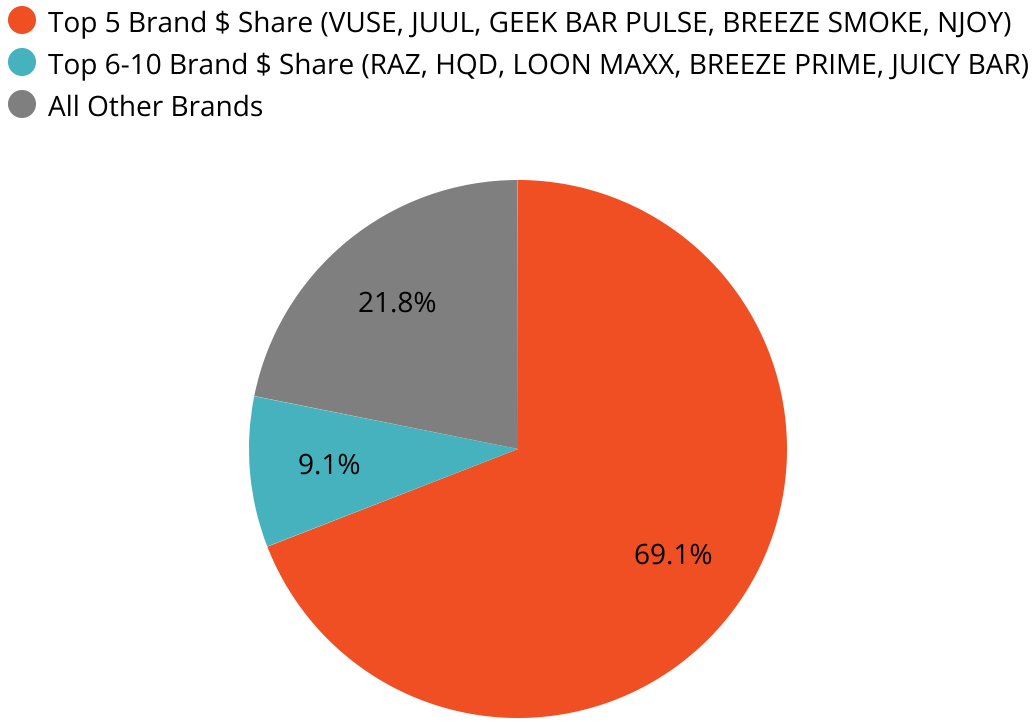
Figure 11. Dollar Market Share of Top Brands **



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** Brands included here are presented as they are described within Circana data (therein labelled BrandFranchiseName); 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 4/21/2024 to 6/16/2024, unless otherwise specified

The top ten brands during the period spanning April 21, 2024, through June 16, 2024, were (in descending order of dollar sales) VUSE, JUUL, GEEK BAR PULSE, BREEZE SMOKE, NJOY, RAZ, HQD, LOON MAXX, BREEZE PRIME and JUICY BAR. The top five brands and top ten brands accounted for 69.1% and 78.2% of dollar sales, respectively

All estimates and analyses in this data brief based on Circana (formerly IRI, Information Resources, Inc.) Multi-Outlet + Convenience data are by the author and not by Circana. Financial support was provided by Bloomberg Philanthropies through a grant to the CDC Foundation. According to Circana, new e-cigarette product coding is managed to consistently meet or exceed releasing products that cover a minimum of 95.5% of total e-cigarette dollar sales at any given time. Coding and releasing of new products are prioritized based on significance of dollar sales in order to continually comply with capturing at least 95.5% of total e-cigarette dollar sales in each period.