Euromonitor International

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the US

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Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the US - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

INDUSTRY PERFORMANCE

Tighterning Regulations Fuel Consumer Demand Shift Towards Tobacco Free Oral Nicotine

Tobacco Free Oral Nicotine Surpasses Smokeless Tobacco as Consumers Migrate to Modern Oral Options

Njoy Ace Ban Accelerates Shift to Illicit Vapour and Oral Nicotine

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Innovation in Tobacco Free Oral Nicotine Expected to Accelerate User Migration and Volume Gains

Illicit Vapour and Modern Oral Formats Anticipated to Reshape Consumption and Value

Chart 4 - Forecast Volume Sales 2020-2030

Chart 5 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Zyn and Velo Capture Smokers as Illicit Vapour Gains Ground

Zyn and Velo Expands the Boundaries of Oral Nicotine

Chart 6 - Analyst Insight for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Convenience Stores Capture Nicotine Pouch Growth as Illicit Vapour Drives Channel Split

Illicit E-Vapour Accelerates Online Channel Growth While Legal E-Commerce Remains Constrained

PRODUCTS

Velo Plus and Portfolio Diversification Drive the Next Wave of Nicotine Innovation

Formulation Advances and Retail Execution Define the Boundaries of Recent Innovation

Innovation Reshapes Revenue Structures and Long-Term Strategic Priorities

ECONOMIC CONTEXT

Chart 9 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 10 - Real GDP Growth 2020-2030

Chart 11 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 12 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 13 - Population 2020-2030

Chart 14 - Population by Generation 2025

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Nicotine in the US - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 15 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

Shifts in Nicotine Consumption Highlight Cigarette Decline While Modern Alternatives Gain Traction
Value-Seeking Behaviour Drives Cross-Format Consumption as Cigarette Volume Declines
Chart 16 - Volume Sales 2020-2030
Chart 17 - Volume Sales by Category 2025

WHAT'S NEXT?

Nicotine Pouch Brands Anticipated to Capture Smokers as Cigarette Volumes Shrink
Illicit E-Vapour Expected to Drive Fragmentation as Legal Brands Lose Pricing Power
Chart 18 - Forecast Volume Sales 2020-2030
Chart 19 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Zyn and Velo Plus Outpace Cigarettes as Shares Fragment
Velo Plus Ignites New Rivalry in Nicotine Pouches
Product Innovation and Convenience Drive New Business Gains
Chart 20 - Analyst Insight for Nicotine
Chart 21 - Company Shares 2025
Chart 22 - Brand Shares 2025

CHANNELS

Nicotine Retail Channels Become Increasingly Bifurcated between Convenience Stores and Untracked, Illicit Channels
Online Retailers Expand Pouch Sales as Illicit Vapour Accelerates

PRODUCTS

Consumer Demand for Convenience and Discretion Redefines the Innovation Agenda
Higher-Moisture Formulations and Flavour Architecture Represent the Frontier of Product Development
Modern Oral Innovation Unlocks Premium Margins and Accelerates Portfolio Repositioning

OPERATING ENVIRONMENT

Legislation
Chart 23 - Legislation Summary at a Glance
Minimum Legal Smoking Age
Smoking Prevalence
Tar Levels
Health Warnings
Plain Packaging
Advertising and Sponsorship
Point-Of-Sale Display Bans
Smoking in Public Places
Low Ignition Propensity (Lip) Cigarette Regulation
Flavoured Tobacco Product Ban
Reduced Harm
Vapour Products

PRODUCTION/IMPORTS/EXPORTS

ECONOMIC CONTEXT

Chart 24 - Economic Context for Nicotine

Chart 25 - Real GDP Growth 2020-2030
Chart 26 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 27 - Consumer Context for Nicotine
Chart 28 - Population 2020-2030
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