



NRT Smoking Cessation Aids in US

September 2026

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KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

INDUSTRY PERFORMANCE

Contraction maintained as format performance diverges

Manufacturers deprioritise NRT smoking cessation aids as alternative nicotine products divert demand

E-commerce outpaces pharmacies while shoppers trade down to private label

Chart 1 Value Sales 2021-2031

Chart 2 Value Sales by Category 2026

WHAT'S NEXT?

Structural decline in the number of smokers to drive a continued fall in sales

Alternative nicotine products to reshape consumer expectations and demand

Chart 1 Forecast Value Sales 2021-2031

Chart 2 Forecast Value Sales by Category 2026-2031

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Haleon loses share as private label gains ground

Chart 1 Company Shares 2026

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Pharmacies and grocery retailers retain their lead through habitual purchasing

Retail e-commerce expands its share as shoppers seek value and convenience

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Established brands cede ground to retailer offerings

Value competition redefines the competitive order

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