



Nicotine in the US

July 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - 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 2 - Volume Sales 2020-2030

Chart 3 - 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 4 - Forecast Volume Sales 2020-2030

Chart 5 - 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 6 - Analyst Insight for Nicotine

Chart 7 - Company Shares 2025

Chart 8 - 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 9 - 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 10 - Economic Context for Nicotine

Chart 11 - Real GDP Growth 2020-2030

Chart 12 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 13 - Consumer Context for Nicotine

Chart 14 - Population 2020-2030

Chart 15 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigarettes in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigarettes Summary

KEY INDUSTRY TRENDS

Chart 16 - Key Industry Trends for Cigarettes

INDUSTRY PERFORMANCE

Smokers Reduce Purchases as Volumes Decline Sharply

Shifting Consumer Behaviour Accelerates Category Decline

Affordability Pressures Reshape Consumption Patterns

Chart 17 - Volume Sales 2020-2030

WHAT'S NEXT?

Price-Sensitive Smokers Anticipated to Accelerate Shift to Discount Options as Volumes Fall

Manufacturers Expected to Face Shrinking Volumes as Regulatory Shifts Drive Consumer Migration

Chart 18 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Philip Morris Usa Inc and Rj Reynolds Tobacco Co Lose Share as Smaller Rivals Grow

Value Brands Increase but Philip Morris and Rj Reynolds Hold Steady

Chart 19 - Analyst Insight for Cigarettes

Chart 20 - Company Shares 2025

Chart 21 - Brand Shares 2025

CHANNELS

Convenience Retailers Maintain Dominance as Primary Purchase Points

Retail E-Commerce Remains Marginal as Regulations Limit Online Sales

Chart 22 - Retail Channels 2020-2025

TAXATION AND PRICING

Taxation Rates

Average Cigarette Pack Price Breakdown

Chart 23 - Average Cigarette Pack Price Breakdown: Brand Examples

PRODUCTS

Limited Differentiation Defines the Product Landscape

Stagnation in Product Development Narrows Competitive Options

ECONOMIC CONTEXT

Chart 24 - Economic Context for Cigarettes

Chart 25 - Real GDP Growth 2020-2030

Chart 26 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 27 - Consumer Context for Cigarettes

Chart 28 - Population 2020-2030

Chart 29 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigars, Cigarillos and Smoking Tobacco in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigars, Cigarillos and Smoking Tobacco Summary

INDUSTRY PERFORMANCE

Scandinavian Tobacco Group Pivots to Limited Editions as Everyday Use Declines

Premium Large Cigars Sustain Demand as Consumers Trade up for Special Occasions

Swisher International Drives Value Sales as Economic Pressure Reshapes Buying Habits

Chart 30 - Volume Sales 2020-2030

Chart 31 - Volume Sales by Category 2025

WHAT'S NEXT?

Value Pricing and Premium Positioning Anticipated to Shape Future for Manufacturers

Cigars and Cigarillos Set to Remain the Largest Despite Overall Volume Decline

Chart 32 - Forecast Volume Sales 2020-2030

Chart 33 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Swisher International Leverages Value Promotions to Reinforce Its Lead

Swisher, Stg, and Altria Jockey for Leading Cigar Shares

Chart 34 - Company Shares 2025

Chart 35 - Brand Shares 2025

CHANNELS

Convenience Retailers Reinforce Leadership through Value-Driven Promotions

E-Commerce Remains Secondary as In-Store Access Prevails

ECONOMIC CONTEXT

Chart 36 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 37 - Real GDP Growth 2020-2030

Chart 38 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 39 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 40 - Population 2020-2030

Chart 41 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

KEY INDUSTRY TRENDS

Chart 42 - Key Industry Trends for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

INDUSTRY PERFORMANCE

Tightening 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 43 - Volume Sales 2020-2030

Chart 44 - 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 45 - Forecast Volume Sales 2020-2030

Chart 46 - 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 47 - Analyst Insight for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 48 - Company Shares 2025

Chart 49 - 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 50 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 51 - Real GDP Growth 2020-2030

Chart 52 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 53 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 54 - Population 2020-2030

Chart 55 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/nicotine-in-the-us/report.