



Euromonitor
International

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

July 2026

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

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 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

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

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Zyn and Velo Capture Smokers as Illicit Vapour Gains Ground

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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

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KEY DATA INSIGHTS

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Chart 19 - Forecast Volume Sales by Category 2025-2030

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Product Innovation and Convenience Drive New Business Gains

Chart 20 - Analyst Insight for Nicotine

Chart 21 - Company Shares 2025

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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

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