



# Monitoring U.S. E-Cigarette Sales: *National Trends*

**This brief report highlights trends in national e-cigarette sales from January 2017 to January 2021.**

*Please note this data brief has been updated since its original publication based on additional information that has become available for specific products. This version has been updated on 6/25/2021*

- **E-Cigarette Use**

- The 2020 National Youth Tobacco Survey (NYTS), released in September 2020, showed that current e-cigarette use was 19.6% among high school students and 4.7% among middle school students. Although these data show a decline since 2019 when e-cigarette use among youth peaked (at 27.5% and 10.5%, respectively), 3.6 million U.S. youth still currently used e-cigarettes in 2020, and more than 8 in 10 used flavored e-cigarettes.<sup>1</sup>

- **Federal Legislative and Regulatory Initiatives**

- Sales Restrictions: On December 20, 2019, a federal law was passed to raise the minimum age of sale of tobacco products, including e-cigarettes, to 21 years.
- Flavors: The U.S. Food and Drug Administration issued an enforcement policy, effective February 2020, prohibiting the sale of flavored prefilled cartridges e-cigarettes such as Juul and Vuse. This policy does not apply to tobacco-and menthol-flavored prefilled cartridges, e-liquids, or single use disposable products, such as Puff Bar and Mojo, which are available in a wide array of flavors.

- **Other Relevant Issues**

- Between August 2019 and January 2020, federal, state, and local public health entities investigated a national outbreak of e-cigarette or vaping product use-associated lung injury (EVALI).
- Since March 2020, the coronavirus disease (COVID-19) pandemic has been affecting schools and businesses, including retail stores that sell e-cigarettes

- **State and Local Legislative Initiatives**

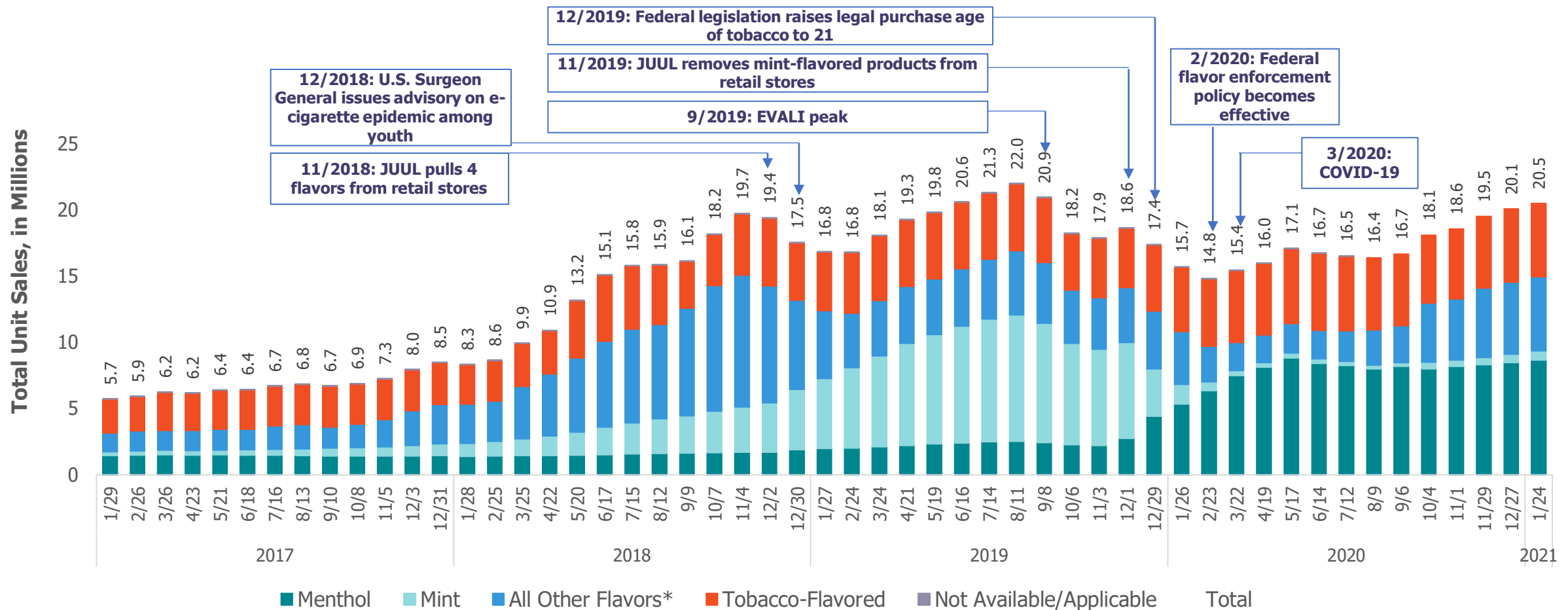
- Communities and states have begun to enact laws that prohibit sales of flavored tobacco products, including e-cigarettes.

## Key Findings

- From January 26, 2020 to January 24, 2021, national total e-cigarette unit sales increased by 30.7%.
- Since the release of 2020 NYTS findings, e-cigarette sales increased by 23.0% between September 6, 2020 and January 24, 2021.
- As of January 24, 2021, all non-tobacco flavored e-cigarettes accounted for 73.0% of the national e-cigarette market, and menthol e-cigarette sales accounted for 42.2% of the market.
- The market shares of disposable e-cigarettes and menthol-flavored prefilled cartridges significantly increased in 2020, likely influenced by the federal enforcement policy that exempted these flavors and product types.

**Conclusion:** Restrictions that exempt certain flavors could shift sales to the flavors that remain on the market, deterring progress in reducing use. Comprehensive removal of flavors from the e-cigarette market may reduce e-cigarette sales, reduce youth access to flavored e-cigarettes and ultimately reduce youth e-cigarette use.

**Figure 1. National E-Cigarette Unit Sales by Flavor, 4 Week Estimates 1/2017 – 1/2021\***

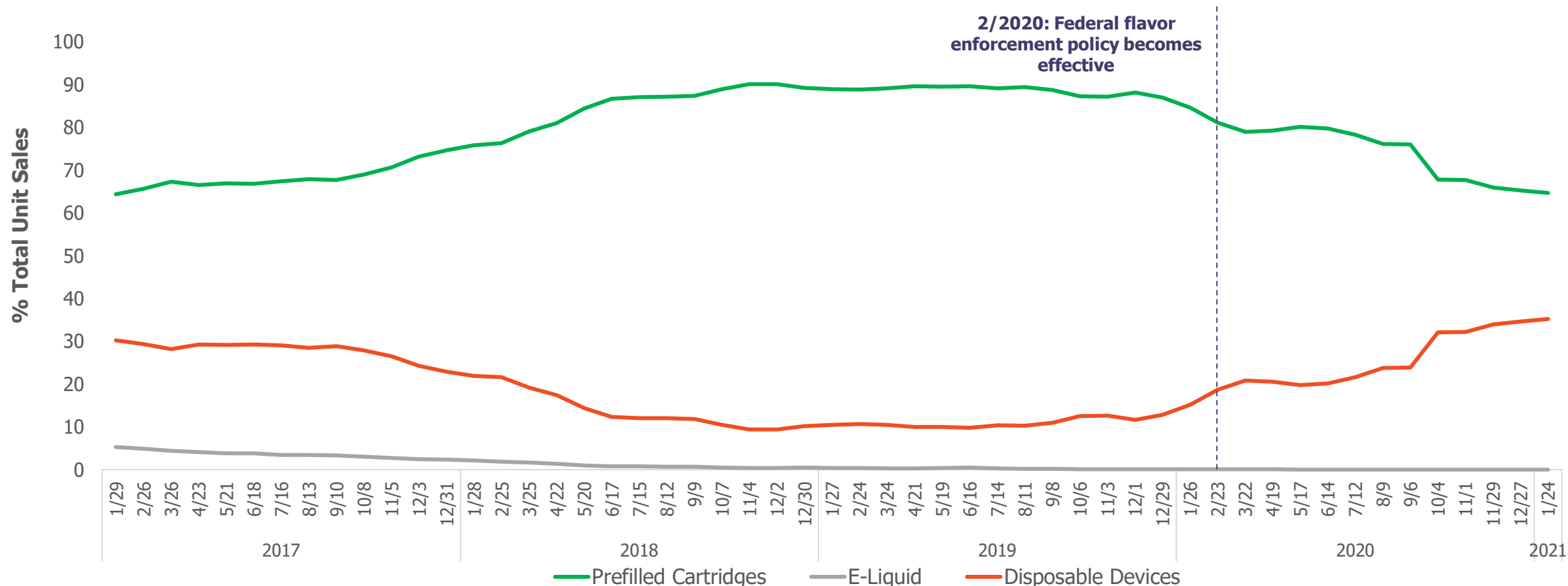


\*Sales data does not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; All Other Flavors category includes fruit, clove/spice, chocolate, alcoholic drink (such as wine, cognac, or other cocktails), candy/desserts/other sweets, some other flavor; e-cigarette accessories and devices sold without e-liquids were excluded (11.5% of total sales).

**Unit Sales Data Trends (1/26/20-1/24/21)**

- From January 26, 2020 to January 24, 2021, monthly e-cigarette unit sales increased by 30.7% to 20.5 million units.
  - Since the release of 2020 NYTS data, sales increased by 23.0% between September 6, 2020 and January 24, 2021.
- As of January 24, 2021, the proportion of menthol e-cigarette sales is 42.2% of the entire e-cigarette market. The proportion of tobacco e-cigarette sales is 27.0% of the entire e-cigarette market.
- From January 26, 2020 to January 24, 2021:
  - Menthol-flavored e-cigarette sales increased by 61.9% (from 5.3 million to 8.7 million);
  - Tobacco-flavored e-cigarette sales increased by 13.7% (from 4.9 million to 5.5 million);
  - Mint-flavored e-cigarette sales decreased by 52.8% (from 1.5 million to 0.7 million); and
  - All other-flavored e-cigarette sales increased by 40.4% (from 4.0 million to 5.6 million).

**Figure 2. National E-Cigarette Unit Sales by Product Type, 4 Week Estimates 1/2017 – 1/2021\***

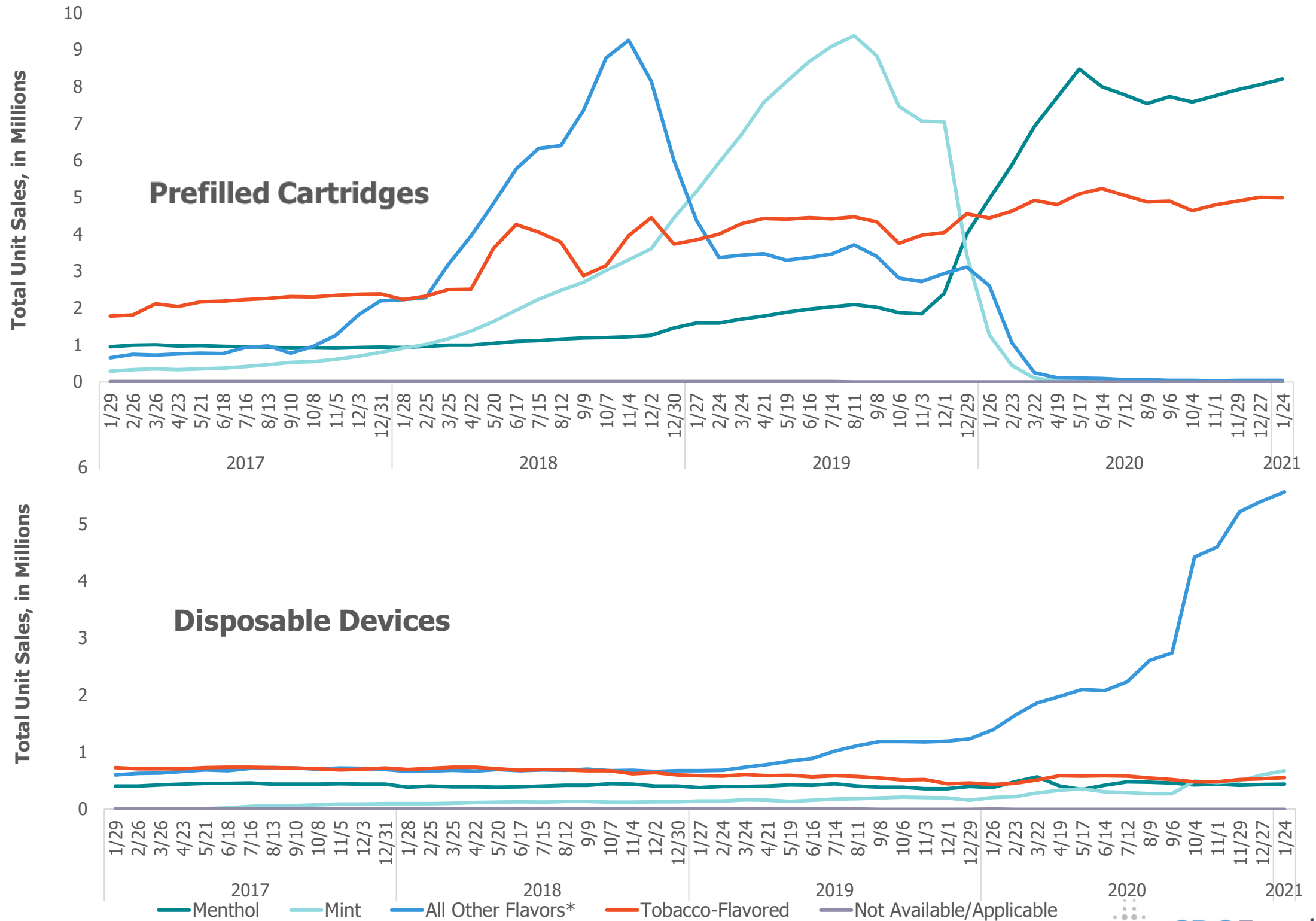


\*Sales data does not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; prefilled cartridges include tanks, cartridges, and pods used in rechargeable and reusable e-cigarette device; disposable devices include nonrechargeable and nonreusable e-cigarette devices that are not intended to be refilled with e-liquid after being depleted; e-liquids are containers of the liquid used in e-cigarette devices, which typically contains a humectant (e.g., propylene glycol), nicotine, and flavoring.

### Trends of Unit Sales by Product Type (2/23/20-1/24/21)

- Following FDA’s flavor enforcement policy, the market share of prefilled cartridges decreased from 81.1% of total sales to 64.7% of total sales between February 23, 2020 and January 24, 2021.
  - Since the release of 2020 NYTS data, the market share decreased from 76.1% in September 6, 2020 and 64.7% in January 24, 2021.
- Following FDA’s flavor enforcement policy, the market share of disposable devices increased from 18.8% of total sales to 35.3% of total sales between February 23, 2020 and January 24, 2021.
  - Since the release of 2020 NYTS data, the market share increased from 23.9% in September 6, 2020 to 35.3% in January 24, 2021.

**Figure 3. National E-Cigarette Unit Sales by Product Type and Flavor, 4 Week Estimates 1/2017 – 1/2021**



**Figure 4. National E-Cigarette Unit Sales by Product Type and Flavor, 4 Week Estimates 1/2017 – 1/2021**

