

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

This brief report highlights trends in national e-cigarette sales from January 2016 to November 2020.

- **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.¹ 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.¹

- **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).
- By mid-March 2020, nearly all U.S. states had declared a state of emergency due to the novel coronavirus disease (COVID-19) pandemic. States and local jurisdictions enacted various public health interventions to limit the spread of COVID-19, including temporary closures of non-essential businesses and schools, restrictions on public gatherings, and isolation and quarantine measures.

- **State and Local Legislative Initiatives**

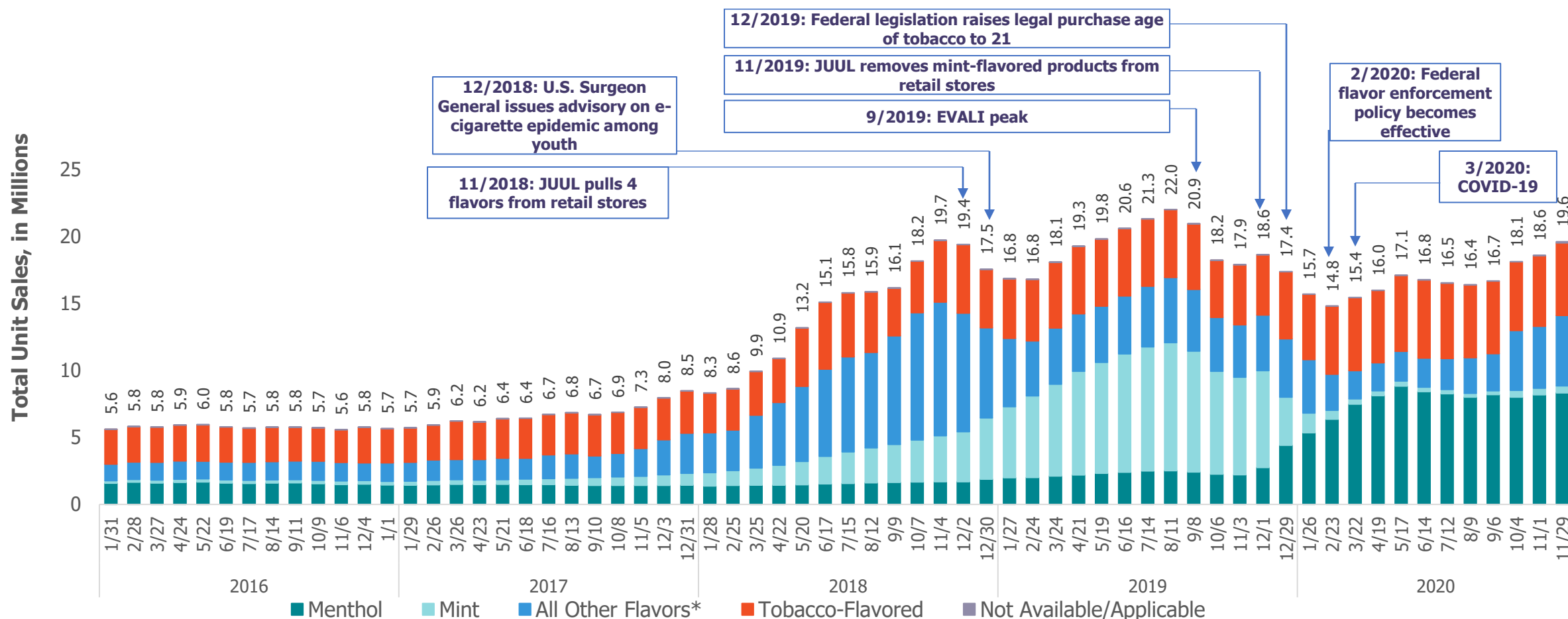
- Communities and states have begun to enact laws that prohibit sales of flavored tobacco products, including e-cigarettes.

Key Findings

- From January 26, 2020 to November 29, 2020, national total e-cigarette unit sales increased by 25.0%.
- Since the release of 2020 NYTS data, e-cigarette sales increased by 17.6% between September 6, 2020 to November 29, 2020.
- As of November 29, 2020, all non-tobacco flavored e-cigarettes accounted for 71.9% of the national e-cigarette market, and menthol e-cigarette sales accounted for 42.5% 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: Comprehensive removal of flavors from the e-cigarette market may prevent substitution; strategies to reduce youth access to flavored e-cigarettes could reduce youth e-cigarette use.

Figure 1. National E-Cigarette Unit Sales by Flavor, 4 Week Estimates 1/2016 – 11/2020*

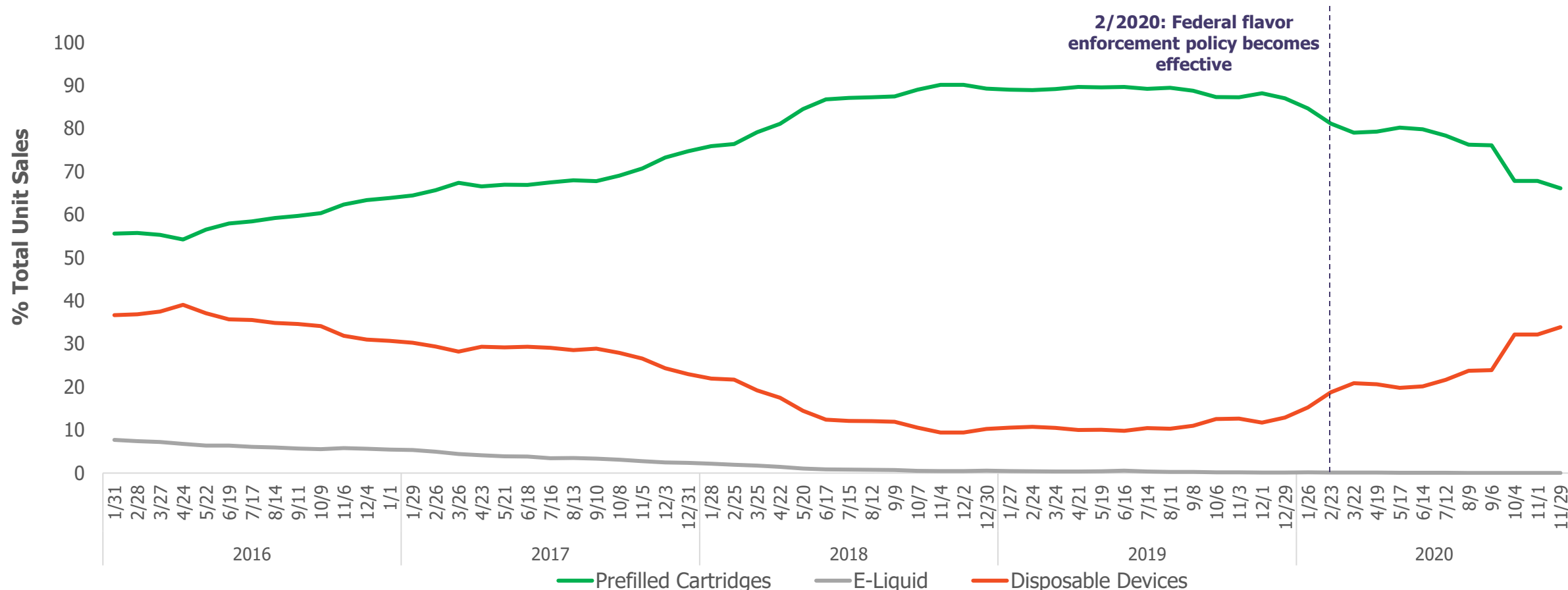


*Sales data does not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; All Other Flavors category includes fruit, clove/spice, chocolate, alcoholic drink (such as wine, cognac, or other cocktails), candy/desserts/other sweets, some other flavor; e-cigarette accessories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

Unit Sales Data Trends (1/26/20-11/29/20)

- From January 26, 2020 to November 29, 2020, total e-cigarette unit sales (excluding hardware) increased by 25.0% to 19.6 million units.
 - Since the release of 2020 NYTS data, sales increased by 17.6% between September 06, 2020 to November 29, 2020.
- As of November 29, 2020, the proportion of menthol e-cigarette sales is 42.5% of the entire e-cigarette market.
- From January 26, 2020 to November 29, 2020 :
 - Menthol-flavored e-cigarette sales increased by 55.9% (from 5.3 million to 8.3 million);
 - Tobacco-flavored e-cigarette sales increased by 11.0% (from 4.9 million to 5.4 million);
 - Mint-flavored e-cigarette sales decreased by 64.8% (from 1.5 million to 0.5 million); and
 - All other-flavored e-cigarette sales increased by 31.6% (from 4.0 million to 5.3 million).

Figure 2. National E-Cigarette Unit Sales by Product Type, 4 Week Estimates 1/2016 – 11/2020*



*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

- Following FDA’s flavor enforcement policy, the market share of prefilled cartridges decreased from 81.1% of total sales to 66.1% of total sales between February 23, 2020 to November 29, 2020.
 - Since the release of 2020 NYTS data, the market share decreased from 76.1% in September 6, 2020 to 66.1% in November 29, 2020.
- Following FDA’s flavor enforcement policy, the market share of disposable devices increased from 18.8% of total sales to 33.9% of total sales between February 23, 2020 to November 29, 2020.
 - Since the release of 2020 NYTS data, the market share increased from 23.9% in September 6, 2020 to 33.9% in November 29, 2020.

Figure 3. National E-Cigarette Unit Sales by Product Type and Flavor, 4 Week Estimates 1/2016 – 11/2020

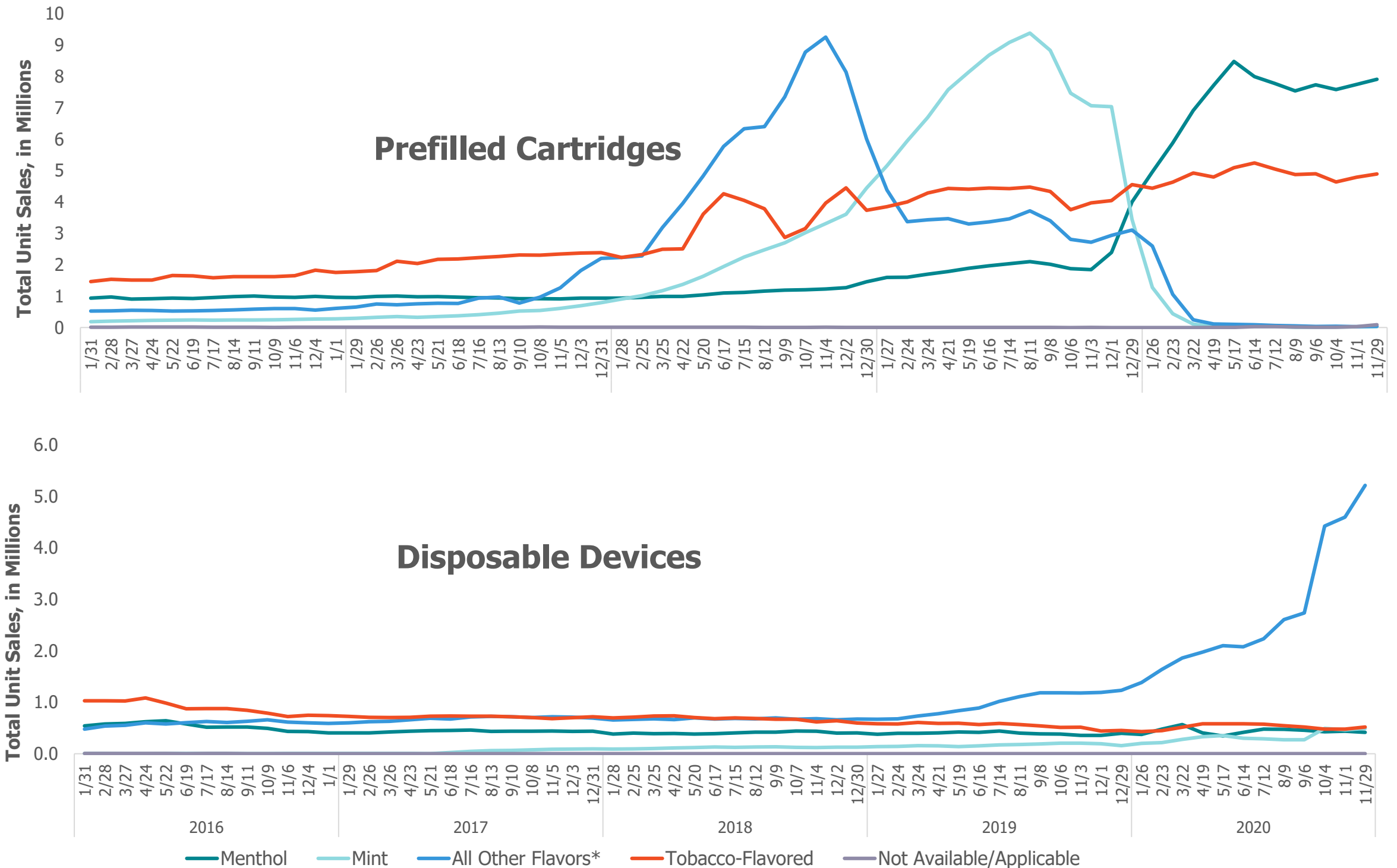


Figure 4. National E-Cigarette Unit Sales by Product Type and Flavor , 4 Week Estimates 1/2016 – 11/2020

