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.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).
  • 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*

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*

*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 to 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

Prefilled Cartridges

Total Unit Sales, in Millions

Disposable Devices

Total Unit Sales, in Millions

Menthol  Mint  All Other Flavors*  Tobacco-Flavored  Not Available/Applicable

2017  2018  2019  2020  2021

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