

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

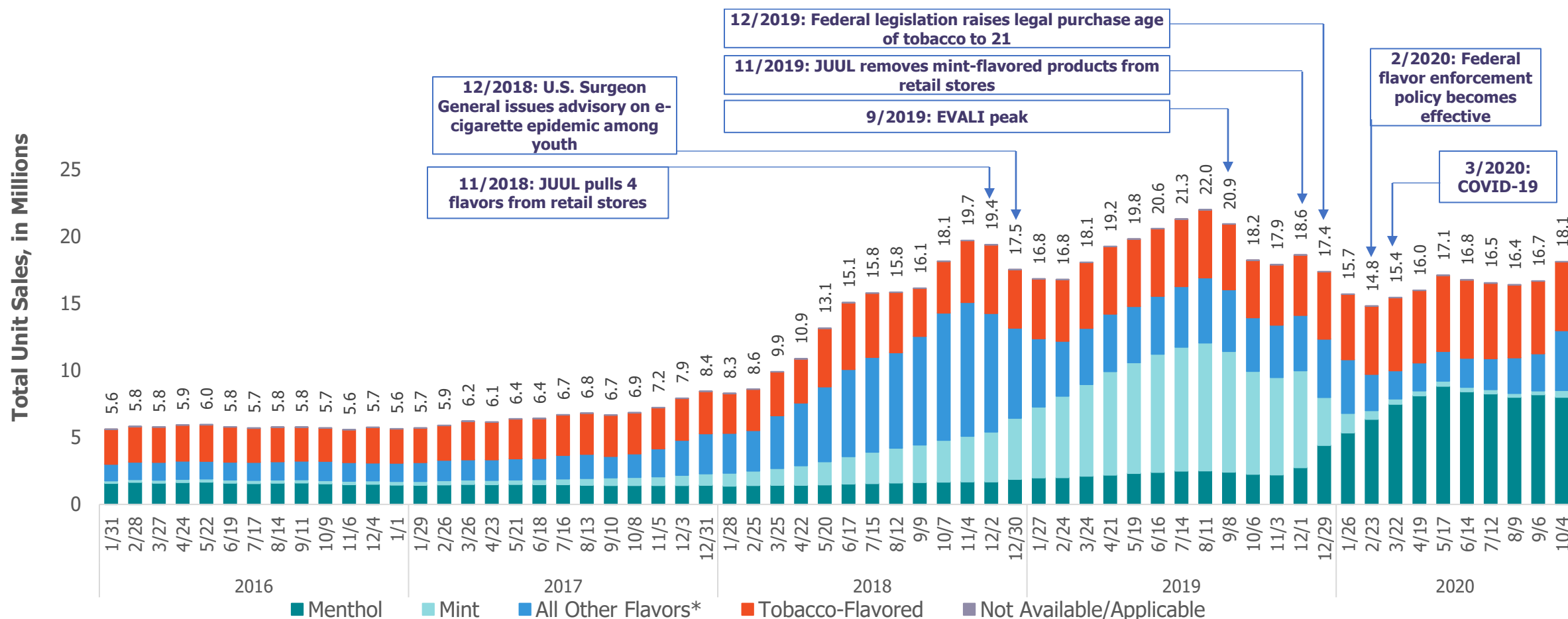
This brief report highlights trends in national e-cigarette sales from January 2016 to October 2020.

- **E-cigarette Use**
 - In 2020, 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).
 - 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 establish laws that prohibit sales of flavored tobacco products, including e-cigarettes.

Key Findings

- From January 26, 2020 to October 04, 2020, national total e-cigarette unit sales increased by 15.5%.
- As of October 04, 2020, menthol e-cigarette sales accounted for 44.2% of the national e-cigarette market, and all non-tobacco flavored e-cigarettes accounted for 71.7% 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.
- Data suggest that comprehensive removal of flavors from the e-cigarette market could reduce e-cigarette sales.

Figure 1. National E-Cigarette Unit Sales by Flavor, 4 Week Estimates 1/2016 – 10/2020*



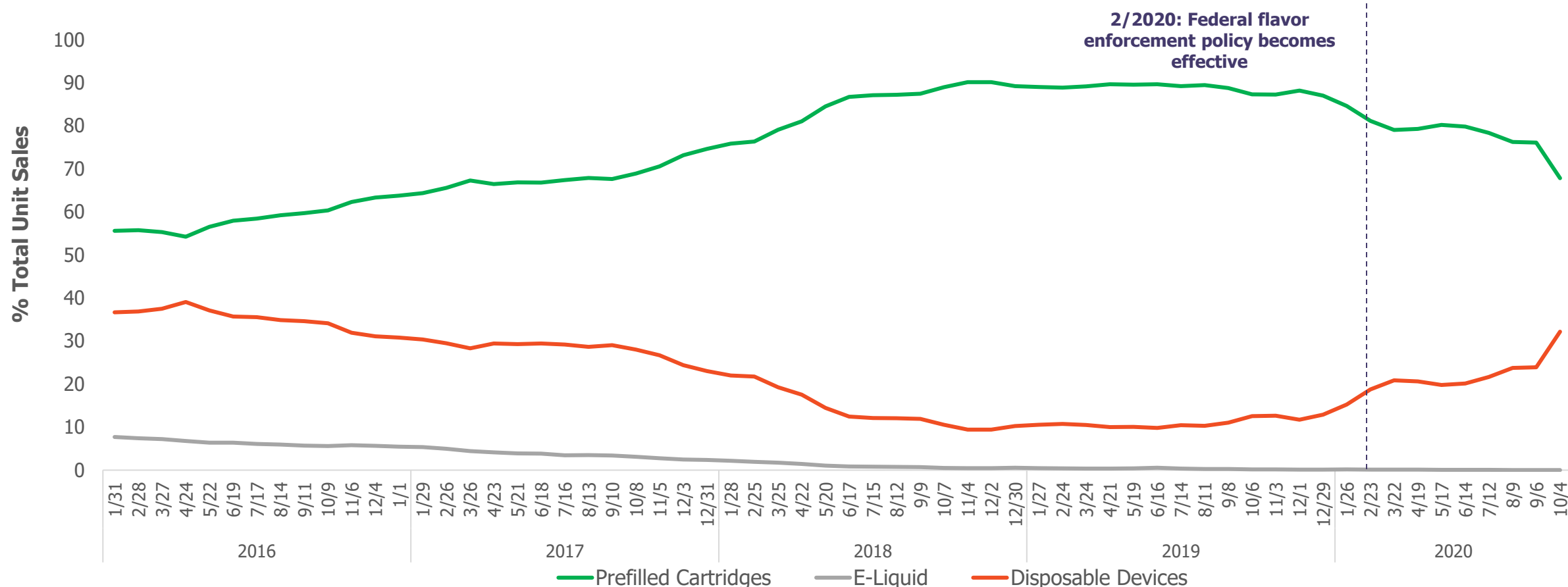
*Sales data does not reflect sales from vape shops or online retailers; dates represent end of 4-week periods; All Other Flavors category includes fruit, clove/spice, chocolate, alcoholic drink (such as wine, cognac, or other cocktails), candy/desserts/other sweets, some other flavor; e-cigarette accessories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

National

Unit Sales Data Trends (1/26/20-10/04/20)

- From January 26, 2020 to October 04, 2020, total e-cigarette unit sales (excluding hardware) increased by 15.5% to 18.1 million units.
- As of October 04, 2020, the proportion of menthol e-cigarette sales is 44.2% of the entire e-cigarette market.
- From January 26, 2020 to October 04, 2020 :
 - Menthol-flavored e-cigarette sales increased by 49.9% (from 5.3 million to 8.0 million);
 - Tobacco-flavored e-cigarette sales increased by 5.0% (from 4.9 million to 5.1 million); and
 - Mint and all other-flavored e-cigarette sales decreased by 8.9% (from 5.5 million to 5.0 million).

Figure 2. National E-Cigarette Unit Sales by Product Type, 4 Week Estimates 1/2016 – 10/2020*



*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 67.8% of total sales during February 23, 2020-October 04, 2020.
- Furthermore, the market share of disposable devices increased from 18.8% of total sales to 32.1% of total sales during February 23, 2020-October 04, 2020.

Figure 3. National E-Cigarette Unit Sales by Product Type and Flavor , 4 Week Estimates 1/2016 – 10/2020

