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

- **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**
  - As of June 2021, five states and over 300 local jurisdictions have enacted laws that prohibit sales of flavored tobacco products, including e-cigarettes.

**Key Findings**

- Estimated national e-cigarette unit sales hit record high for the second month in a row, reaching 22.44 million units by June 13, 2021.
- Following FDA's flavor enforcement policy in February 2020, national total e-cigarette unit sales increased by 51.6% from February 23, 2020 to June 13, 2021.
- Since the release of 2020 NYTS findings, e-cigarette sales increased by 34.6% between September 6, 2020 and June 13, 2021.
- As of June 13, 2021, all non-tobacco flavored e-cigarettes accounted for 74.6% of the national e-cigarette market, and menthol e-cigarette sales accounted for 40.4% 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 and product types are likely to shift sales to the products and flavors that remain on the market, deterring progress in reducing overall use. Comprehensive policies that prohibit all non-tobacco flavored e-cigarettes, including flavored disposable e-cigarettes, 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 – 6/2021*

Trends of Unit Sales by Flavor Following FDA’s Flavor Enforcement Policy

- From February 23, 2020 to June 13, 2021, total monthly e-cigarette unit sales increased by 51.6% to 22.4 million units.
- From February 23, 2020 to June 13, 2021, sales of non-tobacco flavored e-cigarettes (mint, menthol and other flavors) increased by 72.3% (from 9.7 million to 16.7 million).
  - Since the release of 2020 NYTS data, sales increased by 34.6% between September 6, 2020 and June 13, 2021.
- From February 23, 2020 to June 13, 2021:
  - Menthol-flavored e-cigarette sales increased by 42.5% (from 6.4 million to 9.1 million); market share decreased from 43.0% to 40.4%.
  - Tobacco-flavored e-cigarette sales increased by 12.1% (from 5.1 million to 5.7 million); market share decreased from 34.3% to 25.4%.
  - Mint-flavored e-cigarette sales increased by 25.7% (from 0.7 million to 0.8 million); market share decreased from 4.4% to 3.7%.
  - All other-flavored e-cigarette sales increased by 153.7% (from 2.7 million to 6.9 million); market share increased from 18.3% to 30.5%.

*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).
Figure 2. National E-Cigarette Unit Sales by Product Type, 4 Week Estimates 1/2017 – 6/2021*

Trends of Unit Sales by Product Following FDA’s Flavor Enforcement Policy

- Following FDA’s flavor enforcement policy, which prohibited the sale of flavored prefilled cartridges but exempted disposable devices and menthol and tobacco prefilled cartridges, between February 23, 2020 and June 13, 2021:
  - Sales of disposable devices increased by 207.4% (from 2.8 million to 8.5 million); market share increased from 18.8% to 38.0%.
  - Sales of prefilled cartridges increased by 15.8% (from 12.0 million to 13.9 million); market share decreased from 81.1% to 61.9%.
- Since the release of 2020 NYTS findings, between September 6, 2020 and June 13, 2021:
  - Sales of disposable devices increased by 114.4% (from 4.0 million to 8.5 million); market share increased from 23.9% to 38.0%.
  - Sales of prefilled cartridges increased by 9.6% (from 12.7 million to 13.9 million); market share decreased from 76.1% to 61.9%.

*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.
Figure 3. National E-Cigarette Unit Sales by Product Type and Flavor, 4 Week Estimates 1/2017 – 6/2021

Prefilled Cartridges

Disposable Devices

All estimates and analyses in this data brief based on Information Resources, Inc., Multi-Outlet + Convenience data are by the author and not by Information Resources, Inc. Financial support was provided by Bloomberg Philanthropies through a grant to the CDC Foundation.
Figure 4. National E-Cigarette Unit Sales by Product Type and Flavor, 4 Week Estimates 1/2017 – 6/2021

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