



UNITED STATES OF AMERICA

The Nicotine Pouch and Oral Nicotine Report 2026

MARKET DEVELOPMENT, ILLICIT TRADE,
AND CONSUMER BEHAVIOR



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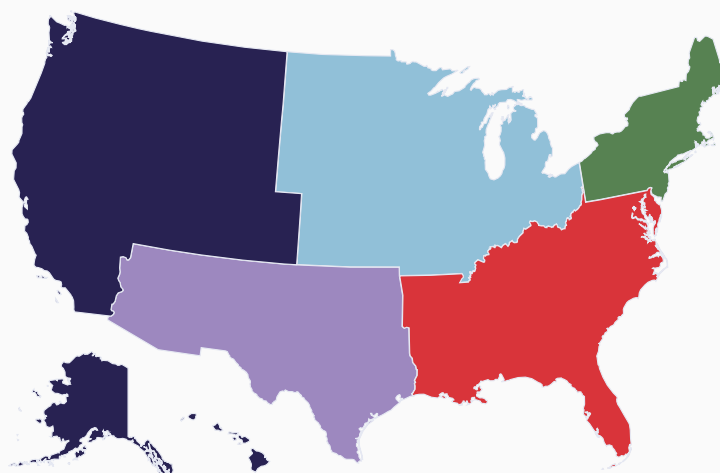
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ABOUT THE NICOTINE POUCH AND ORAL NICOTINE REPORT 2026

This report was produced by Nicokick.com in collaboration with Northerner.com. It provides insights into U.S. consumer behavior based on a survey of 2,245 customers (Dec 2025–Jan 2026) and 2025 purchasing data from more than 450,000 nicotine pouch consumers.

REGIONAL BREAKDOWN USED IN THIS REPORT

- West
- Southwest
- Midwest
- Northeast
- Southeast



Executive Summary

GROWTH IN THE U.S. NICOTINE POUCH MARKET AND ITS DRIVERS

- Nicotine pouch sales continue strong growth, increasing by 22% in 2025, according to sales data from the leading e-commerce platforms Nicokick.com and Northerner.com.
- Switching away from smoking or vaping is a key driver of adoption. 46% of nicotine pouch consumers report that their primary motivation for starting to use nicotine pouches was to stop smoking, vaping, or both.
- Almost all former smokers report improved well-being after switching. 93% of respondents who transitioned from cigarettes to nicotine pouches say they feel better following the change.
- Nicotine pouch consumers describe practical and social advantages. 72% identify lower perceived health risks compared with traditional tobacco products, while 71% highlight the products' unobtrusive and socially considerate use.
- 2025 marked the beginning of a clearer regulatory phase for nicotine pouches. While these developments are expected to strengthen the market, Nicokick.com and Northerner.com did not operate in 14 states or the District of Columbia due to evolving regulatory requirements and legal conditions related to online sales.

DEEP DIVE: THE EMERGENCE OF A BLACK MARKET

- Exposure to illicit nicotine pouches is not uncommon. One in ten respondents report having encountered nicotine pouches on the black market, rising to 20% among those aged 21–34.
- Concerns about health risks of illicit products are substantial. Two-thirds of nicotine pouch consumers (66%) report being concerned about the health risks associated with black-market nicotine pouches.
- Enforcement is perceived as unclear or ineffective. More consumers consider enforcement against illicit trade to be ineffective (19%) than effective (15%), while a substantial majority (66%) report that they are uncertain or lack sufficient knowledge to assess its effectiveness.

CONSUMER PREFERENCES IN THE U.S. NICOTINE POUCH MARKET

- on!, ZYN, and Rogue were the three most purchased brands on Nicokick.com and Northerner.com in 2025. Together, these brands accounted for a 57% share of the online market.
- Mint flavor accounts for the largest share of the market, while fruit flavors are gaining traction. Nearly six in ten cans sold in the U.S. are mint-flavored. Fruit flavors rank second (14%), and their sales have increased steadily over time, suggesting growing demand.



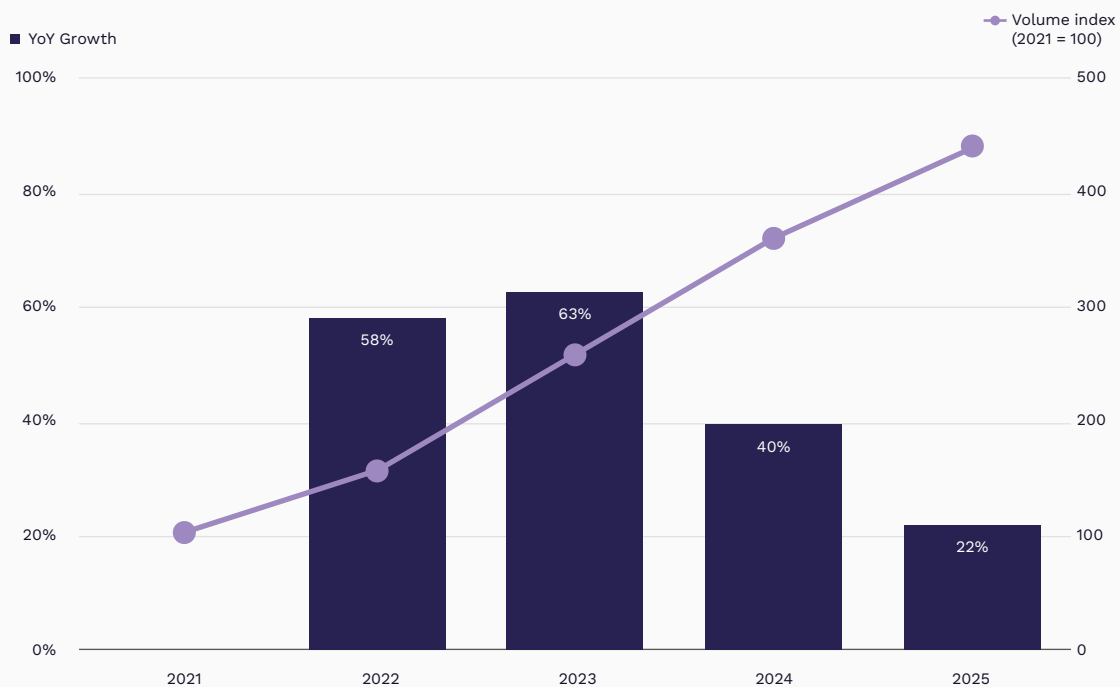
Market Development and Drivers of Growth

The U.S. nicotine pouch market is relatively new and rapidly evolving. Nicotine pouches do not contain tobacco leaf and are not burned; they are widely regarded as an alternative to traditional tobacco products. Globally, the category is projected to expand at an average annual growth rate of approximately 30% through 2030, with the United States considered one of the most dynamic and fastest-growing markets.¹

Growth has been strong since the nationwide sale of nicotine pouches started in 2019.² Data from the leading U.S. e-commerce platforms Nicokick.com and Northerner.com reflect this trend, with 2025 sales increasing by 22% on a comparable basis.³ The moderate growth observed during the year is due to several factors, including 8-month unavailability of the leading product and ongoing regulatory developments and increasing competition as the market continues to expand.

GROWTH IN THE U.S. ONLINE NICOTINE POUCH MARKET

Yearly volume growth and volume index 2021–2025*



*Sales data from Nicokick.com and Northerner.com.

¹ [Grandviewresearch.com](https://www.grandviewresearch.com), "Nicotine Pouches Market (2025–2030)".

² [Majmudar et al.](https://doi.org/10.1001/jama.2022.11e2242235), Nicotine Pouch Sales Trends in the US by Volume and Nicotine Concentration Levels from 2019 to 2022. JAMA Netw Open. 2022;11:e2242235.

³ Total growth for Nicokick.com and Northerner.com amounted to 1% in 2025, reflecting the fact that sales were discontinued in 15 U.S. states/territories during the year. Adjusted for this effect, comparable growth in the remaining states was 22%.

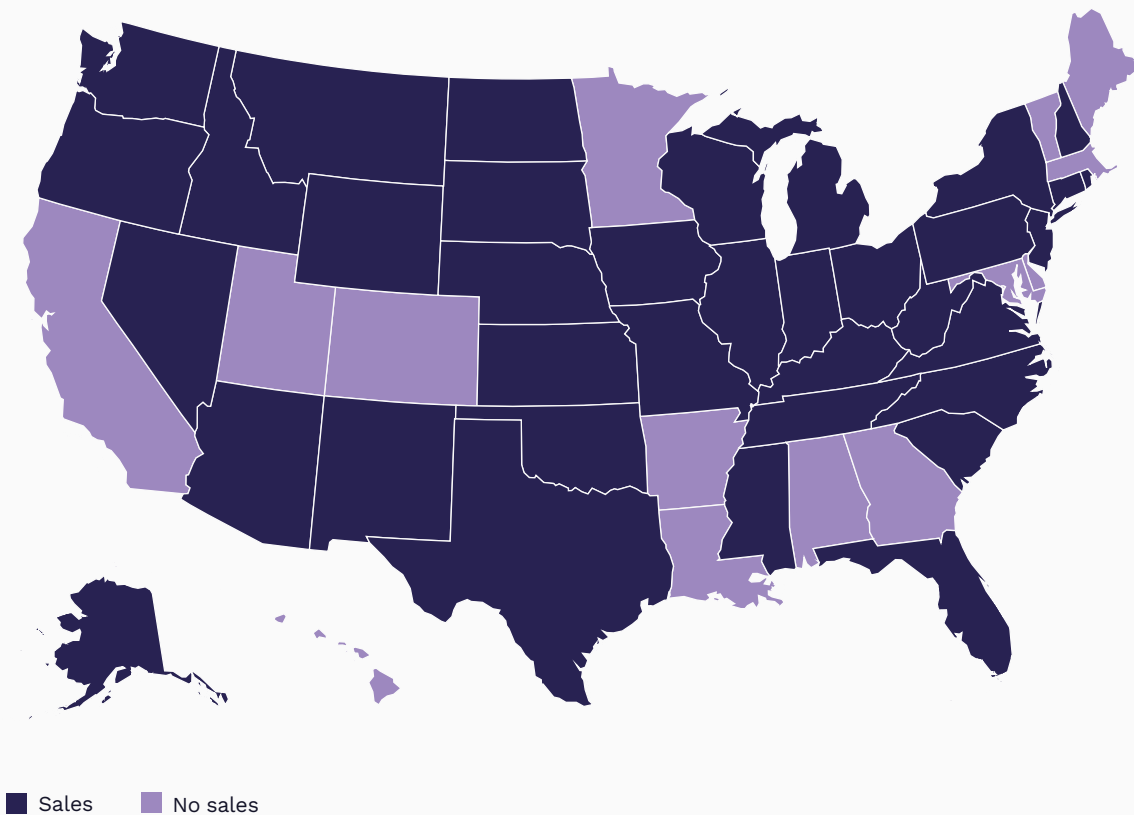
Rapid market expansion has been accompanied by increased regulatory attention. The 2009 passage of the Family Smoking Prevention and Tobacco Control Act gave the U.S. Food and Drug Administration (FDA) authority to regulate all tobacco and nicotine products, including newer categories such as nicotine pouches.

At the federal level, the FDA oversees product authorization through the Premarket Tobacco Product Application (PMTA) process, which assesses whether products are better alternatives than products that are known to cause harm. If they are, they are authorized for sale. In 2025, the first 26 authorizations were granted. The Modified Risk Tobacco Product (MRTP) pathway allows manufacturers to apply to communicate reduced health risks relative to other products on the market, subject to scientific review. The first MRTP scientific review on pouches took place in 2025, with a decision expected in 2026.

At the state and local levels, nicotine pouch regulation remains fragmented, with varying requirements affecting product availability and online distribution. As the industry adapts to evolving regulatory requirements, the online retail channel is undergoing an adjustment period. While these developments will hopefully lead to a stable, regulated market, they create short-term uncertainty. Nicokick.com and Northerner.com did not sell nicotine pouches in 15 U.S. states/districts in 2025 due to ongoing legal processes, flavor bans, and other regulatory constraints affecting online distribution.⁴

Despite these challenges, the online channel provides structural advantages including detailed product information and standardized age-verification systems. These could influence growth potential as regulatory frameworks become more clearly defined.

MARKET COVERAGE 2025 BY STATE FOR NICOKICK.COM AND NORTHERNER.COM



⁴ During 2025, Nicokick.com and Northerner.com did not conduct sales in Alabama, Arkansas, California, Colorado, the District of Columbia, Delaware, Georgia, Hawaii, Louisiana, Maine, Maryland, Massachusetts, Minnesota, Utah, or Vermont.

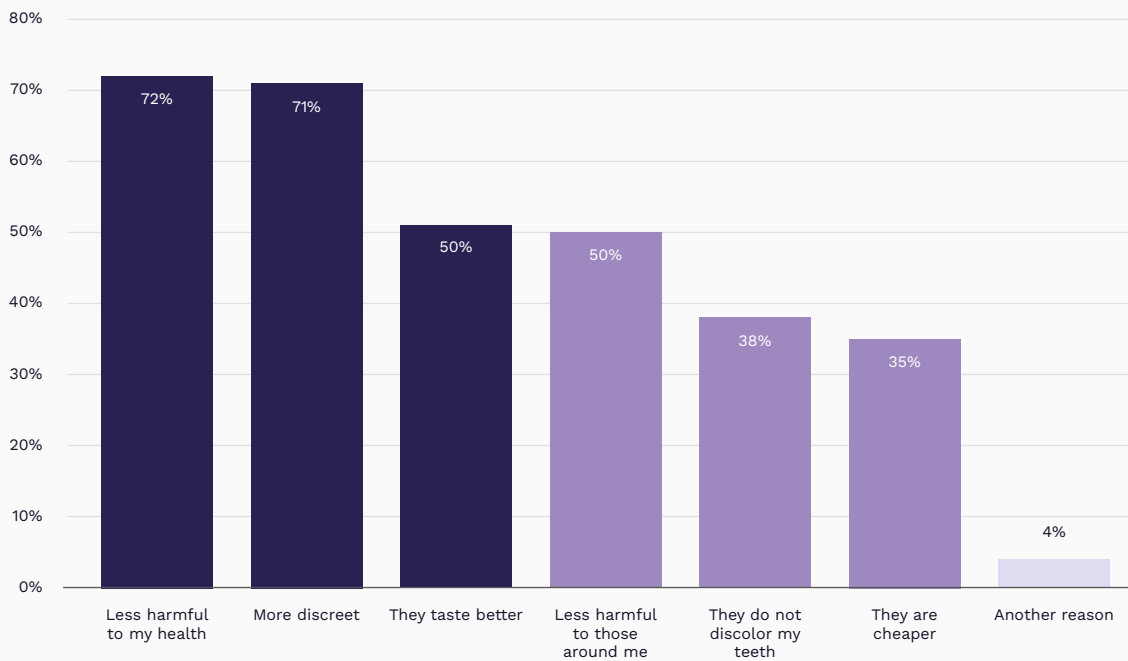
Perceived health changes and everyday convenience drive nicotine pouch use

Nicotine pouches are perceived not only as a potentially less harmful alternative to traditional tobacco products, but also as a socially considerate and practical way of consuming nicotine. A majority (72%) of survey respondents identify reduced harm to their own health as a primary advantage, while 71% point to the ability to use the product without drawing attention in everyday settings.

Half (51%) of respondents report taste as one of the primary drivers of nicotine pouch use. An equal share (50%) also perceives these products as less harmful to those around them, underscoring their reduced social impact and the absence of secondhand exposure. Additionally, 38% highlight that nicotine pouches do not stain teeth, while just over one-third (35%) cite affordability as an advantage.

HEALTH CONCERNS: A KEY DRIVER OF NICOTINE POUCH USE

Survey question: What do you consider to be the main advantages of using nicotine pouches compared to other types of traditional tobacco products?



Smokers switching, social acceptance, and product awareness drive adoption

Several factors are driving the expansion of the nicotine pouch market. This section shows that a substantial share of growth is driven by former smokers and vapers switching to nicotine pouches. At the same time, increasing social acceptance is reinforcing market momentum.

NICOTINE POUCHES INCREASINGLY USED AS AN ALTERNATIVE TO SMOKING AND VAPING⁵

Survey data indicate that nicotine pouches are frequently adopted by individuals seeking to move away from inhaled nicotine products such as cigarettes and e-cigarettes. Nearly half of nicotine pouch consumers report that their initial use of nicotine pouches was linked to an effort to replace these products.

A substantial share of respondents' report adopting nicotine pouches as a means of moving away from smoking and vaping. In total, 46% state that replacing cigarettes, vaping products, or both was their primary reason for use.

These survey data mirror findings in the published literature. A recent scientific publication of data from 2022-2023 concluded that daily nicotine pouch use is most common

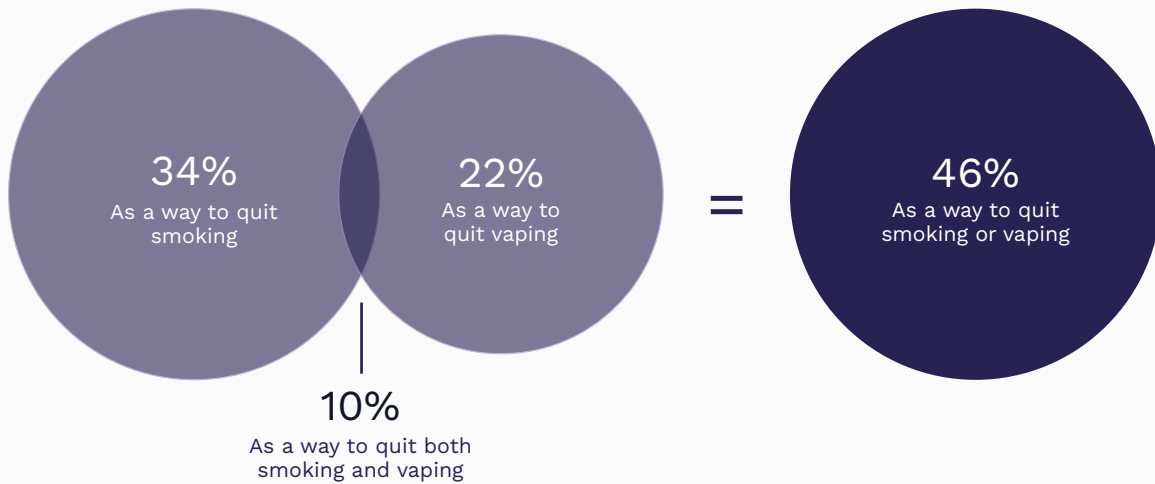
among adults who recently quit another tobacco or nicotine product.⁶

Social dynamics also play a central role in category expansion. Interpersonal channels are the main source of initial exposure, with 28% first trying nicotine pouches after being offered them by a friend or family member and 21% after observing others use them. This indicates that peer interaction and everyday social visibility are key drivers of awareness and trial.

Formal promotional channels appear to have limited influence. Only a small share of respondents report discovering nicotine pouches through social media or marketing, suggesting that adoption is primarily driven by interpersonal contact rather than advertising.

ALMOST HALF OF RESPONDENTS STARTED USING NICOTINE POUCHES TO QUIT SMOKING OR VAPING

Survey question: Why did you start using nicotine pouches?



Other alternatives:

- 28%** A friend or family member offered it to me
- 21%** I saw others using nicotine pouches and got curious
- 3%** I saw nicotine pouches on social media
- 2%** I found the marketing appealing
- 9%** I don't remember
- 24%** Other reason

⁵ This section describes user behavior or perception and is not intended to evaluate the efficacy of nicotine pouches as a treatment for tobacco dependency or harm reduction.

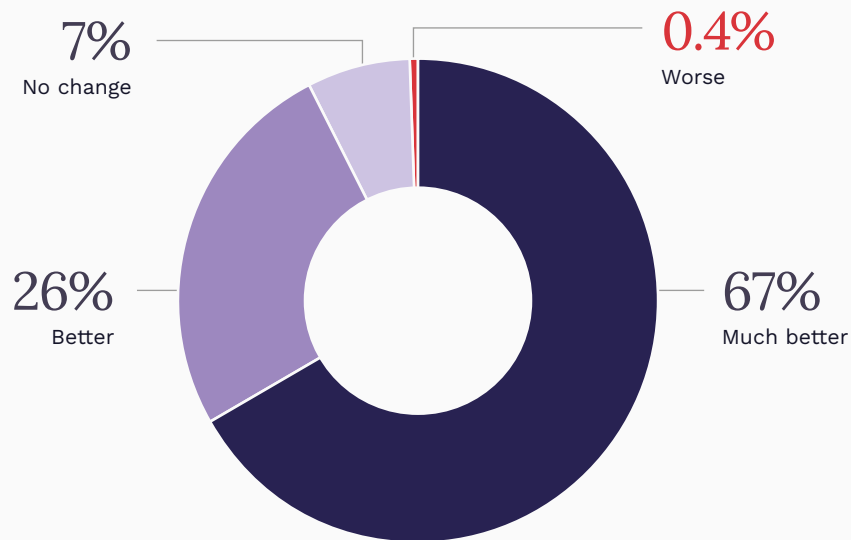
⁶ [Delnovo et al.](#) Patterns of Nicotine Pouch Use Among Adults in the US, 2022-2023. JAMA Netw Open. 2026;8:e2531155.

Nicotine pouch consumers who previously smoked report improved well-being

Respondents who previously smoked had improved perceived well-being after switching to nicotine pouches. A majority (93%) state that they feel better following the transition.

MOST NICOTINE POUCH CONSUMERS FEEL BETTER AFTER SWITCHING FROM CIGARETTES

How do you feel after switching smoking to nicotine pouches?



Social networks support switching

Social factors appear to play a meaningful role in nicotine pouch adoption in the United States. A large share (28%) of consumers report that they were first introduced to the product through friends or family, suggesting that informal networks play an important role in awareness and product trial. This aligns with established research showing that new consumption patterns, particularly in categories shaped by risk perception and social norms, often spread through peer influence rather than through formal communication channels alone.⁷

Survey results further confirm this trend. When asked whether they had encouraged others to switch from cigarettes to nicotine pouches, 66% responded yes, 29% said no, and 5% were unsure. That two-thirds of nicotine

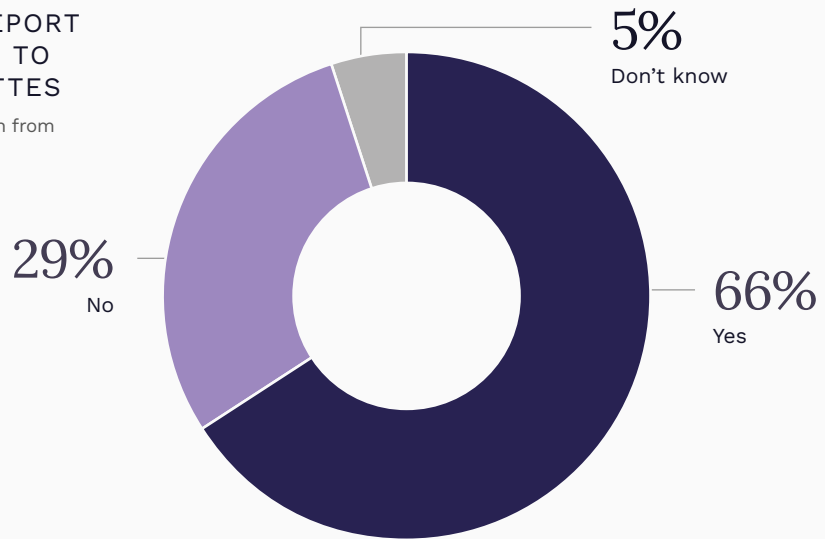
pouch consumers report actively encouraging others suggests that many function as informal ambassadors within their social circles, potentially accelerating transitions away from combustible tobacco.

At the same time, this peer-to-peer dynamic warrants a nuanced interpretation. While such social transmission may facilitate substitution among adult smokers, it may also contribute to the broader normalization of nicotine pouches. The data do not specify who is being encouraged (current smokers or former smokers), but they clearly suggest that social influence is a structural factor shaping how nicotine pouches spread within the U.S. market, with implications for both market development and public health policy.

⁷ Papakonstantinou et al. A Systematic Review and Meta-Analysis of the Effectiveness of Social Norms Messaging Approaches for Improving Health Behaviours in Developed Countries. Nat Hum Behav. 2025;9:2632-2650.

TWO IN THREE NICOTINE POUCH CONSUMERS REPORT ENCOURAGING OTHERS TO SWITCH FROM CIGARETTES

Have you encouraged others to switch from cigarettes to nicotine pouches?



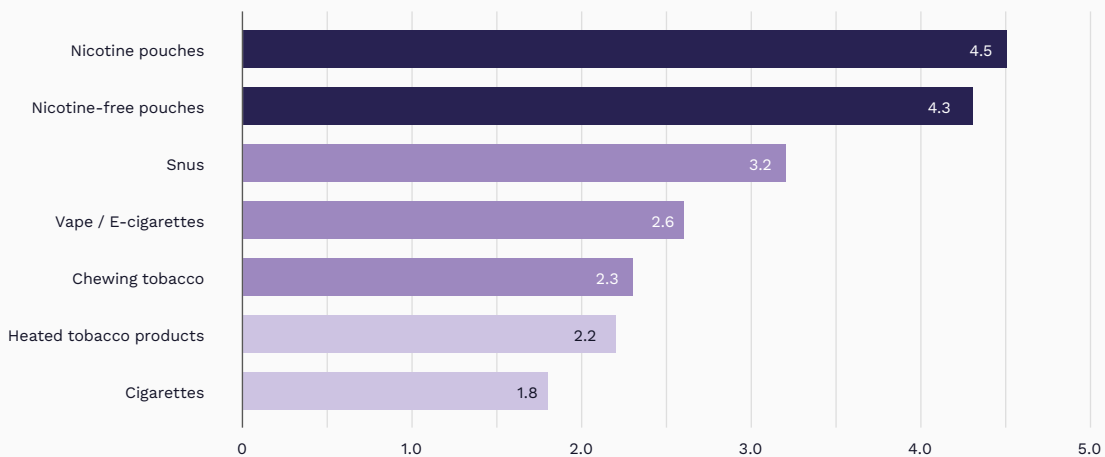
A clear shift in social norms away from cigarettes

Survey results indicate a marked shift in perceived social acceptability away from combustible tobacco and toward alternatives. Among the products assessed, nicotine pouches receive the highest acceptability rating, with an average score of 4.5 out of 5, closely followed by nicotine-free pouches at 4.3. Snus (i.e., moist snuff) also scores above the midpoint of the scale at 3.2, suggesting that modern oral nicotine products are generally viewed as socially acceptable in social environments.

In contrast, products associated with inhalation, more traditional oral tobacco, or combustion receive substantially lower ratings. Vapes/e-cigarettes score 2.6, chewing tobacco 2.3, and heated tobacco products 2.2. Cigarettes rank lowest at 1. This suggests that cigarettes are less socially acceptable than the growing range of alternative products.

NICOTINE POUCHES LEAD – CIGARETTES RANK LOWEST IN PERCEIVED SOCIAL ACCEPTANCE

Survey question: How socially acceptable do you believe it is to use these different nicotine and tobacco products? Mean values, where 1 = not accepted and 5 = Fully accepted.



Moving toward Healthy People 2030 goals

In the United States, the growing demand for alternatives to conventional tobacco products has contributed to the expansion of nicotine pouches. Although the product category is relatively new and long-term evidence on health effects remains limited, its growth reflects a broader shift toward smoke-free nicotine products in the U.S. nicotine market.

Healthy People 2030 aims to reduce adult cigarette smoking prevalence to 6.1% by 2030, prevent youth smoking initiation, increase smoking cessation, and reduce exposure to secondhand smoke.⁸

According to the U.S. Centers for Disease Control and Prevention (CDC), cigarette smoking among adults has declined substantially over time and now stands at historically low levels. The share of U.S. adults who smoke fell from 42.4% in 1965 to 11.6% in 2022, with more recent estimates suggesting that the rate has continued to decline to around 10%.⁹ The long-term downward trend is clear, and the country is on the path to reach the 6.1% rate set for in Healthy People 2030.¹⁰ Public health policies, changing social norms, and the increasing availability of alternative nicotine products have all contributed to this development.

Sweden is often cited as a comparative example in discussions of declining smoking prevalence. The country has a long tradition of oral nicotine use through pasteurized pouched snus, a smokeless tobacco product often linked to Sweden's comparatively low smoking rates and low incidence of smoking-related disease. In 2024, just 5.4% of the Swedish population reported daily smoking¹¹

While institutional, cultural, and regulatory contexts differ between the United States and Sweden, the comparison illustrates how substitution of cigarettes may play a role in accelerating declines in smoking prevalence. The U.S. experience suggests a similar directional shift, though the pace and policy frameworks differ. Although multiple factors are at work, the expanding availability and uptake of alternative nicotine products appear to be part of the broader move away from cigarettes.

⁸ <https://odphp.health.gov/healthypeople/objectives-and-data/browse-objectives/tobacco-use>

⁹ [Arazola et al.](#) Notes from the Field: Tobacco Product Use Among Adults - United States, 2017-2023.

¹⁰ [Office of Disease Prevention and Health Promotion](#). Reduce current cigarette smoking in adults — TU-02.

¹¹ [Public Health Agency of Sweden](#). 2025. Use of tobacco and nicotine products.

Risk perception of nicotine pouches remains low relative to cigarettes

When assessing perceived harm on a scale, where 0 and 10 denote “completely harmless” and “very dangerous,” nicotine pouches continue to be rated substantially lower than cigarettes. In 2026, nicotine pouches receive an average score of 3.7, unchanged from 2025. Nicotine-free pouches are perceived as least harmful overall, increasing modestly from 2.7 in 2025 to 3.0 in 2026.

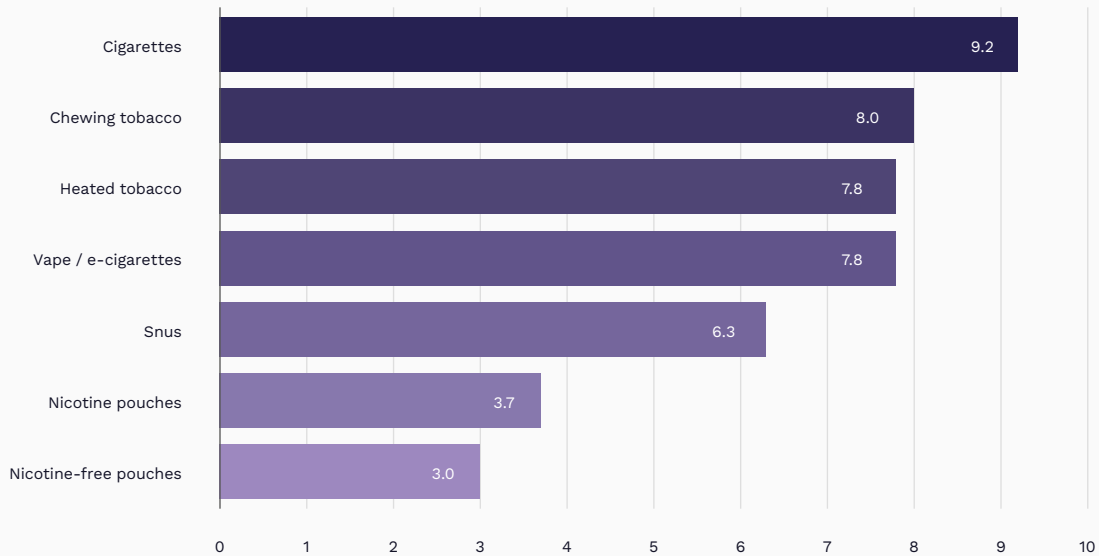
Cigarettes are rated as the most dangerous product (9.2). Other tobacco and inhaled products are also rated as considerably more harmful with chewing tobacco at 8.0, heated tobacco at 7.8, and vapes or e-cigarettes at 7.8. Snus came in at 6.3.

From a behavioral perspective, differentiation in perceived risk may be significant. If the perceived harm gap between cigarettes and nicotine pouches is narrow, it could weaken incentive to switch. Access to clear, evidence-based information about relative risks remains central to enabling informed consumer decision-making in a changing nicotine market.

In this context, ZYN’s application for MRTP status with the U.S. FDA may play an important role. If granted, such authorization would allow labeling and marketing to communicate reduced exposure to harmful substances relative to cigarettes, which could contribute to a clearer category differentiation.

RISK PERCEPTIONS OF NICOTINE POUCHES REMAIN LOW

Survey question: On a scale from 0 to 10, where 0 is “completely harmless” and 10 is “very dangerous,” how harmful do you think the following products are?



Evolving supply: innovation, e-commerce, and competition

Demand for nicotine pouches is increasing. In the United States, this has attracted both established tobacco companies and new entrants, leading to greater competition and product differentiation. Brick-and-mortar retail distribution continues to expand, improving product visibility and consumer access, whereas e-commerce provides a wider assortment of products and broader geographic reach. However, regulatory developments (e.g., flavor restrictions and product approvals) are likely to affect new product introductions.

The pace of development is reflected in continued assortment expansion and product innovation. In 2025, Nicokick.com and Northerner.com together offered 15 nicotine pouch brands comprising a total of 288 product variants, of which 124 were newly introduced during the year. The assortment reflects products for which PMTAs have been filed with the U.S. FDA. Due to regulatory uncertainty, some product launches may have been somewhat constrained in some jurisdictions.

Online advantages support market expansion

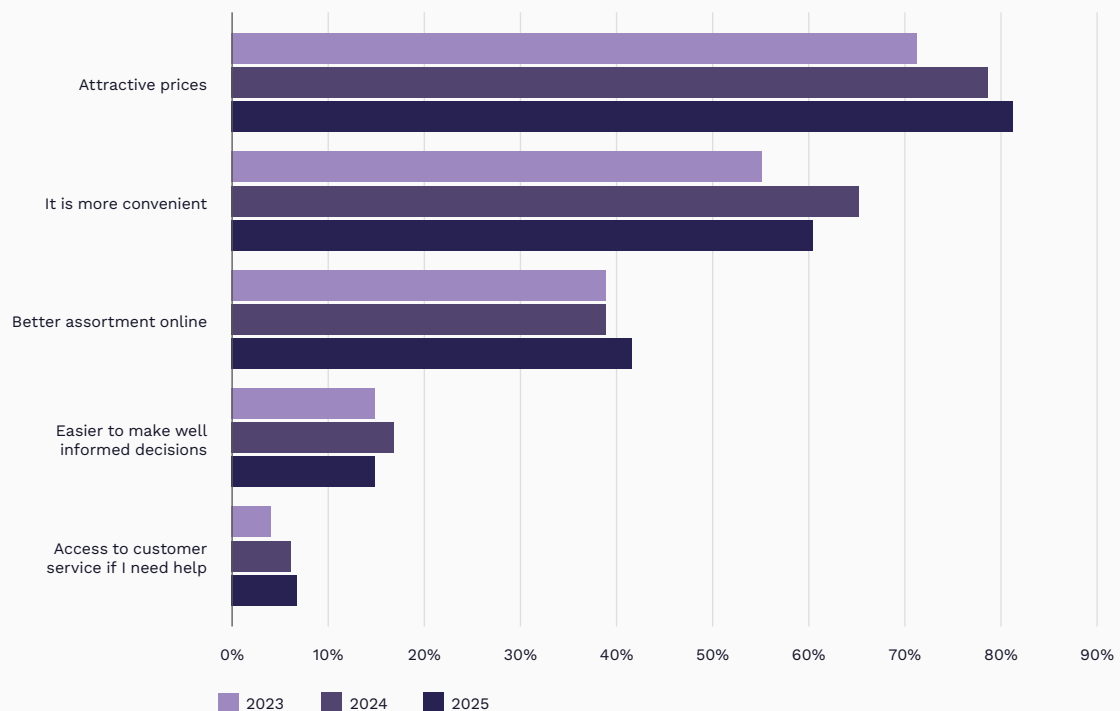
The online channel plays a central role in nicotine pouch market expansion, offering benefits that consumers value. Competitive pricing remains the primary driver of online purchasing. In 2026, 81% of respondents cite attractive prices as a reason for buying online, up from 79% in 2025 and 71% in 2024.

Convenience is another key factor. In 2026, 61% report that shopping online is more convenient, compared with 66% in 2025 and 55% in 2024. Convenience remains a strong and stable motivator.

Access to a broader assortment also supports online growth. In 2026, 41% of respondents highlight the wider product selection available online, up from 39% in both 2024 and 2025. In addition, 15% state that the online environment makes it easier to make informed decisions through improved product information and digital guides, compared with 17% in 2025 and 14% in 2024.

PRICE, CONVENIENCE AND ASSORTMENT ARE THE MAIN DRIVERS OF ONLINE PURCHASES

Survey question: When you buy nicotine pouches online, why do you choose to buy online rather than from a physical store?



Youth access prevention across purchasing channels

Both Nicokick.com and Northerner.com restrict sales to adults 21+ and apply mandatory age and identity verification before any online order can be placed. This market-leading process puts the sites at the forefront of underage access prevention in the US.

Survey respondents who reported using nicotine pouches while underage were asked where those products were obtained. The top two sources were physical retail outlets and friends. A majority (52%) reported purchasing the products from a local shop, while 10% bought from supermarket chains. Based on the survey data, brick-and-mortar retail accounts for the largest share of reported youth access, potentially pointing to gaps in age-verification compliance in the physical retail environment.

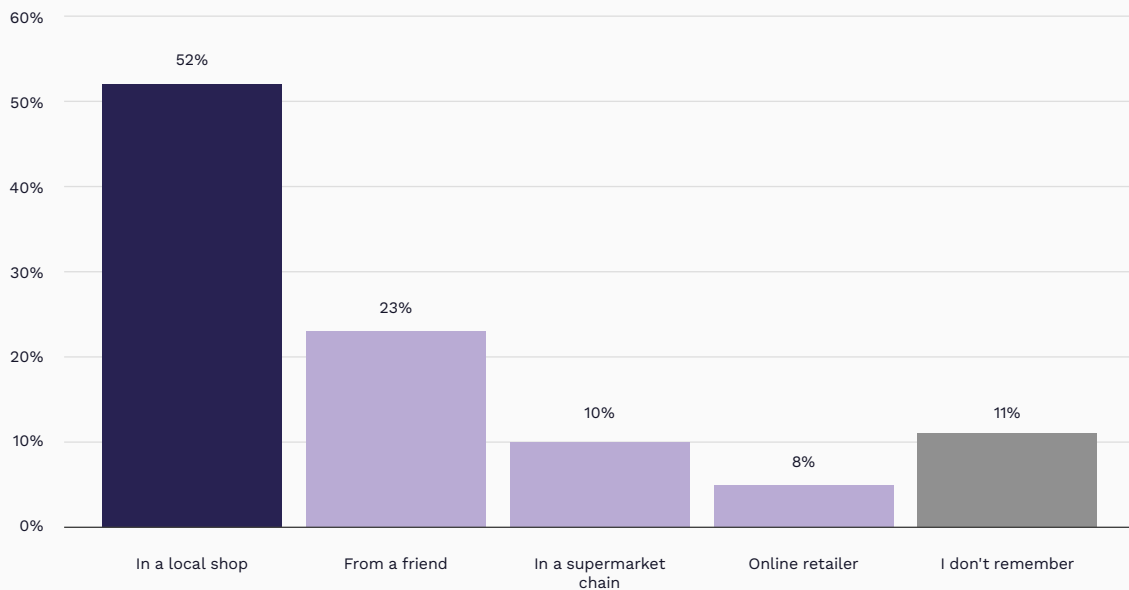
Almost one-quarter of respondents (23%) reported obtaining nicotine pouches from a friend. Informal social sourcing therefore remains a relatively common channel. An additional 11% state that they do not remember where they obtained the products.

Compared with physical retail and informal social sources, online retail played a limited role, with just 5% reporting online retail as their source when underage. The comparatively limited role of online sales is consistent with the presence of standardized digital age-verification systems and centralized compliance procedures, although not all e-commerce platforms have such rigorous processes.

Physical retail constitutes the primary reported access point among underage nicotine pouch consumers. Regulatory measures focused solely on online sales would therefore address only a small share of reported access pathways. Strengthened enforcement and compliance in brick-and-mortar retail are central to reducing underage availability, although this would not address social sourcing.

LOCAL SHOPS ARE THE MAIN ACCESS ROUTES FOR MINORS

Survey question: Did you ever use nicotine pouches when you were under 21? If yes, where did you buy them?



Consistent age verification and product transparency through online distribution

The online environment offers structural advantages from youth access protection and consumer information perspectives. Almost all (98%) consumers on two platforms report remembering being asked to verify their age when purchasing nicotine pouches online. This applies equally to the overall consumer base and to consumers aged 21–34 (98%).

In physical retail, age verification is common but less consistently applied. Among all consumers, 75% report being asked to verify their age in-store. The share is higher among younger adult consumers (92%), but still below the level observed online. This gap suggests that automated digital verification systems provide a more standardized compliance mechanism than face-to-face retail interactions, where enforcement may vary across locations and individual staff members. At Nicokick.com and Northerner.com, preventing underage access

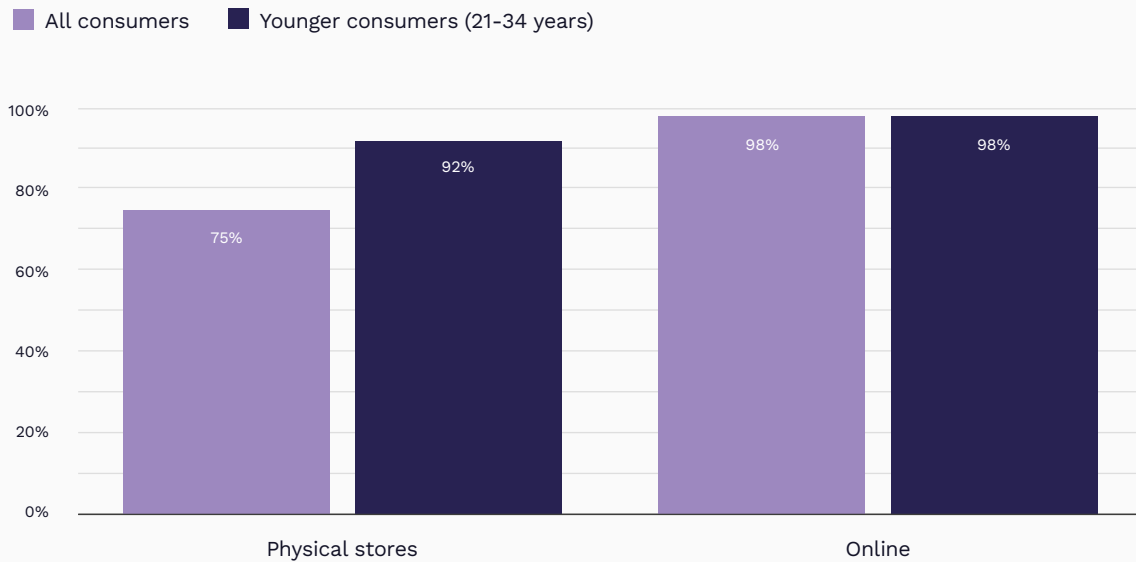
is a top priority. Both ecommerce platforms require age and identity verification before any orders can be placed online.

Beyond age controls, the online channel also supports informed decision making with greater product transparency. Digital platforms enable detailed and standardized communication of product characteristics, including nicotine strength, flavor varieties, safety standards, quality controls, and testing procedures. Consumers can review this information at their own pace, without time pressure.

This structural difference is also reflected in purchasing behavior. A majority (56%) of consumers report reviewing information about product quality or safety before purchasing nicotine pouches online, compared with just over one in three (38%) when purchasing in physical retail environments.

MORE UNIVERSAL AGE VERIFICATION ONLINE

Survey question: Have you ever been asked to verify your age in store/online?



Deep Dive: The Emergence of a Black Market

Challenges of black-market activity

Nicotine pouches have gained popularity in the United States during a period of heightened regulatory oversight, including the requirement for pre-market authorization by the FDA. The review process can be lengthy and resource intensive. While Nicokick.com and Northerner.com only list products with filed or approved PMTAs, there is an alternative universe of products being sold in various channels, including the black market.

The black market consists of three main segments. First, some brands have not submitted applications for the FDA's PMTA process. Second, certain products are manufactured outside the country using formulations that differ from those authorized for sale on the U.S. market, including variations in nicotine strength and ingredients. Third, authorities have identified counterfeit nicotine pouches (often manufactured outside the U.S.) that imitate established brands but fall entirely outside the regulated supply chain. These illicit products frequently lack compliant packaging, ingredient disclosure and quality controls, raising concerns about product safety and consumer protection.¹²

Younger people have more exposure to illicit products. While many consumers may not be aware of the exact boundaries between formal and black markets, 10% of survey respondents report having encountered nicotine pouches sold through the black market. Among those aged 21–34, exposure is double at 20%.

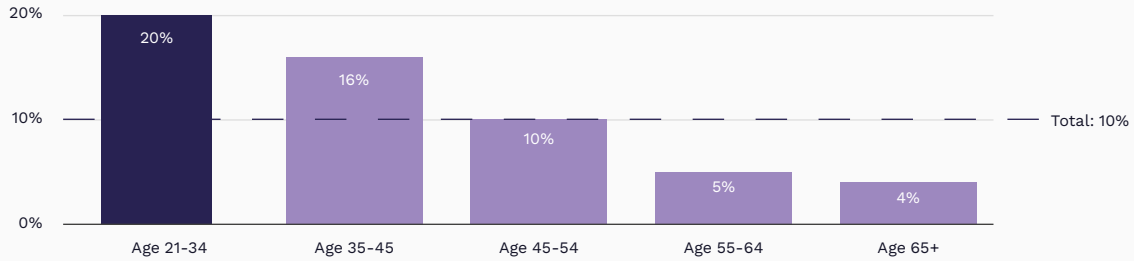
Black-market activity undermines the integrity of the legal market and raises broader public health and consumer safety concerns. For example, risks extend beyond regulatory non-compliance when illicit distribution is linked to organized criminal networks.¹³

¹² Read more at The Northerner, "[There's a booming black market in nicotine products: Don't be fooled!](#)"

¹³ [Kim, J.](#) How \$40-a-Pack Cigarettes Pushed Australians to the Black Market. New York Times. 15 Feb 2006.

ONE IN TEN HAVE BEEN EXPOSED TO BLACK MARKET POUCHES

Survey question: Have you ever come across nicotine pouches being sold in places you suspect are not official retailers (e.g. markets, social media, informal shops)?



The economic roots of black markets

Black markets arise when expected returns are higher in the illicit market than in comparable formal markets. This imbalance is typically explained by a combination of a high regulatory burden in formal markets and weak enforcement, which creates a competitive cost advantage for black-market actors.¹⁴ While legitimate vendors comply with taxes and extensive regulations, including consumer protection requirements, black-market vendors can evade these costs, often facing a low probability of detection due to inadequate or ineffective enforcement.

Prohibitive product regulation can create de facto monopolies for black-market actors. In the case of nicotine pouches, this risk may arise if restrictions on nicotine content or flavorings significantly constrain legal supply. Similar dynamics have been observed in adjacent nicotine categories in the United States. Following the FDA's 2020 enforcement policy targeting flavored cartridge-based e-cigarettes, the U.S. market witnessed a rapid expansion of disposable vape products. Several reports indicate that many of these products

entered the market without FDA pre-market authorization, contributing to the growth of a large unauthorized segment.¹⁵ Overregulation may therefore redirect consumer demand from the formal to the black market, increasing revenues and profitability for illegitimate and potentially organized criminal actors.

The current U.S. nicotine pouch market appears closer to a low-friction market with gray zones (Box B in the matrix below), characterized by uneven enforcement and the presence of unauthorized products circulating alongside FDA-reviewed brands. While nicotine pouches are subject to the FDA's pre-market authorization framework for tobacco products, many products currently on the market have not completed the PMTA process. As enforcement of this framework increases, compliance requirements for manufacturers and importers are likely to rise, potentially reducing legal uncertainty over time. Whether this ultimately leads to less or more black-market activity will depend on compliance costs, the pace of regulatory decisions, and the credibility and consistency of enforcement.

¹⁴ Economists have studied the incentives for crime and black markets extensively following the seminal work of Nobel laureate Gary Becker ["Crime and Punishment: An Economic Approach."](#)

¹⁵ For some context, see Li et al. (2022), ["The impact of FDA flavour enforcement policy on flavoured electronic cigarette use behaviour changes."](#) Extensive seizures have been reported by The FDA, see e.g. ["HHS, CBP Seize \\$86.5 Million Worth of Illegal E-Cigarettes in Largest-Ever Operation"](#).

BLACK MARKETS TEND TO EMERGE IN REGULATED ENVIRONMENTS WITH INADEQUATE ENFORCEMENT

Level of enforcement



Social media and informal shops dominate as black-market sales channels

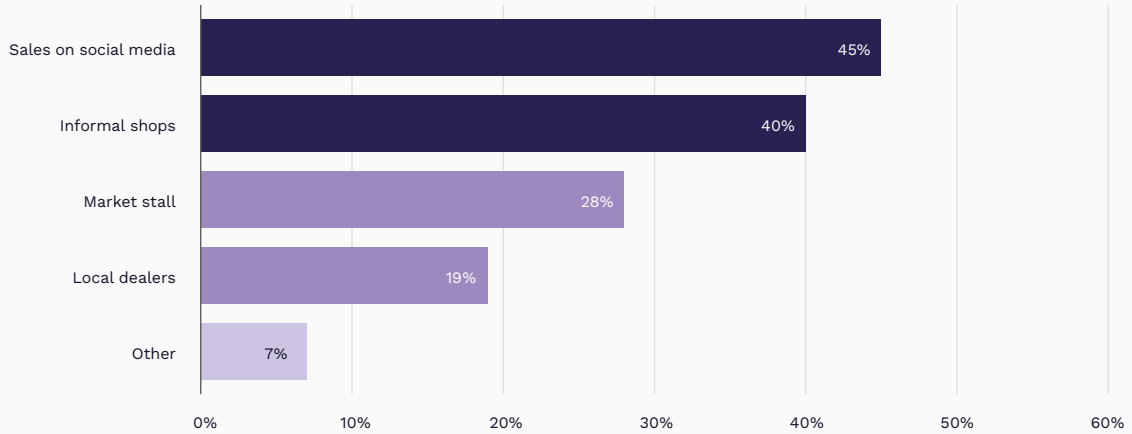
The two most prevalent channels for nicotine pouches sold on the black market are social media (45%) and informal shops (40%).¹⁶ These figures are based on consumers who report having encountered illicit nicotine pouches and reflect multiple-response data. The relatively high prevalence of informal social media purchases may suggest greater inflow of unapproved pouch products from abroad, potentially with lower prices and extended product range as drivers.

Nicotine pouch consumers are most likely to have come across informal shops in the Northeast. More than half of respondents in the Northeast (52%) who report exposure to black-market products encountered them in informal shops, compared to 40% in the US.

¹⁶ In the corresponding survey question, an “informal shop” was explicitly defined as “a shop that does not normally sell cigarettes or other nicotine products as part of its main business.”

SOCIAL MEDIA AND INFORMAL SHOPS ARE THE PRIMARY ILLICIT SALES CHANNELS

Survey question: What type of non-official seller of nicotine pouches have you come across?



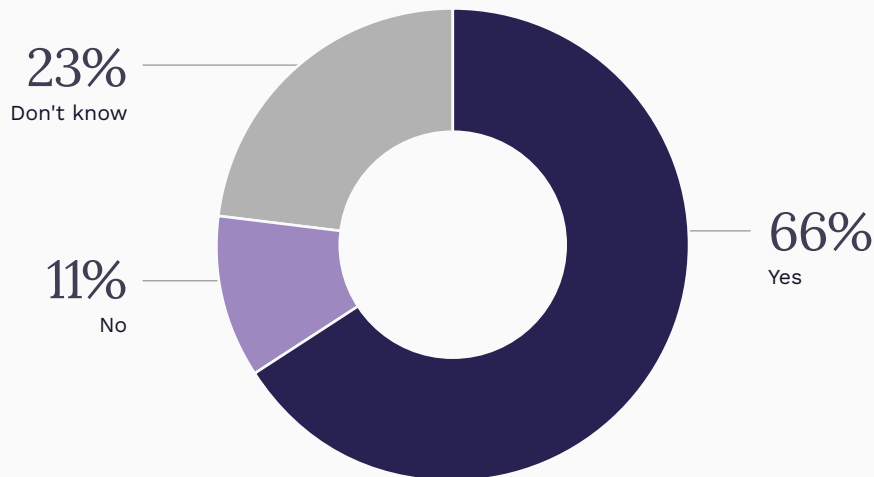
Most consumers are concerned about health risks of black-market products

Two thirds (66%) of respondents report being concerned about the health risks associated with nicotine pouches purchased on the black market. The main risks relate to uncertain nicotine strength, potential contamination or unregulated ingredients, and the absence of quality control and consumer safeguards that apply in the legal market.

Only 11% of nicotine pouch consumers report no concern. This indicates that awareness of potential health risks is relatively high among consumers, even in the context of illicit products. Furthermore, concern is higher among women than among men, but relatively evenly shared among different age groups. This pattern may reflect greater risk sensitivity among women, as well as broadly similar levels of risk perception across age groups.

TWO THIRDS EXPRESS CONCERN ABOUT HEALTH RISKS OF BLACK-MARKET POUCHES

Survey question: Are you concerned about the health risks of nicotine pouches purchased on the black market?



Social norms and enforcement shape behavior

Willingness to engage with the black market among consumers is limited, but not negligible. About one in seven nicotine pouch consumers (14%) report that they would be open to purchase nicotine pouches from the black market in the future, with men being more inclined to do so.

Similarly, 15% perceive it as acceptable among people of their own age group to buy nicotine pouches from the black market, with higher figures among those aged 21–34. If illicit purchases are seen as common or socially tolerated within a peer group, the social cost of buying outside the legal market declines. In that context, low price points and easy access become stronger pull factors, particularly for price-sensitive consumers.

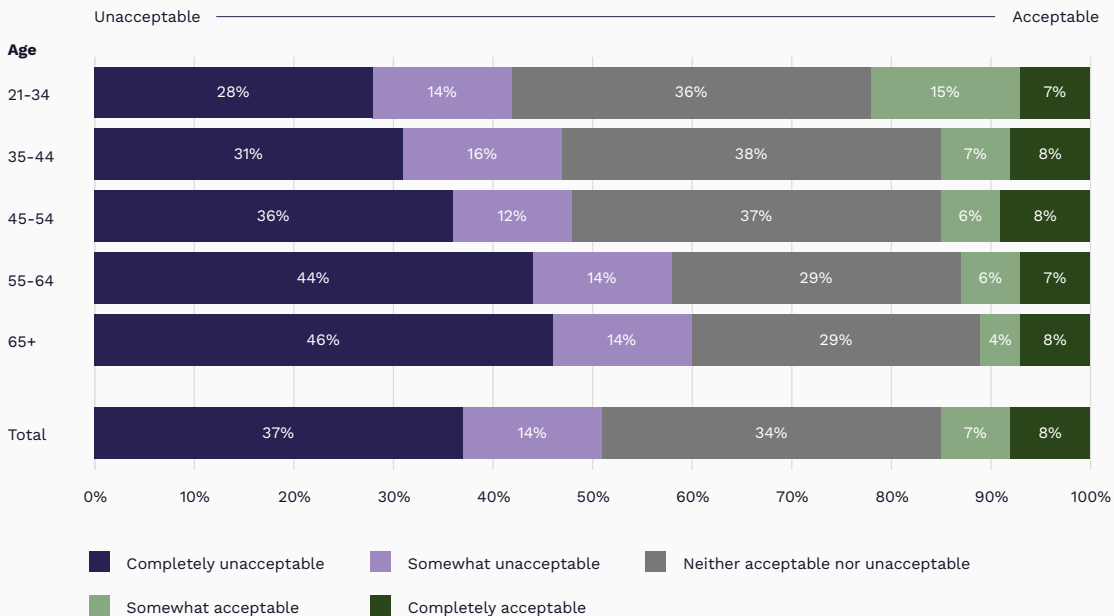
Perceptions of enforcement also appear relevant. More consumers believe enforcement against illegal nicotine pouch sales to be ineffective (19%) compared with those who consider it effective (15%), while a majority (66%) report that they do not know. Weak or unclear enforcement can reduce the perceived risk of sanctions for retailers and buyers alike, reinforcing the view that compliance with product, marketing, and labeling standards is not strictly monitored.

1 in 7

nicotine pouch consumers would be open to purchase nicotine pouches from the black market in the future

OLDER AGE GROUPS SHOW PARTICULARLY STRONG REJECTION OF BLACK-MARKET BUYING

Survey question: How acceptable do you think buying black market nicotine pouches is among people your age?

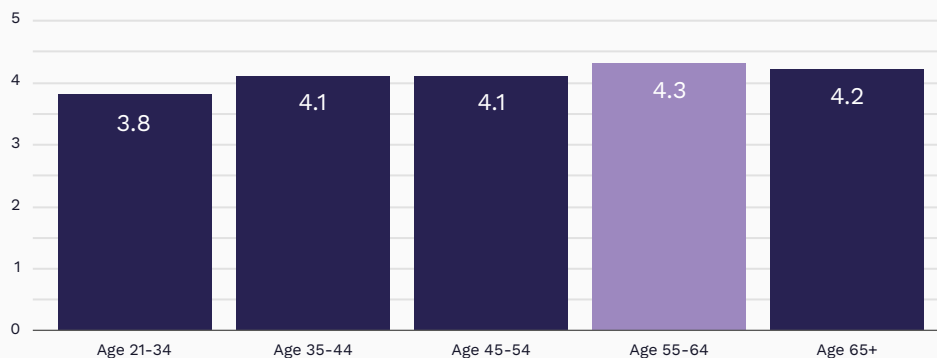


The American Nicotine Pouch Consumer

According to sales data from NicoKick.com and Northerner.com, customers aged 55–64 years were the largest growth group in 2025 (26%). This age group also represents the most frequent user group, consuming an average of 4.3 cans per week. In contrast, adults aged 21–34 years report the lowest average pouch use, at 3.8 cans per week. This indicates that category expansion in online channels is concentrated among older nicotine pouch consumers rather than younger age cohorts. This pattern may partly reflect higher smoking prevalence among older age groups.

CONSUMERS AGED 55–64 SHOW THE HIGHEST NICOTINE POUCH USE

Survey question: How many cans of nicotine pouches do you use per week? Calculated average

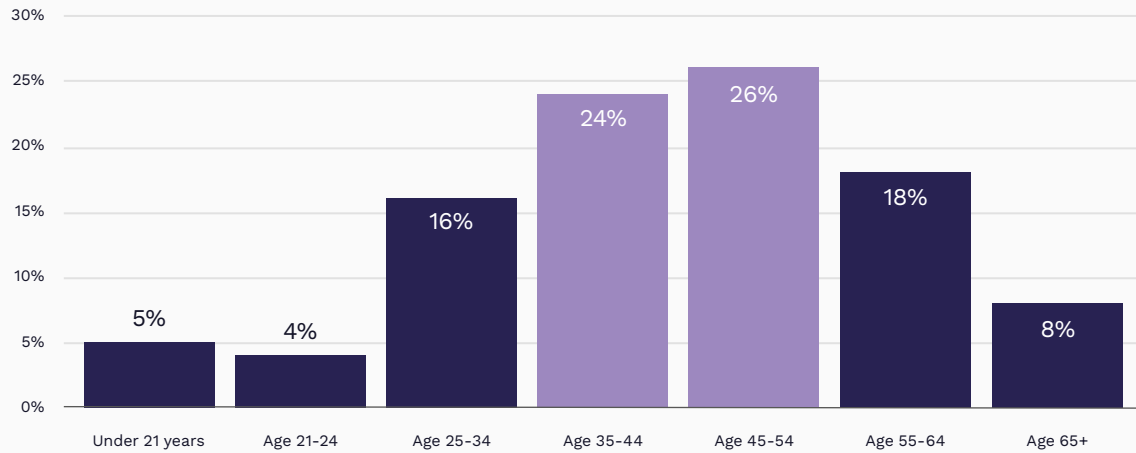


First-time use typically occurs in mid-adulthood

Among Nicokick.com and Northerner.com customers, the typical first-time user of nicotine pouches was 45 years old. This represents a slight increase from 44 years old in last year's survey. Five percent of nicotine pouch consumers report having initiated use before the age of 21 (+1% compared with the previous year). The relatively high age of first-time use likely reflects that many consumers who purchase online transition to nicotine pouches after prior use of other nicotine products, particularly cigarettes or vaping products.

FIRST-TIME NICOTINE POUCH CONSUMERS CONCENTRATED IN MID-ADULTHOOD

Survey question: How old were you when you first tried nicotine pouches?



Male-dominated adoption with potential for female growth

Men accounted for 87.5% of purchases at Nicokick.com and Northerner.com in 2025, while women represented 12.5%. The disparity between men and women remains broadly similar to that reported in 2024, suggesting a stable usage pattern across genders in the U.S. online market.

However, there are signs of earlier adoption among women. Over half (55%) of women reported having used nicotine pouches for up to 2 years, compared with 41% of men. This suggests that female participation may expand further as the market matures.

A similar trend was observed in more mature markets during their expansion phase. In Sweden, where nicotine pouches originated, women have increasingly shifted towards nicotine pouches, which were first sold at the end of 2016. In 2022, female purchases of nicotine pouches surpassed that of snus.¹⁷

Southwest leads in per capita use

Nicotine pouch usage per capita varies significantly across U.S. regions. Based on sales data from Nicokick.com and Northerner.com, the Southwest records the highest purchasing levels, increasing from an index value of 183 to 193 in 2025. The Southwest almost doubles the national average of 100, while the remaining regions fall below this level, highlighting substantial regional disparities in online purchases.

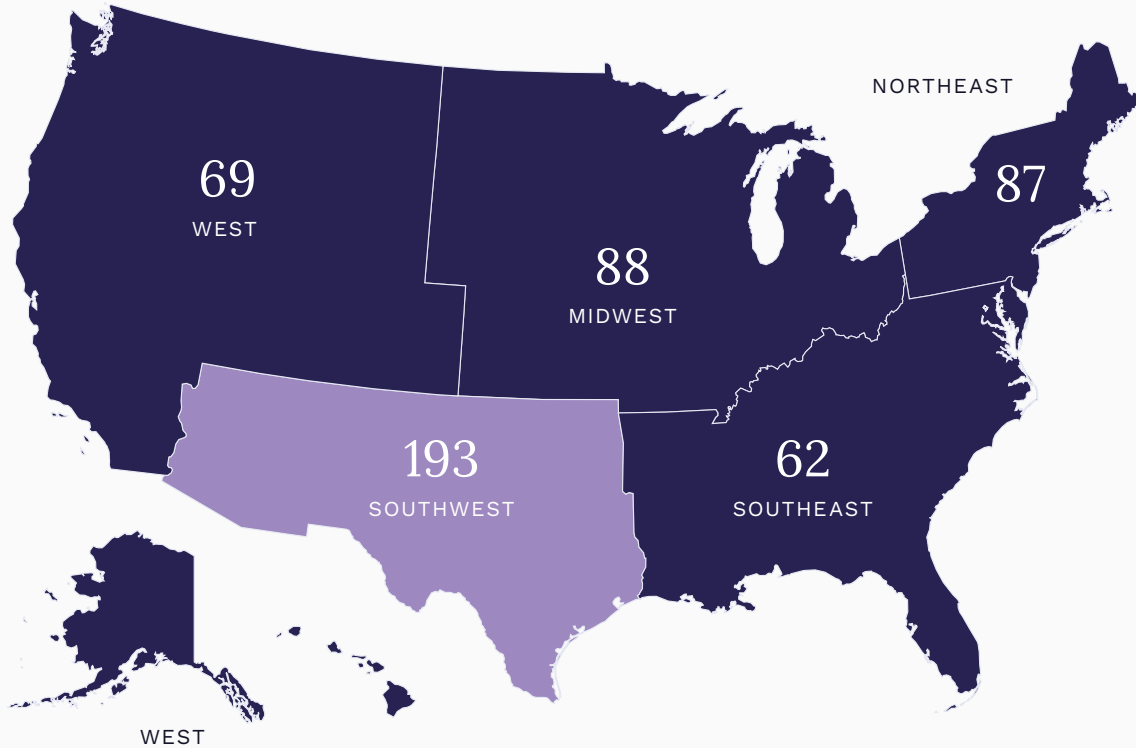
In contrast, purchasing levels in California dropped from an index of 142 to 69 in 2025. This decrease follows the expansion of the state's flavor ban to include online shipments, which resulted in reduced online sales in the state in 2025, thereby affecting overall consumption levels in the West region.

These differences illustrate that the online nicotine pouch market remains sensitive to local regulatory developments. Changes in product availability can influence purchasing levels from year to year. When availability is restricted, declines in purchasing may reflect regulatory constraints rather than reduced underlying demand.

¹⁷ [Murphy MA, Henenberg D, Reese L.](#) Cross-Sectional Study on Oral Nicotine Product Sales Trends in Scandinavia From 2018 to 2025. *JMIR Public Health Surveill.* 2026;12:e85490.

SOUTHWEST REMAINS THE LEADING PURCHASING REGION ONLINE

Online sales per capita index, based on sales volumes on NicoKick.com and Northerner.com
 US average = 100



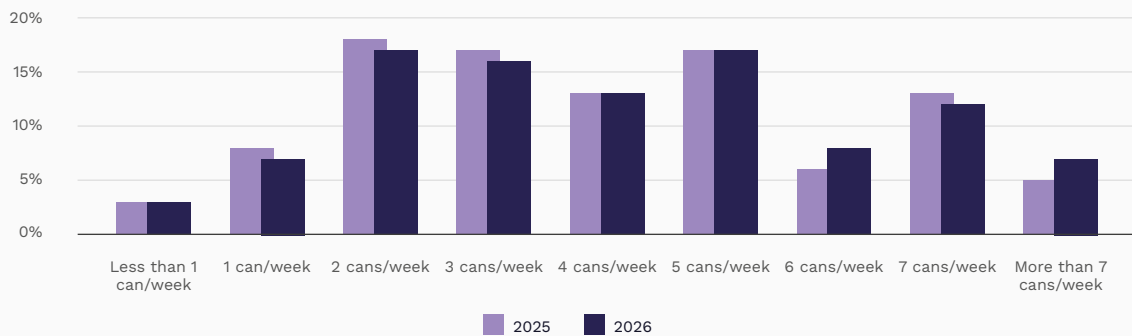
Rising purchasing volumes and usage intensity

American consumers are purchasing larger volumes of nicotine pouches per order. Sales data from NicoKick.com and Northerner.com show that the number of cans per order increased from about 25 to 30 units in 2025 (+21%).

Usage frequency also slightly increased, with 93% reporting daily use, compared with 91% in the previous year. The share of high-frequency consumers has grown slightly, with the proportion using four cans per week or more on average rising from 53% to 57%.

U.S. NICOTINE POUCH CONSUMERS USE FOUR CANS PER WEEK ON AVERAGE

Survey question: How many cans of nicotine pouches do you use per week?



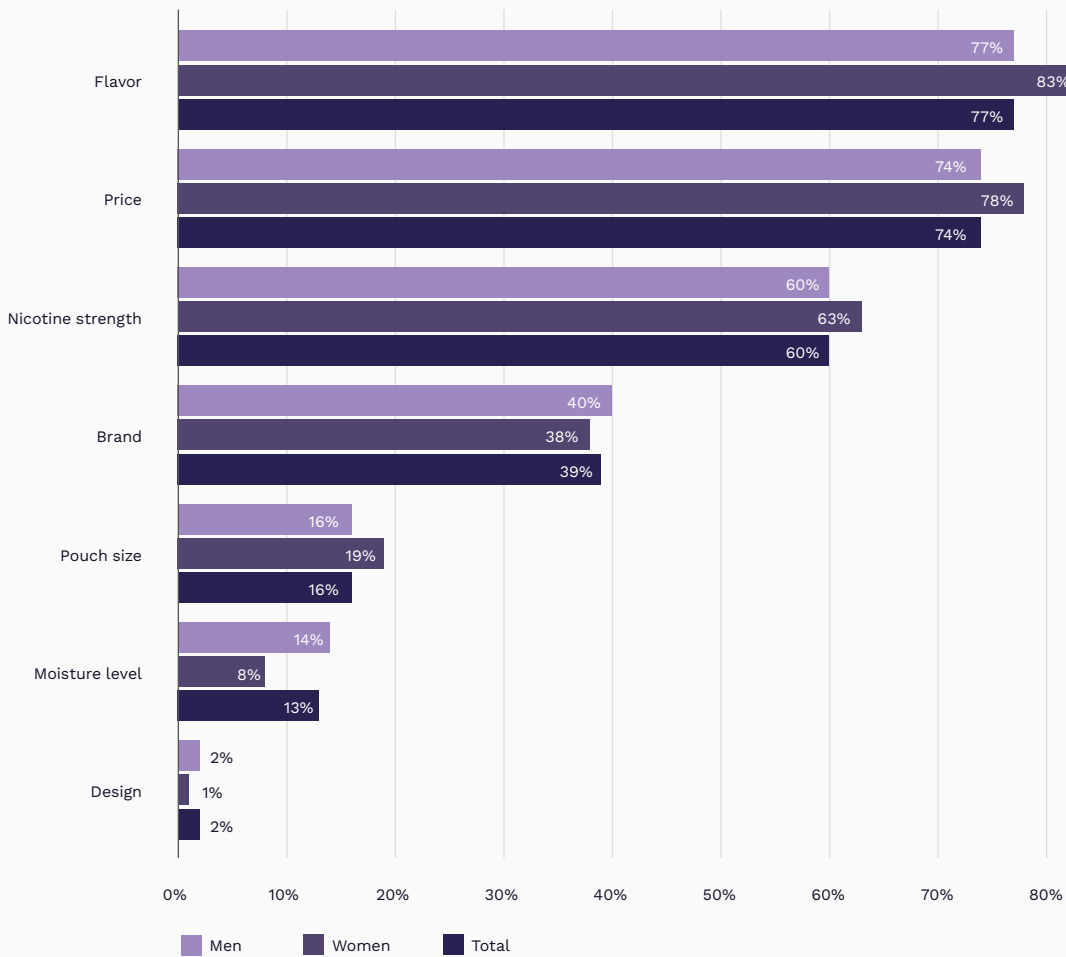
Flavor outweighs price in purchasing decisions

Flavor, price, and nicotine strength are the three most important drivers of purchasing decisions. Flavor has overtaken price as the primary factor when consumers buy nicotine pouches, increasing from 71% in 2025 to 77% in 2026. Women place greater emphasis on these factors than men. At the same time, price sensitivity among men appears to have declined, indicating a shift in purchasing priorities.

Mint is the most purchased flavor overall. However, gender differences are evident in other flavors. Men have a stronger preference for citrus flavors than for coffee, while women’s purchasing behavior demonstrate the opposite preference.

THE MOST IMPORTANT FACTORS WHEN BUYING NICOTINE POUCHES

Survey question: When you are considering purchasing nicotine pouches, what are the 3 most important factors for you? Three alternatives possible.



Products on the Podium in 2025

The three most purchased brands on NicoKick.com and Northerner.com in 2025 were on! (28%), ZYN (17%), and Rogue (12%). Almost one in three products sold were on!, which had seven out of ten products in the top ten ranking. The brand was able to strengthen its position during 2025, as a temporary market gap emerged following the suspension of online sales of ZYN.

ZYN fell from first to second place in the rankings following the online sales hiatus in the U.S. market. The brand was not sold through online channels until September 2025, resulting in lower annual sales compared to the previous year. Its market share of 17% reflects fourth-quarter sales in 2025, underscoring the brand's strong market position.

In 2025, zone showed the highest growth (158%), rising to fifth place in the brand rankings. Two new brands, CLEW and ALP, entered the top ten ranking in eighth and ninth place, respectively.

Slim format preferred

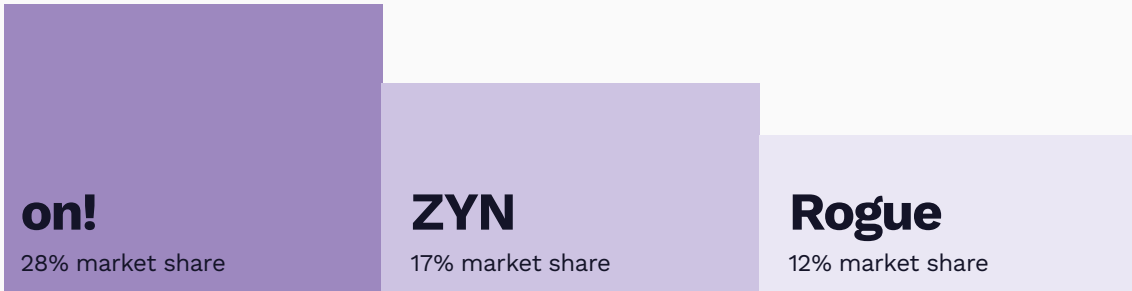
Nicotine pouches in slim formats were purchased more than mini formats in 2025. The mini format dominated the U.S. market in 2024 but declined from a share of 58% to 45% in 2025. This shift is likely linked to the suspension of ZYN products from online sales channels for most of 2025.

Fruit flavors gaining market share

Mint remains the most popular flavor in the U.S., accounting for nearly six out of ten cans sold. Fruit ranks second, with a market share of 14%, followed by citrus at 8%. Although fruit lags far behind mint, demand for fruit-flavored nicotine pouches is increasing. Fruit flavors have grown steadily and more than doubled their market share between 2022 and 2025, increasing from 6% to 14%.

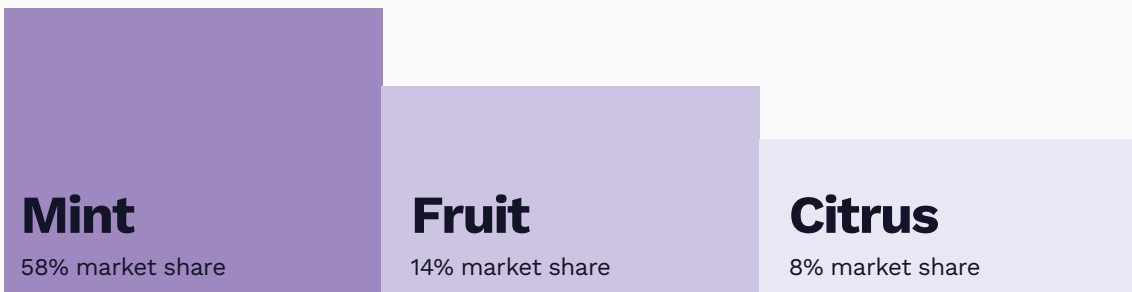
THE BRAND PODIUM

Most popular brands & online market share



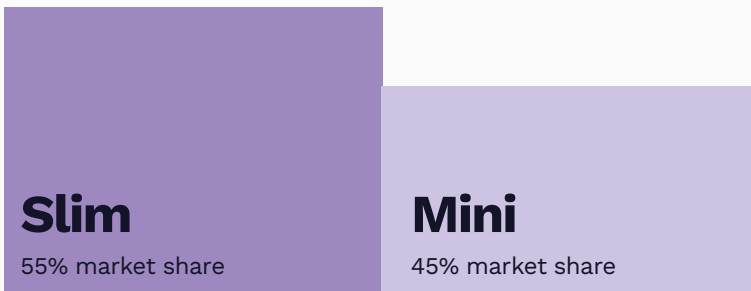
TOP FLAVOURS

Most popular flavors & online market share



TOP POUCH SIZES

Most popular formats & online market share



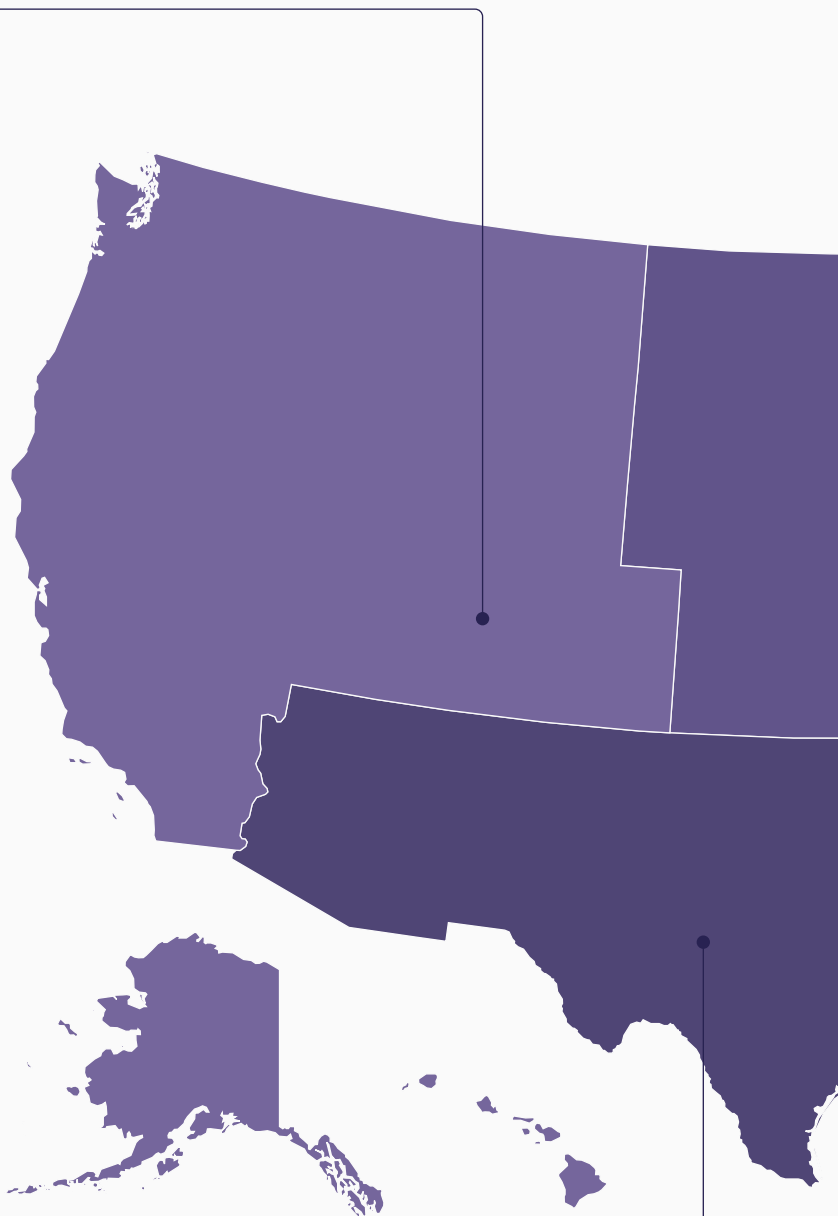
The US Nicotine Pouch Map

West - Brand loyalty

58% of nicotine pouch consumers in the West stick to a single nicotine pouch brand, compared with 50% nationwide. In California, the largest state in the West, nicotine pouches enjoy particularly high social acceptance, with an average rating of 4.8 on a scale from 1 to 5, compared with 4.5 nationally.

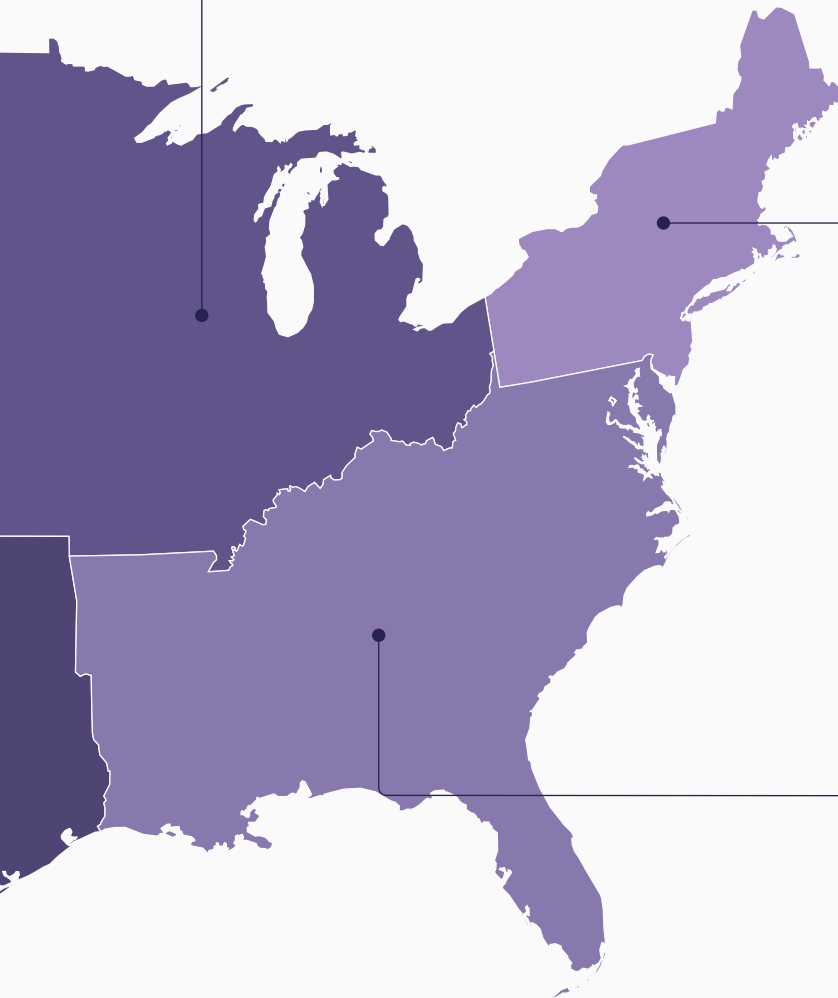
Southwest – Transition from other nicotine products

The Southwest shows broader patterns of nicotine transition, where 40% report starting to use nicotine pouches to quit non-cigarette nicotine products, compared with 36% nationally. In Texas, the largest state in the Southwest, 74% use nicotine pouches because they are easier to use without drawing attention, compared with 71% nationally. Mint is the most purchased flavor in Texas, with a market share of 60%.



Midwest – Lower price sensitivity

Fewer consumers in the Midwest cite attractive prices as a reason to buy online: 75% compared to the national average of 81%. In Illinois, almost 8 out of 10 nicotine pouch consumers (76%) use them because they are perceived as less harmful to their health than other nicotine products, compared to 72% nationally. Citrus-flavored nicotine pouches in Illinois recorded sales growth of 15% in 2025.



Northeast – Switching advocates

76% in the Northeast have encouraged others to switch from cigarettes to nicotine pouches, compared with 66% nationally. New Yorkers are more frequent nicotine pouch consumers, with an average of 4.7 consumed cans per week, compared to 4.1 nationally. In 2025, sales of fruit-flavored pouches increased by 62% in New York, suggesting a growing interest in this segment.

Southeast – Cigarette quitters

45% in the Southeast report having previously smoked cigarettes but no longer doing so, compared with 41% nationwide. Home use is very common in Florida, where 94% of Floridians use nicotine pouches at home, compared with 90% nationally. In Florida, coffee-flavored nicotine pouches grew by 24% in 2025, indicating stronger consumer preferences for this flavor.

Detailed toplists

Appendix with detailed toplists: brands, products, flavors, formats & strengths

MOST PURCHASED BRANDS IN 2025 - TOP 10

Ranking	Brand	Change versus last year
1	on!	+1
2	ZYN ¹⁸	-1
3	Rogue	-
4	VELO Plus	+6
5	Zone	+2
6	FRE	-2
7	VELO	-2
8	CLEW	NEW
9	ALP	NEW
10	Lucy	-2

MOST PURCHASED PRODUCTS IN 2025 - TOP 10

Ranking	Product	Change versus last year
1	Rogue Wintergreen 6mg	+4
2	on! Wintergreen 4mg	+4
3	on! Mint 4mg	+4
4	on! Coffee 4mg	+9
5	ZYN Wintergreen 6mg	-4
6	on! Mint 2mg	+12
7	on! Wintergreen 2mg	+12
8	on! Mint 8mg	+3
9	on! Wintergreen 8mg	+3
10	Rogue Peppermint 6mg	+6

¹⁸ ZYN was suspended from online sales for about eight months in 2025. Sales resumed on Nicokick.com and Northerner.com in September 2025, resulting in lower annual sales compared to the previous year.

MOST PURCHASED NICOTINE POUCH FLAVORS IN 2025

Ranking	Flavour	Change versus last year	Market share
1	Mint	-	58%
2	Fruit	+1	14%
3	Citrus	-	8%
4	Coffee	-	8%
5	Tobacco	-	1%
6	Other	-	11%

MOST PURCHASED
POUCH SIZES IN 2025

Ranking	Format	Market share
1	Slim	55%
2	Mini	45%

MOST PURCHASED
STRENGTHS IN 2025

Ranking	Strength	Market share
1	Normal	54%
2	Strong	22%
3	Less Intense	18%
4	Extra Strong	6%

About The Nicotine Pouch and Oral Nicotine Report 2026

The Nicotine Pouch and Oral Nicotine Report 2026 was produced by Nicokick.com in collaboration with Northerner.com. The aim is to create the number one source of insight into the behavior and attitudes of nicotine pouch consumers in the US.

This report is based on a survey of a convenience sample of 2,245 US nicotine pouch customers from the NicoKick.com and Northerner.com websites. The respondent group was predominantly male, with men accounting for 1,662 responses and women for 181. The survey took place between December 2025 and January 2026. These insights are complemented by full-year purchasing data for 2025 from more than 450,000 customers.

About Nicokick.com

Nicokick.com is the leading online retailer in the U.S., specializing in selling nicotine pouches. With a diverse inventory of more than 300 unique products, the platform offers a wide selection of popular and emerging brands that help adult consumers transition from cigarettes and traditional tobacco products. Nicotine pouches are securely delivered to consumers' doorsteps or mailboxes, ensuring compliance with a rigorous age verification process. For more information, visit [Nicokick.com](https://www.nicokick.com).

NICOTINE POUCHES ARE STRICTLY FOR ADULTS OVER 21

As the leading online retailer for nicotine pouches and other modern oral nicotine products, we know we have a major responsibility for making sure underage youth don't obtain the products we sell. This is why we adhere to strict regulations, especially around age restrictions for nicotine products. In line with our mission, Haypp Group actively collaborates with authorities, policymakers, and organizations to staunchly prevent the availability of all tobacco and nicotine products to underage individuals.

