



Continuous Surveillance: Emerging Tobacco Products

Maryland Tobacco Control Resource Center
20th Annual Best Practices Conference
October 23, 2025

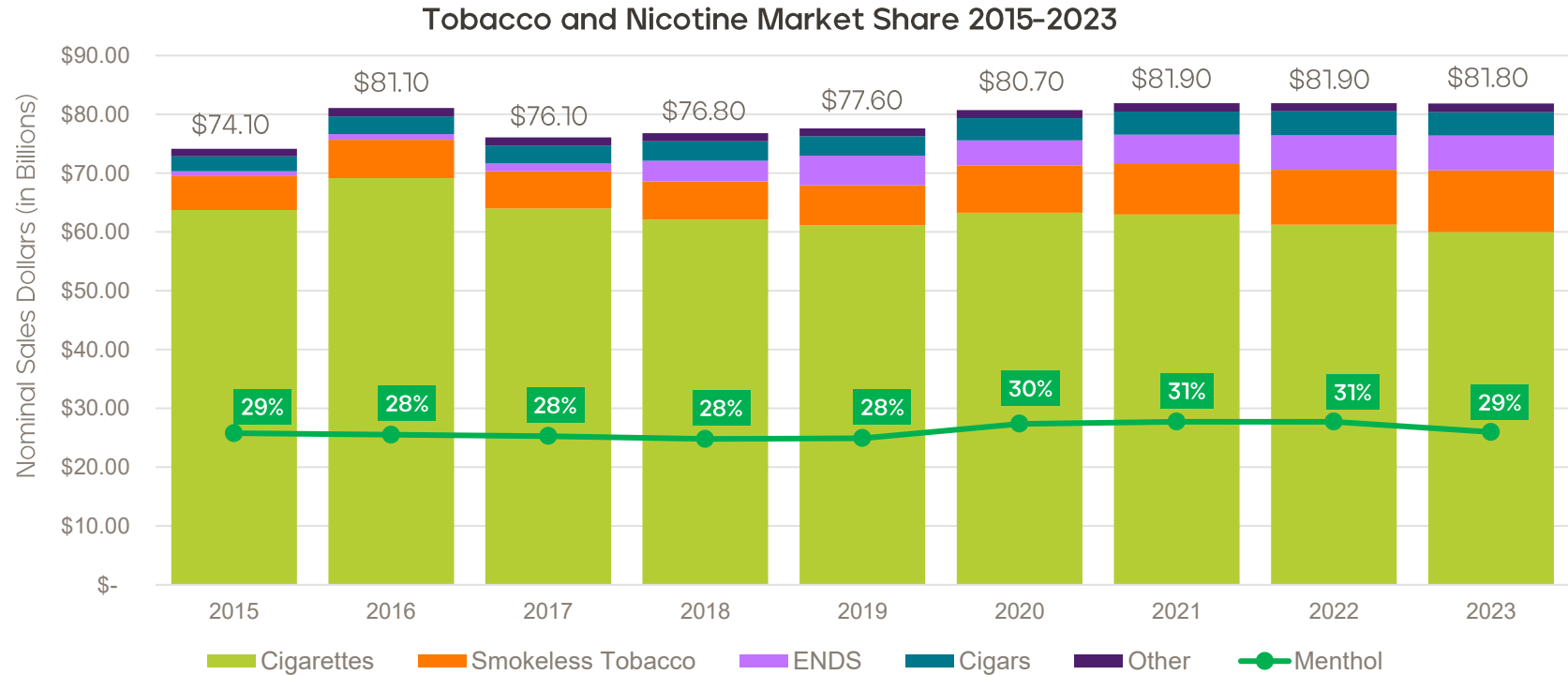
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Research Managing Director
Truth Initiative Schroeder Institute®

Disclosure

- The conclusions drawn from the NielsenIQ data are those of the researcher(s) and do not reflect the views of NielsenIQ. NielsenIQ is not responsible for, had no role in, and was not involved in analyzing and preparing the results reported.
- The data presented are for information purposes only, please reach out for access to this deck.

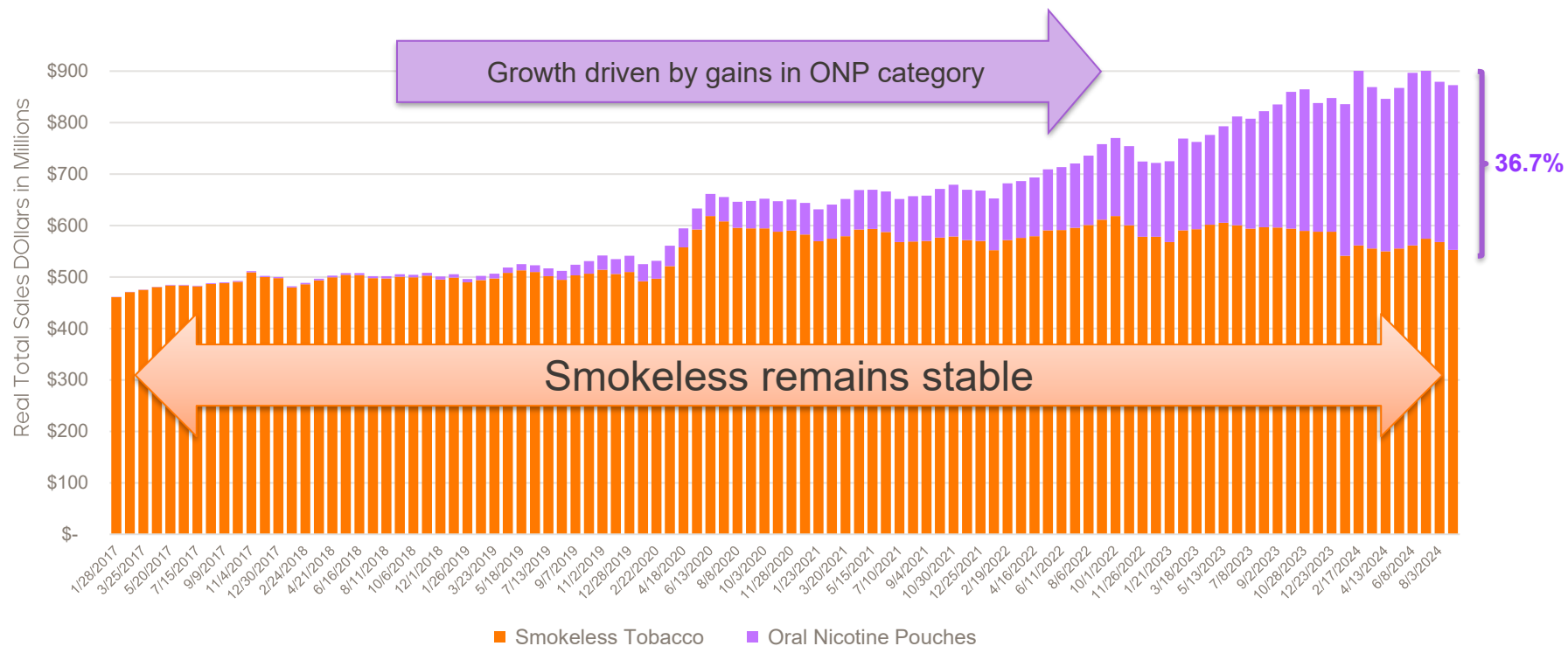
Retail Product Landscape

The Nicotine Market is Robust and Valued at over \$81B

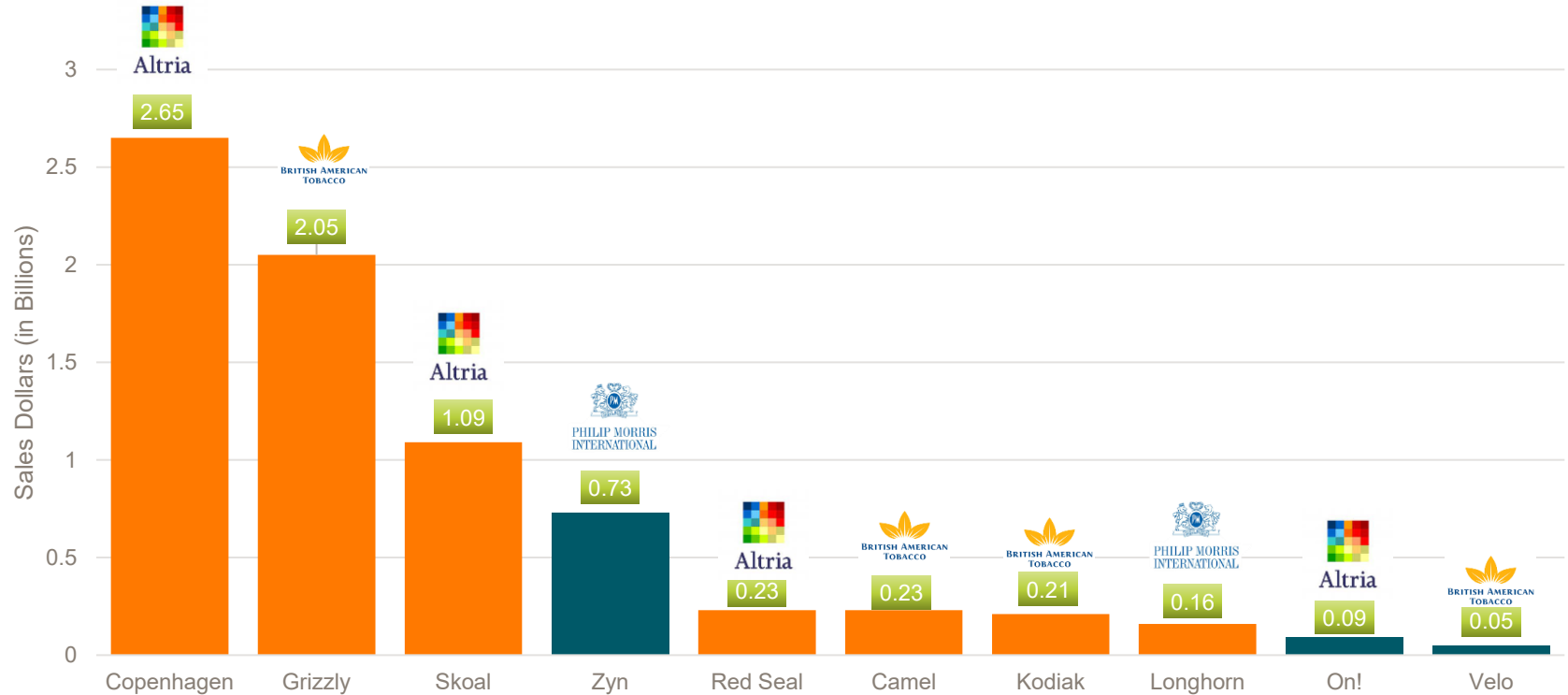


Oral Nicotine Pouches and the Smokeless Market – 12%

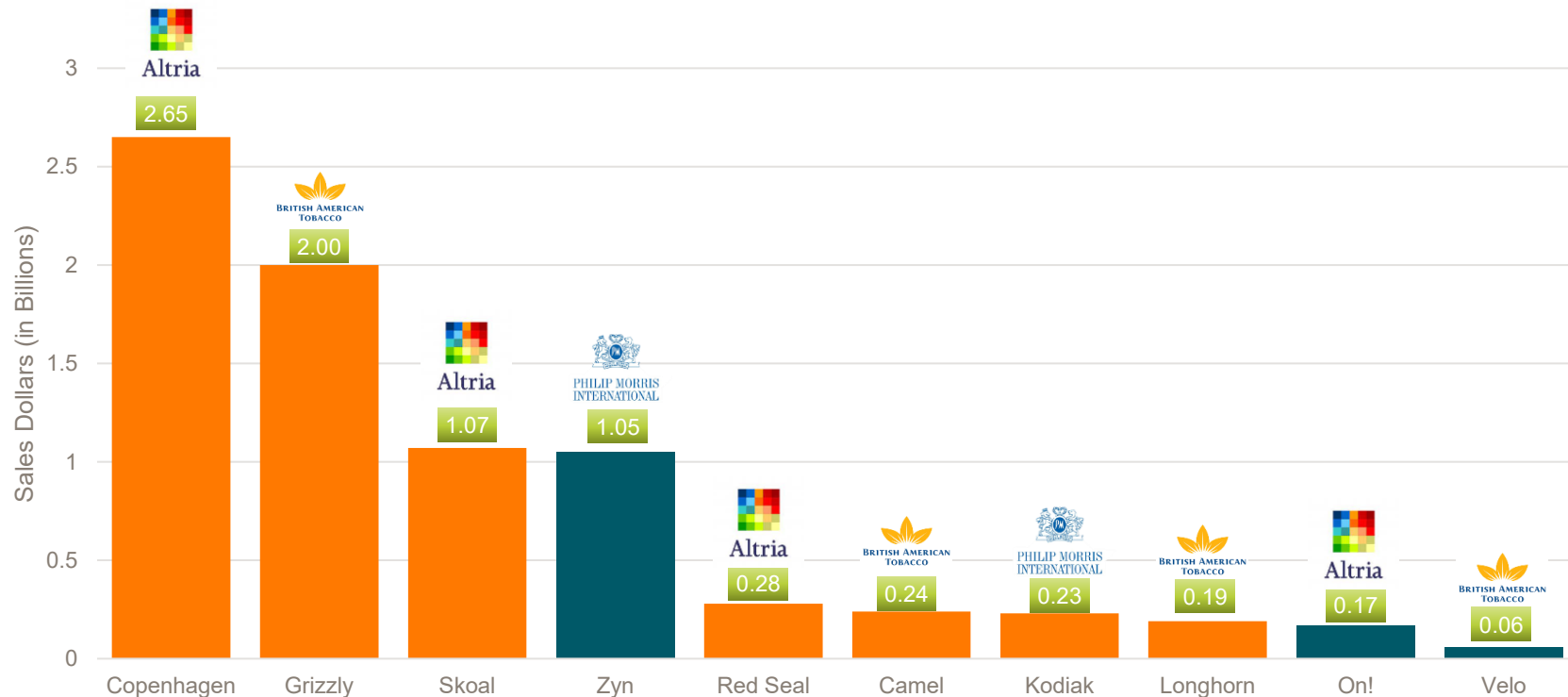
Oral Nicotine Pouches Have Had Explosive Growth



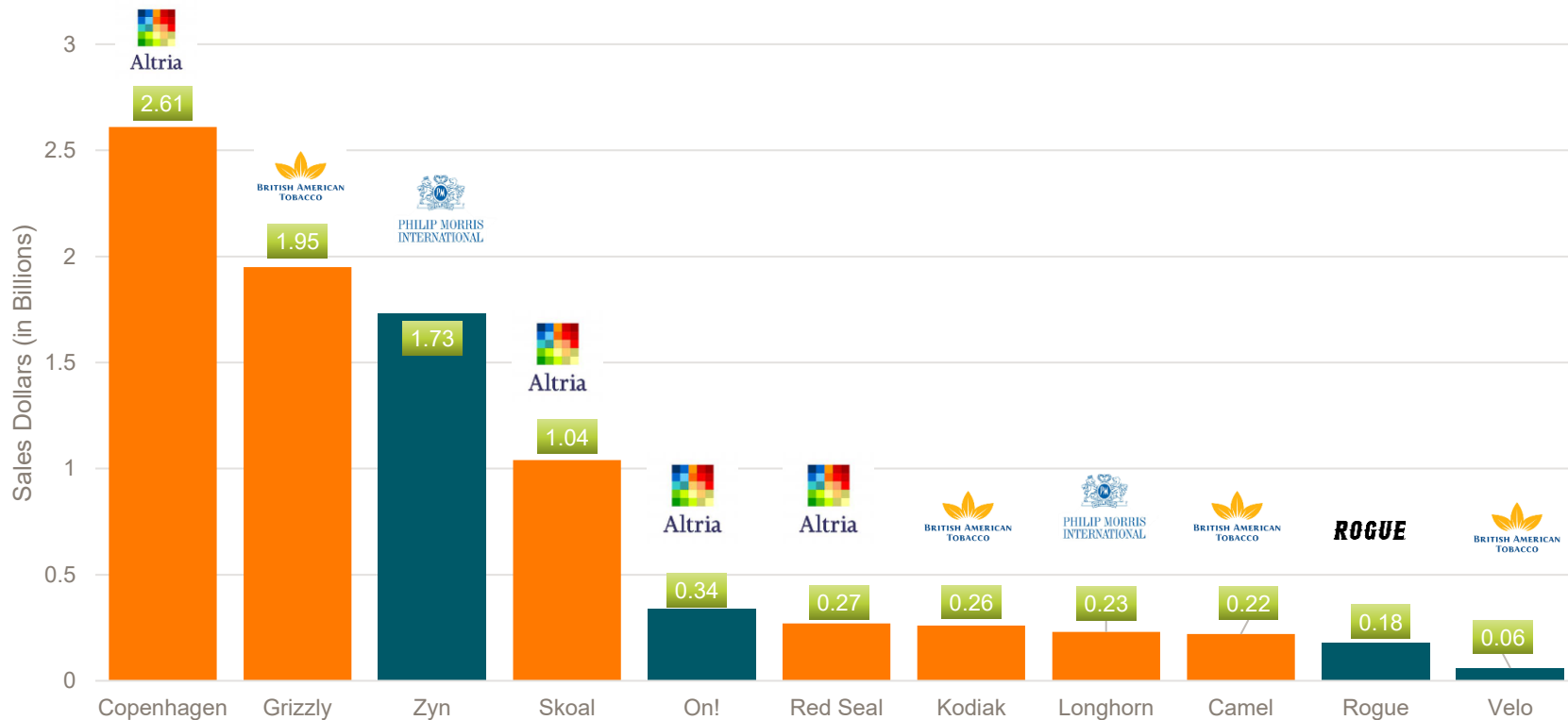
Nicotine pouches gain market share - December 2021



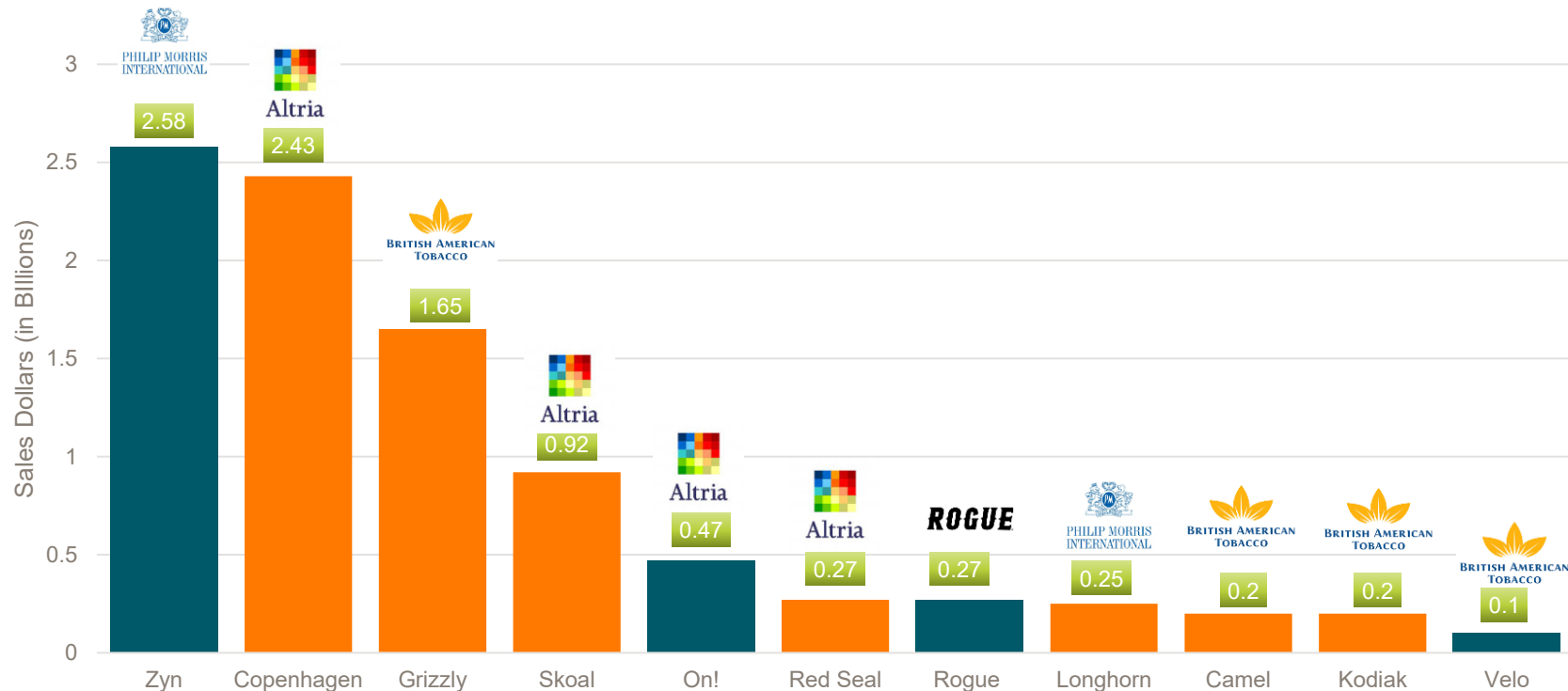
Nicotine pouches gain market share – December 2022



Nicotine pouches gain market share – December 2023



Nicotine pouches gain market share – November 2024



Oral Nicotine Pouch Market Share



68%



19%



9%



4%



1%

What Type of Nicotine is in Nicotine Pouches?

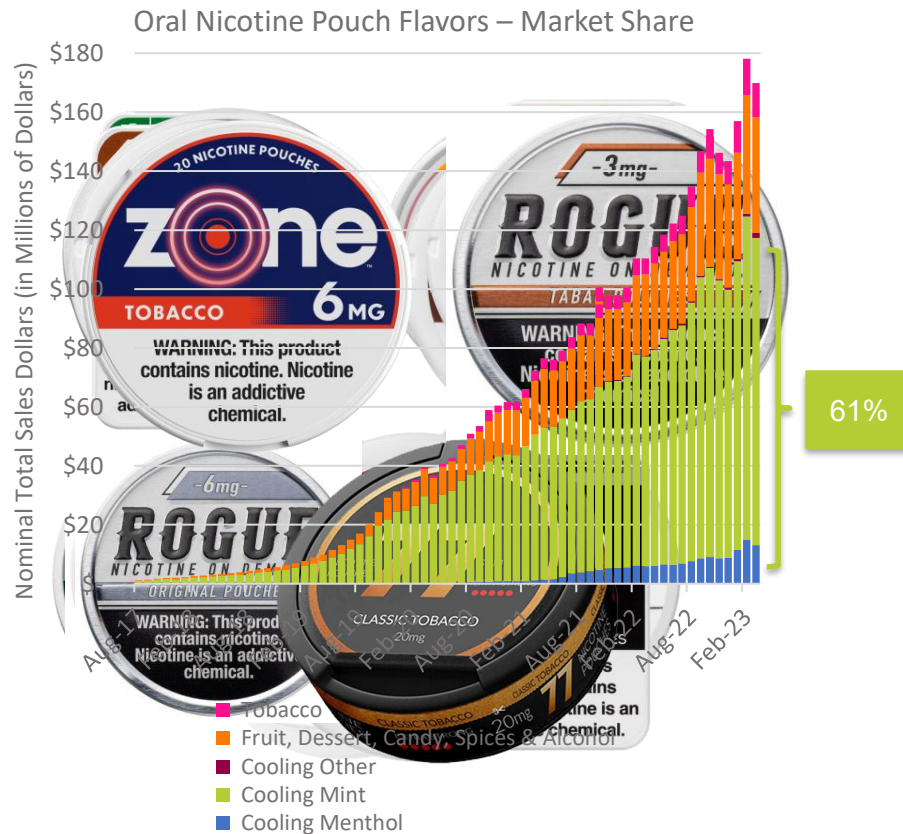


Some brands are made with **tobacco-derived nicotine**

Some brands are made with **synthetic nicotine**

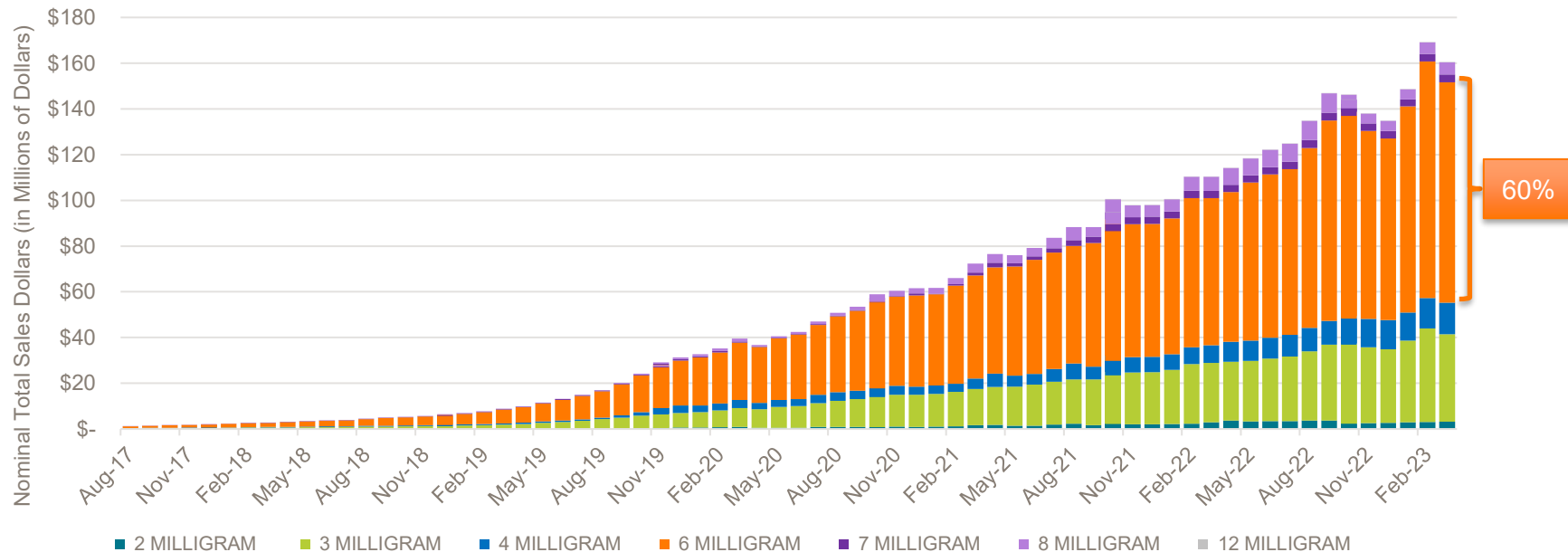
Despite not being made with tobacco, **nicotine pouches are regulated as tobacco products** in the U.S. (regardless of nicotine source)

Nicotine Pouch Flavors

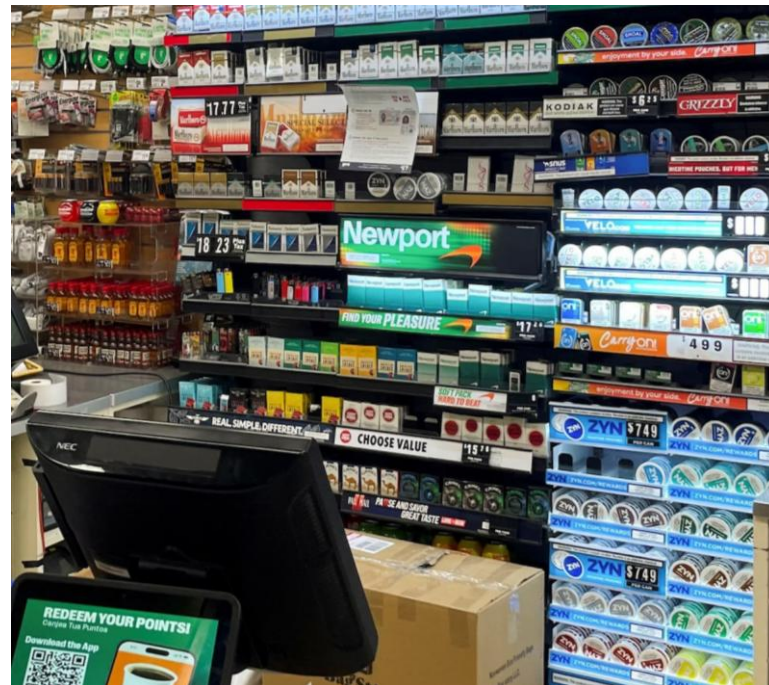


6 mg is Most Popular in the US

Oral Nicotine Pouch Strength – Market Share



Marketing Channels for Oral Nicotine Products include Point of Sale



Event Marketing



ZYN Rewards



A Guide to ZYN Rewards



AUSOUNDS
Wireless Earbuds

Thanks for enrolling in our
Rewards program. We can't wait for you
to start enjoying your perks. Remember,
every 10 punches leads to a Reward.



Hella™ Cocktail Co. Bitters Set



ONE Polarized
Sunglasses



on! product coupons

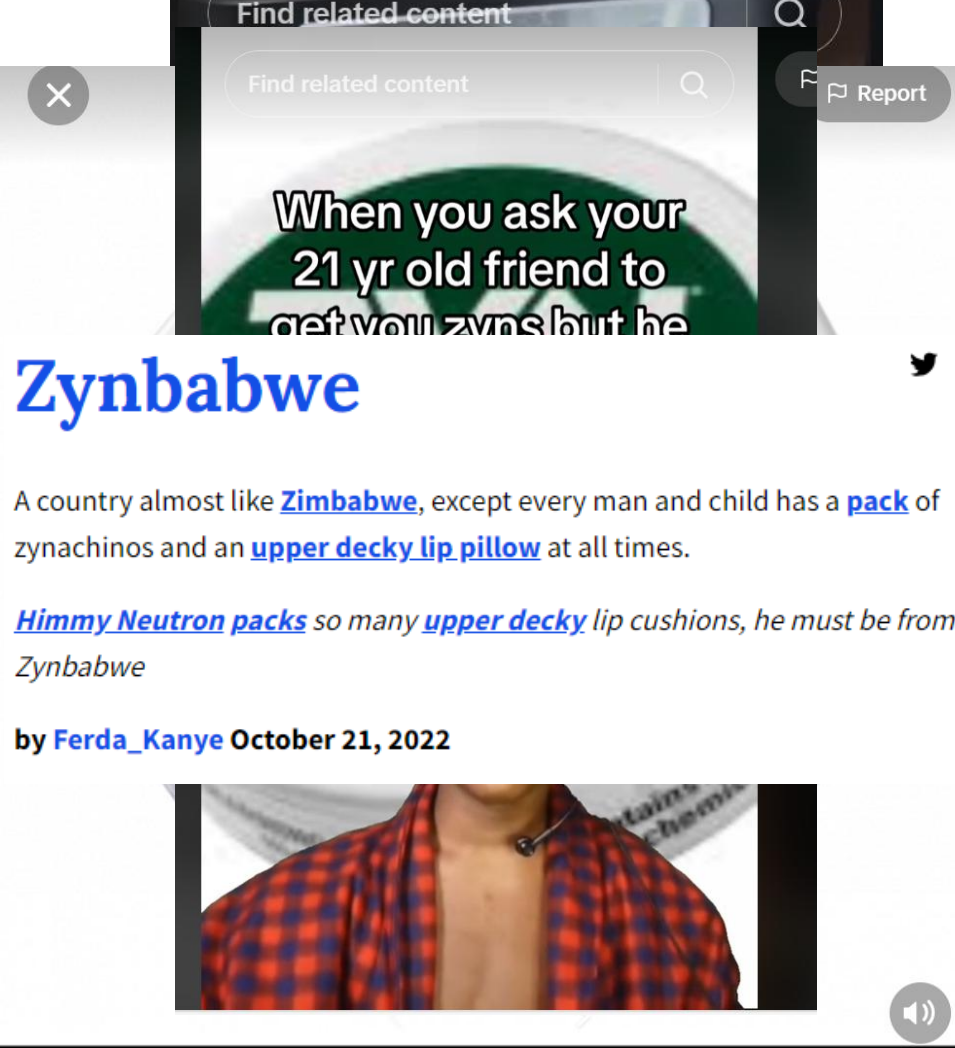
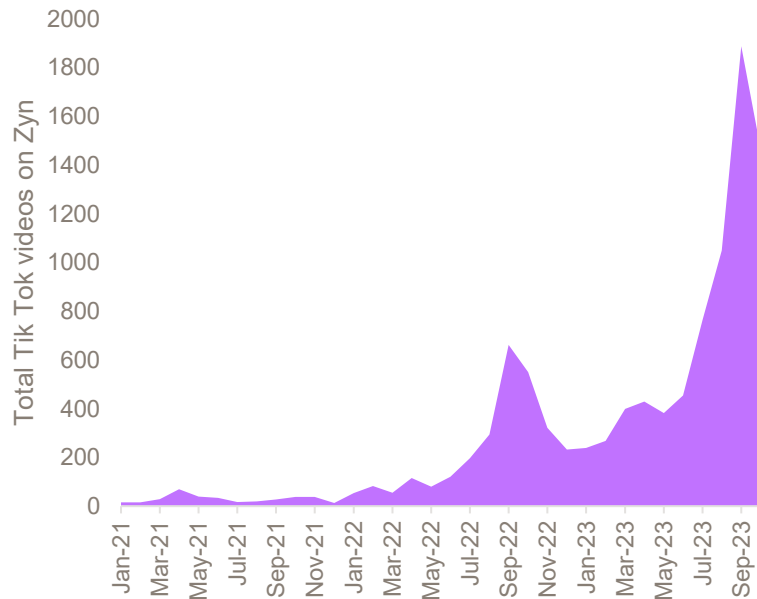


**TRADE YOUR
POINTS FOR
PERKS.**

[VISIT REWARDS PROGRAM](#)



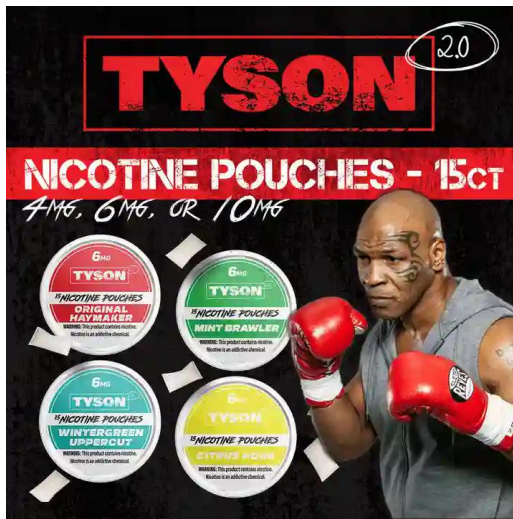
Zyn Sub-Culture on TikTok



More and More and More Copycats



Celebrity Owned or Endorsed Brands



Does this feel familiar?

Disposable Vape Proliferation



E-Cigarette Market – 7%

E-cigarette Technology Continues to Evolve

2007- Cig-a-like (Reusables and "Try a New Product" Disposables)



2010 Mods and Tanks



2015-2016 Pod Based



2018 Disposables



2020-2021 New-Gen Disposables



2023: New
Smart Vapes



"We are becoming a tech company"

From Disposables to Disposable-Rechargeables

- Key Characteristics:
 - Rechargeable battery with a USB charger that allows for even larger liquid capacity, though products are still one-time use products
 - In March 2021, Schroeder Institute researchers noticed "new" products, marketed as Disposable Rechargeables – currently 1065 documented products
 - This represents 20% of our ENDS consumable products



Disposable Vapes Incorporate "Smart" Features



Digital
Screen



Adjust Flavor
And Nicotine
Levels



Access
to Apps



Visual
Notifications



Proximity



Games

... and More Features



Answer
you phone



Provides
Time



Fitness
Tracker



Selfie
Mode

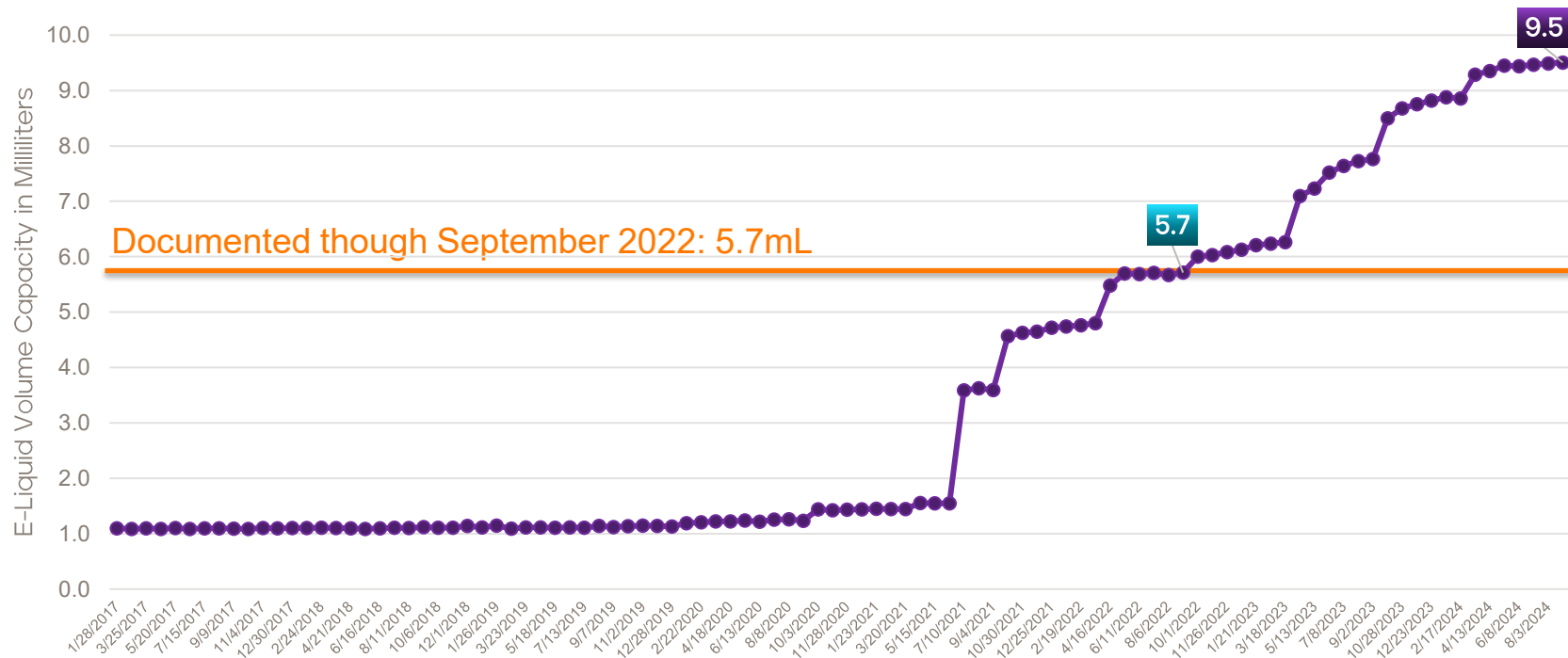


AI
powered



Smart and
Discrete

Disposable E-cigarettes Getting Even Bigger



The Extra-Large Group



20 mL
26.7 JUUL
Pods



26 mL
34.7 JUUL
Pods



28 mL
37.3 JUUL
Pods



40 mL
53.3 JUUL Pods



Disposable E-cigarettes Nicotine Strength Has Increased



Disposable E-cigarettes Are Getting Cheaper

Home > Disposables Under \$10 > True Story 20,000 Disposable Vape

Real Prices (Adjusted to September 2022 Dollars)

\$10.
\$9.
\$8.
\$7.
\$6.
\$5.
\$4.
\$3.
\$2.
\$1.
\$
,



True Story 20,000 Disposable Vape

BY TRUE STORY

Save 40% ~~\$9.99~~ \$5.99

Flavor
Spearmint

Quantity
1

ADD TO CART

BUY IT NOW

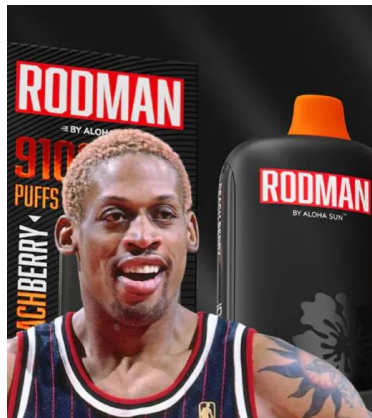
The True Story 20,000 Disposable Vape is a murder-mystery themed device that offers a high-definition animated screen, customizable vape modes, and a spacious tank for prolonged vaping. It is the ideal all-in-one device for both novice and seasoned users.

Specs:

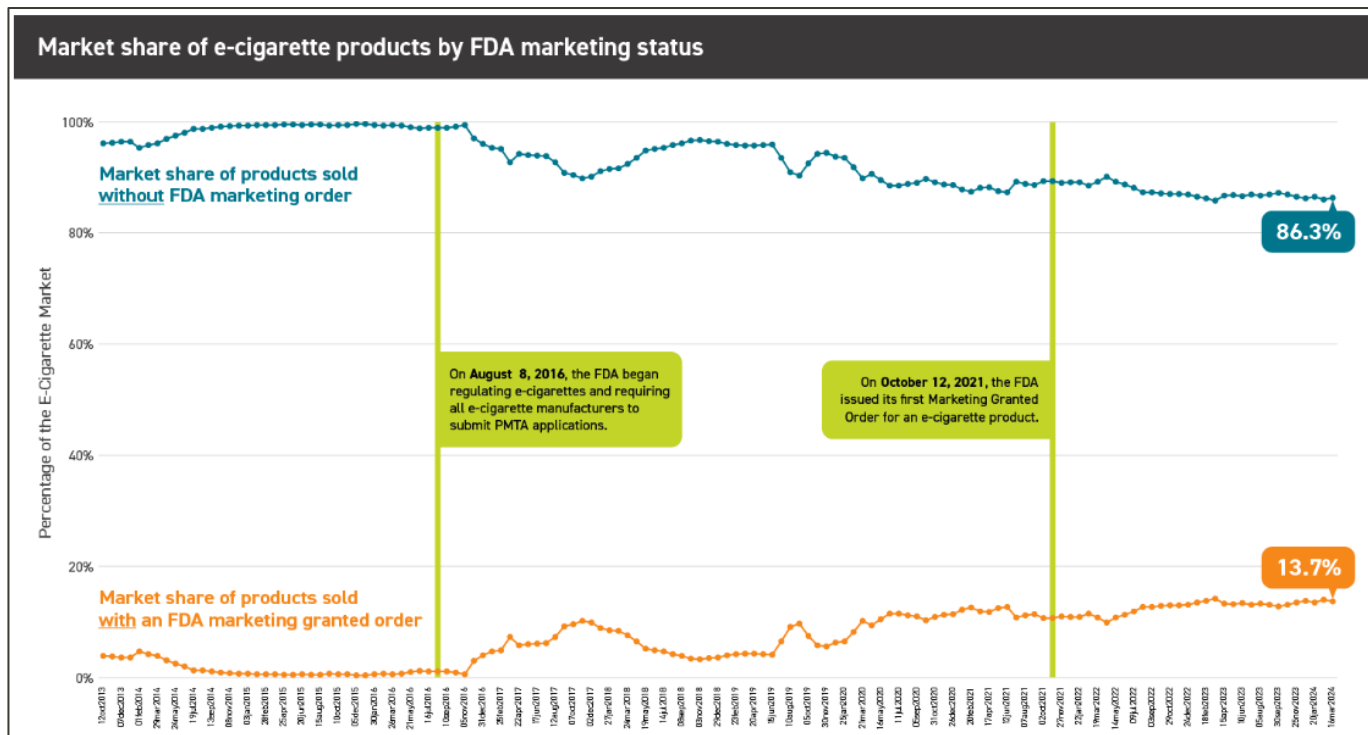
- 20,000 Puffs
- 5% Nicotine
- 20mL Pre-Filled E-Liquid
- Adjustable Vape Modes
- HD Animated Screen

30 cents per mL

Celebrity Owned or Endorsed Brands



73% Of E-cigarette Retail Sales Dollars Are For Illegal Products*

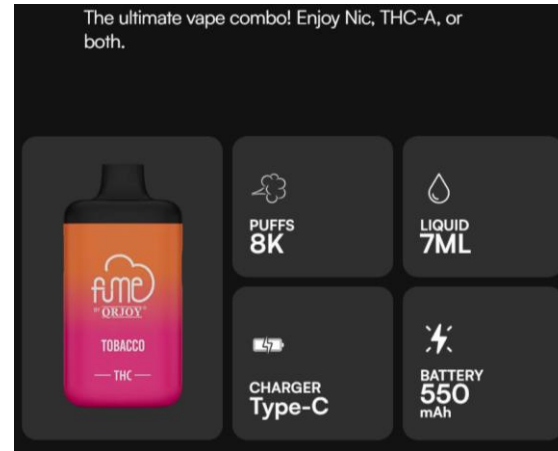


Dual Cannabis and Nicotine Devices are Emerging



....ExStax, a cannabis technology and extraction company from Arizona...told High Times that every cartridge they sell comes with a removable mouthpiece, allowing the user to either use the cartridge as is or to essentially stack vaporizer chambers on top of one another and hit them at the same time.

"You can stack as many as your battery will allow,"



Sources: <https://hightimes.com/products/spliff-vape-new-tech-allows-cannabis-nicotine-to-be-vaped-simultaneously/>
<https://www.fumevapors.com/products/spliffboyz>

More and More New Products

"...harness the sun's power for reliable, **eco-friendly** performance..."

SOLARIS 5% 10000

1st Solar Charging Vape

Triple Animation HD Screen
Star Light Embedded Glow



TYPE-C SOLAR PANEL 10 ML 27 NEW FLAVORS DUAL MESH COIL BOOST MODE MULTITASKING APP

"...learns your habits...it tracks nicotine intake, puff count and even suggests wattage..."

DR.AIR X Pod Kit

Know You Better

INTELLIGENT INTERLOCKING
EXCLUSIVE AI-POWERED APP


THIS WORLD'S FIRST AI-POWERED VAPING BATTERY
AI-POWERED HABIT TRACKING



08:35 1352 12:12

Dual nicotine and cannabis product

The ultimate vape combo! Enjoy Nic, THC-A, or both.



PUFFS 8K

LIQUID 7ML

CHARGER Type-C

BATTERY 550 mAh

Top disposable e-cigarette brand launched its own nicotine powder product


Geek Bar THC products



SATIVA

Pod-based but different?

Off-Stamp SW9000



Power Bank 800mAh Rechargeable
Disposable 2000mAh Battery

POWERED BY LOST MARY

Delta-8 vapes



Cookies

DELTA 8 VAPE
10 DISPOSABLE

BERRY PIE

DISPOSABLE VAPOR PEN NET WT 10.0 (2.66 OZ)

NICOTINE POUCHES



fume ORJOXY

NICOTINE POUCHES

CHILL 20 POUCHES

WARNING: THIS PRODUCT CONTAINS NICOTINE. NICOTINE IS AN ADDICTIVE CHEMICAL.

Key Takeaways

- Nicotine use is deepening and evolving
- Culture and marketing channels are shifting
- Oral nicotine pouches, with Zyn as the market leader, are a new and rapidly growing product category
- Disposable e-cigarettes are getting bigger, stronger, cheaper, and some are getting smarter and sweeter
- Multiple celebrities own or endorse e-cigarette brands and use



Questions?

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