



Smokeless Tobacco, E-Vapour Products and Heated Tobacco in the US

July 2025

KEY DATA FINDINGS

2024 DEVELOPMENTS

Illicit trade in e-vapour products thrives in regulatory vacuum, reshaping consumer behaviour

Zyn a model for modern nicotine: Clean, discreet and culturally embedded

Convenience retailers capitalise on the boom in nicotine pouches

PROSPECTS AND OPPORTUNITIES

Nicotine pouches to continue to shape developments

Functional nicotine to gain momentum with a new lens

Heated tobacco's prospects hinge on smarter positioning and regulatory navigation

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Tobacco in the US - Industry Overview

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Competitive landscape

Retail developments

What next for tobacco?

OPERATING ENVIRONMENT

Legislation

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Minimum legal smoking age

Smoking prevalence

Tar levels

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Low ignition propensity (LIP) cigarette regulation

Flavoured tobacco product ban

Reduced harm

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PRODUCTION/IMPORTS/EXPORTS

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