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WATCHDOG

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Brief



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Understanding Nicotine Pouches

Current Evidence and Industry Activity



Key Takeaways

- Transnational tobacco companies (TTCs) are aggressively promoting nicotine pouches, often emphasizing flavors, convenience and discreet use.
- Rates of use are growing quickly, especially among young people.
- In 2025, an estimated 34 billion pouches were sold, up 660% from 2020.
- By 2027, it's estimated the global pouch market will be valued at US\$15.99 billion.
- Nicotine pouches do not contain tobacco and therefore may not be covered by tobacco control regulations. TTCs are taking advantage of this ambiguity to quickly expand markets.
- Nicotine pouches are not a proven cessation aid and the long-term health effects are not known.
- Governments should prioritize preventing young people from being introduced to nicotine, and reject attempted industry influence over regulations.

Tobacco companies are selling an addictive new product: nicotine pouches. If left unregulated, the industry's aggressive promotion could fuel a new wave of nicotine addiction and harms, even as the world continues to grapple with the effects of the current cigarette and e-cigarette epidemics.

What are nicotine pouches?

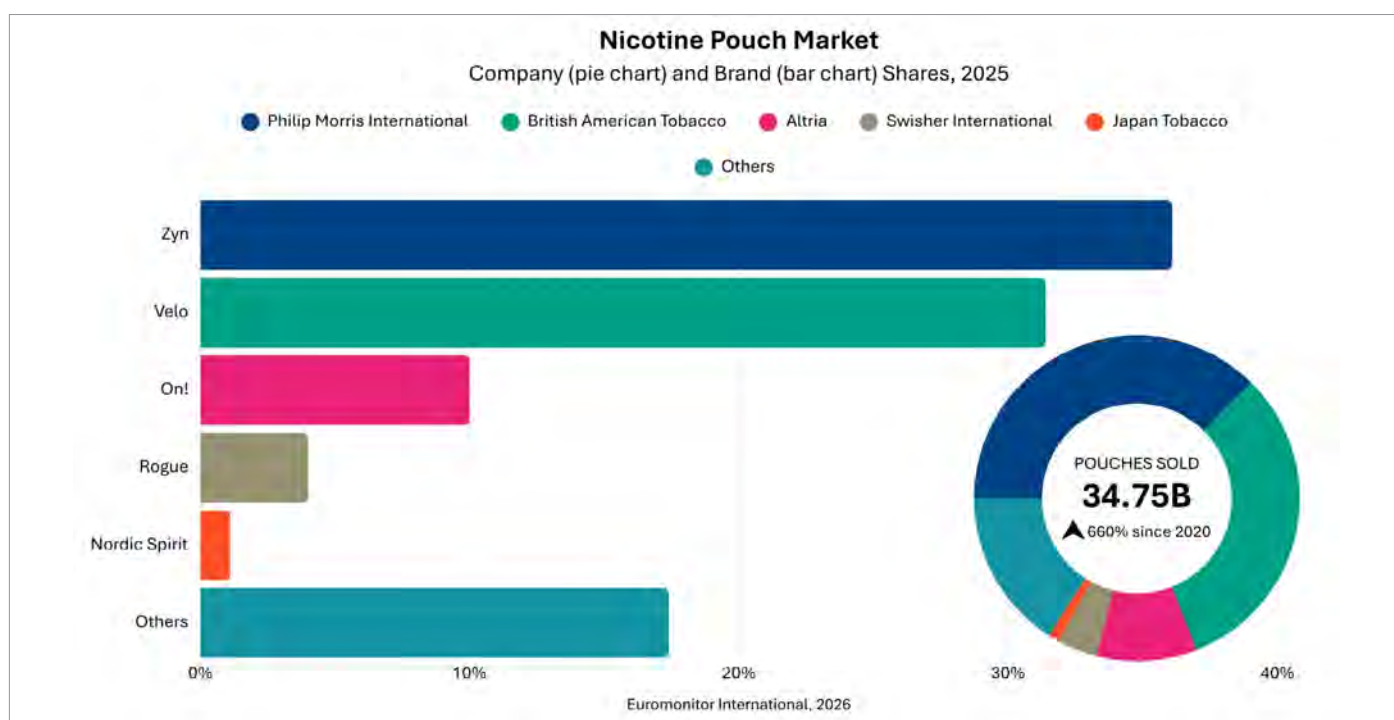
A nicotine pouch is a small sachet that users place between the lip and the gum. The pouch contains powdered nicotine, flavor additives, plant fibers such as cellulose and other fillers.¹ The nicotine may be derived from tobacco or produced synthetically.

Nicotine pouches are similar to snus, a popular oral product in Sweden. The two are often conflated, especially as nicotine pouches are called “white snus” in some regions. However, snus contain tobacco, while nicotine pouches do not.

Some of the leading pouch brands are owned by the world’s largest transnational cigarette manufacturers. Philip Morris International (PMI) and British American Tobacco (BAT) each controlled roughly one-third of the global pouch market in 2025, according to Euromonitor.² Japan Tobacco International (JTI) and Imperial Brands appear to have controlled about 1% or less of the market in 2025. While these transnational tobacco companies (TTCs) still earn the great majority of their profits from cigarettes, falling smoking rates have spurred them to expand their product portfolios to offset losses, retain customers and recruit new ones. TTCs often refer to nicotine pouches as “oral smokeless products” or “modern oral nicotine.”

Many pouches deliver more nicotine than cigarettes

- Some pouches are marketed as having less than 2 mg of nicotine per pouch, while others claim to have almost 50 mg, or even more.³ Most major tobacco companies sell pouches in a range of strengths.
- By comparison, most cigarettes contain between 10 – 12 mg of nicotine, of which about 1 – 2 mg is absorbed during use.⁴ Common nicotine replacement therapy products approved for tobacco cessation, such as nicotine gum and lozenges, typically contain between 2 – 4 mg.⁵
- Research suggests that 4 mg pouches can deliver similar nicotine to a cigarette, while 8 mg pouches and higher deliver significantly more.⁶ Nicotine consumption can rise further when users consume multiple pouches at once, known as “stacking” or “multi-packing.”⁷
- The labeling on pouch packaging is often unclear and can be misleading. Labeling is not standardized, with some package labels showing mg per pouch and others mg per gram.⁸ This makes comparing nicotine content across products difficult for consumers.



Nicotine pouch market company (pie chart) and brand (bar chart) shares, \$US, 2025. (Source: Tobacco Tactics. Available at: www.tobaccotactics.org/article/nicotine-pouches/)



Transnational tobacco companies are driving growth

Big Tobacco's extensive production, distribution, marketing and sales infrastructure, first used to create the tobacco epidemic, then to drive the e-cigarette epidemic, is now being used to grow the nicotine pouch market.

PMI and BAT in particular are investing significant resources in expanding the market:

- BAT said it invested US\$40 million in pouch manufacturing in Pakistan in 2020.²⁵
- In 2024, PMI said it would invest more than US\$800 million in Zyn factories across the United States.²⁶
- In 2024, BAT said it would invest US\$162 million to expand its manufacture of smokeless products at its plant in Hungary.²⁷
- PMI said it invested US\$5 million to grow the pouch market in Ukraine in 2025, and plans to invest US\$10 million more in 2026, including to launch a new line of Zyn products.²⁸

Nicotine pouches are part of a deliberate industry strategy to grow and sustain nicotine use.

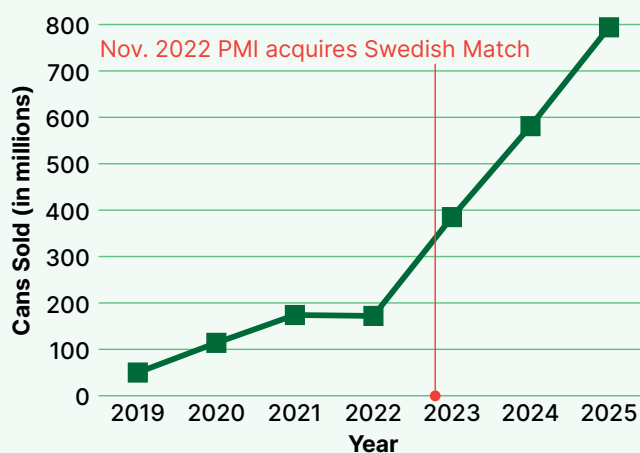
Increasing numbers of young people are using pouches globally and the overall market is rapidly expanding.^{9,10} Sales of stronger nicotine pouches have increased more quickly than those with lower nicotine content.¹¹ While studies from the United States and the United Kingdom show that most pouch uptake thus far is by people who already use tobacco or nicotine products, there is evidence of use among people who have never smoked or used nicotine before.^{12, 13}

In 2025, an estimated 34 billion pouches were sold globally, up 660% from 2020, according to market research company Euromonitor.¹⁴ The company estimates the global market value will reach US\$15.99 billion by 2027, and \$US25 billion in 2028.^{15, 16, 17} In the United States, currently the largest nicotine pouch market, sales increased by more than 1,300% between 2019 and 2025.¹⁸

In 2023, the top markets for nicotine pouches were the United States, Sweden, Denmark, Pakistan and Austria.¹⁹ Other markets that rapidly expanded between 2022 and 2023 include Czechia, Hungary, the United Kingdom and Uzbekistan.²⁰ The industry has also recently started selling these products in other low- and middle-income countries, including Mexico, the Philippines and Nigeria, and is investing in expanding the market in Ukraine.^{21, 22, 23, 24}

How PMI Fueled Zyn Sales in the U.S.

When PMI bought Zyn manufacturer Swedish Match in 2022, the brand was primarily sold in Sweden, the U.S., and in select countries in Europe. By 2025, PMI reported an expansion into 56 markets. In 2026, it began advertising Zyn on F1 Ferrari car livery as part of its sponsorship of the motorsport team, as it had historically done with Marlboro cigarettes.²⁹



Sources: Endnotes 30 - 36

How the industry is trying to influence nicotine pouch regulations

Nicotine pouch regulations range from full sales bans to practically no restrictions. In some countries, pouches fall into a regulatory gray zone—neither banned nor authorized—because they do not fit any existing product category and are thus not included in existing regulations. Where they are regulated, many countries categorize pouches as tobacco or related products, while others treat them as food products, pharmaceutical or nicotine replacement therapy products or even poisons.^{37, 38}

TTCs are taking advantage of this ambiguity to rapidly expand the market before governments close these regulatory gaps.

The industry and its allies use a variety of strategies to lobby for looser regulations, including issuing economic threats and incentives, such as:

- Threats of job cuts and operation stoppages if pouches are banned³⁹
- Threats of an expansion in the illicit market if pouches are strictly regulated or taxed at high rates, an industry-backed narrative that independent research does not support⁴⁰
- Promises to invest in in-country manufacturing if pouches are authorized⁴¹

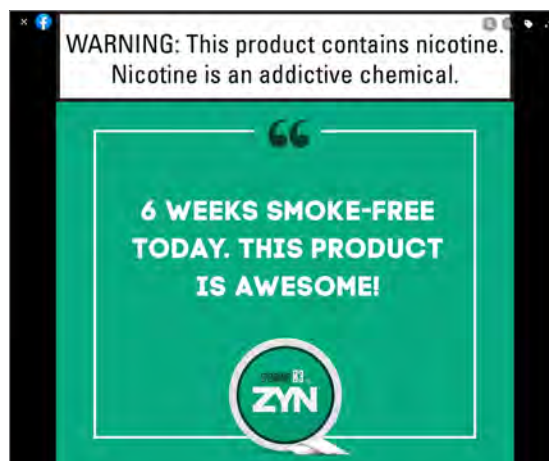
To influence regulators, nicotine pouch manufacturers and their allies have also started referencing on social media and in articles the United States Food and Drug Administration (FDA)’s 2025 marketing authorization of Zyn.⁴² In its decision, the FDA concluded that Zyn pouches had the potential to provide benefits to adults who smoke cigarettes and/or use other smokeless tobacco products, who completely switch to Zyn. The FDA noted that the pouches are not “FDA approved” nor did it authorize them as tobacco cessation tools. Yet proponents of pouches in other countries are using the FDA’s authorization as a signal of credibility, to support tobacco harm reduction narratives and frame Zyn as a “reduced risk” product.⁴³

How Big Tobacco is framing nicotine pouches: “Your Everyday Partner”

The major TTCs have undertaken a global transformation narrative to try to rehabilitate their reputations. In this narrative, they are trying to portray themselves and their industry as having evolved, though their business activities suggest otherwise.⁴⁴ To distract from the trillions of cigarettes they continue to make and sell every year, the industry aggressively promotes its non-cigarette products, including its nicotine pouches.

A report from the World Health Organization found that pouches were indirectly marketed as helping people reduce or quit smoking, supporting the industry’s tobacco harm reduction narrative, but the same brands were also often framed as lifestyle products, depicted in the contexts of travel, dining and entertainment, and even as sports/ performance enhancers.

IMPLIED CESSATION-AID MARKETING



Ad indirectly portraying Zyn as a smoking cessation aid (From the Stanford Research into the Impact of Tobacco Advertising collection)



Ad indirectly portraying Velo as a smoking cessation aid (From the Stanford Research into the Impact of Tobacco Advertising collection)

LIFESTYLE MARKETING



Ad portraying Velo as a lifestyle product (From the Stanford Research into the Impact of Tobacco Advertising collection)



Ad portraying Zyn as a lifestyle product (From the Stanford Research into the Impact of Tobacco Advertising collection)

This follows the same playbook the industry used to hook millions on cigarettes, and suggests the industry is casting as wide of a net as possible to capture new users, including young people and non-smokers.

The theme of “never miss a moment” is a prominent pillar of the industry’s nicotine pouch marketing strategy, and it underpins what appears to be the industry’s goal: Make nicotine pouches “your everyday partner” (a Velo slogan). With pouches being portrayed as a short-term fix in cigarette- or e-cigarette-free environments, it’s clear that it’s not about reducing cigarette or e-cigarette use. It’s about increasing nicotine use, regardless of product.



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Slide from BAT’s presentation to investors at the Consumer Analyst Group of New York Conference



Appealing to a younger demographic

Nicotine pouch manufacturers are using tactics proven to make pouches appealing to young people:

SOCIAL MEDIA MARKETING: TTCs rely heavily on social media to market nicotine pouches, which helps them reach a younger demographic. In the United States, most ads for nicotine pouches are posted on brands' social media accounts.⁴⁶ BAT, PMI and JTI have all used social media influencers with followings ranging from 24,000 to 12 million to promote pouches.⁴⁷

Whether being portrayed as performance enhancers, relaxation aids, lifestyle products or cessation tools, nicotine pouches are nearly always depicted as discreet.⁴⁸ This discreet nature is inherently appealing to young people, and allows them to covertly use pouches in schools, on buses and other settings where smoking or e-cigarette use is banned.⁴⁹

Similar to tobacco advertising, nicotine pouches are associated with friendship, an active lifestyle, romance and success.⁵⁰ Findings from Pakistan suggest this marketing is working. A focus group of 10 – 16-year-olds revealed that many adolescents see BAT's Velo as a stylish, modern "luxury" product.⁵¹

The global reach of this digital advertising is alarming. Researchers estimate that social media marketing of Velo reached more than 10 million teens under age 18, between 2018 and 2023. BAT and PMI are also using their sponsorship of the McLaren and Ferrari F1 racing teams to promote their nicotine pouch brands to F1's increasingly younger audience, of which 34% were between 16 – 24 years old in 2021.^{52, 53}

EMPHASIS ON FLAVORS: Flavors are notorious for appealing to young people and helping to hook them on addictive, harmful products.⁵⁴ In the U.S., an estimated 85% of youth users preferred flavored pouches with relatively high nicotine strengths between 6 – 10mg.⁵⁵ This poses a risk of deepening nicotine addiction, as studies show that flavored products are associated with dual- or poly-use.⁵⁶

Despite these risks, TTCs offer dozens of flavors and heavily promote them. Nicotine pouches come in flavors including mint (menthol), fruit, candy, coffee, spice and tobacco, as well as more ambiguous flavors such as "paan rush," "blast," "frost," "exotic black" and "urban vibe."^{57, 58} Zyn also sells nicotine pouches with "pearls," (small beads embedded in the pouch) that the company claims can accelerate nicotine absorption and enhance flavors.⁵⁹

WARNING: This product contains nicotine. Nicotine is an addictive chemical.



WARNING: This product contains nicotine. Nicotine is an addictive chemical.



Zyn ads promoting flavors such as Cool Mint, Wintergreen, Peppermint, Spearmint, Menthol, Citrus, Chill, Smooth, Coffee, Cinnamon, Spiced Cider, Mojito and Espresso Martini (From the Stanford Research into the Impact of Tobacco Advertising collection)

RETAIL TACTICS: A lack of retail regulations, in-store and online, poses a large risk of youth uptake, as retail spaces are one of the most direct ways tobacco and nicotine companies can reach consumers of all ages.



India: A study of the nicotine pouch market in India found that at least 68 unique brands were available for purchase through direct web sales and third-party e-commerce platforms.⁶⁰ Domestic brands and international brands such as Velo and Zyn are largely sold through online channels.⁶¹



Mexico: There have been reports of nicotine pouches being prominently placed in retail spaces near checkout counters and in stores located near schools.⁶²



Pakistan: In a survey of 382 points of sale, 12.3% had display stands for nicotine pouches.⁶³ A study in Karachi found that 20% of shops selling nicotine pouches were within 200 meters of schools. In 59% of shops, pouches were displayed next to candy, and in 70% of shops, pouches were displayed at children's eye-level.⁶⁴ They are also reported to be sold through online platforms such as FoodPanda.⁶⁵



U.K.: Nicotine pouch brands, including Velo, Nordic Spirit and Zyn, have offered free samples to consumers via their online stores, events and representatives handing them out in city centers.^{66, 67, 68, 69, 70, 71, 72, 73}

"Over the last five years, total poly-use has doubled and **New Category poly-use has increased by 5 times** as consumers choose different categories to match different moods and moments during the day. Importantly, **these consumers generate almost double the revenue** of a New Category solus user, driving 80% of total New Category revenue growth. And as New Categories gain traction, **average daily consumption also rises** as the products become part of a consumer's routine."

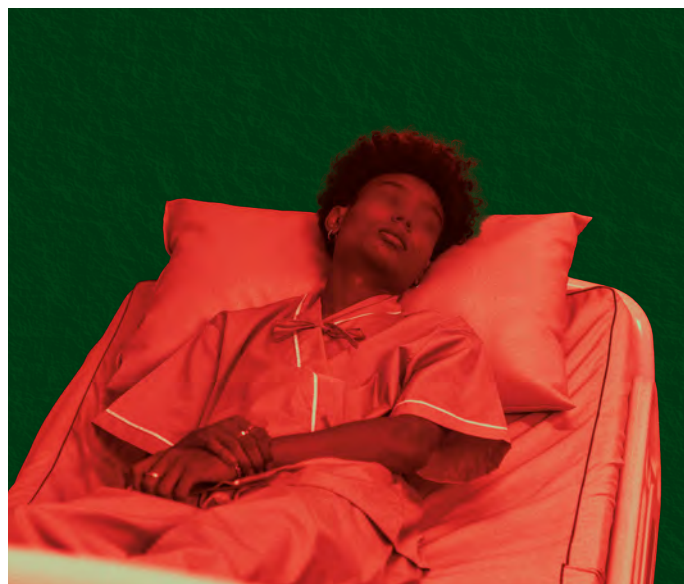
British American Tobacco CEO, Tadeu Marroco, at an investor presentation in 2026 (bold text added for emphasis)⁷⁸

Nicotine pouches are not a proven cessation tool.

Currently, no independent studies provide sufficient evidence that nicotine pouches are an effective tobacco or nicotine cessation tool.^{74, 75}

Using nicotine pouches alongside other tobacco or nicotine products (also known as dual- or poly-use) is a growing issue. In the U.S., more than three-in-four youth and young adults who used pouches used at least one other tobacco product.⁷⁶ Even TTCs acknowledge growing poly-use. BAT's CEO said in a 2026 investor presentation that "new category" poly-use has increased by five times over the past five years.⁷⁷

Further, there is a risk that pouches may serve as an on-ramp for nicotine use, not an off-ramp. In addition to targeting young people who are less likely to be smokers, some nicotine pouches are being directed toward a seemingly health-conscious audience, who would be less likely to use tobacco, by portraying nicotine pouches as cognitive and physical performance enhancers.^{79, 80} Researchers found examples of nicotine pouches being cross-marketed with caffeine pouches in India, and pouches were presented in videos as a cognitive supplement equivalent to caffeine in Mexico.^{81, 82}



Why the industry may want consumers to move from e-cigarettes to nicotine pouches

While TTCs do not explicitly market nicotine pouches as vaping cessation aids, there are reports of consumers using pouches to try to cut back or quit e-cigarettes. These instances could qualify as a win for TTCs, not in terms of public health, but in terms of profit.

TTCs hold a comparatively small portion of the global e-cigarette market. They do, however, lead the nicotine pouch market. Moving consumers to TTC-owned nicotine pouch brands could help tobacco companies win back consumers who previously switched from their cigarettes to non-TCC competitors' e-cigarettes, protecting their profits. Nicotine levels could also surpass those in e-cigarettes, especially in places where pouches are unregulated, increasing addiction and making it harder to quit.

Nicotine pouches carry short-term health risks, and long-term risks are unknown.

Nicotine exposure comes with health risks, especially for young people. Nicotine in any form can negatively affect the developing adolescent brain, including learning, memory and executive function.⁸³

Short-term health risks specifically related to nicotine pouch use are being discovered. Pouch use has been linked to periodontal disease, and regular use has been associated with white lesions on the gums.^{84, 85} One study showed that toxicological responses were greatest for flavored products, specifically spearmint- and tobacco-flavored pouches.⁸⁶

Researchers have also detected tobacco-specific nitrosamines (carcinogens found in tobacco products), toxic chromium and formaldehyde in some nicotine pouches.^{87, 88} Users can consume dangerous amounts of nicotine, sometimes without realizing it, when using pouches with very high nicotine concentrations or consuming multiple pouches at once, as students have reported doing in the U.K.⁸⁹

Because nicotine pouches are a relatively new product, there is no longitudinal data to show the long-term health effects. While the industry may conflate a lack of data showing harm with "harm reduction," the truth is the potential long-lasting health harms are unknown. A literature review of 62 studies about nicotine pouches concluded that most of the key data about pouches is from industry-funded studies, and that independent research is "critically needed."⁹⁰

Recommendations

Lack of regulation is accelerating the TTC-driven rapid uptake of nicotine pouches. Without the necessary regulations in place, TTCs and other manufacturers can exercise their full playbook of tactics to recruit as many users as possible.

In order to curb and, in some places, prevent a new nicotine epidemic that could rival the current e-cigarette epidemic, governments must act now.

Where nicotine pouches are not fully banned, governments can protect young people by:



Regulating packaging, including: • instituting plain packaging
• requiring prominent health warnings • standardizing nicotine level labeling

Regulating in-person and online retail spaces, including instituting age restrictions

Banning all nicotine pouch advertising, promotion and sponsorship

Implementing taxes high enough to deter youth access

Launching youth-targeted campaigns to educate about pouches

Limiting nicotine concentration

Banning flavors and post-market flavor additives

Anticipating policy interference by tobacco and nicotine companies and being prepared to reject it

As the long-term health effects are not yet known, and given the tobacco industry's history of promoting harmful products at the expense of public health, governments must take a cautionary approach to nicotine pouches and be prepared to fend off industry influence.



Reducing harm or introducing harm?

Because they do not combust or contain tobacco, TTCs and their allies often portray nicotine pouches as a less harmful alternative to smoking.⁹¹ However, TTCs, which are motivated by profit and not public health, may be reaching new consumers, introducing new harms.

TTCs have a history of developing and aggressively promoting products they imply are “safer” than whatever came before, despite knowing they weren’t. The industry did this with “light,” “low-tar” and filtered cigarettes. Decades later, it marketed e-cigarettes and heated tobacco products as “reduced risk,” despite the long-term harms remaining unknown.⁹² There is evidence to suggest the industry is following the same playbook with nicotine pouches.

To boost its harm reduction narrative, some TTCs are promoting a misrepresentation of the so-called “Swedish Experience.” Some researchers have attributed Sweden’s relatively low smoking rate to the country’s high snus consumption (snus is a pouch that contains tobacco leaf). Some TTCs and their allies have co-opted this argument to promote nicotine pouch use.⁹³

This conflation of snus and nicotine pouches is misleading. Snus is a different product from nicotine pouches (which did not arrive on the market until the late 2010s). Further, Swedish health experts have detailed how the country’s history of implementing strong tobacco control measures correlated with declining smoking rates and stated there was “no statistical support” for the claim that snus was responsible.⁹⁴ The Public Health Agency of Sweden has cited concerns about the rising rate of pouch and e-cigarette use among young people and suggested that nicotine pouches be included in tobacco prevention efforts.⁹⁵

Rates of nicotine pouch use are rapidly growing, and the lack of regulations paired with aggressive industry marketing threatens to hook new users and deepen nicotine addiction in others. Thus, while adult smokers who fully switch to nicotine pouches may experience reduced exposure to certain toxins, harm is not reduced at a societal level if a new generation and nicotine-naïve consumers become hooked on harmful products, whose long-term health effects are unknown, in the process.

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About STOP

STOP is a global tobacco industry watchdog whose mission is to expose the tobacco industry tactics that undermine public health. Comprised of a network of academic and public health organizations, STOP researches and monitors the tobacco industry, shares intelligence to counter its tactics, and exposes its misdeeds to a global audience. STOP is funded by Bloomberg Philanthropies as part of the [Bloomberg Initiative to Reduce Tobacco Use](#). For more information, visit exposetobacco.org.