Title: Keeping pace with nicotine pouch market developments

Authors: Georgia Alexandrou[1], Crawford Moodie[1]

Affiliation: [1] Institute for Social Marketing and Health, Faculty of Health Sciences and Sport, University of Stirling, Stirling, FK9 4LA, UK

Corresponding author: Dr Georgia Alexandrou, Institute for Social Marketing and Health, Faculty of Health Sciences and Sport, University of Stirling, Stirling, FK9 4LA, UK. Email: georgia.alexandrou@stir.ac.uk. Telephone: +44 (0)1786 466456

Nicotine pouches entered the US market in 2014 and estimated global sales have increased from 292 million units in 2018 to 6.8 billion units in 2021 [1] and 20.2 billion units in 2023 [2]. Most sales (85%) are within the US [3], and one brand (Zyn) has over 70% of the global nicotine pouch market [4], however multiple brands are increasingly available in other countries. Several market developments have been identified including use of different market channels, such as direct mail and Tik Tok [5,6], and variations in nicotine strength, including products with very high levels of nicotine (up to 97.5mg per pouch) [7].

Between February and August 2024, we purchased nicotine pouch brands and variants that we had not previously identified from supermarkets, convenience stores and a tobacconist in Greater Glasgow (Scotland). While nicotine pouches have been sold in Scotland since 2019 [8], when Nordic Spirit (owned by JTI) was introduced, until recently limited brands were available. We purchased 75 products across 62 brands and identified developments we do not believe have been previously reported. The first was the use of limited-edition packaging. This can help introduce a new brand, increase the number and speed of sales, mark a special occasion or event, or have a lasting impact on brand perceptions once sold out [9,10]. A limited-edition nicotine pouch for Velo, owned by British American Tobacco (BAT), stated that it was 'inspired by the McLaren formula 1 team'. BAT has a long history of Formula 1 sponsorship, including for Lucky Strike cigarettes, Vuse e-cigarettes and now Velo [11]. The Velo pouch, which also featured a 'heat reactive' sticker which could be removed to show an alternative design (see Figure 1), reminds consumers of their partnership with McLaren.

Figure 1

The second theme also relates to pack design, with some nicotine pouches using imagery related to violence (e.g. Killa, Chapo) or drugs (e.g. Dope, Blow), which seems distinct from the pack graphics used for any other tobacco or nicotine product. There are also several nicotine pouch brands which include images of confectionary on the packaging (see Figure 2). Some e-cigarettes have been criticised for a resemblance to candy products [12]; in the case of Mad Bounty and Millions Orange the images and/or brand name used are identical to those currently or formerly used on these confectionary products. We also identified nicotine pouches with anime characters, which has previously been found on e-cigarettes [13]. Nicotine pouches that genuinely look like candies or use anime, with anime growing in popularity among teens worldwide [13], raises questions about the target audience for these products.

Figure 2

A third development, and one likely to cause confusion, relates to product content. While the Siberia brand includes the variant All White (a nicotine pouch), it also includes White Dry (purchased in a tobacconist shop in Glasgow), which despite the similarity in pack appearance is tobacco-containing snus. Aside from snus sales being illegal in the UK, this may cause misunderstanding as nicotine pouches are often referred to as snus by consumers [14,15] and on the packaging (even if not spelt correctly, e.g. snooze[7]). There are several other products likely to create confusion, such as no-nicotine Triple Kick, which contains a synthetic nicotine analog, and products that do not contain any nicotine but cannabidiol (Cannadips) or caffeine (Wakey), see Figure 3.

Figure 3

Our findings extend previous UK research [7], highlighting multiple developments in a rapidly changing nicotine pouch market. While nicotine pouches are currently sold in the UK under general consumer product safety regulations, the new Labour Government announced that it will progress a Tobacco and Vapes Bill which will, *inter alia*, stop nicotine pouches from being branded to appeal to children [16]. Emerging nicotine and tobacco products are similarly creating challenges for governments elsewhere [17]. While there is considerable variation in how nicotine pouches are regulated in different countries [1], governments that regulate these products are most likely to have a minimum age of purchase, a requirement to include health warnings, a maximum nicotine strength, and/or restrictions on advertising [1]. Based on the packs we identified, as a minimum we would recommend a warning on the pack lid that is clearly visible at the point of use, as currently it is not obvious to all (and particularly nicotine naïve) consumers what these products are and that they are not risk free. Additional packaging-related requirements banning the use of defined imagery (e.g. confectionery) and descriptors (e.g. related to violence/drugs) are other options that warrant consideration.

Competing Interest

None to declare.

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