

North America E-Cigarette Market Size and Forecast (2021 - 2031)

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Abstracts

The North America E-Cigarette Market is projected to grow significantly, reaching an estimated US\$ 20,900.5 million by 2031, up from US\$ 10,664.5 million in 2024, reflecting a compound annual growth rate (CAGR) of 10.2% from 2025 to 2031.

Executive Summary and Market Analysis

The North American e-cigarette market is primarily divided into three key regions: the United States, Canada, and Mexico. The market is experiencing robust growth, driven by increasing awareness of less harmful alternatives to traditional smoking, leading to a surge in demand for lower-risk smoking options. The United States dominates the market, holding the largest share, supported by a vast consumer base, a dynamic regulatory environment, and continuous product innovation. Canada is also witnessing significant growth in vaping product adoption, particularly among young adults.

In 2024, disposable e-cigarettes emerged as the most popular choice among users in the U.S., accounting for 55.6% of the market, while prefilled or refillable pods and cartridges made up 15.6%. The leading brands among e-cigarette users included Elf Bar (36.1%), Breeze (19.9%), Mr. Fog (15.8%), Vuse (13.7%), and JUUL (12.6%). The rising usage of e-cigarettes highlights the necessity for comprehensive state policies to regulate flavored e-cigarette sales. For instance, Massachusetts implemented sales restrictions that resulted in a nearly 98% reduction in flavored e-cigarette sales at physical retail locations, a trend mirrored in California and New York.

As of May 2024, the FDA has approved 34 e-cigarette products and devices featuring tobacco and menthol flavors, which have successfully passed scientific evaluations and met public health standards. In Canada, e-cigarette manufacturers offer a diverse range

of products, including disposable e-cigarettes, refillable vape pens, and pod-based systems, catering to various consumer preferences.

Strategic Insights

Market Segmentation

The North America E-Cigarette Market is segmented by product type, category type, and distribution channel:

By Product Type: The market includes Modular, Rechargeable, and Disposable e-cigarettes, with Rechargeable devices holding the largest market share in 2024.

By Category Type: The market is divided into Tobacco and Non-Tobacco categories, with Non-Tobacco products leading in market share.

By Distribution Channel: The market is segmented into Online and Offline channels, with Offline sales dominating in 2024. Within Offline channels, Specialty E-Cig Shops hold the largest share.

Future Outlook

The e-cigarette industry is on the brink of transformation through the integration of smart technologies and Internet of Things (IoT) capabilities. This shift is expected to lead to more intelligent, personalized, and secure vaping solutions, driven by changing consumer expectations. Future e-cigarettes are anticipated to feature enhanced connectivity with mobile applications, wearable devices, and digital health platforms, allowing users to monitor metrics such as nicotine intake and device usage in real time.

Recent innovations include smart vapes and disposable e-cigarettes equipped with advanced features like built-in speakers for audio streaming and notifications for calls and messages. AI is also set to play a crucial role in the evolution of e-cigarettes, with devices potentially analyzing user behavior to customize vaping experiences by adjusting temperature, power output, and airflow.

Moreover, biometric authentication is expected to enhance device security, addressing concerns about unauthorized and underage usage. For instance, Ispire, Berify, and

Chemular have formed a joint venture to develop biometric age-verification solutions for vaping devices, which could streamline the FDA approval process and reduce compliance costs.

Market Dynamics

The U.S. remains the most vibrant e-cigarette market, driven by changing consumer preferences, regulatory changes, and technological advancements. E-cigarettes, initially marketed as smoking cessation aids, have gained popularity among both adults and minors. The market features a variety of products, including rechargeable vape pens, disposable devices, and pod systems, with brands like Juul, Vuse, and NJOY leading the market due to their innovative designs and reliable performance.

According to a report by the CDC Foundation and Truth Initiative, retail e-cigarette unit sales in the U.S. surged by 47% from 2019 to 2023, largely due to the popularity of flavored products, which account for over 80% of total sales. Flavors such as fruit, candy, mint, menthol, and dessert significantly influence consumer purchasing decisions.

Company Profiles

Key players in the North America E-Cigarette Market include British American Tobacco Plc, Imperial Brands Plc, Philip Morris International Inc, JT International SA, NJOY, LLC, and several others. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

Research Methodology

The report's data collection and analysis involved comprehensive secondary research, utilizing various sources such as company reports, industry publications, and government documents. Primary research included interviews with industry stakeholders to validate findings and gain insights into market trends and dynamics.

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