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Point of Sale Scanner Data for Rapid Surveillance of the E-cigarette Market

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Abstract

Objectives—Describe e-cigarette sales trends and market share from U.S. convenience stores and mass market retailers.

Methods—We used Nielsen Scantrack to calculate U.S. e-cigarette sales market share from convenience and mass market channels during the 4-week period ending 1/19/13 through the period ending 12/19/15. Internet searches were used to supplement Nielsen product information.

Results—From 2013 to 2015, rechargeable e-cigarette brands VUSE and MarkTen experienced the largest growth in Nielsen channels. E-liquid and tank type brands Vapin Plus and Haus experienced growth although their Nielsen market share is small compared to other brands. Sales of brands with high labeled nicotine content (according to packaging or website) increased. Fruit-flavored sales increased rapidly in Nielsen, yet still represent a minority of market share in these channels.

Discussion—Market-leading e-cigarette brands changed substantially in Nielsen channels from 2013 to 2015. Brand leaders in these channels are now owned by tobacco companies. Changes in labelled nicotine content and fruit-flavored products and product types suggest that as e-cigarette use increases, convenience store and mass market channels are offering new products to meet consumer preferences; however, Nielsen channels do not represent the entire e-cigarette marketplace.

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Human Subjects Statement

This research did not involve human subjects.

Keywords

E-cigarettes; Nielsen; sales; flavors

INTRODUCTION

Electronic cigarette (e-cigarette) use has increased in recent years.^{1,2} E-cigarettes are battery-operated products that deliver aerosolized nicotine, flavors, and chemicals to the user. User preferences for e-cigarette brand, product type, nicotine content, and flavor may have resulted in changes in the types of products offered and most frequently sold in convenience stores and mass retailers as product sales expanded from internet or vape/specialty shops.

Traditional surveys provide valuable information on user characteristics and prevalence, but point-of-sale scanner data can provide timely market information. Previous analyses of convenience store scanner data reported e-cigarette sales increased from 2012 to 2013; top brands in 2013 included blu, Njoy, Logic and 21st Century Smoke.³ According to Euromonitor, a market research firm, in 2014 nearly half of U.S. e-cigarette sales were multi-use tank systems or e-liquids whereas disposable cigalikes represented 23% of the market and rechargeable cigalikes represented 30% of the market.⁴ However, Nielsen does not cover internet or vape/specialty shops which Euromonitor estimates accounted for 45% of sales (25.9% internet sales, 8.3% specialty retailers and 10.9% forecourt retailers).⁴ Therefore, the breakdown of product types in Nielsen does not reflect the breakdown seen in the market as a whole as Nielsen markets report a lower percentage of tank/e-liquid sales.³

The objective of this research was to describe the recent trends in e-cigarette sales in convenience stores and mass market retailers in the U.S. Additionally, we report market share data based on product type, nicotine content, and flavor in Nielsen e-cigarette sales channels. This study builds on previous studies by exploring more recent data and expanded product characteristics. Changes in e-cigarette product type, nicotine content and e-liquid flavors seen in point-of-sale scanner surveillance may inform research priorities, survey measure development, and help put survey data in context to complement more traditional surveys.

METHODS

We obtained e-cigarette sales data from nationally representative Nielsen Scantrack convenience and mass market point-of-sale scanner data. Nielsen data does not capture vape shop or Internet sales (Nielsen company, email communication, June 2014). The Nielsen convenience store channel includes stores between 800 and 3,000 square feet and 500 to 1,500 SKUs selling a limited selection of grocery items. The Nielsen mass market channel includes food stores, drug stores and a selection of retailers from mass merchandiser, club, Walmart, military, and dollar stores. Nielsen uses proprietary statistical methods to create estimates of U.S. dollar sales data by universal product code (UPC) (Nielsen company, email communication, March 2020). To estimate e-cigarette sales in Nielsen channels, we used e-product files (e-cigarettes, e-cigars and e-accessories) during the 4-week period ending

1/19/13 through the 4-week period ending 12/19/15. While total sales by brand were available from 9/4/2010 onward, detailed product descriptions were analyzed from 1/19/13 onward to examine recent market changes.

Characteristics tracked included brand, product type, nicotine content and flavor. Information on product type, nicotine content, and flavor were incomplete. For example, in the 2014 datafile, 57.6% of UPCs were missing information on product type, 42.6% were missing nicotine information, and 15.4% were missing flavor. We conducted Internet searches of e-cigarette manufacturer websites in May 2015 using product information or UPC code to supplement the Nielsen description, and repeated searches in February 2016 for new UPCs in 2015. After Internet searches, less than 7% of UPCs were missing product type (2013: 5.4%, 2014: 3.5%, 2016: 6.6%), less than 10% were missing flavor information (2013: 9.8%, 2014: 2.5%, 2016: 7.0%), and less than 11% were missing nicotine content each year (2013: 10.8%, 2014: 6.0%, 2016: 9.5%). We classified product type as disposable, rechargeable, cartridge/cartomizers (refill), e-liquid bottles, tanks, and atomizers/clearomizers. For this analysis, labelled nicotine content in mg/mL was converted to percentages; labels with nicotine mass (mg or mg/cartridge) were assumed to be mg nicotine/mL e-liquid, as previously reported and calculated.⁵ We classified flavors into 5 categories: tobacco (ie “tobacco”, “original”, “traditional”, and “classic” flavors), menthol/mint, fruit, “other” (coffee, chocolate, vanilla, spices, undiscernible descriptors, etc.), or “assorted.”

Data analyses were completed using SAS 9.4. We calculated total sales dollars, market share (in dollars), and percent change in sales dollars compared to previous years (the difference between the two years divided by the earlier year’s total).

RESULTS

E-cigarette sales in the 2015 Nielsen channels totaled \$763.6 million, a 7% increase compared to 2013 (\$711.2 million). The majority of e-cigarette sales tracked by Nielsen occurred in the convenience store channel (75% in 2013, 81% in 2014, and 84% in 2015).

Brand

Table 1 presents the top 10 brands according to sales dollars in 2015. In 2013, the top 5 brands (in order of sales) were Blu, Njoy, Logic, Fin and 21st Century which together accounted for 86.1% of sales. In 2015, the top 5 brands were VUSE, Blu, Logic, MarkTen and Njoy, (82.1% of sales) (Figure 1). In 2013, only one top 5 brand (Blu, Lorillard) was owned by a tobacco company that manufactures cigarettes and other tobacco products, but in 2015, VUSE (R.J. Reynolds Tobacco Company (RJR)), Blu (Lorillard), Logic (acquired by Japan Tobacco in 2015),⁶ and MarkTen (Altria) were all owned by traditional tobacco companies. Of over 100 other e-cigarette brands captured by Nielsen from 2013–2015, only 11 had annual sales of at least 1% of total market share in 2015.

In 2014 and 2015, both Blu and Njoy lost market share compared to 2013 (Table 1). In contrast, VUSE and MarkTen each comprised less than 2% of market share in 2013 but

together account for nearly 40% in 2015, likely due to their expansion from test markets to nationwide availability. VUSE was the market leader in 2015 (Table 1).

Product Type

In 2015, over 75% of Nielsen e-cigarette sales were disposable, rechargeable or cartridge products, falling from 90% in 2014 and 94% in 2013. Disposable product sales decreased since 2013, but sales of rechargeable and cartridge products grew (Table 1). Together, rechargeable products and their replacement cartridges accounted for over half of dollar sales in 2014 and 2015. Tank sales increased from <1% in 2013 to 8.5% in 2015. Non-cartridge e-liquid bottle sales increased from <1% in 2013 to 4.7% in 2015. Approximately 3–7% of product type information remained missing following online searches (Table 1).

Labelled Nicotine Content

Nielsen sales for products labelled as containing 4–4.9% nicotine (highest category in dataset) increased from 2013 to 2015. In contrast, sales of 1–2.4% and 2.5–3.9% nicotine products were lower in 2015 than 2013 (Table 1). Products labelled as 0 nicotine or <1% nicotine constituted <2% of Nielsen sales in 2013, 2014 and 2015. However, we could not ascertain the labelled nicotine content for 6.0–10.8% of Nielsen sales following Internet searches (Table 1).

Flavors

Tobacco- and menthol-flavored products dominated the Nielsen market in 2013 to 2015. In 2013 and 2014, fruit and other flavored products accounted for <10% of sales, but both categories increased in 2015 (fruit, 9.2%; other, 4.4%). Overall, blu and Njoy brands' market share fell from 2013 to 2015, but their sales of non-tobacco and non-menthol flavored products increased as they released new flavors (Table 1). Following Internet searches, 2–10% of flavor information remained unclassified.

DISCUSSION

The rechargeable brands (including cartridges) VUSE and MarkTen which are owned by large tobacco companies that manufacture cigarettes and other tobacco products, experienced the largest growth in Nielsen channels in 2014 and 2015. Analysts predict these companies will be key players in the e-cigarette industry due to their experience building brands and established distribution chains.⁷ VUSE experienced significant growth in 2014 and was the top-selling brand in 2015. Both VUSE and MarkTen were only available in test markets during 2013.^{8–13} In 2014 and 2015, Nielsen channels also experienced growth in the e-liquid/tank brands Vapin Plus and Haus, although their overall market share was small. Our findings of increased e-liquid sales in convenience stores are consistent with marketing data showing that shipment of e-liquids to convenience stores has increased.¹⁴

Nielsen market share of brands with high labelled nicotine content (according to packaging or manufacturer website) was greater in 2015 than 2013. Although not all brands include nicotine labelling on the packaging (where it can be easily recorded by Nielsen), many brands provide nicotine information on their websites. For example, many VUSE products

do not list nicotine content on the packaging but the VUSE website reports 4.8% nicotine (<http://is.gd/pkzN3P>). Some MarkTen products do not list nicotine content on the packaging but the MarkTen website reports nicotine content below 3.5% (<http://is.gd/hT51U6>). Nicotine labelling on product packaging is not standardized, and reports indicate that actual measured nicotine content differs from labelled nicotine content.^{15,16} However, VUSE, the best-selling brand in 2015 reports higher nicotine content than many other products in this dataset. Our data is based on manufacturers' claims and was not independently verified.

Fruit-flavored e-cigarette sales increased in 2014 and 2015 Nielsen channels, although these products remained a minority of market share. Most products sold in convenience stores and mass market retailers are tobacco- or menthol-flavored. Our tobacco-flavored estimates in 2014 (48.5%) are slightly lower than Giovenco et al.'s estimates from 2013 (59.1%), while our 33.8% estimate of menthol sales is similar to their estimate (34.9%).³ This may be because we conducted Internet searches for all flavors listed as "not stated" and included those we could not identify in a separate unclassified category. If unclassified products were assumed to be tobacco-flavored, our numbers would show continued decline in the tobacco-flavored sales in Nielsen channels over time.

We observed changes in brand leaders, a declining share of disposable products, increased labelled nicotine content, and an increased proportion of flavored product sales. However, this study is not without limitations. The Nielsen scanner data does not include information on Internet or vape/specialty shop sales, estimated to account for 45% of the total e-cigarette market,⁴ nor can it describe the characteristics of e-cigarette users. Therefore, results from this paper may not reflect trends in the whole e-cigarette market. Vape shops stock more diverse product types and more flavored e-liquids than convenience stores.¹⁷ Our data likely underrepresent overall sales of tanks and e-liquids, since tank products are customizable and more expensive tank products may be sold at vape shops and online. However, the expansion of tank and flavored products in convenience and mass retailer channels may reflect emerging user preferences. Additionally, while we were able to identify a large percentage of the missing data from online searches, some products could not be assigned product type, nicotine content or flavor information. Finally, Nielsen data identifies attributes from product packaging, but e-cigarette labelling is not standardized, and during the time period examined in the study, e-cigarettes were unregulated products. However, in May 2016, FDA extended its authority over additional tobacco products (Deeming Rule) including e-cigarettes.¹⁸

Although Nielsen scanner data do not show large total dollar increases from 2013 to 2015, Euromonitor International predicts continued growth in the e-cigarette market.⁴ Consequently, the lack of total dollar sales growth in our data could reflect differences between the Nielsen markets and untracked markets. We do observe an increase in labeled nicotine content possibly driven by tobacco manufacturers entering the market and responding to user preferences for higher nicotine. These manufacturers may also be responding to user preferences for more flavors, as both VUSE and MarkTen introduced new flavors in 2015.^{19,20}

Although our results are not representative of the whole e-cigarette market, point-of-sale scanner surveillance may inform research priorities and complement more traditional population surveillance, and offer valuable insight into e-cigarette sales trends for researchers and policy makers. Market-leading e-cigarette brands and product attributes changed substantially in Nielsen channels from 2013 to 2015 as products marketed by cigarette manufacturers were introduced into the market, suggesting researchers should take product characteristics into account when studying e-cigarettes. Further research would inform purchasing patterns and habits of consumers and characterization of trends in e-cigarette sales through the Internet or vape/specialty shops.

IMPLICATIONS FOR TOBACCO REGULATION

Our analyses and past analyses of Nielsen E-cigarette data have shown changes in the traditional tobacco retailer space over short periods of time,³ suggesting that point-of-sale scanner surveillance data may be a useful complement to traditional public health surveillance tools to study e-cigarette products. Our findings of increased sales of rechargeable brands, e-liquids and tanks suggest that researchers and public health practitioners should take product characteristics into account when studying e-cigarettes. For public health practitioners, scanner surveillance may also inform survey measure development, and help put survey data in context by providing timely information about the changing environment with respect to e-cigarette brands and product attributes (eg device types, nicotine content, e-liquid flavors) that researchers can use in the design and conduct of studies. Prior to May 2016, e-cigarettes were unregulated products, but in May 2016, FDA extended its authority over e-cigarettes and other tobacco products.¹⁸ The results from this paper will provide important baseline information about sales of e-cigarettes convenience store and mass market channels prior to federal regulation. However, less is currently known about sales of these products online or through vape/specialty stores and further representative research on these markets would help describe trends in the total market in addition to the Nielsen channels described here.

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Conflict of Interest Statement

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FIGURE 1.
Sales Dollars Over Time by Brand, Inflation-Adjusted to 2014 Dollars

Nielsen Convenience and Mass Market Dollar Sales and Market Share of E-cigarette Products 2013 to 2015

Table 1

	2013 Total, in \$millions (% market share)	Percent Change from 2013-2014	2014 Total, in \$millions (% market share)	Percent Change from 2014-2015	2015 Total, in \$millions (% market share)	Percent Change from 2013-2015
Total	\$711.2		\$775.8		\$763.6	
Brands						
blu	\$293.4 (41.3%)	-12%	\$258.8 (33.4%)	-32%	\$175.5 (22.9%)	-40%
Logic	\$82.3 (11.6%)	51%	\$124.1 (16.0%)	-10%	\$111.6 (14.6%)	36%
VUSE	\$2.5 (<1%)	4117%	\$105.7 (13.3%)	143%	\$256.8 (33.6%)	>10,000%
Njoy	\$161.4 (22.7%)	-54%	\$74.4 (9.6%)	-48%	\$38.8 (5.1%)	-76%
MarkTen	\$0.6 (<1%)	6723%	\$40.8 (5.3%)	11%	\$45.2 (5.9%)	7450%
Fin	\$37.6 (5.3%)	-30%	\$26.5 (3.4%)	-47%	\$14.0 (1.8%)	-62%
21 st Century Smoke	\$39.2 (5.5%)	-43%	\$22.4 (2.9%)	-36%	\$14.4 (1.9%)	-63%
Vapin plus	\$0	n/a	\$20.8 (2.7%)	11%	\$23.2 (3.0%)	n/a
mistic	\$22.1 (3.1%)	-9%	\$20.2 (2.6%)	-36%	\$12.8 (1.3%)	-42%
Haus	\$0	n/a	\$9.9(1.3%)	60.9%	\$16.0 (2.1%)	n/a
Product Type						
Disposable	\$369.5 (52.0%)	-21%	\$292.0 (37.6%)	-40%	\$175.2 (22.9%)	-53%
Rechargeable	\$71.5 (10.1%)	34%	\$957.4 (12.3%)	-16%	\$805.3 (10.5%)	13%
Cartridges	\$231.2 (32.5%)	41%	\$324.9 (41.9%)	8%	\$352.2 (46.1%)	52%
Tank	\$<0.1 (<1%)	>10,000%	\$13.1 (1.7%)	394%	\$64.6 (8.5%)	>10,000%
E-liquid	\$0.2 (<1%)	>10,000%	\$209.9 (2.7%)	73%	\$362.4 (4.7%)	>10,000%
Atomizers/ Clearomizers	\$0.6 (<1%)	267%	\$2.4 (<1%)	79%	\$4.3 (<1%)	555%
Unclassified/missing	\$31.1 (5.4%)	-30%	\$26.8 (3.5%)	80%	\$50.5 (6.6%)	27%
Nicotine Content ¹						
0	\$1.1 (<1%)	44%	\$1.5 (<1%)	-21%	\$1.2 (<1%)	14%
<1%	\$12.4 (1.8%)	1%	\$12.6 (1.6%)	-35%	\$8.1 (1.1%)	-35%
1-2.4%	\$489.5 (68.8%)	11%	\$541.9 (69.8%)	-23%	\$418.5 (54.8%)	-15%
2.5-3.9%	\$43.5 (6.1%)	-59%	\$17.7 (2.3%)	-79%	\$3.8 (<1%)	-91%

	2013 Total, in \$millions (% market share)	Percent Change from 2013–2014	2014 Total, in \$millions (% market share)	Percent Change from 2014–2015	2015 Total, in \$millions (% market share)	Percent Change from 2013–2015
4–4.9%	\$87.8 (12.3%)	75%	\$153.4 (19.8%)	69%	\$256.1 (33.5%)	192%
Unclassified/missing	\$76.8 (10.8%)	–37%	\$46.8 (6.0%)	55%	\$72.6 (9.5%)	–5%
Flavors ²						
Tobacco	\$345.2 (48.5%)	13%	\$388.4 (50.1%)	11%	\$335.0 (43.9%)	<1%
Menthol/Mint	\$240.6 (33.8%)	7%	\$256.8 (33.1%)	–1%	\$253.9 (33.2%)	6%
Fruit	\$26.8 (3.8%)	76%	\$47.2 (6.1%)	49%	\$70.5 (9.2%)	163%
Other	\$12.6 (1.8%)	66%	\$20.8 (2.7%)	54%	\$33.5 (4.4%)	156%
Assorted	\$16.6 (2.3%)	50%	\$24.8 (3.2%)	–60%	\$10.0 (1.3%)	–40%
Unclassified/missing	\$69.2 (9.8%)	–72%	\$19.6 (2.5%)	32%	\$53.1 (7.0%)	–62%
Flavors by Brand ³						
Blu tobacco	\$143.0 (20.1%)	–2.5%	\$139.4 (18.0%)	40%	\$84.3 (11.0%)	41%
Blu menthol	\$81.4 (11.4%)	–18%	\$66.7 (8.6%)	–47%	\$35.6 (4.7%)	–56%
Blu fruit	\$14.0 (2.0%)	92%	\$26.9 (3.5%)	59%	\$42.8 (5.6%)	205%
Blu other	\$9.7 (1.4%)	3%	\$100 (1.3%)	1%	\$10.1 (1.3%)	2%
Blu assorted	\$9.9 (1.4%)	54%	\$15.2 (2.0%)	–82%	\$2.8 (<1%)	–72%
Logic tobacco	\$36.9 (5.2%)	56%	\$57.4 (7.4%)	<1%	\$57.0 (7.5%)	54%
Logic menthol	\$37.5 (5.3%)	52%	\$56.9 (7.3%)	–21%	\$44.9 (5.9%)	20%
Logic fruit	\$1.4 (<1%)	–21%	\$1.1 (<1%)	0	\$1.1 (<1%)	–21%
Logic other	\$<0.1 (<1%)	0	\$<0.1 (<1%)	1000%	\$1.1 (<1%)	1000%
Logic assorted	\$6.3 (<1%)	37%	\$8.6 (1.1%)	–30%	\$6.0 (<1%)	–5%
VUSE tobacco	\$1.4 (<1%)	4243%	\$60.8 (7.8%)	122%	\$135.1 (17.7%)	9950%
VUSE menthol	\$0.8 (<1%)	5463%	\$44.5 (5.7%)	145%	\$109.0 (14.3%)	>10,000%
VUSE fruit	\$0	0	\$0	n/a	\$4.5 (<1%)	n/a
VUSE other	\$0	n/a	\$<0.1 (<1%)	8100%	\$8.2 (1.1%)	n/a
NJOY tobacco	\$92.7 (13.0%)	–51%	\$45.4 (5.9%)	–56%	\$19.8 (2.6%)	–79%
NJOY menthol	\$60.0 (8.4%)	–62%	\$23.3 (3.0%)	–66%	\$8.0 (1.0%)	–650%
Njoy fruit	\$0	n/a	\$1.6 (<1%)	218%	\$5.1 (<1%)	n/a
Njoy other	\$0	n/a	\$1.0 (<1%)	140%	\$2.4 (<1%)	n/a

	2013 Total, in \$millions (% market share)	Percent Change from 2013–2014	2014 Total, in \$millions (% market share)	Percent Change from 2014–2015	2015 Total, in \$millions (% market share)	Percent Change from 2013–2015
Njoy assorted	\$0	n/a	\$0.3 (<1%)	233%	\$1.0 (<1%)	n/a
MarkTen tobacco	\$0.2 (<1%)	10650%	\$21.5 (2.8%)	–78%	\$4.8 (<1%)	2300%
MarkTen menthol	\$0.2 (<1%)	8000%	\$16.2 (2.1%)	48%	\$23.9 (3.1%)	>10,000%
MarkTen other (Fusion)	\$0	n/a	\$<0.1 (<1%)	200%	\$0.3 (<1%)	n/a

¹ Atomizers and clearomizers were assumed to contain no nicotine

² Atomizers and clearomizers were assumed to be unflavored

³ Unclassified flavors are not presented in the Flavors by Brand category