

GLOBAL NICOTINE POUCH MARKET BLUE BOOK II

2024



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01 Introduction

Basic Introduction to Nicotine Pouches

NICOTINE POUCH

Nicotine pouch refers to a modern oral tobacco product containing nicotine, sourced from tobacco plants or synthesized nicotine. It does not include tobacco leaves, tobacco extracts, or tobacco stems.



Nicotine pouches are the most common form in the modern oral tobacco market. These products come in various forms, including nicotine pouches, nicotine lozenges, nicotine gum, etc., with nicotine pouches being the most common. They offer multiple flavors, such as mint, citrus, cherry, and various nicotine levels, usually ranging from 1 mg/pouch to 10 mg/pouch.

Mainstream Modern Oral Tobacco Product Categories

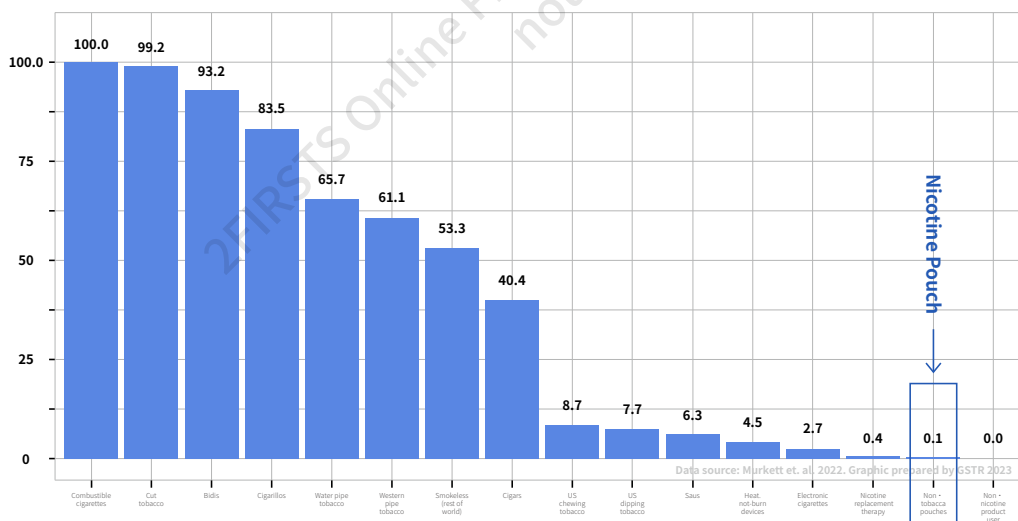


Lab-synthesized nicotine is created by rearranging other plant molecules to replicate nicotine. On the other hand, tobacco-derived nicotine is extracted from tobacco leaves using a solvent, excluding any tobacco leaves or dust.

When used, the nicotine in nicotine pouches is absorbed through the oral mucosa into the bloodstream, then transported to the brain. Users typically experience an overall sense of pleasure, resulting in both calming and stimulating effects.

Recent studies suggest that nicotine pouches have lower health risks compared to smoking cigarettes. A study comparing high-concentration nicotine pouches (6 or 8 mg) with nicotine gum (4 mg) found that nicotine pouches provide nicotine concentrations similar to existing smokeless products rapidly and without significant adverse effects. This suggests that nicotine pouches may effectively reduce withdrawal symptoms and help smokers reduce or quit cigarette use, potentially similar to or better than other nicotine replacement therapies. However, it's essential to note that there are currently no available longitudinal study on the safety of prolonged nicotine pouch use. Despite this, they are generally considered much safer than cigarettes. The U.S. Food and Drug Administration (FDA) has reviewed evidence indicating that using nicotine pouches alone is better than smoking cigarettes. However, there is still a lack of long-term or peer-reviewed studies on their effectiveness as an FDA-approved smoking cessation tool. In summary, nicotine pouches offer a smoke-free alternative for nicotine delivery. Due to their convenience and perceived harm reduction compared to traditional tobacco products, they cater to a broad range of consumer preferences with a variety of flavors and intensity options.

Relative Risk Level of Nicotine Products



Source: Global State of Tobacco Harm Reduction.org

Development History of Nicotine Pouches

➤ Swedish Snus as Origin:

The roots of nicotine pouches can be traced back to the 19th century and originated in Sweden as snus. The initial snus pouches were moist tobacco products placed under the upper lip. This traditional oral tobacco use laid the foundation for innovation in the industry.

➤ Development of Pre-packaged Pouches:

Despite the existence of Swedish snus for centuries, the first pre-packaged pouches were introduced in the 1970s. These pouches, providing a more convenient option compared to loose tobacco snuff available earlier, naturally led to the development of alternatives to smokeless tobacco leaves. Nicotine pouches emerged as small white pouches without tobacco leaves, dust, or stems. The first product of this kind, named "Zonnic," was registered in Scandinavia in 2008 by Nicovum, a company focused on nicotine replacement therapy (NRT) products. In 2009, RJ Reynolds (now British American Tobacco) acquired Nicovum, marking a significant step in industry growth.

➤ Expansion into the U.S. Market:

The introduction of nicotine pouches to the U.S. market was witnessed in 2014 with the launch of ZYN by Swedish Match. The success of ZYN in the U.S. prompted other major tobacco and nicotine companies to enter the market. Brands introduced in 2019, such as On!, VELO, and Lucy, offered a variety of flavors and nicotine strengths, further driving growth.

➤ Innovation and Market Growth:

The industry reached its peak in 2020, with a significant increase in the introduction of new products to the market. Innovative products like FRE Nicotine Pouch, completely free of tobacco, unlike traditional tobacco-derived nicotine products, were launched during this period. This innovation signaled a new era in the industry, catering to the growing demand for tobacco-free products.

➤ Increased Awareness and Acceptance:

By 2021, oral tobacco experienced substantial growth in the U.S., and the visibility and acceptance of nicotine pouches as an alternative to classic oral tobacco products increased. Established brands expanded their product ranges, introduced new flavors and strengths, and innovated to remain competitive.

➤ Future Outlook:

As of 2023, the nicotine pouch industry continues to evolve, with manufacturers becoming increasingly creative, and new brands entering the market. Brands like LIX and Juice Head are introducing innovative products, including soft, long-lasting pouches and fruit-based series. The industry is expected to continue growing, with potential expansions in product types, flavors, and nicotine sources.

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02 Nicotine Pouch Industry Chain Analysis

Upstream

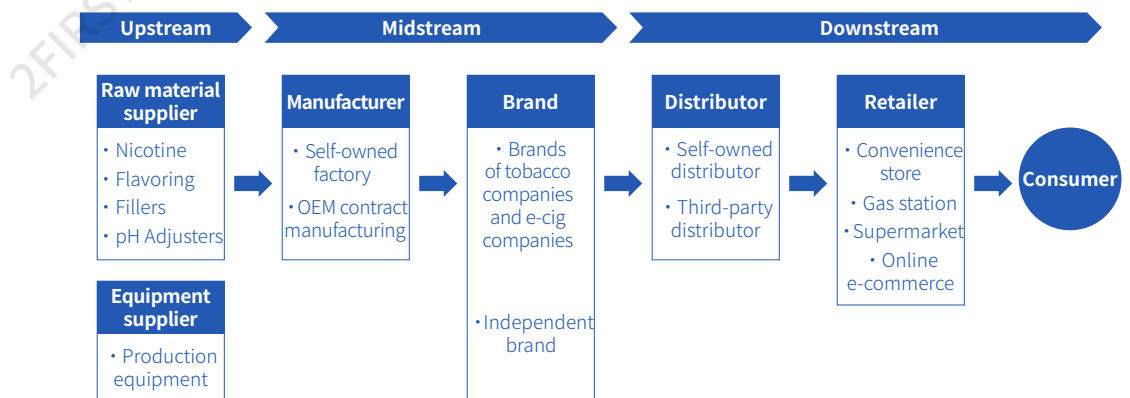
The upstream of the nicotine pouch industry consists of raw material suppliers and equipment suppliers. Raw material suppliers are typically located in local consumer markets. Nicotine is a crucial raw material, and typical suppliers include Alchem and BGP Healthcare in India, and the Polish company Chemnovatic. Equipment suppliers provide production equipment related to oral nicotine products, with notable companies such as the Italian company G.D and the German company Hauni Maschinenbau AG.

Midstream

This stage encompasses manufacturers and brand owners. Manufacturers are mainly the proprietary factories of nicotine pouch brands or OEM factories, such as the well-known Chinese OEM factory Sciecure. Dominant players among brand owners are primarily tobacco companies with nicotine pouch brands, such as ZYN under Philip Morris International (PMI) and VELO under British American Tobacco (BAT). There are also brands launched by e-cigarette companies and numerous independent brands, including Elfbar's nicotine pouch brand TACJA, Boltbe and FEATX in the Chinese market.

Downstream

The downstream involves distributors and retailers. Distributors for oral pouch brands are typically third-party distributors and brand-owned distributors (such as the SMD Logistics owned by Swedish Match). Retailers are numerous and include offline convenience stores, gas stations, supermarkets, as well as online e-commerce websites.



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03 Nicotine Pouch Consumer Market

Geographic Distribution of Nicotine Pouch Market



Europe

Currently, Europe is the largest nicotine pouch market globally, accounting for a substantial 65% .

In Europe, nicotine pouches are particularly popular in the Nordic countries such as Sweden, Norway, and Denmark. The prevalence of snus consumption traditions in these regions has contributed to a favorable consumer culture and a solid consumer base.



North America

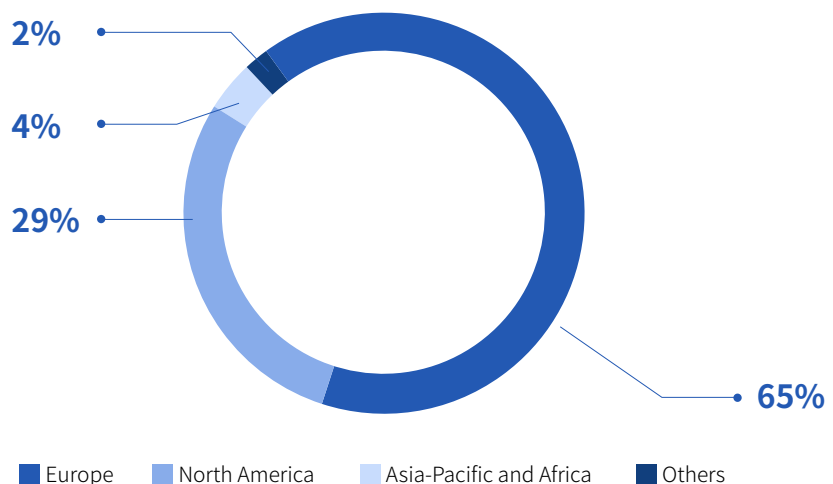
The North American market constitutes approximately 29% of the global market, with the United States being a key player experiencing rapid growth. According to data from the Centers for Disease Control and Prevention (CDC), nicotine pouch sales in the United States increased 300-fold between 2016 and 2021. The American Cancer Society mentioned in 2022 that since 2019, the consumption of nicotine pouches in the U.S. has doubled annually. Companies like PMI and Swedish Match have witnessed rapid growth in U.S. nicotine pouch market, with the latter reporting a 50% increase in sales of its in the first half of 2021.



Asia-Pacific and Africa

The market share in the Asia-Pacific and Africa regions combined is less than 5% of the global market, with major sales occurring in countries such as Pakistan, Indonesia, and Kenya.

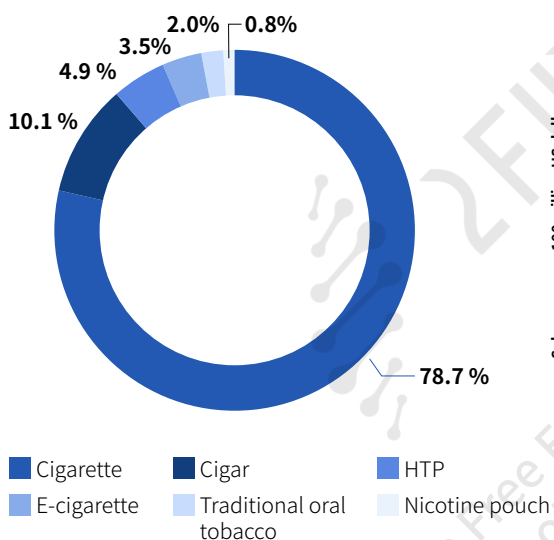
Global Nicotine Pouch Market Share (2022)



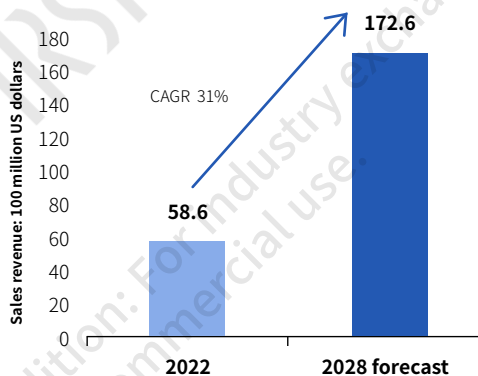
Data Source: Precision Reports, Expert interview

Market Size

Proportion of Tobacco Products' Global Sales(2022)



Global Sales of Nicotine Pouch (2022-2028)



Data Sources: National Bureau of Economic Research, "2022 World Tobacco Development Report (Part I)," "Eastern Tobacco Report," Everbright Securities Research Institute, Market Reports World.

In various tobacco products, nicotine pouches accounted for only 0.8% of the sales in 2022. As a significant emerging tobacco product, there is still vast growth potential in the future. According to the data from the market research company Market Reports World, global nicotine pouch sales were \$5.86 billion in 2022 and are expected to reach \$17.26 billion by 2028, with an annual compound growth rate of 31%.

Behind the rapid growth in market size, the main driving factors include:

Impact of COVID-19:

The pandemic has had a positive effect on the nicotine pouch market. Growing health concerns and a shift to online retail significantly increased sales of these products, and this trend is expected to continue in the forecast period.

Consumer Trends:

Public awareness of the harm of traditional tobacco is gradually deepening. Public health consciousness and hygiene levels are improving, and people are more willing to reduce the negative impact of combustible tobacco on themselves and others. Nicotine pouches, which involve no combustion, produce no irritating odor, and satisfy the nicotine intake needs, are gradually gaining popularity among more consumers.

Brand Initiatives:

To ensure sustainable business growth, tobacco companies expand into new categories of tobacco products. They incorporate nicotine pouches into business portfolios through acquisitions and other means. Leveraging significant financial resources and channel advantages, they aim to expand the market for nicotine pouches. For example, in May 2022, PMI acquired Swedish Match AB for \$16 billion to expand its product line in the U.S. The smoke-free tobacco segment, including products like ZYN from Swedish Match AB, accounted for 98% of global revenue in 2022.

Synthetic and Flavored Nicotine Pouches:

Significant growth is expected in artificially synthesized nicotine pouches, with brands like NIIN and Rush expanding their product lines with synthetic nicotine pouches. Flavored nicotine pouches dominate the global market, representing over 90% of sales. The growth in this segment is driven by the demand for reduced risk, smoke-free, and tobacco-free alternatives.

Product Strength and Flavor Preferences:

Nicotine pouches come in a wide variety of flavors and strengths, catering to the diverse preferences and needs of different individuals. In 2022, high-strength variants held the largest market share, indicating a growing demand for different nicotine strengths.

In conclusion, the nicotine pouch market is characterized by rapid growth and is poised for further expansion. This growth is driven by changing consumer preferences, increased health awareness, investment expansion by participants, and innovative product development.

Product and Marketing Features

> Mainstream Nicotine Pouch Products on the Market

According to incomplete statistics, the current mainstream nicotine pouch brands on the market generally offer products with various nicotine levels and flavors. The list is as follows:

Brand	Manufacturer	Nicotine Content	Flavors
ZYN	Swedish Match	3MG, 4MG, 5MG, 6MG, 8MG	Holly, Lavender, Cool Mint, Citrus, Mint, Cinnamon, Coffee, Menthol
VELO	BAT	2MG, 4MG, 7MG	Holly, Lavender, Mint, Citrus, Dragon Fruit, Mint, Citrus Burst, Cinnamon, Black Cherry, Coffee
Rogue	Swisher International Group	2MG, 3MG, 4MG, 6MG	Holly, Mint, Tobacco, Apple, Berry, Lavender, Original, Cinnamon, Mango, Honey Lemon

> Marketing Scenarios: Versatile Applications

ZYN and Velo are the two nicotine pouch brands with the highest marketing investment, emphasizing the integration of their products into individuals' lifestyles and their suitability for various scenarios.

ZYN highlights the versatility of its use in different situations, such as being usable anywhere, during commuting, in the workplace, at bars or clubs, and during social gatherings.

Velo's advertisements emphasize the modernity and convenience of its product, highlighting its capability to be used anywhere and in social settings.



(Source: National Center for Biotechnology Information; ZYN product ad example featuring information on transportation, workplace, and modern medical features.)



(Source: National Center for Biotechnology Information; VELO product ad example featuring scenes of swimming, high-altitude zip-lining leisure activities, urban environments, and subway transportation.)



(Source: Rogue official website; product applicable in classic scenarios including gaming, office, and gatherings.)

➤ Marketing Product Features: Convenience, Diverse Flavor Options, Tobacco-Free

ZYN emphasizes product features such as a variety of flavor options, modern or high-tech attributes, and the use of medical terminology. Velo's advertisements highlight the modernity, convenience, and the ability to use the product anywhere and in social settings.

The advertising for the Rogue nicotine pouch brand focuses primarily on emphasizing product functionality, including diverse product choices, flavor options, taste, nicotine strength selection, and food safety (being the only brand using the term "food-grade ingredients").



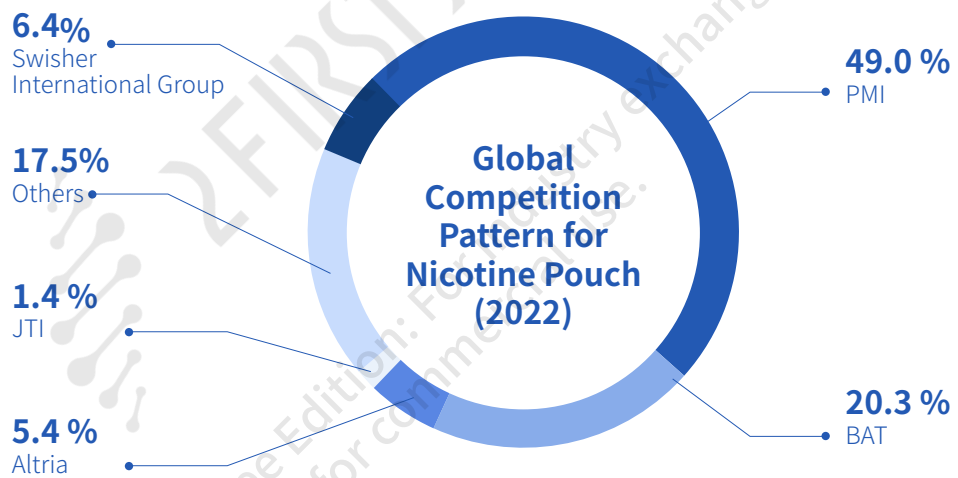
(Source: Dryft, Rogue, and Revel brand ad examples)

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04 Nicotine Pouch Brand Competition Landscape

Overview of Competition Landscape

According to statistics, in the global nicotine pouch market in 2023, the top five leading nicotine pouch manufacturers held a combined market share of 82.5%. Swedish Match (acquired by PMI in November 2022) ranked first with a market share of 49%, followed closely by BAT, holding approximately 20.3% of the market share. In subsequent rankings, Swisher International Group had a market share of around 6.4%, Altria held about 5.4%, and JTI had only about 1.4% of the market share.



PMI Nicotine Pouch Brand: ZYN



BAT Nicotine Pouch Brands: LYFT & VELO



Swisher International Group Nicotine Pouch Brand: ROGUE



Altria Nicotine Pouch Brand: on!



JTI Nicotine Pouch Brand: NORDIC SPIRIT

Overview of Key Competitors

> Philip Morris International (PMI)



PMI owns the well-known brand ZYN.

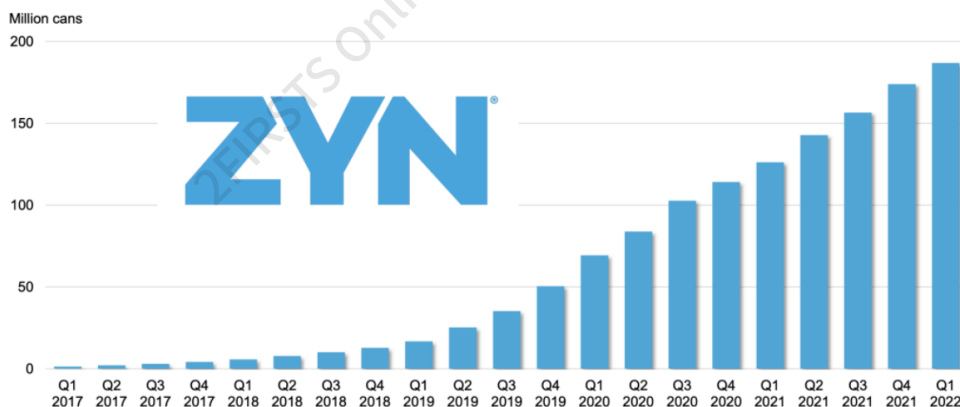
In 2022, PMI acquired the nicotine pouch manufacturer Swedish Match for 16 billion USD. The ZYN brand under Swedish Match became a major player in the nicotine pouch category. Swedish Match's ZYN, a smokeless tobacco brand, holds a significant market position in the Scandinavian market, including Nordic countries like Sweden, Norway, Denmark, and Switzerland. In Europe, Swedish Match's ZYN operates in many countries.

According to Swedish Match's financial report, ZYN's shipments grew by over 40% from 2020 to 2021, with single-can sales increasing from 83.2 million cans in 2020 to 125.7 million cans in 2021.

-- The continuous growth of ZYN in the U.S. submarket drove overall financial performance.

According to Swedish Match's 2022 annual report, ZYN's sales in the smoke-free product submarket grew by 15%, primarily due to record-high shipments in the U.S. market. The increased sales volume of ZYN in the U.S. contributed to Swedish Match's 35% sales growth.

ZYN U.S. Shipments (2017 Q1-2022 Q1)



Source: Swedish Match reported shipments.

In 2023, ZYN held a market share of 30.6% in the five major oral tobacco markets of the United States, Sweden, Denmark, Norway, and Switzerland. ZYN nicotine pouches accounted for a global share of 40%.

> British American Tobacco

British American Tobacco plc. (BAT), established in 1902 and headquartered in London, is the world's largest tobacco company.

BAT's nicotine pouch brands include VELO, Lyft, and Epok.



VELO originated from the Scandinavian Peninsula and has become a well-known global oral tobacco brand. Leveraging BAT's proprietary nicotine delivery technology and unique design, VELO has surpassed competitors in key attributes such as flavor and satisfaction.

According to its financial report, In 2022, BAT's modern oral tobacco total sales reached 4 billion pouches, a growth of 21.7% compared to 2021, with revenue increasing by 45% to reach £398 million.

VELO continues to maintain its strong market share, dominating the U.S. as a major consumer market with a 69% share in the European market. Pakistan currently stands as BAT's third-largest oral tobacco market by sales volume, and VELO's monthly sales in the country have exceeded 40 million units.

> Swisher International

Swisher International, founded in 1861 and headquartered in Jacksonville, Florida, is the parent company of ROGUE, a brand focusing on modern oral tobacco. ROGUE offers a diverse range of modern oral tobacco products, including nicotine pouches, lozenges, gum, and tablets. The products come in various flavors such as mint, lemon, mango, apple, and tobacco.



ROGUE nicotine pouch



ROGUE modern oral tobacco

> Altria

The nicotine pouch brand owned by Altria Group is On!

Primary Market: Most of Altria's oral tobacco products are produced for the U.S. market.

Market Share: In 2021, Altria's nicotine pouch brand, On!, experienced rapid market share growth. By the end of 2021, On! was available in 117,000 retail stores in the United States.

According to Altria's annual report for 2022, the total shipment volume of On! nicotine pouches was 82.5 million cans, representing an increase of approximately 70.5% from 2021.

The table below summarizes the shipment performance of Altria's oral tobacco products:

(cans and packs in millions)	Shipment Volume	
	For the Years Ended December 31,	
	2022	2021
Copenhagen	470.6	503.6
Skool	179.4	197.4
on!	82.5	48.4
Other	68.1	70.9
Total oral tobacco products	800.6	820.3

According to disclosed market data from Altria, the total shipment volume of oral tobacco in the first quarter of 2023 reached 190 million boxes. Among them, the shipment volume of On! reached 25.2 million boxes, representing a year-on-year increase of 37.7%. The oral tobacco business is expected to continue its growth.

> Japan Tobacco International



Japan Tobacco International (JTI) owns nicotine pouch brand NORDIC SPIRIT.

The nicotine pouch brand, Nordic Spirit, originated in the Nordic region and was launched in Switzerland in mid-November 2019. Nordic Spirit products come in various concentrations, flavors, and forms.

Nordic Spirit's primary markets currently include the UK, Ireland, Sweden, and Switzerland. In 2022, JTI announced the trial launch of Nordic Spirit in the Philippines and plans to introduce a new "formula" in the UK.

In the UK market, according to Japan Tobacco's comprehensive report for 2020, Nordic Spirit holds a 70% market share in the nicotine pouch market.

➤ Nicotine Pouches by E-cigarette Brands

Some e-cigarette brand companies have also entered the nicotine pouch business, such as the Chinese company Elfbar.

In October 2023, the Chinese e-cigarette brand Elf Bar launched the nicotine pouch brand TACJA in the UK, Switzerland, and Sweden.

The flavors include "MELLOW" (Rich) and "FROZEN" (Frozen) series. The Rich series has four flavors: watermelon ice, cherry ice, lemon mango, and blueberry sour raspberry. The Frozen series also has four flavors: spearmint, mint, menthol, and freezing ice.

The nicotine concentrations are 20 mg/g, 18 mg/g, and 12 mg/g, respectively. According to TACJA, these products contain pharmaceutical-grade ingredients and comply with EU Good Manufacturing Practice.



> Independent Nicotine Pouch Brands -----

In addition to traditional tobacco companies and e-cigarette enterprises, there are numerous emerging independent nicotine pouch brands. In China, notable nicotine pouch brands include BOLTBE and Cloud Shadow FEATX.

BOLTBE

BOLTBE is a brand affiliated with Shenzhen BOLTBE Technology Co., Ltd., established in 2022.

Product Flavors:

The main focus is on fruit flavors, comprising a total of 10 flavors. 4mg products feature 8 flavors, including Spearmint, Grape Ice, Lemon Ice, Mung Bean, Watermelon Ice, Strawberry Ice, Pineapple Ice, and Peach Ice; 8mg nicotine pouches feature two flavors: Blueberry and Tropical Fruit.

Nicotine Strength: Each flavor is available in two concentrations, 4mg and 8mg.

User Base: Primarily targeting moderate and heavy adult smokers.

Market Distribution: Mainly catering to domestic users, with a strategic focus on overseas markets, specifically avoiding overlap with the Western markets and aiming at untapped markets in Southeast Asia, such as Malaysia and the Philippines.



BOLTBE products

FEATX

FEATX is an emerging independent nicotine pouch brand of Shenzhen Tuwu Technology Enterprise Management Co., Ltd., established in 2021.

Flavors and Nicotine Strength:

FEATX offers a diverse range of nicotine concentrations and primarily focuses on fruit flavors. The concentrations available are 5mg, 10mg, and 20mg. For the 5mg concentration, flavors include Green Apple, Iced Mint, Iced Grape, Raspberry, and Mango. The 10mg options consist of Kiwi Fruit, Iced Mint, Lemoned, Coconut, Iced Cola, Watermelon, Long Jing, Orange, and Blueberry. The 20mg concentration features Super Mint flavor.

User Base:

The main consumer base includes returnees (Chinese nationals who have studied abroad) and frequent international travelers. The different concentration levels cater to both heavy and light smokers.

Market Distribution:

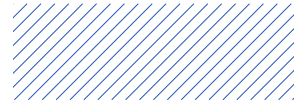
Overseas market, including Russia, Canada, the UK, etc.



FEATX products

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05 Nicotine Pouch Market Mergers and Acquisitions

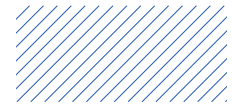


With limited growth in the traditional cigarette market, tobacco companies are striving to expand their growth opportunities. They are not only focusing on the traditional cigarette market but are also proactively entering the realm of Next Generation Products (NGPs), adopting a strategy of diversification. Among these, nicotine pouches are a crucial category, and tobacco companies generally enter this niche market through acquisition.

Tobacco Company	Date	Acquisition Details
Philip Morris International (PMI)	May 2021	In May 2021, PMI acquired Danish snuff manufacturer AG Snus, the maker of Shiro nicotine pouches.
	July 2021	In July 2021, PMI announced the acquisition of Fertin Pharma, a company specializing in nicotine replacement therapy (NRT) products.
	November 2022	In November 2022, PMI completed the acquisition of Swedish Match. Swedish Match is involved in snuff and nicotine pouch products.
British American Tobacco (BAT)	September 2020	In September 2020, BAT constructed a new factory in Hungary dedicated to the production of modern oral products.
	November 2020	In November 2020, BAT's subsidiary, Reynolds American Inc. (RAI), acquired U.S. nicotine pouch company Dryft Sciences. These nicotine pouches are sold under the Velo brand.
Japan Tobacco International (JTI)	2017	In 2007, JTI acquired Gallaher. Since 2017, JTI has been selling oral tobacco in Norway and Sweden through its wholly-owned subsidiary Nordic Snus, with its nicotine pouch brand being Nordic Spirit. By 2019, Nordic Spirit had been launched in 7 European markets, including the UK and Switzerland.
Imperial Tobacco	June 2023	In June 2023, Imperial Tobacco announced the successful acquisition of the nicotine pouch business of Canadian TJP Laboratory for £65 million, aiming to enter the U.S. oral tobacco market. Post-acquisition, Imperial Tobacco plans to relaunch this product line with a new brand in 2024, totaling 14 varieties. TJP will continue producing nicotine pouches for Imperial Tobacco according to the contract.
Turning Point Brands (TPB)	June 2019	In 2019, Turning Point Brands announced the acquisition of 80% of Swiss tobacco company Burger Sohne's oral nicotine pouch product On!. The company established a new subsidiary called Helix Innovations to manufacture and promote this product.
	February 2021	In February 2021, Turning Point Brands acquired the remaining 20% of On! shares.

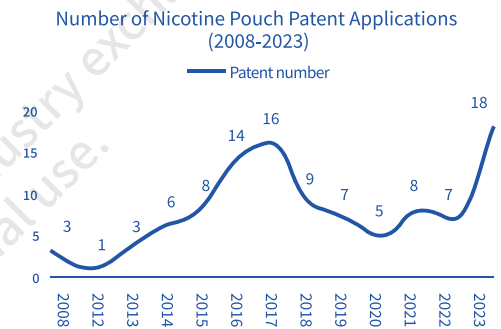
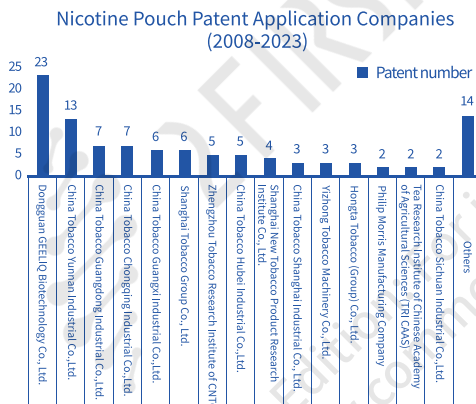
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06 Research on Nicotine Pouch-Related Patents in China



➤ Overall Increase in Quantity

The data indicates that with the rapid advancement of technology, an increasing number of e-cigarette companies are focusing on patent applications in nicotine pouches, leading to an overall upward trend in the total number of patents. Dongguan GEELIQ Biotechnology Co., Ltd. has the highest number of patent applications related to oral tobacco, totaling 23, constituting 22% of the overall count. Additionally, two significant spikes in patent applications for oral tobacco appear in 2017 and 2023. Before 2017, traditional tobacco companies dominated, but by 2023, emerging e-cigarette companies rapidly ascended. One notable example is Dongguan GEELIQ Biotechnology Co., Ltd., a supplier dedicated to the research and production of top-notch fragrance materials globally.



➤ Improvement in Manufacturing Processes

The data from the National Patent Center indicates that the inspiration for the first batch of nicotine pouches came from the traditional cigarette industry, which generates a significant amount of by-products. The proper utilization of these by-products is crucial to avoid resource wastage and increase efficiency. To achieve sensory quality similar to traditional tobacco and usage effects, the by-products from the cigarette industry are used as raw materials for producing nicotine pouches. With the advancement of manufacturing processes, the production of nicotine pouches has become more refined, replacing traditional preparation methods with synthetic technologies for various modifiers, emollients, flavorings, etc. This substitution addresses issues such as indirect pollution during production and challenges in human resource allocation.

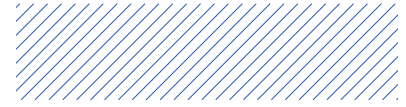


➤ Emphasis on Improving Taste Experience

Traditional nicotine pouches are often characterized by excessive stimulation, strong bitterness, and intense spiciness. Currently, more tobacco manufacturers are recognizing this issue and investing in technological R&D to innovate new flavors. Simultaneously, slow-release technologies are being employed to extend retention time, meeting the perceptual expectations of young consumers and gradually expanding the consumer market.

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07 Nicotine Pouch Regulatory Policies



> Regulatory Overview

Overall, global regulatory attitudes and related provisions for nicotine pouches vary significantly across regions based on market maturity. Given Sweden's long history of snus, the country has the most comprehensive regulations for nicotine pouches. The regulatory landscape for synthetic nicotine in the United States in 2022 has also contributed to the legal regulation of the local nicotine pouch market. In the European Union, there is currently no specific regulation for nicotine pouches under the current Tobacco Products Directive (TPD). However, some EU countries have taken the initiative to explore regulations for their own nicotine pouch markets. In other regions, where local consumer markets are generally underdeveloped, regulation is often in a gray area.

> Europe

European Union Countries:

In European Union (EU) countries, there is a unified legislative framework, TPD, that guides member states in regulating tobacco products. However, member states can make adjustments based on their specific circumstances. The TPD, implemented by the EU, establishes regulatory rules for tobacco and novel tobacco products, covering aspects such as product composition, packaging, and marketing.

As nicotine pouches do not contain tobacco, they are not subject to TPD. The regulation of nicotine pouches in most EU member states remains in a gray area, while some member states have taken proactive measures and introduced regulations to address the legality and regulation of nicotine pouches.

Overall, there is significant variation in the regulatory approaches and practices regarding nicotine pouches among EU member states. The following outlines the regulatory attitudes and practices of major member states:

EU Member State	General Attitude	Relevant Regulations
Sweden	Allowed for sale	Due to Sweden's long history of snus use, it has special treatment in the ban on sales. This means that Sweden can manufacture and sell snus domestically.
Czech	Actively incorporating into regulation	In May 2021, the Czech Republic updated the "Food and Tobacco Products Act," requiring manufacturers, importers, retailers, and distributors of modern oral tobacco to ensure their products comply with the requirements of the health department. Manufacturers need to conduct information collection to assess the impact of their products on human health. All non-tobacco smokeless modern oral tobacco products that do not comply with the revised regulations must exit the Czech market by 2022.

EU Member State	General Attitude	Relevant Regulations
Netherlands	Prohibited	<p>Currently, in the Netherlands, nicotine pouches without tobacco containing 0.035 mg or more of nicotine are prohibited because they are considered "unsafe food."</p> <p>On April 21, 2023, the Dutch government agreed to a comprehensive ban on the sale of nicotine pouches and other non-tobacco nicotine products, such as steam stones, and regulated them under the "Dutch Tobacco and Smoking Products Act" (Tabaks-en rookwarenwet Nicotine pouches are defined as "nicotine pouches or small bags for oral use without tobacco." Currently, Article 3a of the "Dutch Tobacco and Smoking Products Act" only prohibits the marketing of oral tobacco, such as nicotine pouches containing tobacco (Swedish snus). In addition, regulating nicotine pouches and other non-tobacco nicotine products under the "Dutch Tobacco and Smoking Products Act" will apply smoking bans, advertising bans, age restrictions of 18, and other sales restrictions to them in workplaces and public buildings.</p> <p>The effective date of the amendment has not been proposed. However, the government proposed this ban in response to a parliamentary motion, which may expedite the parliamentary process.</p>
Belgium	Prohibited	<p>In March 2023, Belgium announced a comprehensive ban on the sale of nicotine pouch products according to royal decree. As of October 1, Belgium no longer allowed nicotine pouch sales.</p>
Germany	Gray area (No clear regulatory framework yet, with significant legal uncertainty.)	<p>In 2021, Germany's Consumer Protection and Food Safety Office stated that nicotine pouches are not within the scope of tobacco regulations or food supervision, making their legal sale impossible. Recently, the legality issue surrounding modern oral tobacco has been controversial in Germany. A court ruling in Germany deemed that modern oral tobacco should be considered food, and therefore must comply with EU food regulations. However, EU food regulations prohibit the use of nicotine as a food, food ingredient, food additive, or flavoring.</p>

Non-EU Country	General Attitude	Relevant Regulations
Norway	No manufacturers authorized yet	<p>Currently, in Norway, all new tobacco and nicotine products must obtain approval from the Norwegian Ministry of Health to be introduced and sold in the Norwegian market. The main purpose of this approval plan is to protect children and adolescents from the impact of new products and nicotine addiction. Therefore, during the assessment, special attention must be paid to whether the product can appeal to children and adolescents.</p> <p>So far, no manufacturer has been granted authorization by the Ministry of Health for local sales. The agency has dealt with several applications from manufacturers wishing to launch nicotine pouch products on the market. Based on the considerations mentioned above, these applications were rejected. Two of them appealed to the Ministry of Health and Care Services, which ruled on the case in July 2023. The ministry supported the agency's assessment in its ruling, pointing out that new data and investigations also support the fact that nicotine pouches are attractive to consumers. Adolescents are, therefore, easily initiated into nicotine addiction.</p> <p>However, a product similar to nicotine pouches, called white snuff (a snuff mainly consisting of nicotine-injected plant fibers with a small amount of added tobacco), is legal and can be purchased in Norway, as it is protected by existing legislation that allows the sale of snuff.</p>

Non-EU Country	General Attitude	Relevant Regulations
United Kingdom	Positive	<p>Category: Since nicotine pouches are currently sold in the UK only as consumer products and are considered not tobacco products or medicines, they are not under the jurisdiction of the Tobacco, Medicines, and Healthcare Products Regulatory Agency (MHRA).</p> <p>Regulatory laws: Currently, nicotine pouches in the UK are regulated by the General Product Safety Regulations (GPSR) by default. The Tobacco and Related Product Regulations currently regulate all categories of tobacco products; however, the TRPR does not cover nicotine pouches, which means compared to these products, nicotine pouches have no maximum limit on nicotine concentration, and there are no specific restrictions on their advertising.</p> <p>Despite the lower usage in the UK, it is increasing and has caught the attention of regulatory agencies. For example, in 2021, Action on Smoking and Health (ASH) expressed concerns about the regulatory approach to nicotine pouches. They are concerned that GPSR is not an appropriate regulatory framework for nicotine pouches, which may be highly addictive, and children under GPSR can access nicotine pouches. ASH also cautiously stated that there are currently no restrictions on nicotine concentration, age of sale, and advertising, promotion, and sponsorship of nicotine pouches. With the increasing use of nicotine pouches, more stakeholders may become involved, advocating for centralized regulation of nicotine pouches to minimize the risks of unnecessary use by certain populations, such as young people.</p> <p>In June 2022, an independent report evaluating the UK's smoke-free target, the Khan Review, suggested that the government should support obtaining various safer nicotine alternatives, such as nicotine pouches, to help smokers quit while ensuring that no new risks are introduced to young people. The UK's consumer rights organization, the New Nicotine Alliance, advocates for a regulatory approach to nicotine pouches similar to Slovakia, including regulations limiting nicotine content.</p> <p>To achieve the goal of establishing a smoke-free society by 2030, the UK is developing a tobacco control plan. This plan may actively promote alternative products to traditional cigarettes, such as heated cigarettes and modern oral tobacco.</p>
Switzerland	Allowed	Switzerland introduced nicotine pouches in its recently passed tobacco legislation, which will take effect in 2023. According to this legislation, nicotine pouch products must carry health warnings.
Iceland	Allowed	Iceland recently regulated nicotine pouches in its tobacco law, specifying a maximum nicotine content of 20 mg per pouch.

> United States

The regulatory stance and legislation concerning nicotine pouches in the United States are becoming clearer. Since the passage of the Family Smoking Prevention and Tobacco Control Act in 2009, commonly known as the Tobacco Control Act, the FDA has been regulating the manufacturing, distribution, and marketing of tobacco products. In 2016, a deeming rule expanded the FDA's authority over more tobacco products, including e-cigarettes.

To address the increasing presence of non-tobacco nicotine addictive (NTN) components in popular tobacco products, Congress passed a federal law effective on April 14, 2022, clarifying the FDA's authority to regulate tobacco products containing nicotine from any source, including synthetic nicotine. This law delineates the FDA's powers and imposes requirements on manufacturers, importers, retailers, and distributors of NTN products under the Federal Food, Drug, and Cosmetic Act.

NTN product manufacturers seeking to sell their products must submit pre-market tobacco applications (PMTA) and obtain FDA authorization, or they will be subject to FDA enforcement. Currently, nicotine pouches in the United States are regulated by the FDA as tobacco products, subject to a series of restrictions, including age restrictions, nicotine health warnings, and pre-market assessments.

Nicotine pouch manufacturers must now submit PMTA for each product SKU, and only those obtaining Marketing Granted Orders (MGO) are legally allowed to be marketed and sold.

Currently, no nicotine pouch product in US has obtained a PMTA marketing granted order.

> China

Currently, nicotine pouches are still a nascent phenomenon in the Chinese market. Compared to traditional cigarettes and e-cigarettes, the market size is relatively small, and it is in the early stages of development. In terms of regulation, there is no definitive conclusion on whether nicotine pouches are considered "tobacco monopoly products" as they do not use tobacco leaves as raw materials, and nicotine is artificially synthesized.

It is worth noting that the Implementation Regulations of the Tobacco Monopoly Law of the People's Republic of China, released in November 2021, stipulate that "new tobacco products such as e-cigarettes shall be subject to the relevant provisions of this Regulation on cigarettes." If nicotine pouches are interpreted as corresponding to the "new tobacco products" in this provision, they may be subject to regulatory measures similar to e-cigarettes. This would involve the implementation of a tobacco monopoly license system in production, distribution, branding, and other areas, with oversight from the national tobacco monopoly department.

> Other Regions:

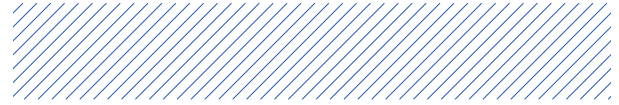
Australia: In Australia, the government has already banned nicotine pouches and all other new nicotine products, including nicotine e-cigarettes and HTPs. In Australia, the government has banned nicotine pouches and all other new nicotine products, including e-cigarettes and heated tobacco products, unless they are prescribed for medical purposes and purchased from a pharmacy. This means that the sale and use of these products are not allowed in Australia without a doctor's prescription.

New Zealand: Banned.

Kenya: Initially, a ban on nicotine pouches was implemented in Kenya in 2020. However, this ban was later revoked. According to the current Tobacco Control Act, nicotine pouches are allowed for sale in the country.

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08

**Risks and
Challenges**

Global regulatory policies are still in adjustment, and attitudes toward the regulation of nicotine pouches vary. The biggest risk for the nicotine pouch industry comes from policy uncertainties. In many parts of the world, regulation of nicotine pouches is unclear, and there is uncertainty regarding the category to which nicotine pouches belong and the applicable laws, posing significant challenges to the market's development.

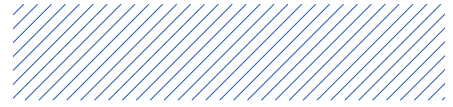
Taking the example of the German market in 2021, a German court classified nicotine pouches as food products, requiring compliance with EU food regulations. However, EU food regulations prohibit nicotine from being used as food, food ingredients, food additives, or flavorings. Despite multiple rulings, the German Federal Office for Consumer Protection and Food Safety (BVL) stated that nicotine pouches are not subject to tobacco or food regulations and, therefore, cannot be legally sold. Due to legal uncertainties, British American Tobacco withdrew the Velo brand nicotine pouches from the German market in July 2021.

The entry of e-cigarette companies into the nicotine pouch market introduces new risks. Traditional nicotine pouch brands position them as alternatives to smoking. However, when certain e-cigarette brands enter the nicotine pouch market, they introduce products with a mindset rooted in e-cigarettes, borrowing packaging and marketing strategies. While this may increase nicotine pouch consumption, it inevitably brings risks associated with the "attraction to minors" and tobacco advertising existing in the e-cigarette domain into the nicotine pouch market. Faced with these risks, regulatory agencies may adopt measures similar to those applied to e-cigarettes to restrict the development of nicotine pouches.

The long-term outlook for the nicotine pouch market is positive. With the increasing awareness of personal health and public health, nicotine pouches, with their harm reduction, smoke-free, and less secondhand smoke pollution characteristics, are expected to be more suitable for modern nicotine consumption needs. This meets consumer demands for the convenience of nicotine intake while reducing harm to others and the surrounding environment. With continuous product innovation and brand expansion, the market size for oral nicotine products is expected to grow.

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09 Trends and Recommendations



Emerging markets offer vast prospects. While nicotine pouches originated in markets such as Europe and the United States, their smoke-free nature and lack of negative external effects will make them applicable to a broader market. In emerging markets such as India, Africa, and the Middle East, where consumption is still in the nascent stage, brands should conduct timely market research and consumer insights to develop products that meet local tobacco consumer demands and quickly capture the market.

Ensure compliance. The nicotine pouch industry should learn from the past experiences of the e-cigarette industry in compliance. Promote industry self-discipline and corporate compliance to expand the market size while avoiding issues such as illegal trade, attraction to minors, proliferation of counterfeit products, and "retaliatory regulation." Achieve synergy between business development and social responsibility.

Continuous innovation in nicotine pouch product categories and functions. The current innovation in nicotine pouch products is only a beginning. Research and innovation potential in areas such as sensory experience and release agents is vast. Investment in these areas may bring more business opportunities.

Some nicotine pouch brands will focus more on human health. For example, certain nicotine pouches may add herbal extracts, innovatively proposing health functions for nicotine pouches.

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10 Category Extension and Innovation — "Nicotine Pouch+" Products

The oral sustained-release technology driven by nicotine pouches can be applied not only for nicotine absorption but also for a variety of needs and scenarios. By transforming the release agents in nicotine pouches from nicotine to other substances, entirely new functional products, known as "Pouch+," can be created. For example, adding caffeine results in a "Caffeine Pouch." There are many possibilities for such substances, including vitamins, betel nut alkaloids, traditional Chinese herbs, and more.

The development of these new products will bring brand new functional consumer experiences for humans and open up a new business market.

However, the R&D of "Pouch+" products should take into account the substance regulation requirements in different regions, as the same substance may face different regulations in different areas.



Appendix:

List of Nicotine Pouch Patents in China (2008-2023)

Applicant	Patent Title	Application Date
Dongguan GEELIQ Biotechnology Co., Ltd.	A cinnamon tea-flavored oral product and its preparation method	2023/8/29
Dongguan Cloupor Technology Co., Ltd.	A method for producing oral cigarette packaging and its equipment	2023/7/7
Dongguan GEELIQ Biotechnology Co., Ltd.	An oral product containing natural antioxidant tea polysaccharides and its preparation method	2023/4/12
	A nicotine oral product containing a pH-adjusting agent complex and its preparation method	2023/4/12
	Nicotine-containing chewing gum with Ophiopogon polysaccharide extract and its preparation method	2023/4/12
	Preparation method of wolfberry extract, nicotine oral product with periodontitis prevention, and preparation method	2023/4/12
	Nicotine oral product with chitosan as the matrix and its preparation method	2023/6/16
	Anti-fatigue chewing gum and its preparation method	2023/6/16
	Nicotine oral product containing citronella essential oil and its preparation method	2023/6/15
	Oral product containing capsaicin extract and its preparation method	2023/6/15
	Nicotine oral lozenge with controlled release of nicotine and its preparation method	2023/6/15
	Preparation method of propolis extract and its application in nicotine oral products	2023/6/15
	Chewing product containing probiotics and its preparation method	2023/2/15
	Nicotine oral product containing a combination of antioxidants and its preparation method	2023/2/15
	Oral product with moisturizing function and its preparation method and application	2023/2/9
	Nicotine slow-release oral tobacco and its preparation method	2023/2/9
	Lozenge for preventing and treating oral ulcers and its preparation method	2023/2/9
	Nicotine chewing gum with fresh breath effect and its preparation method	2023/1/4
	Nicotine oral product containing rosemary extract and its preparation method	2022/12/30
	Nicotine oral product containing plant prebiotic inulin from chrysanthemum powder and its preparation method	2022/12/30
	Nicotine-alginate, its preparation method, and nicotine-containing oral tobacco	2022/12/30
	Particle-loaded nicotine oral product and its preparation method	2022/12/29
Nicotine oral product and preparation method and preparation method of alkaline electrolyzed water	2022/12/22	
Oral product containing betel nut extract and its preparation method	2022/8/23	
Matchstick Man (Shenzhen) New Material Technology Co., Ltd.	Herbal lip cigarette and its production process	2022/6/23
Philip Morris Manufacturing Company	Nicotine pouch composition	2021/11/16
China Tobacco Yunnan Industrial Co., Ltd.	A method for inhibiting the increase of TSNA content in tobacco leaves of oral tobacco	2021/11/5
China Tobacco Guangxi Industrial Co., Ltd.	Cinnamon-flavored bagged oral tobacco for warming the spleen and stomach	2021/10/29
	Composite-flavored bagged oral tobacco with clearing heat and detoxifying properties of licorice	2021/10/29
	Composite-flavored bagged oral tobacco for clearing heat and moistening lungs and its preparation method	2021/10/29
	Bagged oral tobacco invigorating the spleen, and drying dampness and phlegm, tangerine peel flavor	2021/10/29
	Bagged oral tobacco with lung-moistening and cough-relieving properties of loquat and jujube	2021/10/29

Applicant	Patent Title	Application Date
China Tobacco Yunnan Industrial Co., Ltd.	Oral tobacco leaching device	2021/5/19
Shanghai New Tobacco Product Research Institute Co., Ltd.	Oral tobacco and its preparation method	2020/11/30
Philip Morris Manufacturing Company	Non-tobacco nicotine pouch combination	2021/11/16
Inolama Pharmaceutical Company	Nicotine pouch	2020/9/17
Shanghai New Tobacco Product Research Institute Co., Ltd.	Oral tobacco containing tea and its preparation method	2020/6/29
China Tobacco Yunnan Industrial Co., Ltd.	Bagged oral tobacco that can reduce the risk of oral epithelial health	2020/1/22
Changning Dekang Biotechnology (Shenzhen) Co., Ltd.	Oral tobacco box	2019/11/26
Shanghai New Tobacco Product Research Institute Co., Ltd.	A method for evaluating the in vitro absorption of nicotine in oral tobacco	2019/9/5
Yunnan Tianhong Flavors & Fragrances Co., Ltd.	Flavors for oral tobacco and their preparation methods and applications	2019/7/31
China Tobacco Yunnan Industrial Co., Ltd.	Application of ume extract in the preparation of drugs or health products for preventing and treating oral epithelial cell death caused by oral tobacco	2019/6/25
China Tobacco Yunnan Industrial Co., Ltd.	A process control method for nicotine content in bagged smokefree oral tobacco products	2019/5/22
Shanghai New Tobacco Product Research Institute Co., Ltd.	Packaging device for oral tobacco and system for packaging	2019/1/4
China Tobacco Yunnan Industrial Co., Ltd.	Research method for nicotine oral tobacco with controlled release of nicotine	2018/9/30
Zhengzhou Tobacco Research Institute of CNTC	Device for detecting nicotine release behavior in oral tobacco	2018/8/28
	Method for detecting nicotine release behavior in oral tobacco and its special testing instrument	2018/8/28
Shanghai New Tobacco Product Research Institute Co., Ltd.	Bacterial culture device and method for testing antibacterial performance of oral tobacco	2018/4/23
Guangxi China Tobacco Industrial Co., Ltd.	Capsule with explosive beads for both HNB and oral tobacco	2018/2/13
Yizhong Tobacco Machinery Co., Ltd.	Oral tobacco packaging system	2018/1/11
	A packaging device for oral tobacco bar boxes	2018/1/11
Shanghai New Tobacco Product Research Institute Co., Ltd.	Method for preparing oral tobacco	2017/12/29
	Oral tobacco bag packaging machine	2017/12/29
	A production line for preparing oral tobacco powder	2017/12/29
Shanghai Tobacco Group Co., Ltd.	A method for determining the release of heavy metal elements in oral tobacco	2017/10/25
China Tobacco Yunnan Industrial Co., Ltd.	A method to extend the shelf life of bagged oral tobacco	2017/9/6
Tea Research Institute, Chinese Academy of Agricultural Sciences	A comprehensive processing method for bagged Pu'er Tea with oral tobacco content	2017/8/25
	A comprehensive processing method for bagged black tea containing oral tobacco	2017/8/25
National Tobacco Quality Supervision and Inspection Center	Determination of p-hydroxybenzoate compounds in oral tobacco	2017/4/19
Yizhong (Qingdao) Tobacco Machinery Co., Ltd.	A regular entry device for oral tobacco	2017/3/29
China Tobacco Hubei Industrial Co., Ltd.	A method for preparing bagged oral tobacco with violet flavor	2016/12/14
China Tobacco Yunnan Industrial Co., Ltd.	A method for detecting the effect of oral smoking products on cell superoxide dismutase	2016/11/25
	A method for detecting the effect of oral smoking products on cell catalase activity	2016/11/25
Yizhong (Qingdao) Industrial Co., Ltd.	A bagged oral tobacco box with a manual lifting device	2016/11/18
China Tobacco Hubei Industrial Co., Ltd.	A clove oral tobacco and its preparation method	2016/10/12
China Tobacco Yunnan Industrial Co., Ltd.	A convenient oral tobacco container for feeding	2016/8/31
China Tobacco Shandong Industrial Co., Ltd.	Oral tobacco packaging box	2016/7/15

Applicant	Patent Title	Application Date
China Tobacco Guangdong Industrial Co., Ltd.	Preparation method and application of cut tobacco suitable for oral tobacco	2016/5/13
	Fermented oral tobacco	2016/5/13
	Oral tobacco materials and their applications, as well as oral tobacco and its preparation methods	2016/5/13
	Fermentation type oral tobacco with slow-release function and its preparation method	2016/5/13
	Oral tobacco using a large proportion of tobacco materials and its preparation method	2016/5/13
	A tobacco leaf particle suitable for preparing oral tobacco and its application	2016/5/13
	A tobacco stem particle suitable for preparing oral tobacco and its application	2016/5/13
Xinxiang Dongfang Industrial Technology Co., Ltd.	A oral tobacco type tray shaping device	2016/4/19
Shanghai Tobacco Group Co., Ltd.	A method for determining chromium, nickel, arsenic, selenium, cadmium, and lead elements in oral tobacco	2016/3/9
	Oral tobacco packaging box (NGTP0091)	2015/12/31
	Packaging box (oral tobacco)	2015/12/4
	Sealed packaging bag (oral tobacco)	2015/12/4
China Tobacco Hubei Industrial Co., Ltd.	A type of oral tobacco for anti tooth allergies	2015/8/31
China Tobacco Sichuan Industrial Co., Ltd.	Oral tobacco products containing probiotics	2015/7/23
China Tobacco Chongqing Industrial Co., Ltd.	Oral tobacco containing plant fermentation products	2015/7/23
	Oral tobacco based on konjac and its preparation method	2015/7/10
	A preparation method for oral tobacco containing nano sized compound Chinese herbal medicine	2015/7/10
China Tobacco Sichuan Industrial Co., Ltd.	Selenium rich oral tobacco	2015/7/10
China Tobacco Hubei Industrial Co., Ltd.	Grapefruit peel containing tobacco and its preparation method	2015/6/16
China Tobacco Yunnan Industrial Co., Ltd.	A device for in vitro simulated dissolution and continuous online detection of nicotine in bagged oral tobacco products	2015/5/14
	Detection method for bacterial revertant mutations in oral tobacco products	2015/4/22
	Methods for comparing and testing the safety of oral tobacco	2015/4/22
China Tobacco Chongqing Industrial Co., Ltd.	The method of extracting tobacco flavorings from fireworks and applying them to oral tobacco	2015/3/31
China Tobacco Hubei Industrial Co., Ltd.	A soft oral tobacco and its preparation method	2014/12/15
Shanghai Tobacco Group Co., Ltd.	Packaging bag (oral tobacco)	2014/12/2
China Tobacco Henan Industrial Co., Ltd.	A new type of outer packaging that can extend the shelf life of bagged oral tobacco	2014/12/2
China Tobacco Sichuan Industrial Co., Ltd.	Preparation method of strong aroma oral tobacco	2014/7/8
	Oral tobacco extract and its preparation method	2014/5/19
	Pill shaped small candy iron box containing oral tobacco products and its preparation method	2014/3/13
China Tobacco Chuanyu Industrial Co., Ltd.	Formula and preparation method for moist powdered bagged oral tobacco	2014/3/13
Hongta Tobacco (Group) Co., Ltd.	A molding machine adjustment mechanism for bagged oral tobacco	2014/1/22
	A type of oral tobacco	2013/12/10
	A molding regulator for bagged oral tobacco packaging equipment	2013/12/10
China Tobacco Hunan Industrial Co., Ltd.	A mouthful smokefree oral tobacco with plum flavor	2013/9/9
China Tobacco Hubei Industrial Co., Ltd.	A new type of oral tobacco	2012/7/2
Zhengzhou Tobacco Research Institute of CNTC	Bagged oral tobacco	2008/3/13
	Bagged oral tobacco containing air dried tobacco and their preparation method	2008/3/13
	Bagged oral tobacco and its preparation method	2008/3/13

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