

HAYPP

# The UK Nicotine Pouch Report 2026

MARKET DYNAMICS, CONSUMER BEHAVIOUR AND THE  
GROWTH OF TOBACCO-FREE NICOTINE POUCHES



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## ABOUT THE REPORT

The Nicotine Pouch Report 2026 is produced by Haypp in collaboration with Northerner. The aim is to create the number one source of insight into the behaviour and attitudes of nicotine pouch users in the UK.

This report is based on a survey of a sample of 2 082 UK nicotine pouch customers from the Haypp.com and Northerner.com websites. The survey took place between December 2025 and January of 2026. The survey insights are complemented by full-year purchasing data for 2025 from over 50 000 UK customers.

**HAYPP**



**NORTHERNER**

# Key insights

## GROWTH IN THE UK NICOTINE POUCH MARKET AND ITS DRIVERS

- The UK nicotine pouch market is expanding rapidly, with sales volumes on leading e-commerce platforms such as Haypp.com and Northerner.com increasing by 60 per cent in 2025.
- Growth is currently driven by women. Female nicotine pouch usage more than tripled in 2025 on Haypp.com and Northerner.com, rising by 202 per cent in cans sold, compared with a 25 per cent increase among men. As a result, the share of female customers increased from 22 per cent to 40 per cent, substantially narrowing the gender gap in consumption.
- Quitting smoking and vaping is the primary driver of uptake. Some 68 per cent of customers report starting using nicotine pouches to quit smoking, vaping, or both.
- Consumers choose nicotine pouches for both perceived health benefits and practicality. A majority view them as healthier (64%), more discreet (64%), and less intrusive to others (52%) compared to other nicotine products.

## DEEP DIVE: THE EMERGENCE OF A NICOTINE POUCH BLACK MARKET

- Exposure to illicit nicotine pouches is widespread. One in four consumers report having encountered black-market nicotine pouches, rising to 44 per cent among those aged 18–24.
- Health risk concerns regarding illicit products are substantial. A clear majority of customers (70%) report being concerned about the health risks associated with black-market pouches.
- Perceived weak enforcement may reduce deterrence. Twice as many consumers view enforcement as ineffective (27%) as effective (14%), while 9 per cent state they would consider purchasing from the black market.

## CONSUMER PREFERENCES IN THE NICOTINE POUCH MARKET

- Velo maintains a clear lead in brand popularity in the UK. The three most purchased brands on Haypp.com and Northerner.com in 2025 were Velo (35%), Nordic Spirit (15%), and Zyn (11%).
- Mint flavour, slim, and high-strength formats dominate sales. Nearly six in ten cans sold in the UK are mint-flavoured. Around eight in ten are in the slim format, and almost half are classified as extra strong in terms of nicotine strength.

# A rapidly evolving nicotine pouch market

The nicotine pouch market is expanding rapidly and has emerged as a modern segment within the broader category of nicotine products. Nicotine pouches are free from tobacco and considered by experts to be a lower-risk smoke-free alternative to traditional tobacco products. Globally, the market is projected to grow at an average annual rate of 30 per cent through 2030, with the UK standing out as one of the most dynamic European markets.<sup>1</sup>

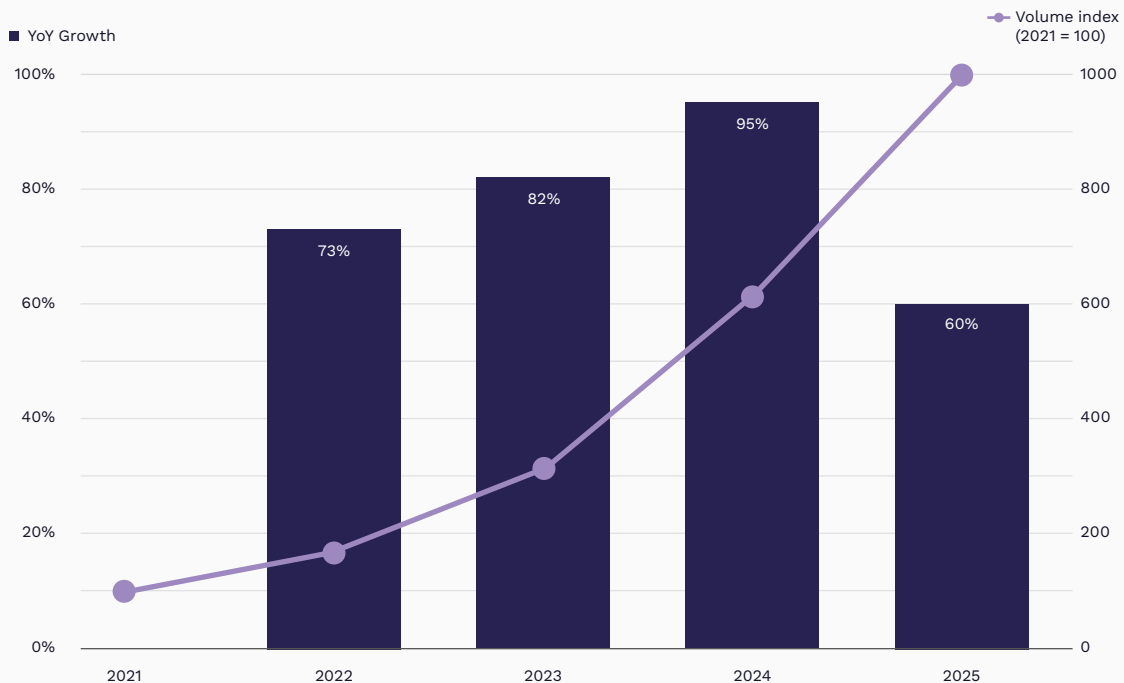
Nicotine pouches have been available on the UK market since 2019. According to one study, 1.1 per cent of the adult population use nicotine

pouches and 6 per cent have tried them in 2025.<sup>2</sup> Current and ever use of nicotine pouches has more than doubled since 2020<sup>3</sup>, indicating increasing adoption. However, overall usage among adult nicotine users remains relatively low, suggesting room for further growth.

While online growth in 2025 moderated compared to the preceding years, the category remains in an intense development phase. Sales volumes on leading e-commerce platforms such as Haypp.com and Northerner.com increased by 60 per cent during the year, with a tenfold increase since 2021.

## THE UK ONLINE NICOTINE POUCH MARKET TAKES OFF

Yearly volume growth and volume index 2021–2025



The growth presented in the chart is derived from sales data from two of the leading online retailers of nicotine pouches in the UK, Haypp.com and Northerner.com, and reflects the development observed across these platforms.

<sup>1</sup> [Grandviewresearch.com](https://www.grandviewresearch.com), "Nicotine Pouches Market (2025 - 2030)".

<sup>2</sup> [Action on Smoking and Health](https://www.actiononsmokingandhealth.org.uk), "How many people in Britain use nicotine pouches?".

<sup>3</sup> [Action on Smoking and Health](https://www.actiononsmokingandhealth.org.uk), "Nicotine pouches and snus factsheet".

## Female adoption is reshaping the nicotine pouch market

A significant share of the growth in 2025 can be attributed to increased female uptake. Female usage more than tripled during the year – up 202 per cent – compared to a 25 per cent increase among men. Although this expansion comes from comparatively lower baseline levels, it is nonetheless substantial. Women now account for 40 per cent of total nicotine pouch consumption on Haypp.com and Northerner.com, while men represent 60%.

Part of this sharp increase likely reflects growth from previously low baseline levels. However, structural factors may also be at play. As the category matures, rising social visibility and normalization among female peer groups may be accelerating adoption. Increased representation in social settings, broader flavour portfolios, and more gender-neutral product positioning could further reinforce this dynamic, amplifying peer-to-peer diffusion effects within female networks.

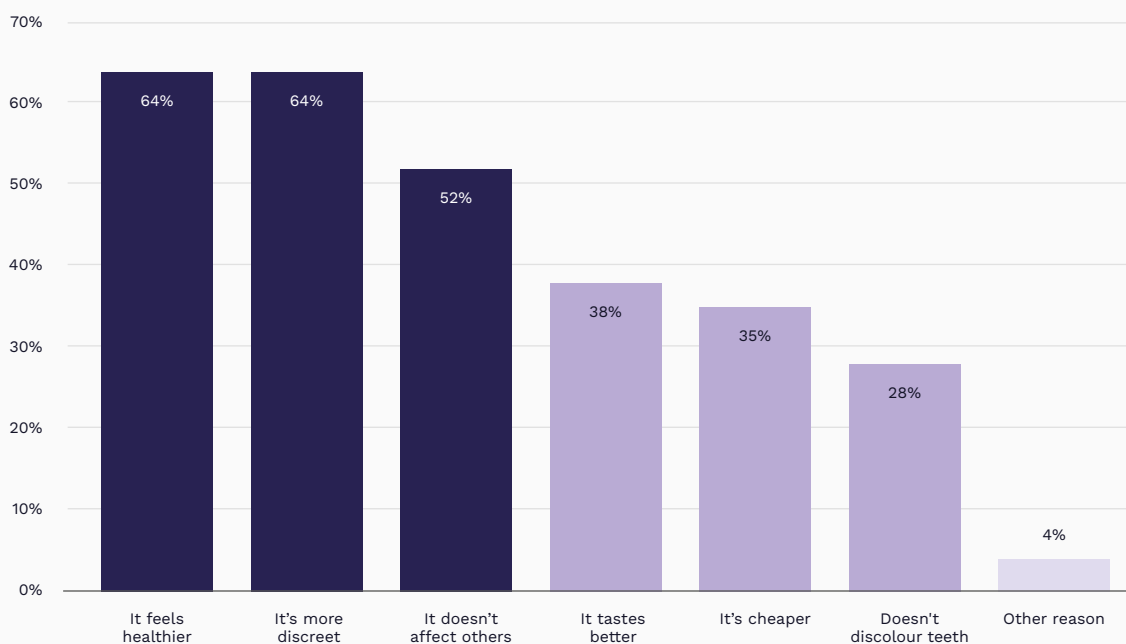
## Why consumers choose nicotine pouches – perceived health benefits and discretion

Nicotine pouches are perceived not only as a potentially less harmful alternative to smoking, but also as a discreet, socially considerate, and practical way to consume nicotine. A clear majority of users (64%) report that the product feels healthier, and the same share emphasise its discretion. More than half (52%) value that it does not affect others, underlining the importance of reduced social impact.

Taste (38%) and price (35%) are additional advantages, but secondary. Over the past year, taste has strengthened slightly as a motivator, while price considerations have become less prominent.

### PRIMARY APPEAL LIES IN PERCEIVED HEALTH BENEFITS AND DISCRETION, NOT PRICE

Survey question: What are your main reasons for using nicotine pouches rather than other types of nicotine products?

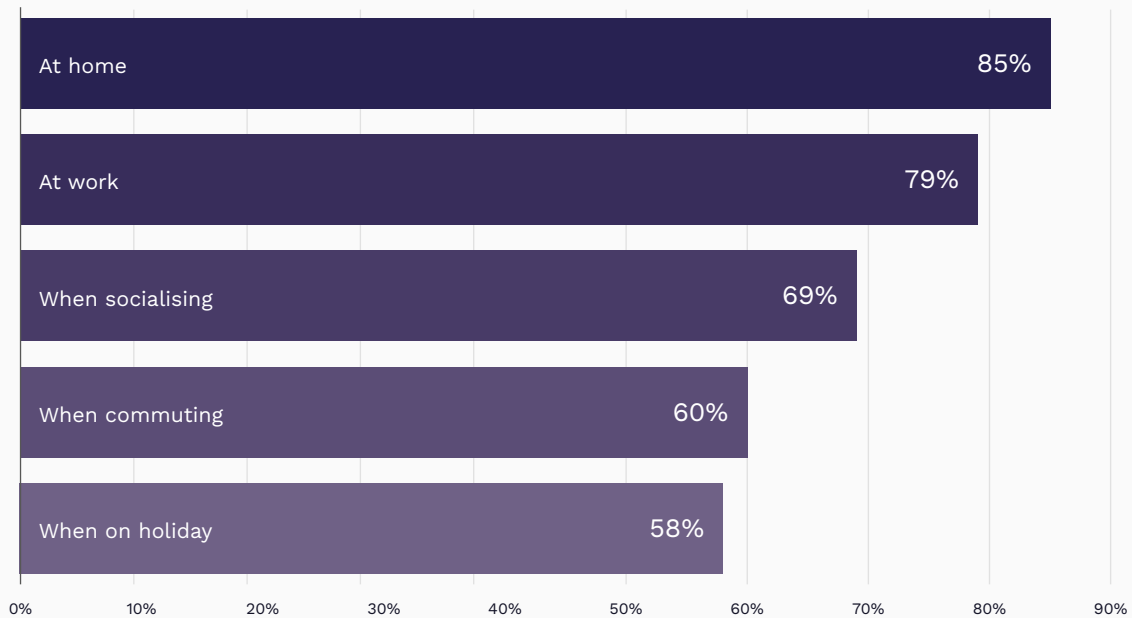


## Use across everyday situations highlights discretion and flexibility

Nicotine pouches are used across a wide range of everyday situations, reflecting their discreet and practical nature. The most common setting is at home, where 85 per cent of customers report using the product, followed by at work (79%). Use is also widespread in social and mobile contexts. Around seven in ten users (69%) report using nicotine pouches when socialising, while 60 per cent use them when commuting and 58 per cent when on holiday.

### NICOTINE POUCHES ARE USED ACROSS A WIDE RANGE OF EVERYDAY SETTINGS

Survey question: In what situations do you use nicotine pouches most often?



## Smokers switching, social acceptance and increasing product awareness drive adoption

Several factors are driving the rapid expansion of the nicotine pouch market. A substantial share of growth comes from former smokers and vape users switching to nicotine pouches. At the same time, product awareness is increasing, and social acceptance is strengthening, reinforcing overall market momentum.

## Quitting smoking and vaping drives nicotine pouch uptake

Efforts to quit smoking and vaping are the primary drivers of nicotine pouch uptake. Seven in ten nicotine pouch consumers (68%) report that they initiated use in order to quit cigarettes, vaping, or a combination of the two. Specifically, 43 per cent adopted the product to stop smoking, while 40 per cent began using it to quit vaping. A further 15 per cent transitioned away from both cigarettes and vapes.

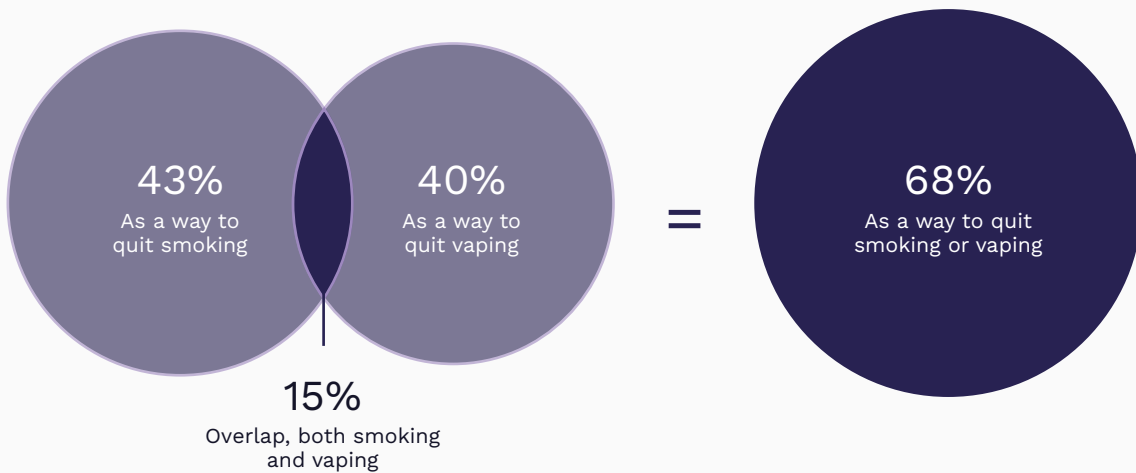
This reinforces a clear pattern: nicotine pouches are primarily used as a substitute for inhaled nicotine products, whether combustible cigarettes, e-cigarettes, or a combination of the two.

At the same time, social dynamics are playing an important role in category expansion. Some 17 per cent state that their interest was sparked by observing others use the product, up from 14 per cent the previous year.

By contrast, direct commercial drivers appear to play a limited role in initial uptake. Only 4 per cent report discovering nicotine pouches through social media, and just 2 per cent cite marketing appeal as a primary reason for trying pouches. This suggests that, while marketing may support awareness and brand positioning, peer influence and social normalisation are currently more powerful mechanisms in driving adoption.

### MORE THAN TWO THIRDS STARTED USING NICOTINE POUCHES TO QUIT SMOKING OR VAPING

Survey question: Why did you start using nicotine pouches?

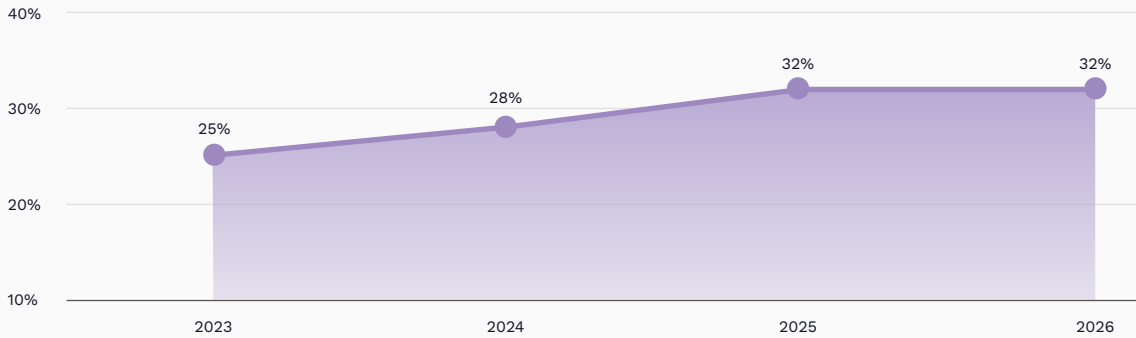


Other alternatives:

- 30%** A friend or family member offered it to me
- 17%** I saw others using nicotine pouches and got curious
- 4%** I saw nicotine pouches on social media
- 2%** I found the marketing appealing
- 6%** Other reason
- 6%** I don't remember

The transition from vaping to nicotine pouches is also reflected in the steadily increasing share of nicotine pouch users on Haypp.com and Northerner.com who used to be vapers.

### GROWING SHARE OF FORMER VAPERS AMONG POUCH USERS



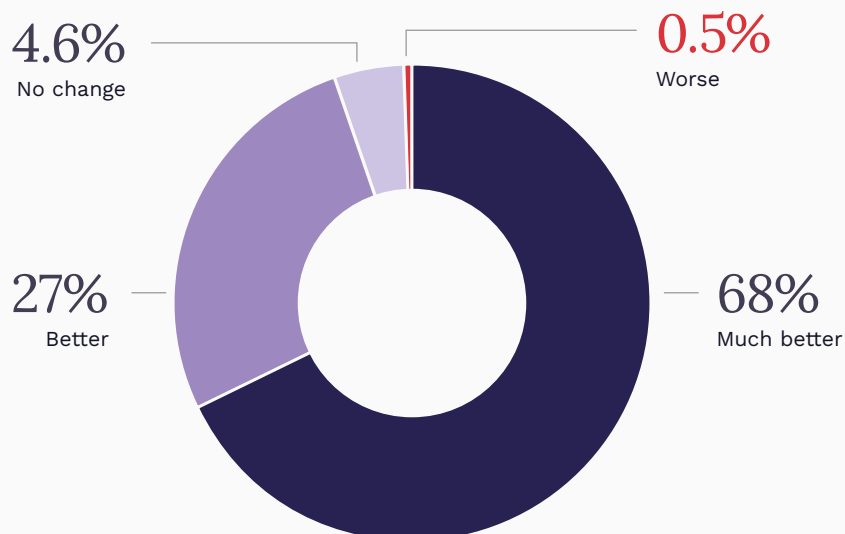
### Switching from cigarettes is associated with improved wellbeing

Nicotine pouch users report clear personal benefits from moving away from cigarettes. Almost all respondents (95%) who have replaced smoking cigarettes with nicotine pouches state that they feel better or much better since making the change. Only 0.5 per cent report feeling worse.

This is consistent with established clinical evidence showing that measurable health improvements can occur shortly after discontinuation of combustible tobacco use.

### 95 PER CENT FEEL BETTER AFTER REPLACING CIGARETTES WITH NICOTINE POUCHES

How do you feel after switching smoking to nicotine pouches?



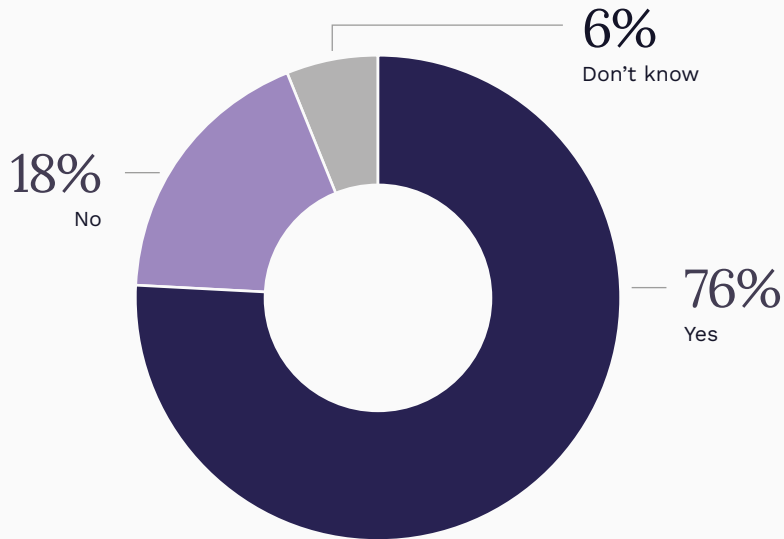
## Social networks support switching

Social factors play an important role in consumer behaviour. Around 30 per cent of users report that they first became aware of nicotine pouches through a friend or family member, up from 23 per cent the previous year. In addition, three in four respondents (76%) state that they have encouraged others to switch from cigarettes to nicotine pouches.

Beyond personal adoption, users appear to share experiences and recommendations within their networks, potentially facilitating transitions away from cigarettes and other combustible tobacco products.

### THREE IN FOUR USERS HAVE ENCOURAGED OTHERS TO SWITCH

Have you encouraged others to switch from cigarettes to nicotine pouches?



## Supporting progress towards a smoke-free society

The desire to choose a less harmful nicotine product is an important driver of the rapid growth of the nicotine pouch category. As a new product, long-term evidence on their health effects remains limited, however nicotine pouches build on Sweden's long tradition of oral smokeless nicotine use through snus. This tradition is frequently cited as one of the factors behind Sweden's comparatively low rates of smoking and lung cancer and why Sweden is widely regarded as having achieved smoke-free status, with less than 5% of the population smoking. Nicotine pouches could play a similar role in enabling the UK to move closer to its smoke-free goals.

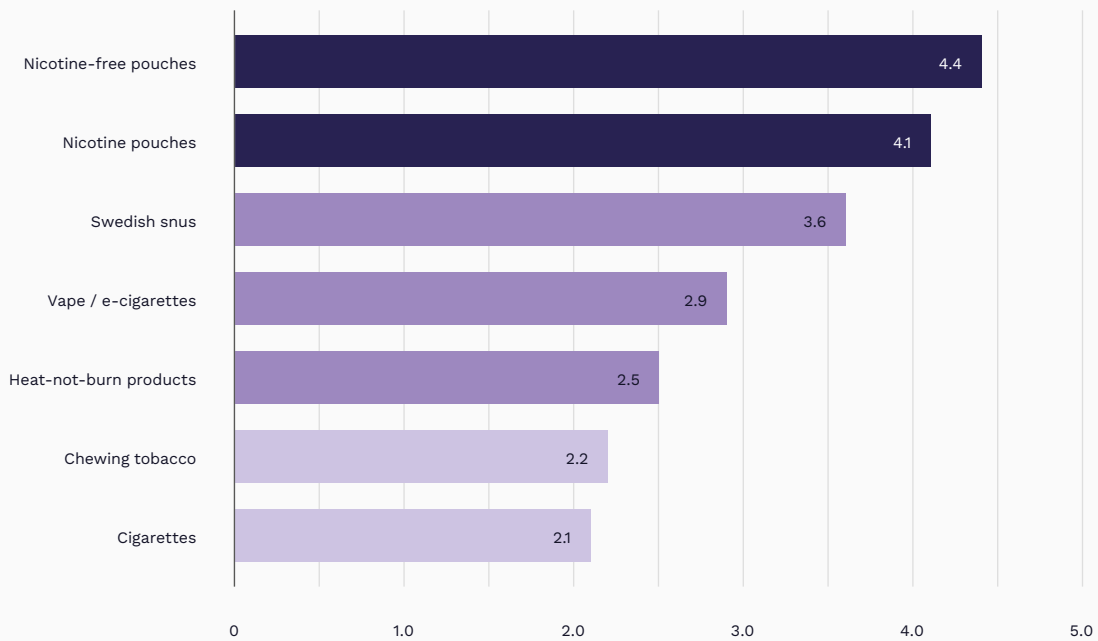
## Pouches are considered the most socially acceptable nicotine product

Social norms are shifting away from combustible tobacco and towards smoke-free and tobacco-free alternatives. According to pouch users' assessments, nicotine-free pouches rank highest in perceived social acceptability, with an average score of 4.4 out of 5. Nicotine pouches follow closely at 4.1, while Swedish snus scores 3.6. These findings indicate that modern oral nicotine products are widely regarded as socially acceptable.

By contrast, products associated with combustion or traditional tobacco use receive markedly lower acceptance scores. Heat-not-burn products score 2.5, and cigarettes rank lowest at 2.1. This places cigarettes well below the midpoint of the scale, underscoring their comparatively weak social standing relative to alternative products.

### NICOTINE-FREE POUCHES LEAD – CIGARETTES RANK LOWEST IN PERCEIVED SOCIAL ACCEPTANCE

Survey question: How socially acceptable do you believe it is to use these different nicotine and tobacco products? Mean values, where 5 = Fully accepted, 1 = Not at all accepted.



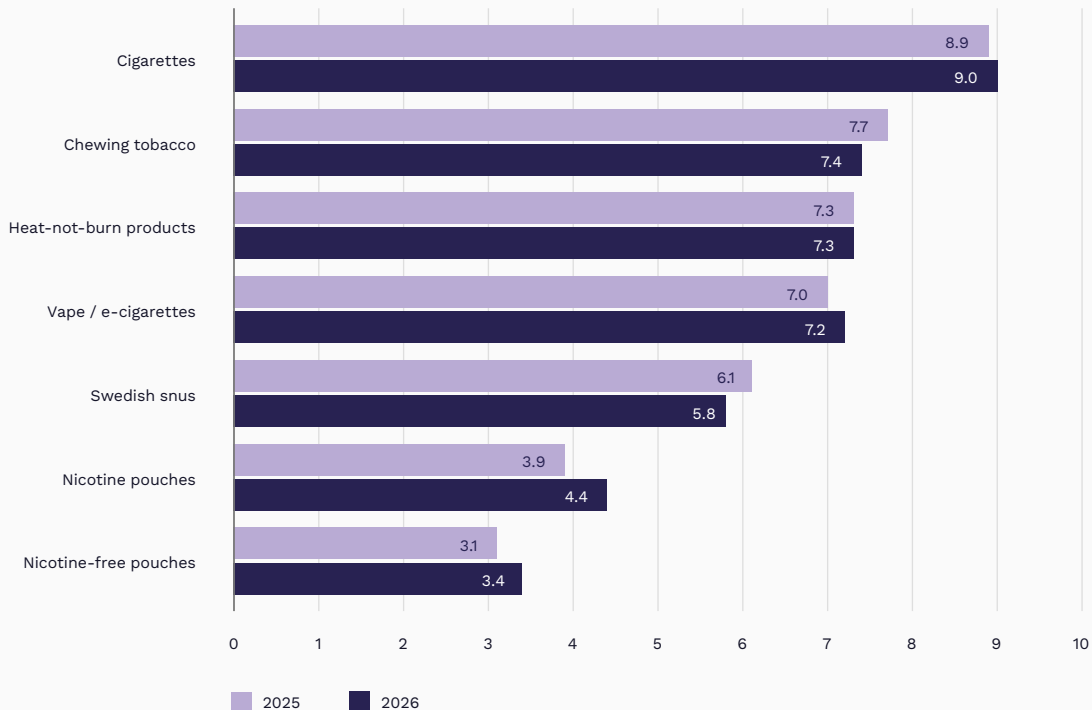
## Customers risk perception of nicotine pouches increases, but remains low

When assessing risk, pouch users rate nicotine pouches as one of the least harmful products. On a ten-point risk scale, where 0 denotes “completely harmless” and 10 means “very dangerous”, nicotine pouches receive an average score of 4.4 in 2026, compared with 3.9 in 2025. Nicotine-free pouches are perceived as least harmful, with an average score of 3.4, up from 3.1 the previous year. While the ranking is accurate, the scores are not, as cigarettes are many times more harmful than nicotine pouches.

The moderate increase in perceived risk for both nicotine pouches and nicotine-free pouches may reflect a broader shift in public risk perceptions observed in recent years. Recent studies have shown that an increasing share of consumers, particularly younger cohorts, perceive alternative nicotine products as being as harmful as cigarettes.<sup>4</sup> This is linked with negative coverage of alternative nicotine products in the media which is not always grounded in science. If perceptions of relative harm become less differentiated, smokers may be less inclined to transition away from cigarettes to lower risk products.

### RISK PERCEPTIONS OF NICOTINE POUCHES INCREASE SLIGHTLY BUT REMAIN LOW

Average between 0 and 10, where 0="completely harmless" and 10="very dangerous"  
 Survey question: On a scale from 0 to 10, where 0 is "completely harmless" and 10 is "very dangerous," how harmful do you think the following products are?



<sup>4</sup> University College London, "Trends in Harm Perceptions of E-Cigarettes vs Cigarettes Among Adults Who Smoke in England, 2014-2023". See also Tobacco Reporter, "[Study Warns Gen Z Getting Misinformation on Smoking, Vaping](#)"

## Structural growth driven by innovation and competition

As more smokers seek smoke-free alternatives, nicotine pouches are gaining share within the broader nicotine products category. This expansion has attracted both established companies and new entrants resulting in an increasingly competitive and differentiated market.

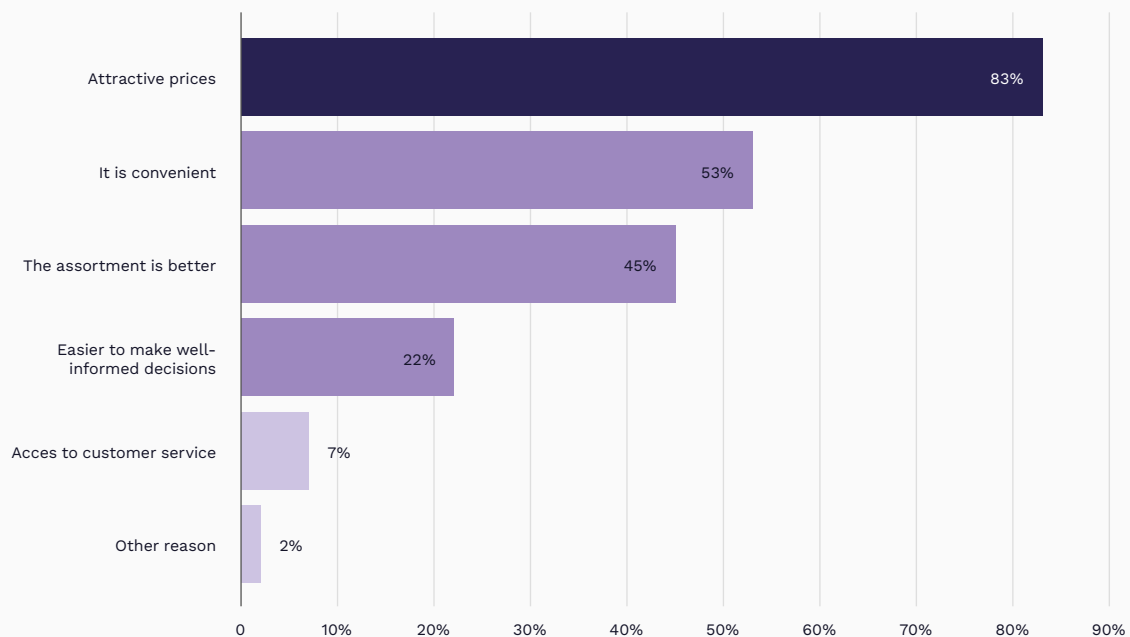
The pace of market development is reflected in rapid brand expansion, product proliferation, and ongoing innovation. In 2025, Haypp and Northerner offered 40 distinct nicotine pouch brands, of which 11 were newly introduced during the year. Dynamism is even more pronounced at the product level. Over the course of 2025, 585 distinct products were sold, including 185 new product launches. At the same time, 80 products were delisted, indicating high turnover within the assortment and intense competitive pressure in the market.

## Online advantages support market expansion

The online channel plays a significant role in market expansion, by offering advantages that are highly valued by consumers. Competitive pricing stands out as the most important factor, cited by 83 per cent of respondents. Convenience is another key driver: 53 per cent state that purchasing online is easier, while 45 per cent highlight access to a broader assortment than in physical stores. In addition, 22 per cent report that the online environment facilitates more informed decision-making through access to product information and guidance.

### PRICE, CONVENIENCE AND ASSORTMENT ARE THE MAIN DRIVERS OF ONLINE PURCHASES

Survey question: When you buy nicotine pouches online, why do you choose to buy online rather than from a physical store?



## The Tobacco and Vapes Bill: introducing a regulatory framework for nicotine pouches

The Tobacco and Vapes Bill represents a major shift in the UK's regulatory framework for tobacco and nicotine products. The Bill aims to phase out smoking over time by making it illegal for anyone born after 1 January 2009 to purchase cigarettes. It will also grant powers to designate more public places and workplaces as smoke-free. In addition, the Bill will introduce a retailer licensing scheme for the sale of tobacco and nicotine products.

The Bill will also establish, for the first time, a dedicated regulatory framework for nicotine pouches. An age-of-sale restriction of 18 years will apply, and pouches will be subject to the same advertising and sponsorship restrictions as cigarettes and vapes. The government will be granted powers to regulate pouch flavours, packaging, nicotine strength and product standards. Once enacted, the Bill is likely to contribute to a more mature and transparent nicotine pouch market in the UK, increasing awareness and understanding of the product among adult nicotine consumers.

Haypp Group supports the introduction of a robust and proportionate regulatory framework for pouches. Our experience in Sweden has demonstrated how a proportionate regulatory framework can enable the transition towards a smoke-free future. Effective regulation helps prevent youth access, protects responsible retailers, and ensures that adult nicotine users can continue to access lower-risk alternatives.

### 20 IS PLENTY

The Tobacco and Vapes Bill will allow the government to set limits on the amount of nicotine in pouches. We strongly believe that there should be a legal upper limit of 20mg of nicotine per pouch.

Haypp Group does not sell any nicotine pouch products above this level. This is a voluntary standard that we have set for ourselves, but it is based on the science. To be an effective alternative to cigarettes, pouches must deliver nicotine in a manner that is competitive with cigarettes. A maximum level of 20mg per pouch achieves this by providing a nicotine experience comparable to a cigarette. Higher levels of nicotine are unnecessary for switching and may not be in the best interests of consumers.

## Addressing underage access: informal social channels pose greatest risks

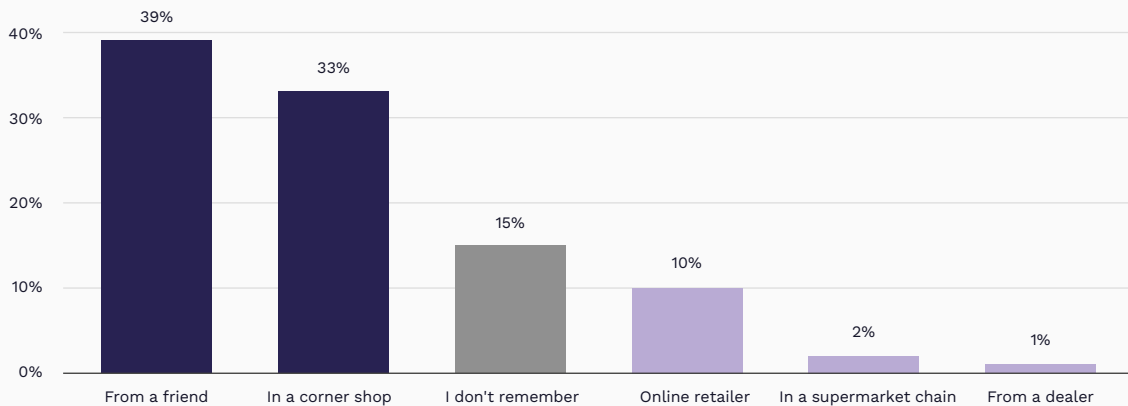
Three per cent of individuals who have purchased nicotine pouches from Haypp.com or Northerner.com report that they first came into contact with nicotine pouches when they were under the age of 18. When asked how they obtained nicotine pouches as underage users, the distribution pattern shows that access is primarily through informal social channels rather than the regulated retail market. The largest share report obtaining nicotine pouches from friends (39%), indicating that peer-to-peer transfer is the principal access route. A further 33 per cent cite corner shops, suggesting weaknesses in age-verification practices within parts of the physical retail sector.

By contrast, only 10 per cent report online retailers as a source, and just 2 per cent supermarkets. The comparatively limited role of online sales is consistent with structured digital age-verification systems and more standardised compliance procedures.

In the context of the Tobacco and Vapes Bill, these findings suggest that retailer licensing and strengthened enforcement may address vulnerabilities in segments of physical retail. However, given the prominence of social sourcing, regulatory measures targeting formal sales channels alone are unlikely to eliminate underage access entirely.

### FRIENDS AND CORNER SHOPS ARE THE MAIN ACCESS ROUTES FOR MINORS

Survey question: Did you ever use nicotine pouches when you were under 18? If yes, where did you buy them?



## Consistent age verification and product transparency through online channels

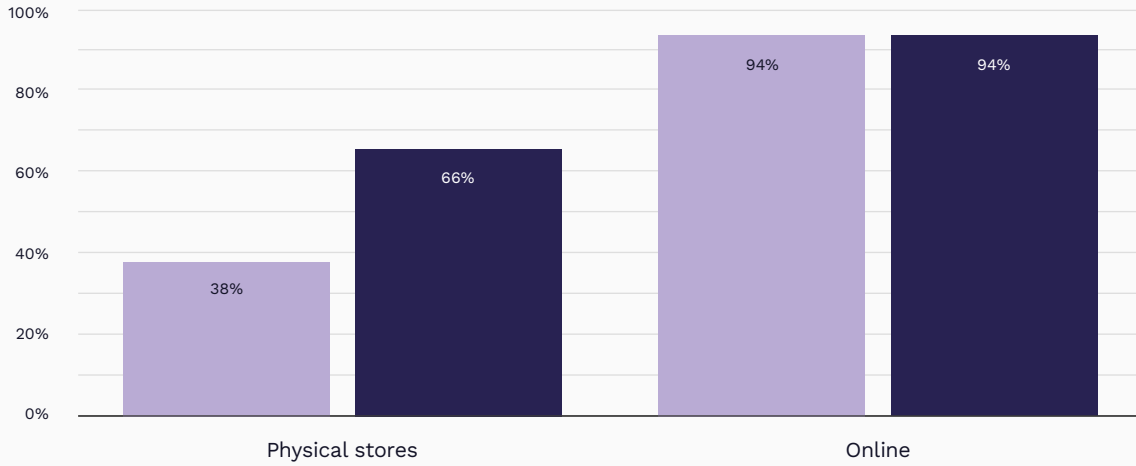
The online environment offers clear advantages from a youth protection and product safety perspective. In terms of excluding minors from the market, online sales enable consistent age verification through automated digital control systems. This reduces reliance on individual staff compliance and limits the scope for human error.

While 94 per cent of consumers report having been asked to verify their age when purchasing online, the corresponding figure for physical stores is only 38 per cent among all consumers and 66 per cent among younger consumers (18–34 years).

### MORE CONSISTENT AGE VERIFICATION ONLINE

Survey question: Have you ever been asked to verify your age in store/online?

■ All consumers ■ Younger consumers (18-34 years)



The online channel also strengthens consumer information and transparency about products. Unlike many physical retail settings, online platforms allow for detailed and standardised communication of product characteristics, including nicotine strength, flavours, safety standards, quality assurance, and testing procedures. Digital interfaces enable consumers to review information at their own pace, without time pressure, and make more informed purchasing decisions.

This is reflected in purchasing behaviour: six in ten nicotine pouch buyers (60%) report checking information on product quality or safety before purchasing online, compared to four in ten (40%) in physical stores. Together, these features reinforce the structural advantages of regulated online distribution in supporting compliance and informed choice.

### CONSUMERS MAKE MORE INFORMED CHOICES WHEN BUYING ONLINE

Survey question: Do you check information on product quality or safety before you purchase nicotine pouches online/in a store?



# Deep dive: the emergence of a black market in nicotine pouches

## Challenges of black-market activity

The rapid growth of nicotine pouches in the UK, combined with regulatory gaps, compliance costs and lagging product-specific legislation, has contributed to the emergence of a black market for these products. Black market nicotine pouches circulate with misleading packaging information, incorrect labelling language and, in some cases, nicotine strengths exceeding recommended levels. According to ITV News, seizures of nicotine pouches by Trading Standards – the local authority service responsible for enforcing consumer protection law – increased by 112 per cent year-on-year as of April 2025.<sup>5</sup> As an example, in February 2025 the authorities in Kent seized 66 000 cans of nicotine pouches, including illicit products labelled in Spanish.<sup>6</sup> A recent study investigated the availability of tobacco-free nicotine pouches in 24 cities across Germany and one-third of the products examined by forensic investigators were found to be counterfeit.<sup>7</sup>

Illicit sales of nicotine pouches often target minors. While many consumers may not be aware of the exact boundaries between formal and black markets, one in four UK pouch users report having encountered nicotine pouches sold through the black market. Among those aged 18–24, exposure rises to 44 per cent.

Where illicit distribution is linked to organised criminal networks, the risks extend beyond regulatory non-compliance. Black-market activity undermines the integrity of the legal market and raises broader public health and consumer safety concerns.

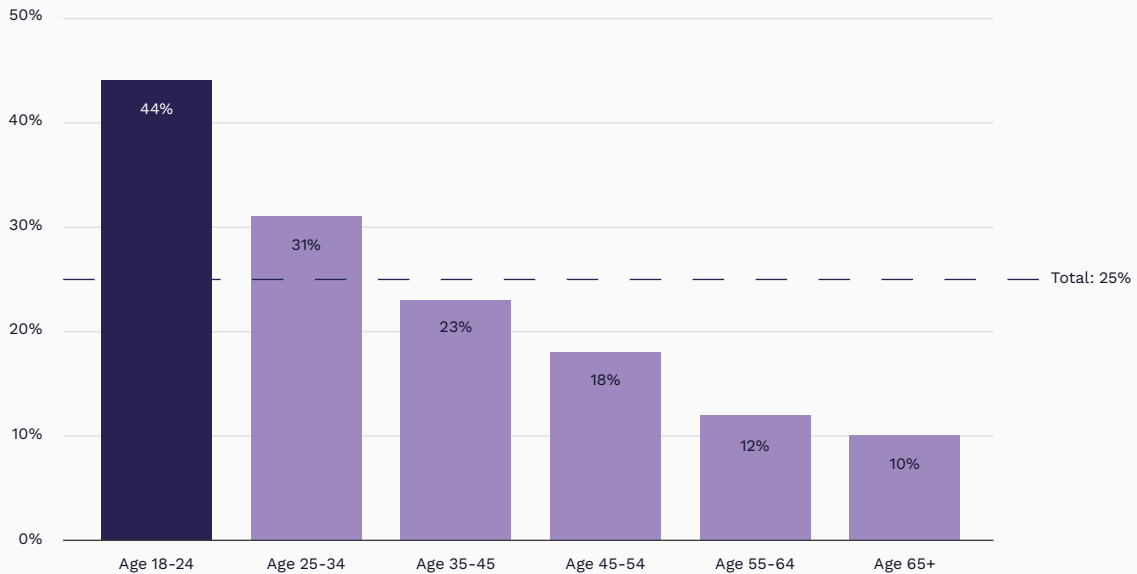
<sup>5</sup> [ITV News](#), "Health warnings as high-strength illicit nicotine pouches flood the UK".

<sup>6</sup> [Kent County Council](#), "Thousands of illicit nicotine pouches seized by Kent Trading Standards."

<sup>7</sup> [Schwarzmarkt für Nikotinbeutel floriert: Bundesweite Studie offenbart die Folgen fehlender Regulierung](#)

## ONE IN FOUR HAVE BEEN EXPOSED TO BLACK MARKET POUCHES

Survey question: Have you ever come across nicotine pouches being sold in places you suspect are not official retailers (e.g., markets, social media, informal shops)?



## The economic roots of black markets

According to economists, black markets arise when expected returns are higher in the illicit market than in comparable formal markets. This imbalance is typically explained by a combination of a high regulatory burden in formal markets and weak enforcement, which creates a competitive cost advantage for black-market actors. While legitimate vendors comply with tax requirements and extensive regulations, including consumer protection requirements, black-market vendors can evade these costs, often facing a low probability of detection due to inadequate or ineffective enforcement.

Furthermore, prohibitive product regulation can, in certain cases, create de facto monopolies for black-market actors within specific product segments. In the case of nicotine pouches, this risk may arise if restrictions on nicotine content or flavourings significantly constrain legal supply. Such a dynamic has been observed in adjacent nicotine categories,

including parts of the vape market following the ban on disposable vapes implemented in June 2025, where restrictions have coincided with increased illicit availability.<sup>8</sup> Erring on the side of overregulation may therefore redirect consumer demand from the formal to the black market, increasing revenues and profitability for illegitimate and potentially organised criminal actors.

At present, the UK nicotine pouch market appears closer to a low-friction market with grey zones (Box B in the matrix below), characterised by limited product-specific regulation and uneven enforcement. The introduction of the Tobacco and Vapes Bill will increase the regulatory burden but may also reduce legal uncertainty. Whether this ultimately leads to less or more black-market activity will depend on the scale of compliance costs and the credibility and consistency of enforcement.

<sup>8</sup> [Haypp.com](https://www.haypp.com), "New survey reveals scale of disposable vape black market".

**BLACK MARKETS TEND TO EMERGE IN REGULATED ENVIRONMENTS WITH INADEQUATE ENFORCEMENT**

Level of enforcement



**Market stalls and informal shops dominate as sales channels**

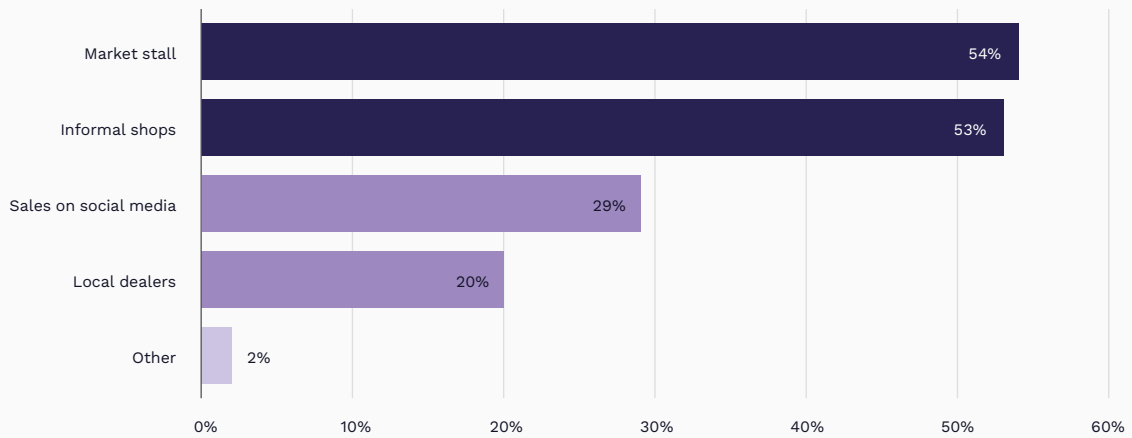
The two most prevalent sales channels for nicotine pouches sold on the black market are market stalls and informal shops.<sup>9</sup> Just over half of consumers who report having encountered illicit pouches state that they came across them through these channels. This suggests that the illicit trade is not primarily driven by online sales or social media channels, but rather is concentrated in visible, low-barrier retail environments operating within everyday consumer settings.

Nicotine pouch users are most likely to have come across informal shops in the North West of England, a region that includes major urban centres such as Manchester and Liverpool. Two thirds of respondents in the North West (67%) who report exposure to black-market products encountered them in informal shops, compared to 53 per cent in the UK as a whole. The patterns in London, however, mirror those observed nationally. This suggests that the black market is not solely an urban phenomenon driven by metropolitan scale but rather is shaped by local retail ecosystems and enforcement dynamics.

<sup>9</sup> In the corresponding survey question, an "informal shop" was explicitly defined as "a shop that does not normally sell cigarettes or other nicotine products as part of its main business".

### MARKET STALLS AND INFORMAL SHOPS ARE THE PRIMARY CHANNELS FOR ILLICIT SALES

Survey question: What type of non-official seller of nicotine pouches have you come across?



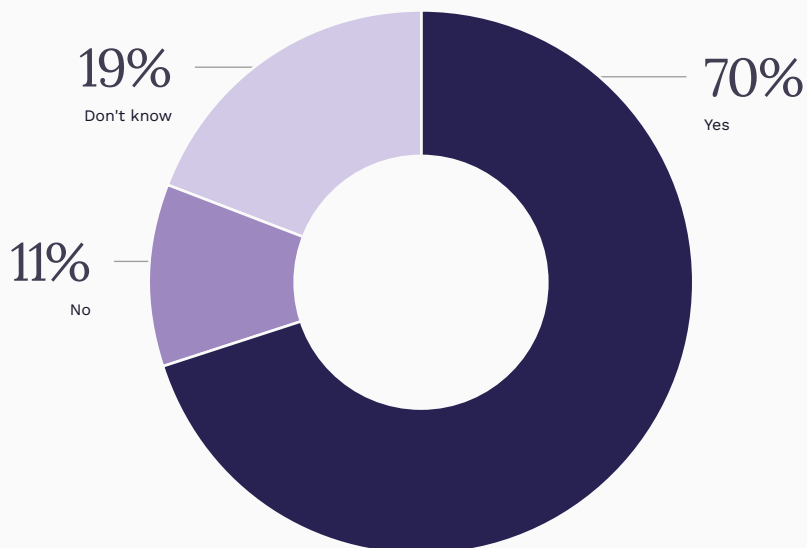
### A majority of consumers are concerned about health risks

A clear majority of respondents (70%) report being concerned about the health risks associated with nicotine pouches purchased on the black market. The main risks relate to uncertain nicotine strength, potential contamination or unregulated ingredients, and the absence of quality control and consumer safeguards that apply in the legal market.

Only 11 per cent of pouch users say they have no concern. This indicates that awareness of potential health risks of illicit products is relatively high among consumers. Furthermore, concern is higher among women than among men, and similarly higher among older users compared with younger consumers.

### STRONG MAJORITY EXPRESS CONCERN ABOUT HEALTH RISKS OF BLACK-MARKET POUCHES

Survey question: Are you concerned about the health risks of nicotine pouches purchased on the black market?



## Social norms and enforcement shape behaviour

Willingness to engage with the black market among consumers is limited, but not negligible. About one in ten pouch users (9%) report that they would be open to purchase nicotine pouches from the black market in the future, with men and long-time users being the most inclined to do so.

In parallel, 12 per cent perceive it as acceptable among people of their own age group to buy nicotine pouches from the black market, with slightly higher figures among younger users. If illicit purchases are seen as common or socially tolerated within a peer group, the social cost of buying outside the legal market declines. In that context, low price points and easy access become stronger pull factors, particularly for price-sensitive consumers.

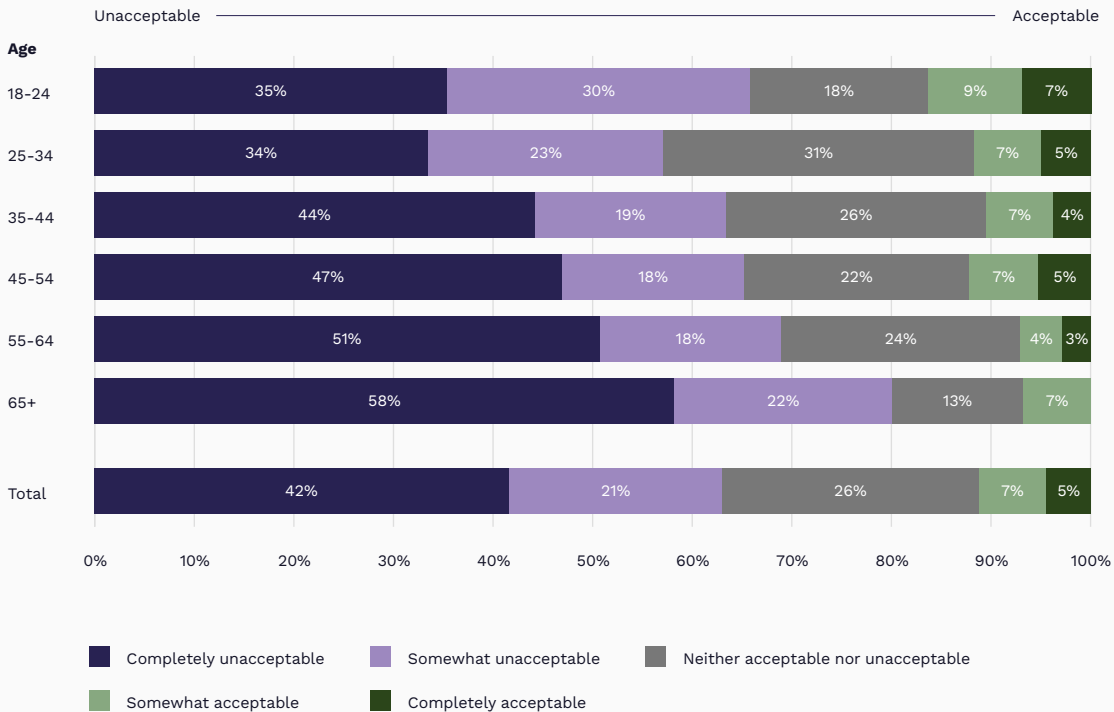
Perceptions of enforcement also appear relevant. Twice as many consumers believe enforcement against illegal nicotine pouch sales to be ineffective (27%) compared with those who consider it effective (14%), while a majority report that they do not know. Weak or unclear enforcement can reduce the perceived risk of sanctions for retailers and buyers alike.

# 1 in 10

Pouch users would be open to purchase nicotine pouches from the black market in the future

### OLDER AGE GROUPS SHOW PARTICULARLY STRONG REJECTION OF BLACK-MARKET BUYING

Survey question: How acceptable do you think buying black market nicotine pouches is among people your age?



# Zooming in on nicotine pouch consumers

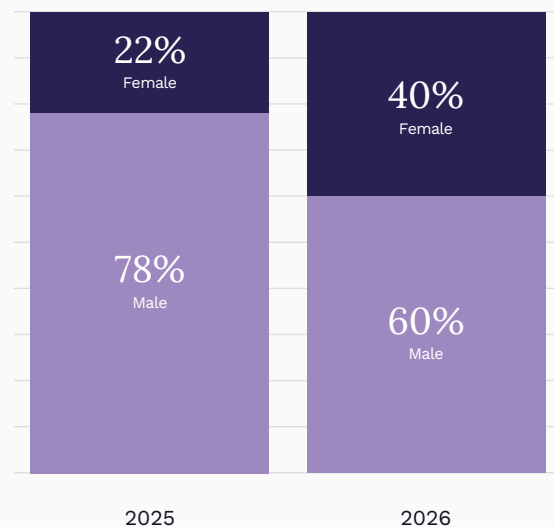
The online nicotine pouch market online is currently driven by adult consumers in their late 20s and early 30s. According to sales data from Haypp.com and Northerner.com, those aged 25–34 recorded the fastest growth in 2025 (69%) and represent the most active user group. This indicates that category expansion is concentrated among established adult nicotine users rather than younger or older age cohorts. According to the survey data, the median age at first use of nicotine pouches in the UK is 32 years.

## The gender gap closes – female pouch use on the rise

The nicotine pouch gender gap narrowed markedly in 2025. The share of female users rose from 22 per cent to 40 per cent, significantly reducing the historical imbalance in nicotine pouch use. One of the possible reasons for the growing popularity among women may be the more discreet nature of the product and the perception that pouches are ‘cleaner’ than traditional tobacco products.<sup>10</sup>

This development mirrors patterns observed in more mature markets during their expansion phase. In Sweden, where nicotine pouches originated, early adoption was male dominated before female participation increased as the category became more established and socially normalised.

SHARE OF FEMALE USERS OF NICOTINE POUCHES



<sup>10</sup> [Sweden's Nicotine Trends: Lessons for UK Smoking Reduction](#)

### Highest per capita use in London and Scotland

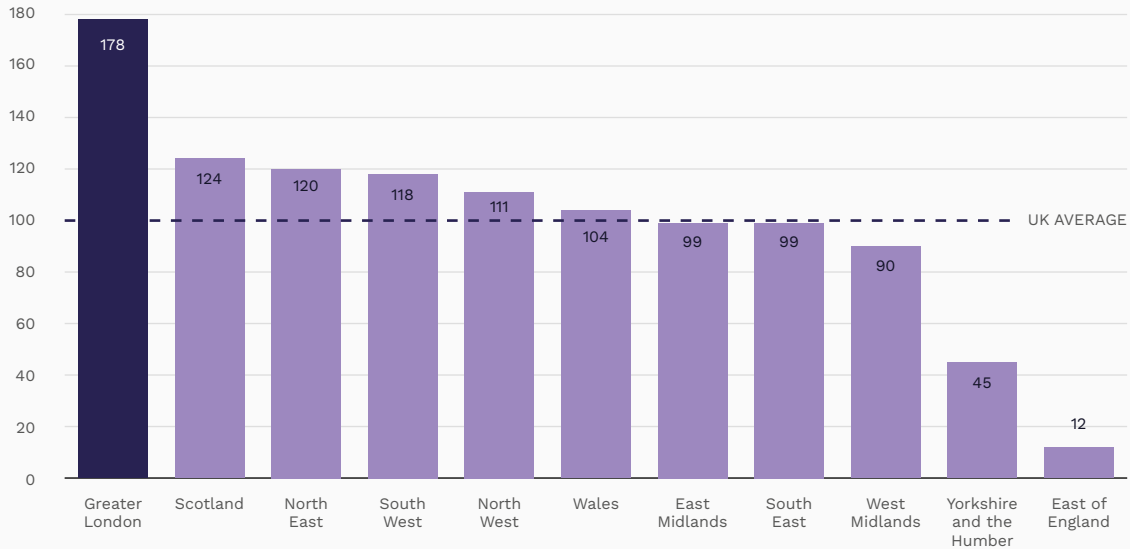
Per capita consumption of nicotine pouches is highest in Greater London. Londoners lead nationally, followed by Scotland. This may be driven by wider usage and higher product visibility in these regions. It may also indicate that adoption of new nicotine products is more rapid in metropolitan and urbanised markets.

### High-frequency use increasing

Among UK nicotine pouch users, more than eight in ten now use the product daily, compared with seven in ten in 2025. This increase is accompanied by a rise in high-frequency pouch users and larger average online orders. The number of consumers using one can per day on average has doubled. In parallel, a growing share of consumers have shifted towards higher-frequency usage. The proportion using between four and seven cans per week has risen from 32 to 41 per cent, indicating an intensification of consumption patterns.

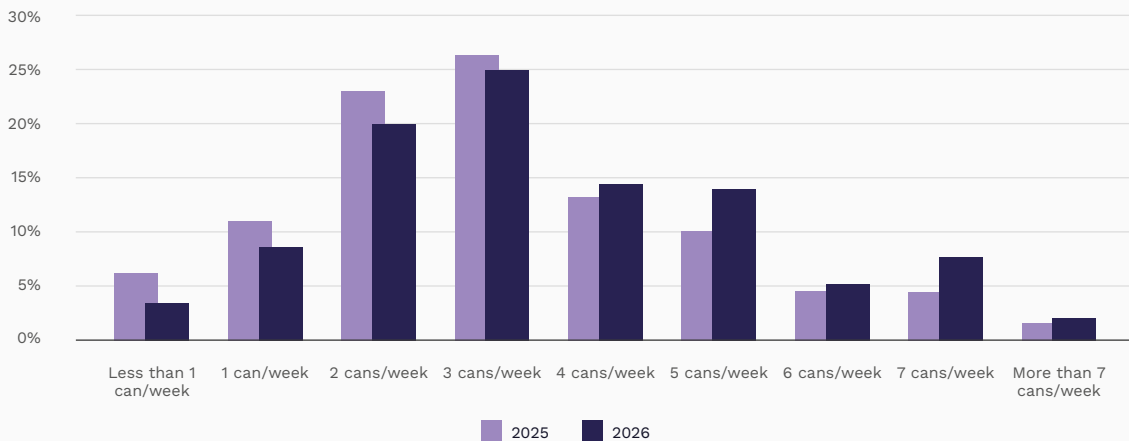
### LONDON REMAINS THE LEADING REGION FOR PURCHASING ONLINE

Online sales per capita index, based on sales volumes on Haypp.com and Northerner.com



### CONSUMERS ARE USING NICOTINE POUCHES MORE OFTEN

Survey question: How many cans of nicotine pouches do you use in a week?



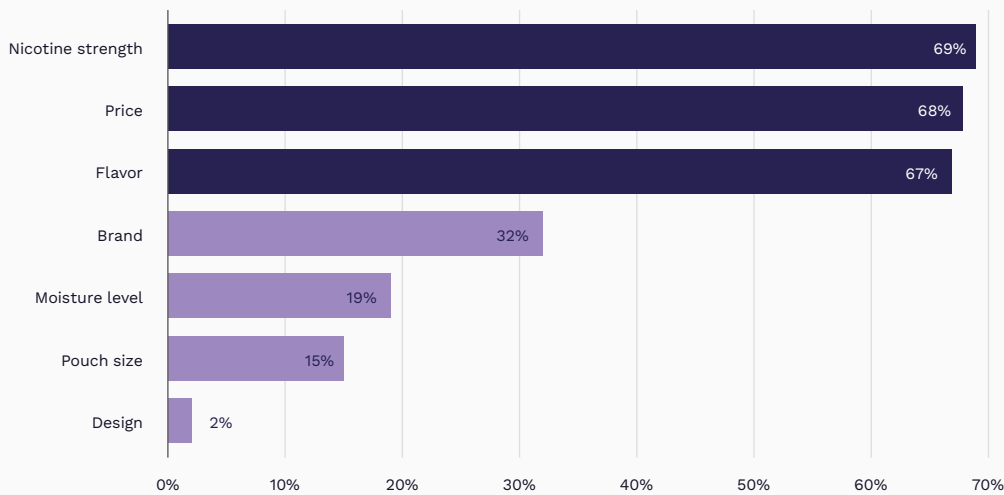
## Nicotine strength now outweighs price in purchasing decisions

Nicotine strength, price and flavour remain the three dominant drivers of purchasing decisions. Nicotine strength has now overtaken price as the single most important factor when consumers buy nicotine pouches. The most favoured strength is “extra strong” for both men and women.<sup>11</sup>

At the same time, price sensitivity has declined, falling from 75 to 68 per cent compared to the previous year. Men place slightly greater emphasis on price than women, while women assign relatively greater importance to flavour. In addition, the importance of flavour increases with age.

### THE MOST IMPORTANT FACTORS WHEN BUYING NICOTINE POUCHES

Survey question: When you are considering purchasing nicotine pouches, what are the 3 most important factors for you? Three alternatives possible.



## One in two consumers are “brand loyalists”

More than one third of British consumers consider the brand important when purchasing nicotine pouches. This is even more pronounced among young adults aged 18–24 years, where 46 per cent attach importance to brand choice.

Half of nicotine pouch users (50%) report being loyal to a single brand, using products exclusively from their preferred supplier, compared to 34 percent in 2024. Increasing loyalty towards a single brand reflects signs of a maturing market. The remaining half

take a more exploratory approach, switching between different brands, flavours and nicotine strengths.

Brand loyalty is strongest among younger consumers aged 18–24, where 57 per cent identify as loyal to one brand. One explanation may be the strong market presence and broad product portfolios of leading players, which have held a dominant position in the category in recent years.

<sup>11</sup>“Extra strong” from Haypp contains 9.1-13 mg nicotine per pouch, which is more generally categorised as “strong”. The extra strong category at Haypp is therefore moderate by market standards. Source: Haypp Nicotine Strength Guide, Haypp.com.

# Products on the podium in 2025

Velo maintained a leading position in terms of brand popularity in the UK in 2025, maintaining the lead from 2024. The three most purchased brands on Haypp.com and Northerner.com in 2025 were Velo (35%), Nordic Spirit (15%) and Zyn (11%).

Following rapid growth, Zyn claimed the third place, replacing On!. By contrast, On! has shown slower growth but remains one of the more popular brands (ranked 4th overall). Übbs Pouches have grown steadily since launch and has reached eighth place in the rankings, despite being a relatively new brand in the UK.

## Spice flavours overtake citrus

Brits overwhelmingly prefer mint-flavoured nicotine pouches. Approximately six out of ten cans sold in the UK are mint-flavoured. Fruit flavours remain the second most popular category, holding a strong position.

In 2025, the strongest growth was recorded for nicotine pouches flavoured with spices, generally perceived as a more neutral and mature choice. This growth lifted the flavour category into third place, behind mint and fruit, surpassing citrus flavours.

## Extra strong and slim take the lead

Nicotine pouches are available in four strength levels and three pouch sizes on Haypp.com and Northerner.com. The Haypp strength range spans multiple categories and formats, with options ranging from “extra strong” to “less intense”, and from “large” to “mini” pouch sizes.

As in 2024, extra strong pouches in the slim format were by far the most preferred option in 2025. In the UK, more than eight in ten cans sold are in the slim format, while nearly five in ten are classified as extra strong, indicating clear dominance for these options.

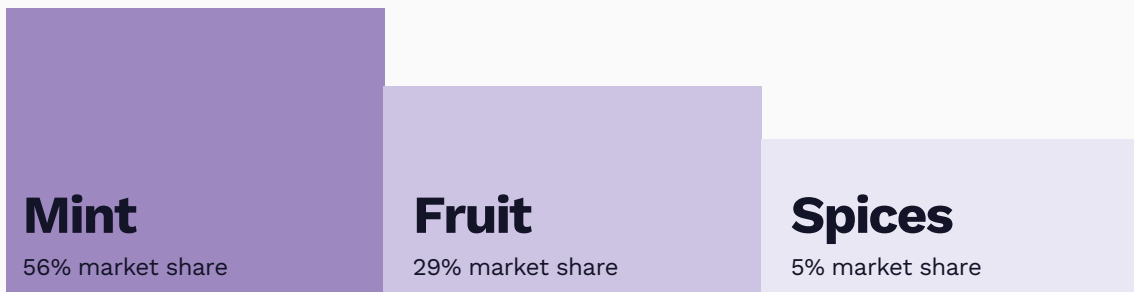
### THE BRAND PODIUM

Most popular brands & online market share



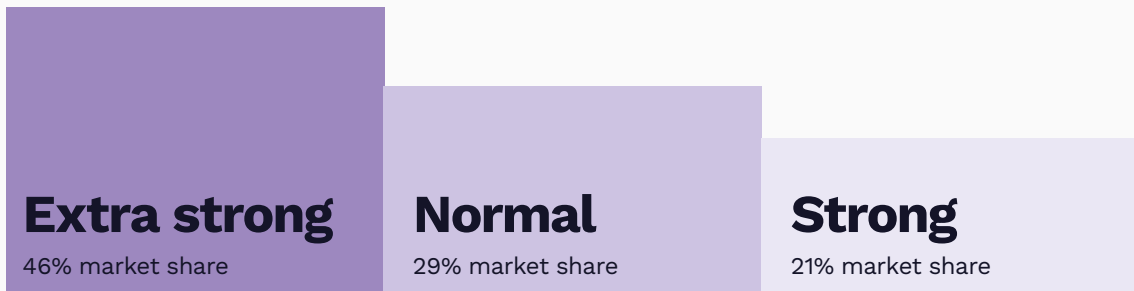
### THE TOP 3 FLAVOURS

Most popular flavours & online market share



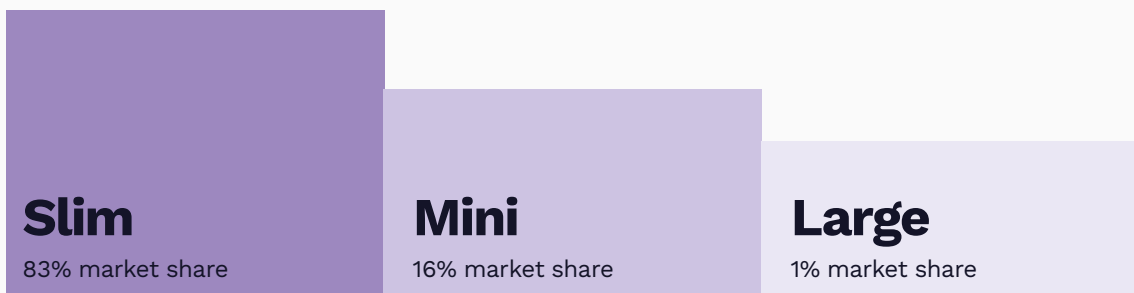
### THE TOP 3 STRENGTHS

Most popular strengths & online market share



### THE TOP 3 POUCH SIZES

Most popular formats & online market share



# The UK regional nicotine pouch map

## **East of England - Cigarette quitters**

In the East of England, nicotine pouches are more frequently used to help quit smoking – 47% report they started using pouches as a way to quit smoking, compared to 43% nationally.

## **East Midlands - Social media exposure**

Consumers in the East Midlands are more likely to encounter nicotine pouches on social media – 30% report seeing them there, versus 25% nationally.

## **Greater London - Brand-loyal buyers**

Londoners show strong brand loyalty, with 54% purchasing exclusively one nicotine pouch brand, compared to 50% nationally.

## **North East - Brand-driven buyers**

In the North East, brand matters more – with 41% ranking brand among their top three purchase drivers of nicotine pouches, versus 32% nationally.

## **North West - Social users**

Nicotine pouch usage in the North West is often socially driven, with 74% using them when socialising, compared to 69% nationally.

## **Northern Ireland - Home users**

Northern Ireland has the highest share of home usage, with 93% reporting they use nicotine pouches at home, versus 85% in the UK as a whole.

## **Scotland - Category explorers**

Scottish consumers are more experimental, with 19% buying multiple brands, flavours and nicotine strengths, compared to 14% in the UK.

## **South East – Firm favourites**

Velo, Nordic Spirit and Zyn are the top three brands in the South East – together the trio accounts for 57 percent of the total South Eastern pouch market.

## **South West – Bargain hunters**

Price is a stronger online driver in the South West – 88% cite attractive pricing as a reason for buying nicotine pouches online, compared to 83% nationally.

## **Wales - Price-sensitive shoppers**

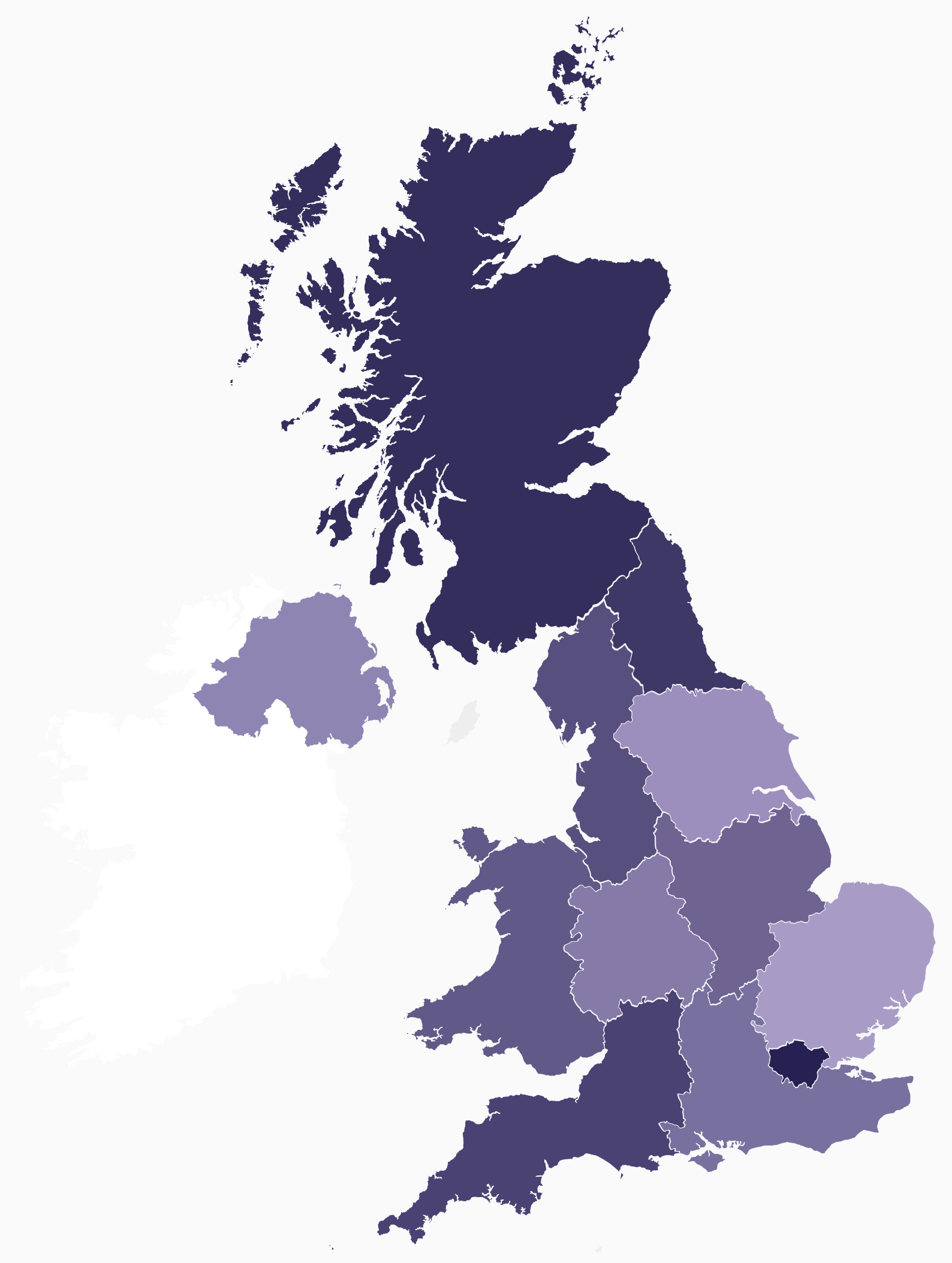
Welsh consumers are more price-focused, where 76% rank price among their top three purchase factors when buying nicotine pouches, versus 68% in the UK as a whole.

## **West Midlands - Caring consumers**

In the West Midlands, 61% use nicotine pouches because it does not affect others, compared to 52% nationally.

## **Yorkshire and the Humber - Vape-switching users**

Yorkshire and the Humber customers show stronger switching from vaping, where 46% started using nicotine pouches as a way to quit vaping, compared to 40% nationally.



# Detailed toplists

Appendix with detailed toplists: brands, products, flavours, strengths and pouch sizes

## MOST PURCHASED BRANDS IN 2025 – TOP 10

Ranking	Brand	Change compared to 2024
1	Velo	-
2	Nordic Spirit	-
3	Zyn	+1
4	On!	-1
5	XQS	+1
6	Loop	-1
7	Fumi	+7
8	Übbs Pouches	+3
9	Helwit	-2
10	White Fox	-1

## MOST PURCHASED PRODUCTS IN 2025 – TOP 10

Ranking	Product	Change compared to 2024
1	Velo Freezing Peppermint Max 17mg	+2
2	Velo Freezing Peppermint	-
3	Velo Crispy Peppermint	-2
4	Velo Bright Spearmint 6mg	NEW!
5	Nordic Spirit Spearmint Regular	+1
6	Nordic Spirit Spearmint Strong	+4
7	Nordic Spirit Mint Regular	-
8	Zyn Slim Cool Mint Extra Strong	+23
9	Nordic Spirit Spearmint Extra Strong	+5
10	Velo Tropical Mango 6mg	+2

## MOST PURCHASED NICOTINE POUCH FLAVOURS IN 2025 - TOP 6

Ranking	Flavour	Change compared to 2024	Market share
1	Mint	-	56%
2	Fruit	-	29%
3	Spices	+1	5%
4	Citrus	-1	5%
5	Coffee	+1	2%
6	Liquorice	-1	0.3%
7	Other	+7	3%

## POUCH SIZES 2025 - TOP 3

Ranking	Format	Market share
1	Slim	83%
2	Mini	16%
3	Large	1%

## STRENGTHS 2025 - TOP 4

Ranking	Strength	Market share
1	Extra strong	46%
2	Normal	29%
3	Strong	21%
4	Less intense	5%

# About Haypp Group

Haypp is a part of Haypp Group, one of the world's largest online retailers of nicotine pouches and is spearheading a global transformation from smoking to healthier alternatives. Established in Sweden, Haypp operates in six countries and has almost one million active customers. Listed on the Nasdaq First North 25 Index, Haypp is the number one online retailer of nicotine pouches in the UK.

Haypp tests all nicotine pouch products before placing them on the market to ensure they meet the highest quality and safety standards. The products are independently tested by Ecofins laboratory in Sweden. Nicotine strength, pH levels, listed ingredients, and presence of foreign substances are all tested.

As a responsible retailer, neither Haypp nor Northerner sell any products or flavours that are targeted at underage users. At Haypp Group, we believe in putting our customers' enjoyment and well-being first, so we made the decision not to stock any extreme strength pouches. We support and follow the policy of the Swedish Institute for Standards, which recommends a maximum amount of nicotine per pouch of 20mg.

We are transparent about our testing and the results are made publicly available on our [Nicoleaks.com](https://nicoleaks.com) website.

