



Smoke-Free Nicotine Innovations

N i c o t i n e P o u c h e s

You don't have to quit to improve your health – just switch to a cleaner, science-backed alternative designed for adult smokers.

Aug 2025 version

Research methodology



for the technology overview report



3200+ patent families analyzed (filed in the US or WO jurisdiction)



Analyzed top market players for their product offerings and activities such as collaborations, acquisition strategies, etc.



Evaluated patent portfolio strength based on multiple quantitative & qualitative parameters



Study period: From May 2005 to May 2025



150+ hours invested

Some of the Eminent players covered in this report:

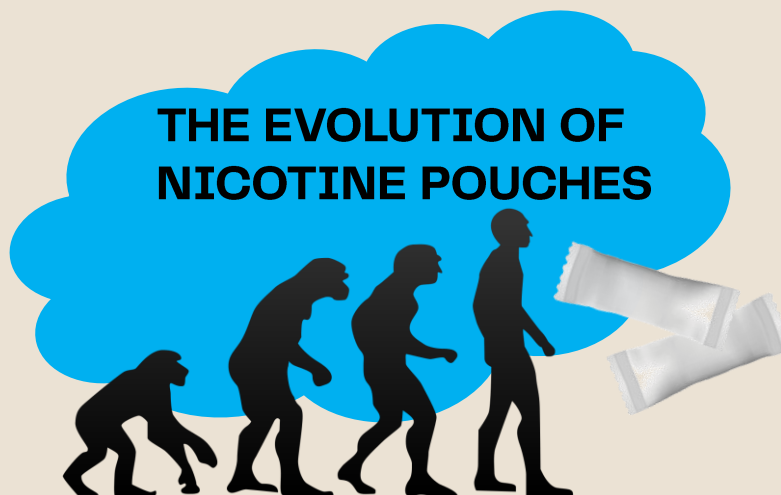


Introduction

Cigarettes have long been associated with harmful smoke, strong odors, stained teeth, and serious health risks due to the combustion of tobacco. Cigarettes contribute to secondhand smoke and long-term health damage, and **nicotine pouches are emerging as a lower-risk, modern solution** aligned with today's demand for healthier, more convenient options for nicotine addicts.



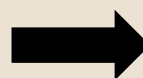
How have nicotine pouches evolved?



Traditional Snus/
Cigarettes



E-cigarettes



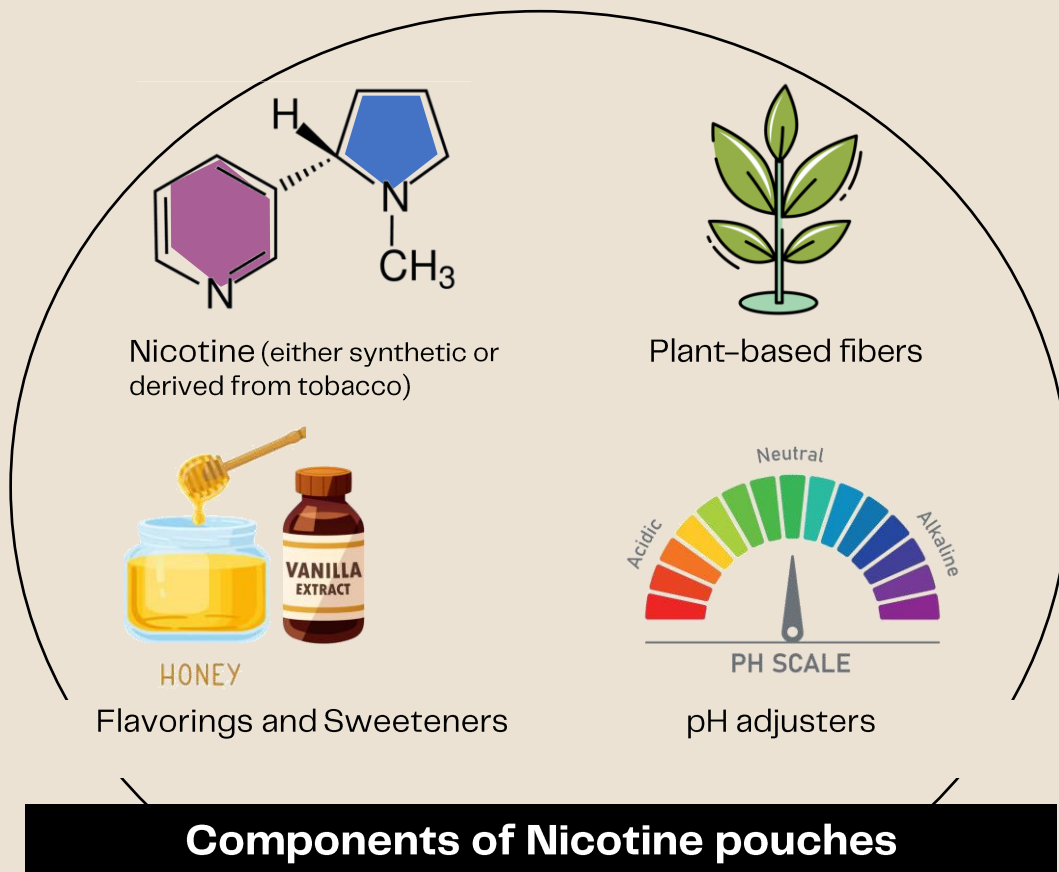
Nicotine pouches

What are Nicotine Pouches?

Nicotine pouches are smokeless, and tobacco-free oral products designed to deliver nicotine without the harmful byproducts of combustion. Typically placed between the lip and gum, these pouches offer a discreet and convenient alternative to traditional smoking or chewing tobacco.



What do they consist of?



Why are they gaining popularity?



⚠️ **Seen as Part of Harm Reduction Strategy**

Nicotine pouches are widely positioned as a lower-risk alternative to smoking, aligning with global harm reduction initiatives aimed at reducing the health burden of combustible tobacco use.

🚭 **No Secondhand Smoke Risks**

Since pouches don't produce smoke or vapor, they eliminate risks associated with secondhand smoke—making them more socially acceptable and safer in shared environments.

📌 **Permissible in Smoke-Free Areas**

Unlike cigarettes and even e-cigarettes, nicotine pouches are often not subject to public smoking bans, offering users greater freedom and convenience in offices, travel, and indoor settings.

🍓 **Come in attractive flavors, strengths, and formats**

Available in a variety of flavors (mint, citrus, berry, coffee, etc.) and nicotine strengths, pouches cater to a wide range of consumer preferences. This flavor diversity also serves as a key marketing tool to attract younger, flavor-seeking consumers.

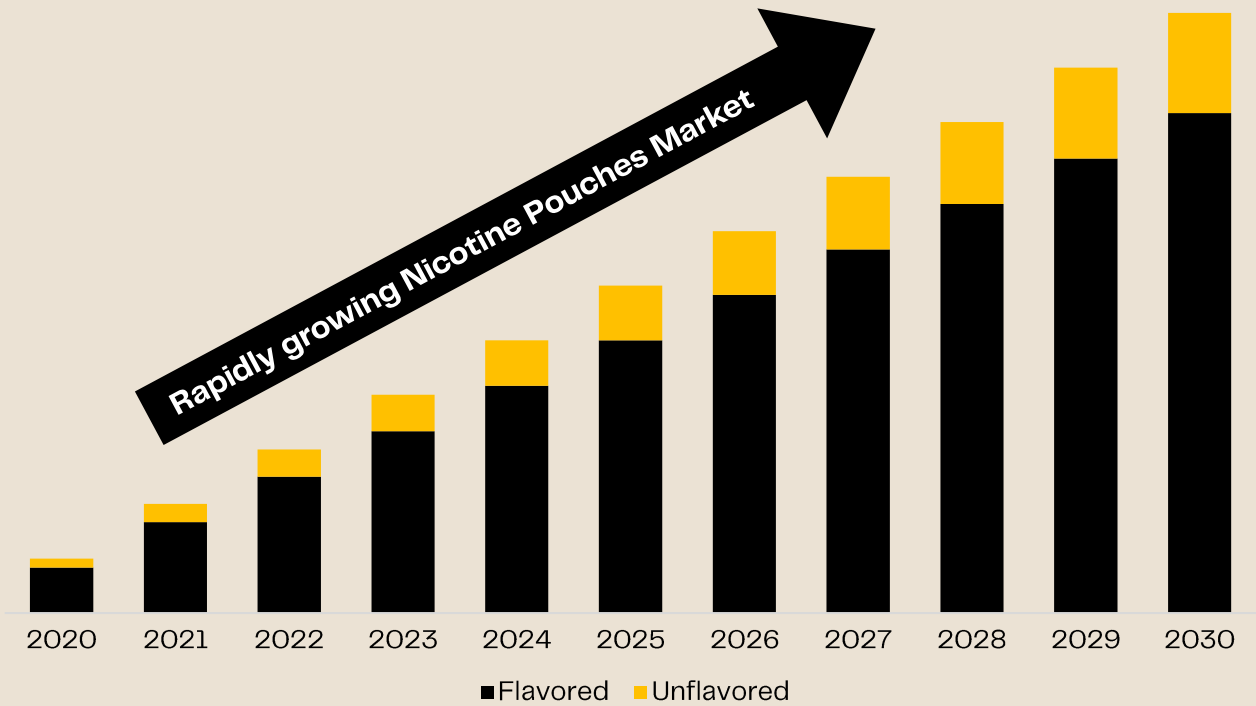
🌿 **Tobacco-Free & Sleekly Packaged**

Sold in small, sleek can-like containers that resemble snus but contain no tobacco, nicotine pouches appeal to modern aesthetics and reinforce a "cleaner" image.

Market Landscape



Nicotine pouches Market Size, By flavor, 2020-2030



The global nicotine pouches market was **valued at USD 5.39 billion in 2024** and is **projected to reach USD 25.40 billion by 2030**, growing at a robust CAGR of **29.6% from 2025 to 2030**. Based on flavor, the flavored segment led the market, accounting for the largest revenue share of 89.92% in 2024.

What's Behind this Surge?

- **Younger consumers are increasingly turning to smoke-free alternatives**, with flavored options like mint, citrus, coffee, and berry driving their preference over unflavored products.
- Also, **flavors enhance user experience and brand loyalty**, while discreet, smoke-free pouches **offer convenience in public and smoke-free settings**.
- Social media drives trends, while **content creators shape perceptions and amplify nicotine pouch usage**.

Geographic Trends in Nicotine Pouch Adoption



North America dominated the nicotine pouches market in 2024, accounting for the largest revenue share of 78.4%. The market is expected to grow significantly in the coming years, driven by rising investments in tobacco alternatives and a growing consumer shift toward tobacco-free products like nicotine patches, gums, and lozenges.

In Europe, which is behind North America in revenue share, the Scandinavian nicotine pouches market is expected to grow at a significant CAGR of 35.8% from 2025 to 2030, serving as the category epicenter, thanks to existing cultural familiarity with oral smokeless products. The nicotine pouches market in the **UK is expected to grow at a substantial CAGR of 7.6% from 2025 to 2030.**



The nicotine pouches market in **the Asia-Pacific region, behind the European revenue share, is projected to grow at a remarkable CAGR of 46.2% from 2025 to 2030.** This surge is driven by rapid urbanization, rising per capita income, and aggressive marketing strategies adopted by global brands. Key growth markets within the region include Japan, South Korea, India, and China.

South America and the Middle East & Africa currently comprise smaller shares but are expected to expand steadily and grow at a significant CAGR from 2025 to 2030 as awareness and availability increase.

A diversity of product offerings (1/2)

A number of players in different parts of the world offer a **wide range of nicotine pouches**, designed to meet diverse consumer preferences and lifestyles.

These include **multiple nicotine strengths (from low to high)**, an extensive **variety of flavors (mint, fruit, coffee, and more)**, and different **pouch formats such as slim, mini, or dry** for discreet and convenient use.



USA



PHILIP MORRIS
INTERNATIONAL

ZYN nicotine pouches by Philip Morris International

do not contain tobacco leaves and are inherently smoke-free. They contain **nicotine and flavors**, and **come in a range of sizes and nicotine strengths**.

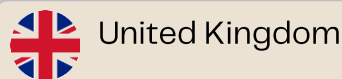


United Kingdom



Originating in Scandinavia, **Velo is now a leading global brand of nicotine pouches by British American tobacco**. Velo appeals to a broader audience than traditional oral tobacco (snus) because of their **attractive price positioning**.

A diversity of product offerings (2/2)



United Kingdom



Zone by Imperial brands was launched in the U.S. in 2024 by Imperial Brands. The pouches are designed with a soft material offering **higher moisture content, ensuring long-lasting flavor and a smoother oral experience.**



Denmark



XQS by Scandinavian tobacco group is marketed as a flavor-forward, easy-fit alternative with **long-lasting taste and strong value appeal.** The brand is deliberately positioned within the tobacco harm reduction space, emphasizing its Swedish heritage, flavor innovation.



USA



LUCY Pouches taste better, last longer, and fit better. These come in a variety of flavors and strengths. LUCY Pouches are crafted for a premium experience.



Collaborations across the industry



PHILIP MORRIS
INTERNATIONAL



Philip Morris International Announces Collaboration with KT&G on U.S. Regulatory Submissions for KT&G's New Heat-Not-Burn Products

Both PMI and KT&G recognize the importance of the U.S. market to advance their shared strategic vision of a smoke-free future. The **signed agreement grants PMI exclusive rights to commercialize KT&G's innovative smoke-free products in markets outside South Korea.**

30 Jul 2024



ALP
Nicotine Pouches



NORTHERNER
SINCE 1988



NICOKICK

Nicokick and Northerner Named Preferred Online Partners for ALP, Expanding Access to Premium Nicotine Pouches

Nicokick.com and Northerner.com, the two largest U.S. online retailers specializing in nicotine pouches, announced a one-year **agreement as preferred online partners for ALP** (a nicotine pouch brand designed for and by adults who unapologetically love nicotine).

07 Apr 2025



Altria



Altria and JT Group to pursue a global smoke-free partnership to accelerate harm reduction.

Altria and JT announce the execution of a non-binding memorandum of understanding, setting forth the strong commitment of both parties toward a greater partnership to accelerate global harm reduction. The companies believe this potential **collaboration could bring significant value to their respective businesses.**

27 Oct 2022

Acquisition strategies across the industry



Imperial acquires US nicotine pouches range from TJP

Imperial Brands, the global tobacco and nicotine business, announced the **acquisition of a range of nicotine pouches from TJP Labs in order to facilitate its entry into the US modern oral market**, to offer legal adult American consumers a diverse range of 14 product variants in a pouch which performs strongly in consumer testing.

23 Jun 2023



BAT strengthens its US New Category portfolio: Announces acquisition of Dryft Modern Oral business

British American Tobacco announced that the US business of the BAT Group (BAT) has **acquired the nicotine pouch product assets of Dryft Sciences**. This acquisition **expands BAT's Modern Oral portfolio in the US**, expanding from 4 to 28 product variants. It follows the acceptance of Dryft's recent Pre-Market Tobacco Product Application submission for filing by the FDA.

03 Nov 2020



KT&G seeks \$200 mn acquisition of Nordic nicotine pouch maker

The **Korean tobacco and ginseng giant is also said to be looking to acquire a Japanese ginseng company**. KT&G's M&A bid **reflects its strategy to expand into the modern oral nicotine segment and reduce reliance on conventional cigarettes**. KT&G appears to benchmark global tobacco companies' expansion into the non-combustible segment through acquisitions.

30 Jun 2025

Toward a Greener Future: Sustainability in Nicotine Pouches



With growing consumer awareness around environmental impact, there is increasing demand for **nicotine products that align with eco-conscious values**. Retailers and regulators are also shifting their focus toward **ESG-compliant brands**, encouraging manufacturers to adopt more transparent and responsible practices.

How can sustainability be achieved?

Using Sustainable Ingredients

- Use of plant-based or biodegradable pouch materials (e.g., cellulose fibers)
- Shift toward clean-label flavorings and food-grade additives
- Adoption of synthetic nicotine to reduce reliance on tobacco farming (synthetic nicotine may have its carbon footprint).

Brands like **TOPIA and Muse** are incorporating biodegradable materials such as plant-based fibers and cellulose into their nicotine pouches. By using compostable and naturally sourced materials, these brands contribute to a more sustainable future. [Source](#)

Green Manufacturing & Supply Chain

- Reduced water/energy use in production
- Suppliers adopting ISO 14001 and carbon tracking

Eco-Friendly Packaging

- Use of recyclable cans (e.g., metal, paperboard)
- Brands exploring refillable or biodegradable containers

Velo plastic cans are being upgraded to use single polymer plastics, with the use of bio-based materials also being trialed, achieving International Sustainability and Carbon Certification. [Source](#)

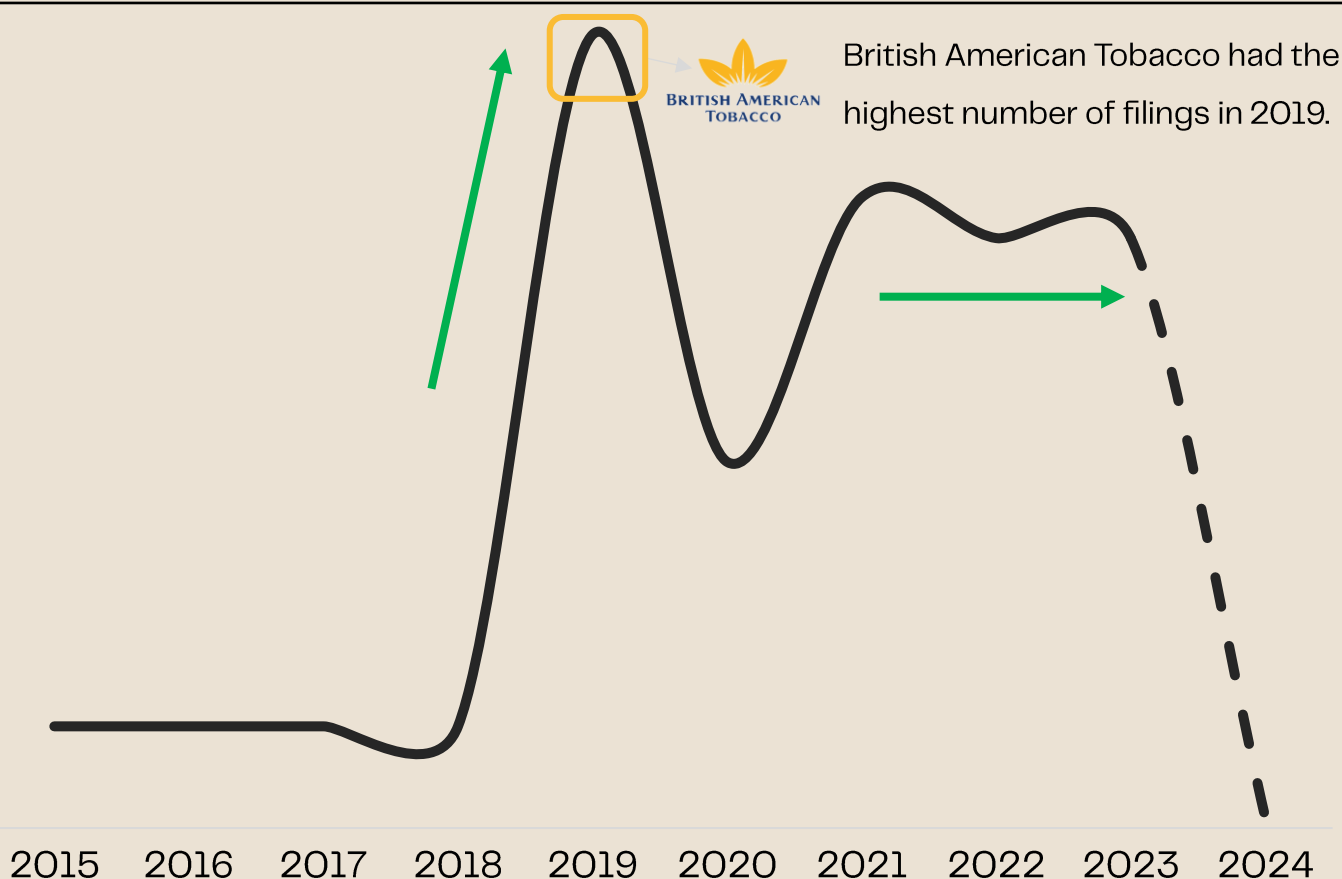
Innovation pacing up across the patent segment



Filing trend

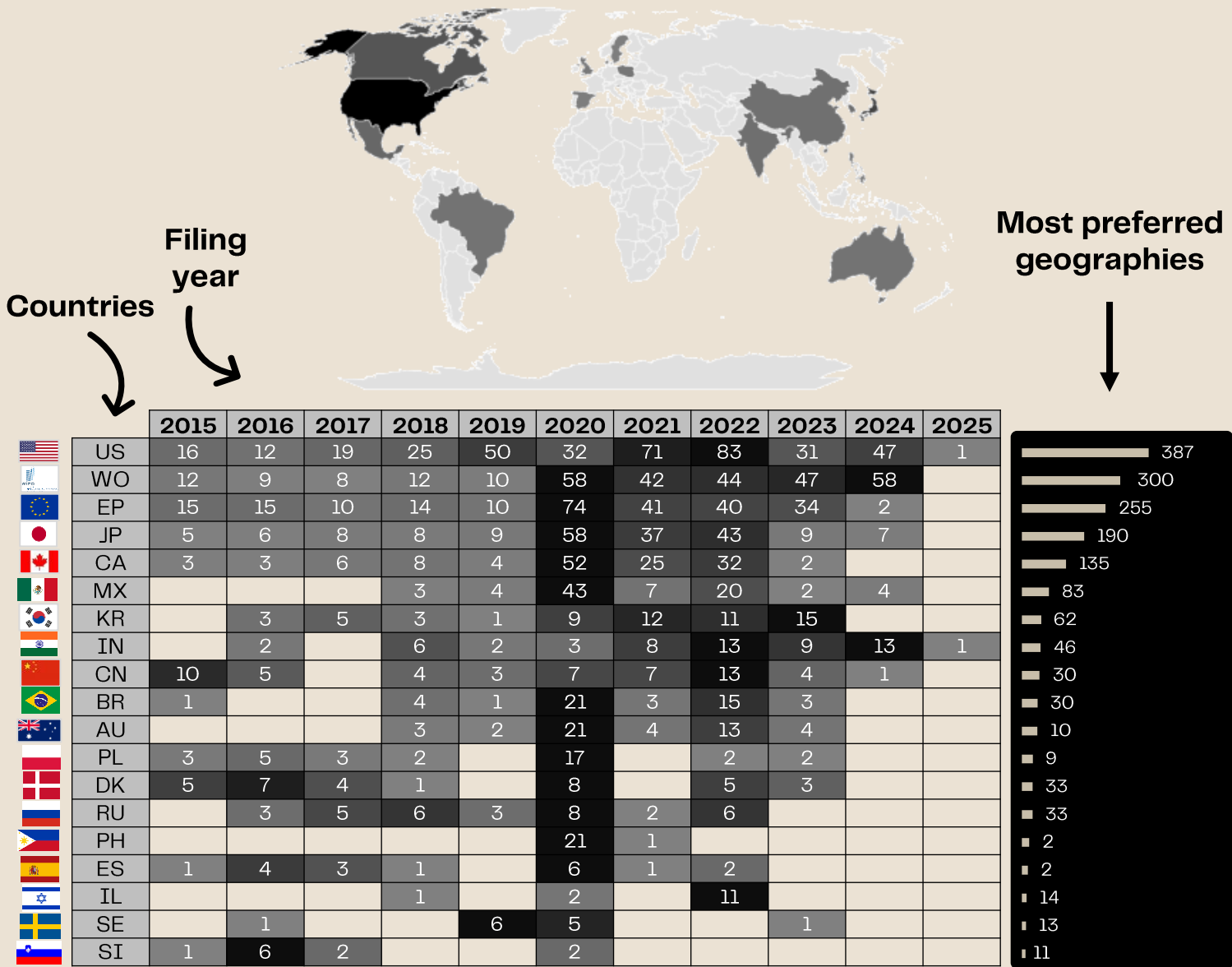


The patent filings in the domain of Nicotine Pouches have seen an exponential peak in 2019.



From the above graph, we can observe that there is a significant increase in the filing of patents in the domain of nicotine pouches since 2019 (for the analysis conducted for patent families protected in US or WO jurisdiction). There is a sharp increase in the year 2019 with a consistent filings in the next few years. It reflects sustained interest and growing technological development in the nicotine pouch domain.

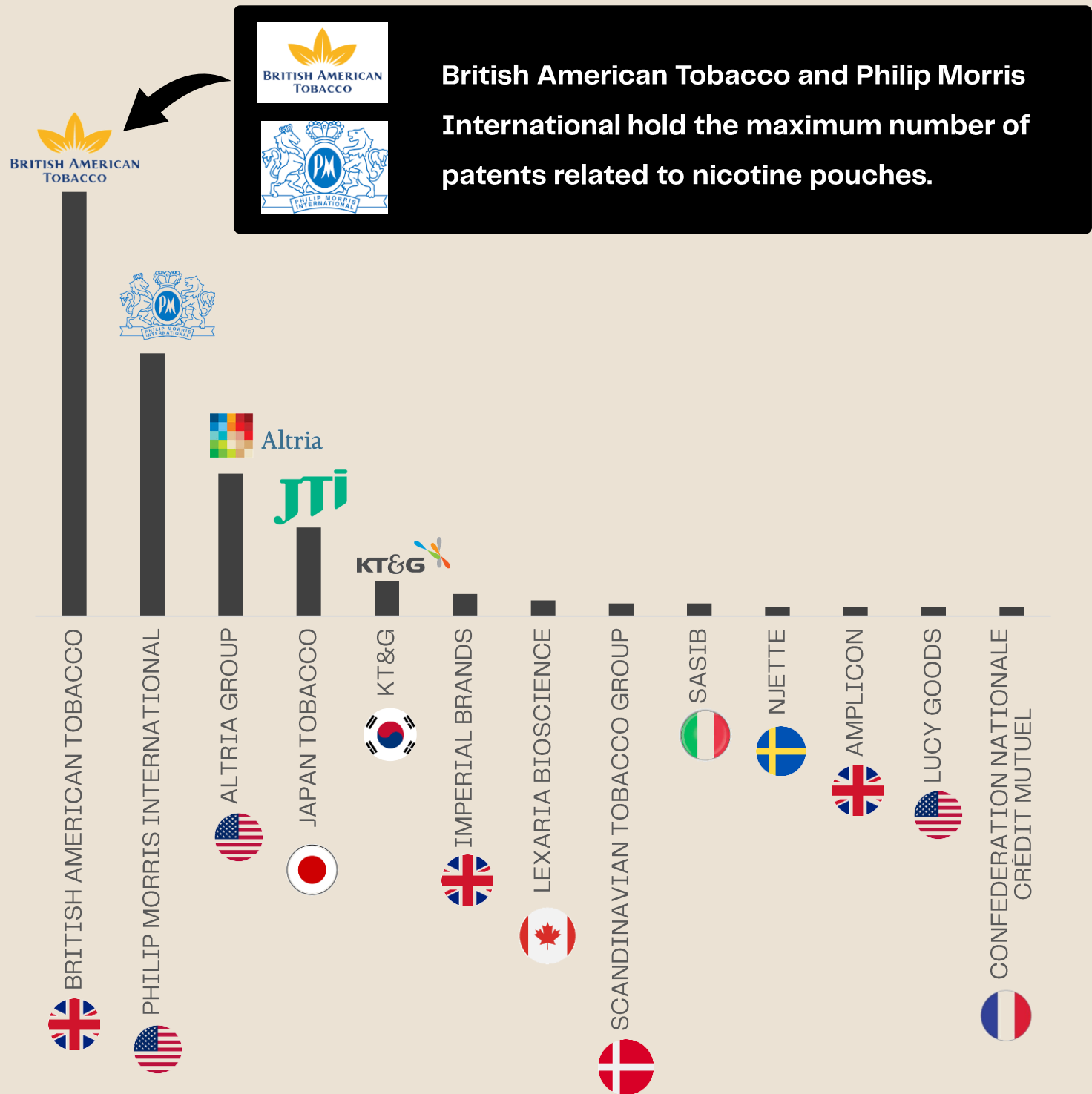
Preferred regions for patent protection



Based on the analysis of patent families filed in at least the US or WO, the **US, Europe, and Japan** emerge as the most preferred regions for filings.

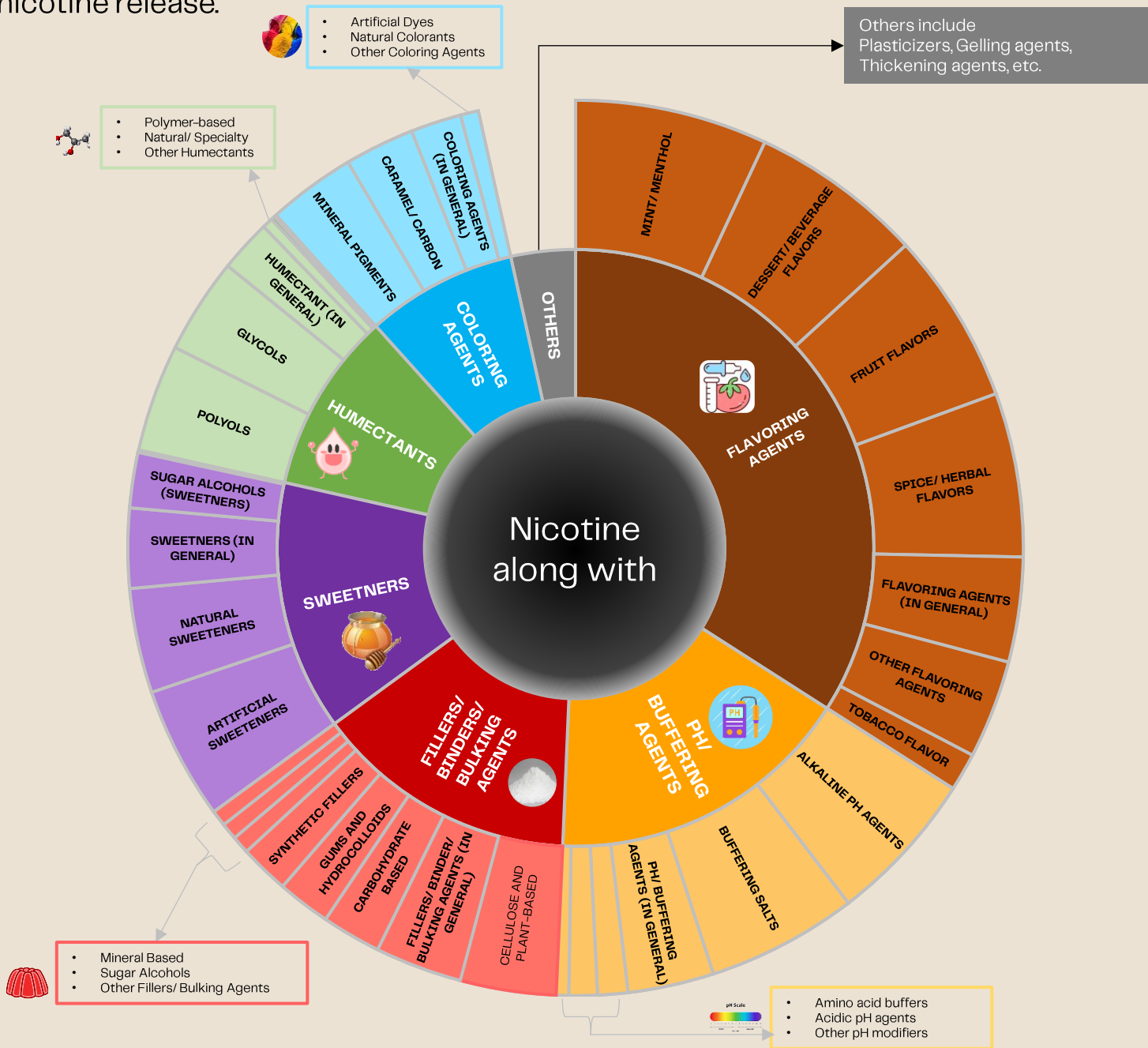
In recent years, there has also been a notable increase in patent activity in countries such as **South Korea, India, Japan, and Canada**.

Key players leading the patent race



Ingredients focused by Players

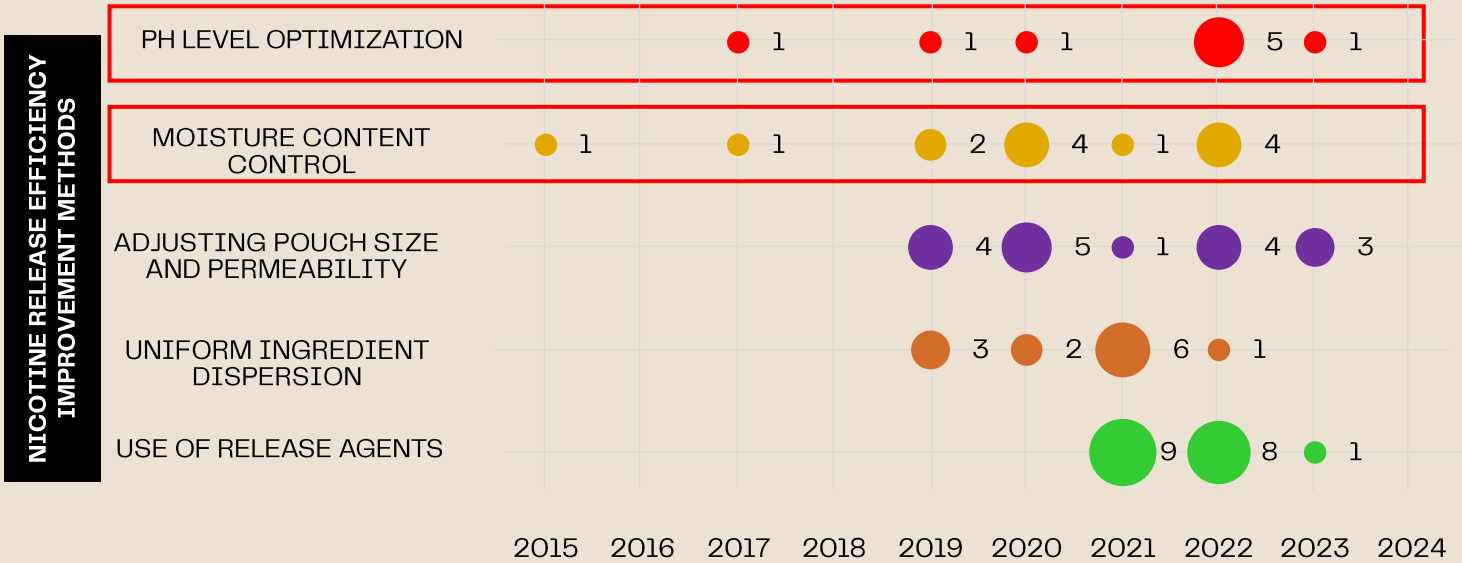
Nicotine pouches are formulated with a blend of carefully selected ingredients designed to deliver a clean, effective, and enjoyable experience. Key focus areas include nicotine, flavorings, and fillers, etc., all chosen for safety, taste, and optimized nicotine release.



Technological fields distribution across IP



Over the past decade, players have primarily focused on controlling moisture content and optimizing pH levels to improve nicotine release efficiency. Recently, the use of release agents has emerged as a promising area of innovation.

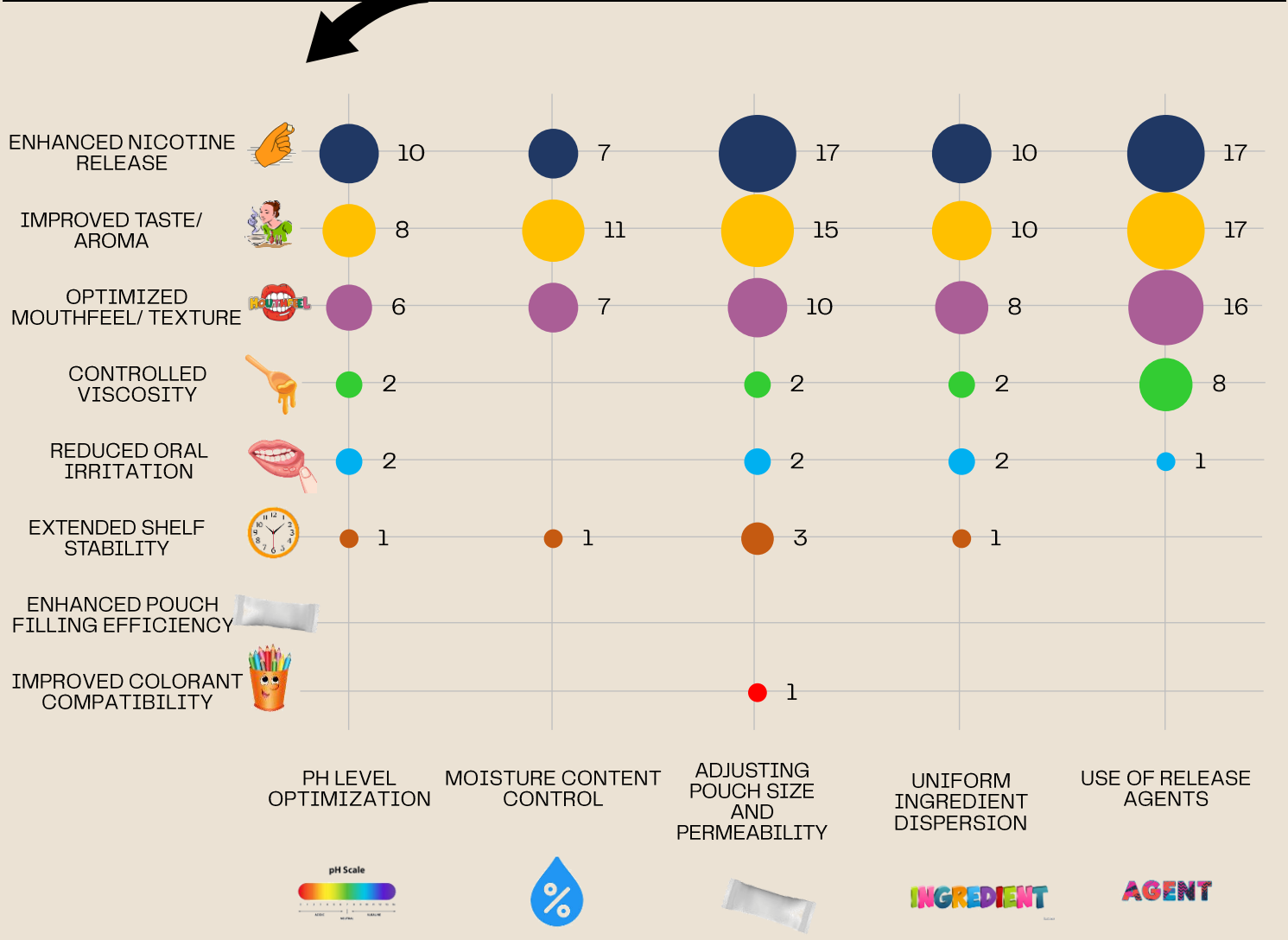


Most patents highlight improved taste and aroma, optimized mouthfeel and texture, and enhanced nicotine release as key properties of nicotine pouches.

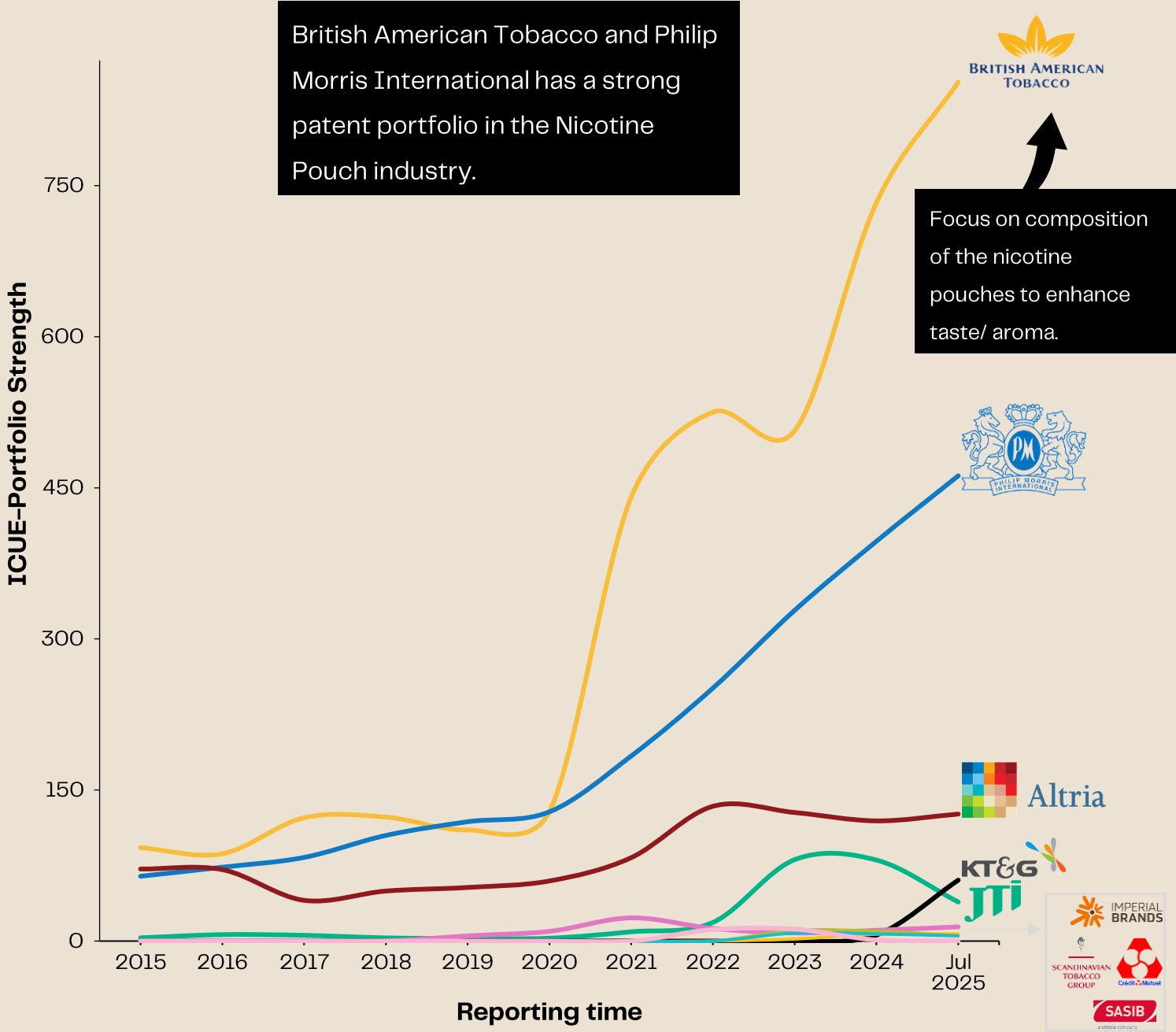


How are the nicotine release efficiency improvement methods related to properties?

Most players disclose that methods aimed at improving nicotine release efficiency are primarily focused on enhancing nicotine delivery, refining the taste and aroma of the pouches, and optimizing mouthfeel and texture—ultimately enriching the overall user experience.



How top players patent portfolios have evolved over time?



Top-Ranked Patent in the Nicotine Pouch Landscape



US12245627B2 by Philip Morris International stands out for its **extensive global coverage** (filed for protection in over 30 countries), and **broad influence**, being cited by 50+ other players within the same or adjacent technological fields.



07 June 2019

The patent discloses an oral pouched product and a method for its manufacture. The pouch is a **saliva-permeable pouch filled with a non-tobacco composition**, further disclosing–

Ingredients– Heat-treated fibers, nicotine, water, sugar alcohol, pH-regulating agent, humectants, flavors, glidants, sweeteners, and preservatives.

Nicotine strength– 4.8 mg to 12 mg

Properties– Improved taste/ mouthfeel, extended shelf stability, and improved nicotine release

Nicotine release efficiency improvement methods– Using humectants and preservatives, release controlling composition such as magnesium stearate, Moisture content control, and using a suitable material for the pouch.

Top players cited by this patent



Top players citing this patent



The high number of forward citations indicates this patent’s foundational value in the nicotine pouch domain and suggests strong competitive relevance and ongoing technological influence.

Technology LEADerboard chart™

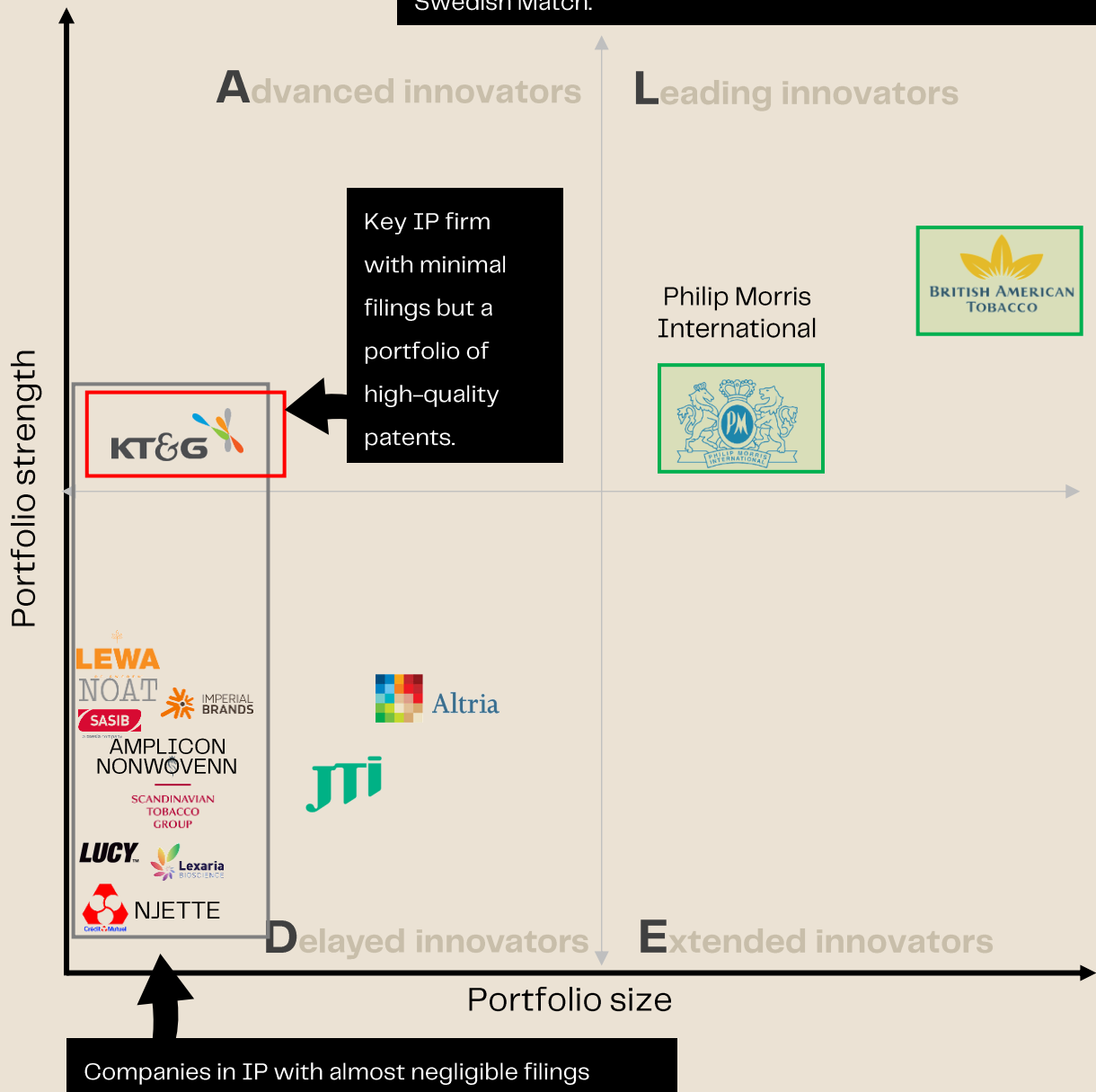


IP Overview

Leaders in IP also have a strong market presence



British American Tobacco and Philip Morris international have strong position in the IP LEADerboard chart, as well as wide product offerings in market. British American Tobacco markets its nicotine pouch under the brand “VELO”, while Philip Morris International owns “ZYN”, acquired through its purchase of Swedish Match.



FAQs



- ✓ What key technologies are driving advancements in nicotine pouch formulation and delivery?
- ✓ Which companies/institutions hold the most patents related to nicotine pouches?
- ✓ How is the nicotine in these pouches sourced or made?
- ✓ Which harm reduction outcomes have been observed in association with nicotine pouch use?
- ✓ What are the key ingredients and materials used to formulate nicotine pouches?
- ✓ Which companies currently have the strongest patent portfolios in this domain?
- ✓ What region-specific regulatory challenges or market opportunities exist?
- ✓ Which industries are investing in or collaborating on nicotine pouch innovations?
- ✓ What product offerings currently exist across different brands and regions?
- ✓ How can new entrants differentiate and establish a strong market presence?
- ✓ Which technologies are being used to enhance specific product attributes like improving nicotine release efficiency?
- ✓ Which academic institutions are open to collaboration in nicotine pouch and tobacco harm reduction research?
- ✓ What recent market activities, partnerships, or acquisitions stand out in the nicotine pouch domain?
- ✓ How is patent strength evaluated based on industry-focused parameters?
- ✓ What are the emerging technology trends in nicotine delivery beyond pouches?
- ✓ Can release/ delivery agents or functional ingredients enhance user experience or health impact?
- ✓ How do nicotine pouches interact with oral or gut microbiome health?
- ✓ Can nicotine pouch formulations be optimized for emotional states (focus, calm, energy)?
- ✓ What sustainable materials are being explored for pouch fabric and packaging?
- ✓ How recyclable or eco-friendly are the current nicotine pouch cans and sachets?
- ✓ What are the emerging regulatory pressures around sustainability for nicotine pouches?
- ✓ Which brands lead in sustainable innovation in the nicotine pouch space?



Do you want to see a complete report answering all the above questions along with other essential insights?



Then, you may set up a demo of our complete report by writing to us at info@icuerious.com or call at +1-(339)-237-3075 (USA) | +91-(988)-873-2426 (India)

About us?

ICUERIOUS is an intellectual property (IP) consulting firm providing full-service technology support for the entire stage of the IP process, with a focus on patents. We work closely with a diverse set of clients, including Fortune 500 companies, premier IP law firms, patent monetization and brokerage firms, independent inventors, and universities and focus on creating valuable IP ecosystems and patent monetization strategies via litigation and/or licensing. Our main services include prior art and invalidation searches, target scouting, evidence-of-use charting and detailed infringement analyses, patent drafting, open-source and proprietary source code review, competitor benchmarking and business/IP intelligence, technology landscaping and whitespace analysis reports, patent monitoring and market research.

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