



Vape Outlets Retail Landscape

Unveiling the Tobacco and Nicotine Retail Sales Landscape: Insights for Policy and Economic Research

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Introduction

Understand and address the implications of Vape shop growth

The e-cigarette and vape market in the United States is expected to reach a projected revenue of \$69.53 billion by 2030 with a compound annual growth rate of 29.8% from 2024 to 2030. This growth is driven in part by increasing awareness of safer tobacco alternatives and the popularity of personalized vapes.¹

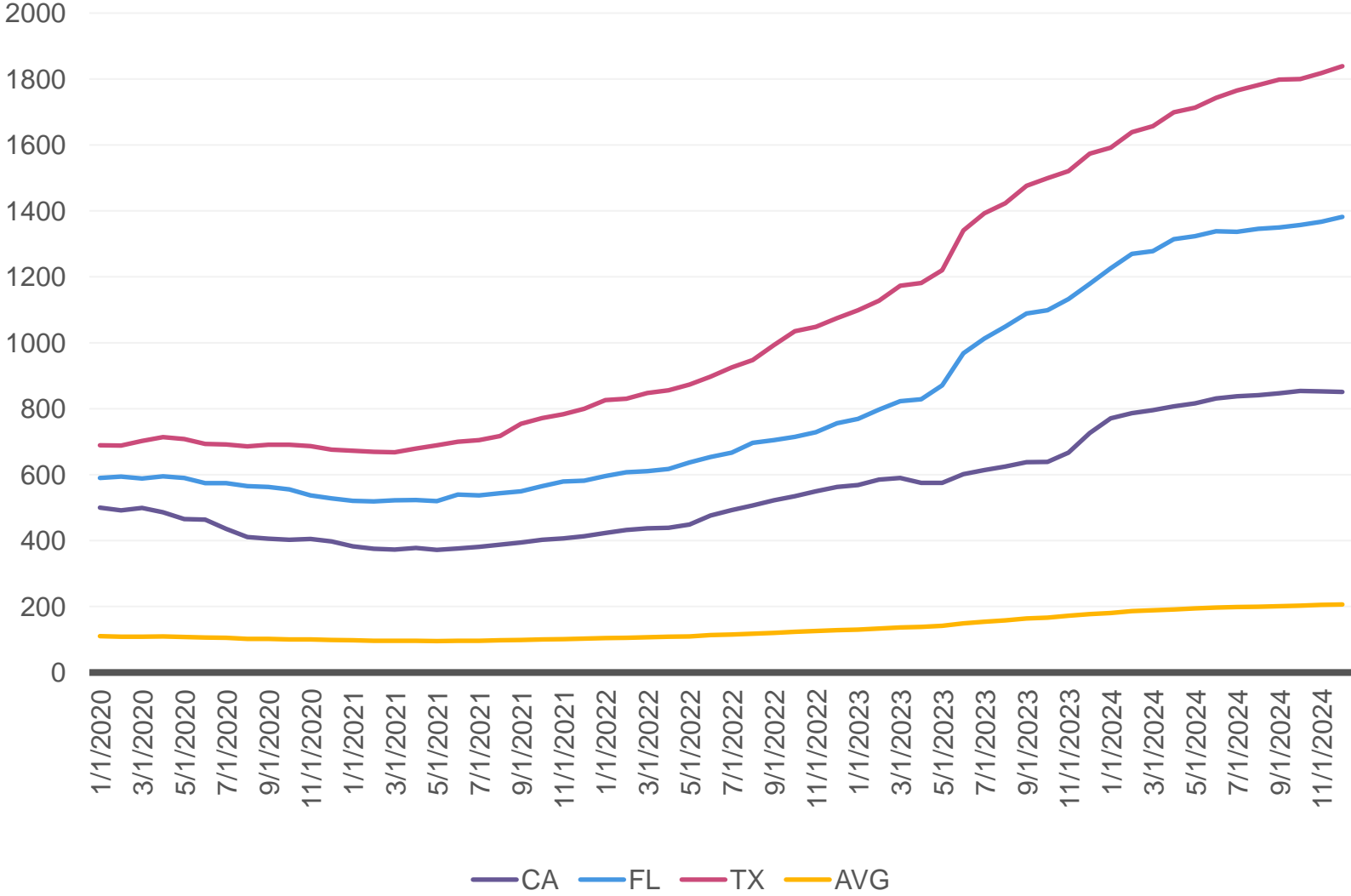
- Using NielsenIQ RMS and TD Linx data, this presentation explores the evolving landscape of tobacco and vapor product outlets in the United States.
- Focus will be on the growing number of vape store outlets, with a particular emphasis on the states of Texas, Florida, and California.
- Specifically, Texas will be used as a case study highlighting the impact of public policy on vape sales and total vape outlets at the state and county level.



Source: NielsenIQ TD Linx, Total US, WE 12/13/2024

Net Increase in Vape Stores primarily concentrated in Texas, Florida, and California

Total Vape Outlets Over Time by State

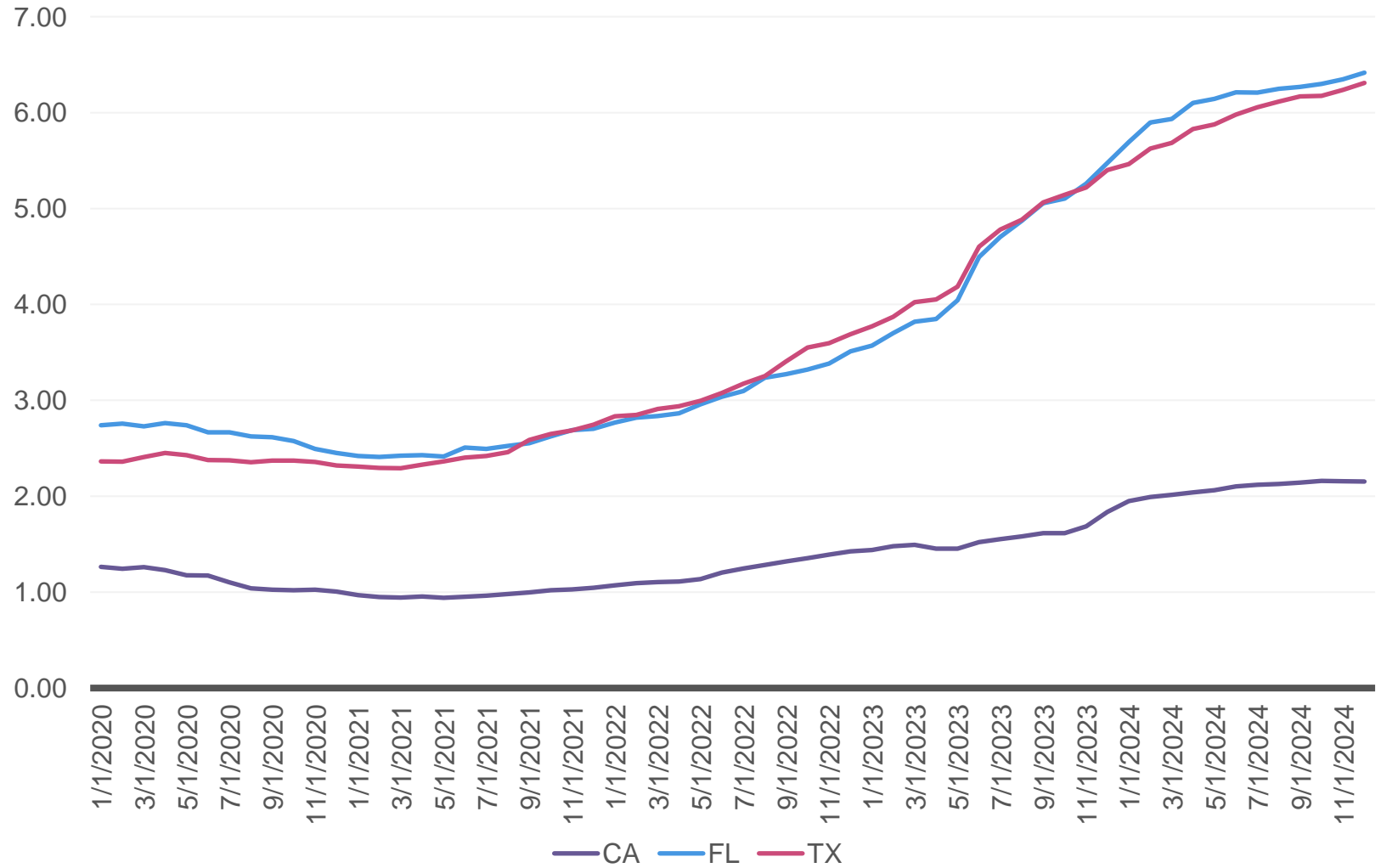


Source: NielsenIQ TDLinx, Total US, WE 12/13/2024

However, Texas and Florida vape outlets significantly outpace California per capita

Greatest Per Capita gains in Tennessee, North Carolina, and South Carolina

Vape Outlets per 100,000 Resident

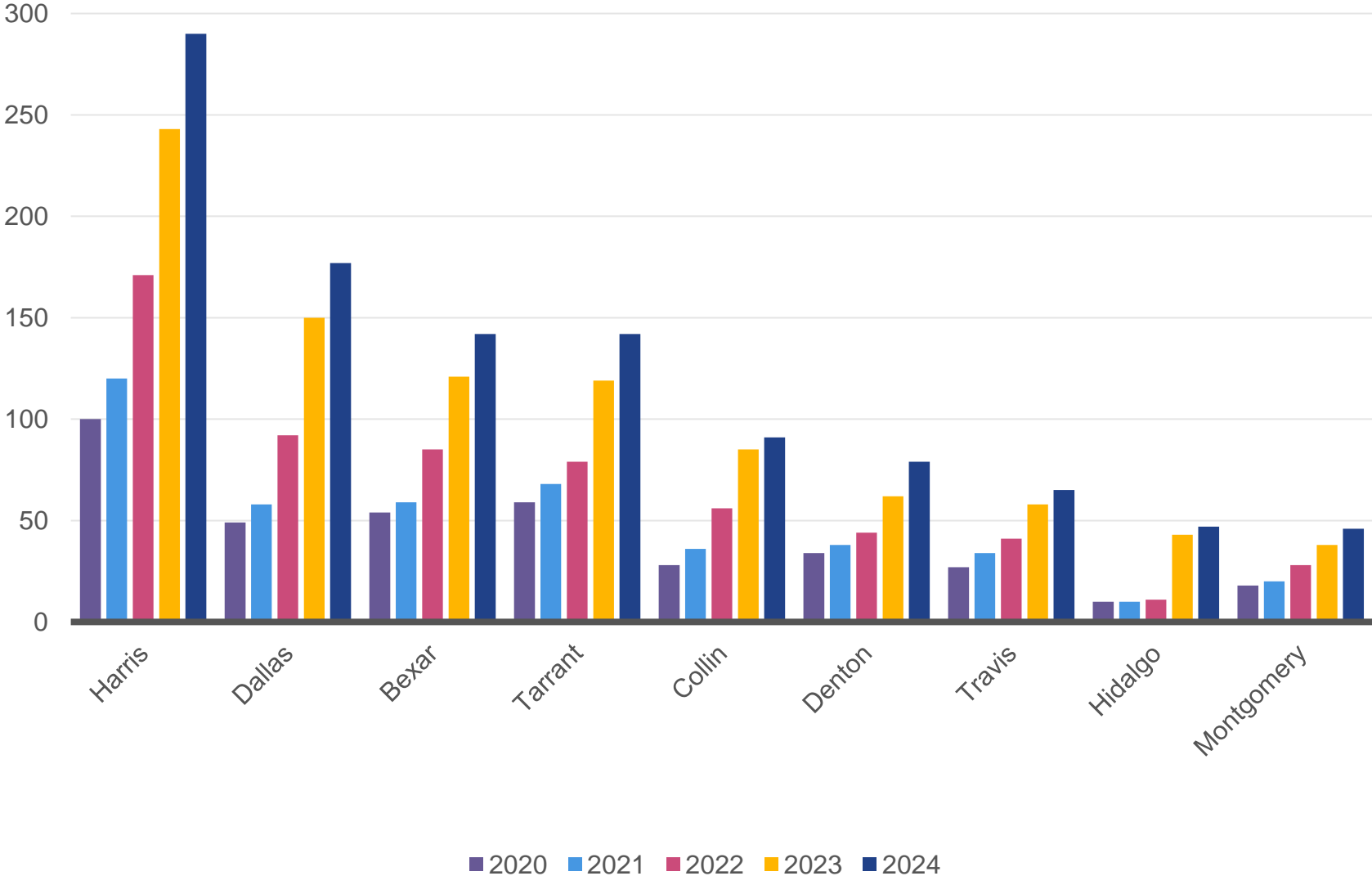


Source: NielsenIQ TDLinx, Total US, WE 12/13/2024 , 2020 US Census Data

Case Study: Texas

- Texas most populous counties have seen the highest growth in vape outlets over time.
- It's possible this growth will decline in 2025 as the state government and various counties bring in new legislation to combat vape products.
- For example, in early 2024 Texas banned the marketing of e-cigarettes to minors.³
- Taking effect December 2025, Dallas will join Houston and San Antonio in prohibiting vaping in places where smoking is already banned.⁴

Open Vape Outlets in Texas by County Over Time



Source: NielsenIQ TDLinx, Total US, WE 12/13/2024

Conclusion

The rise of vape stores is reshaping tobacco and vapor product sales

- While the growth of cigarette outlets is slowing down, the rise of vape stores, particularly in states like Texas, Florida, and California, is reshaping the landscape of tobacco and vapor product sales.
- Texas, with its unique regulatory environment, has seen a significant increase in vapor product sales and vape outlets, but upcoming legislation may impact this trend.
- As the markets move forward, it will be crucial to monitor these changes and their implications and impact.
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Source: NielsenIQ TDLinx, Total US, WE 12/13/2024

References

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5. [-hb-4758-food-and-drug-administration](#)
6. <https://www.dallascitynews.net/dallas-city-council-approves-vaping-ordinance-to-protect-public-health-and-improve-air-quality>

Thank you.

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