



# The Haypp Nicotine Pouch Report 2025

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## ABOUT THE REPORT

The Nicotine Pouch Report 2025 is produced by Haypp in collaboration with The 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 random sample of 1581 UK nicotine pouch customers from the Haypp.com and Northerner.com websites. The survey took place between February and March of 2025. These insights are complemented by full-year purchasing data for 2024 from over 35,000 customers.

# Executive Summary

## – The UK Nicotine Pouch Market at a Glance

### HIGH GROWTH CONTINUES IN THE UK NICOTINE POUCH MARKET

- The UK nicotine pouch market nearly doubled in 2024, growing by 95% year-on-year.
- Increasing awareness of the product is driving adoption, supported by new market entrants and product innovation.
- Legislative changes, such as the disposable vapes ban, as well as the upcoming Tobacco and Vapes Bill, are also shaping the UK market, establishing trust and legitimacy in the product.

### QUITTING SMOKING – THE PRIMARY MOTIVATION OF NEW NICOTINE POUCH USERS

- More than half of pouch users – 57% – started using nicotine pouches as a way to quit smoking.
- Another 27% used pouches to quit other nicotine products, primarily vapes.
- 95% of those who switched from smoking cigarettes to using nicotine pouches say they feel better having done so.

### WHO IS THE TYPICAL NICOTINE POUCH USER? MOSTLY URBAN MEN

- About four in five online buyers of nicotine pouches are men – typically in London or regions with large urban areas.
- The average nicotine pouch consumer uses around three cans of pouches per week and often switches between different products.

- The most common reason given for buying pouches online rather than in-store (for 81% of consumers) is that the prices are seen as attractive. Better assortment (56%) and convenience (51%) are also important.

### RISKS OF UNDERAGE ACCESS: ECOMMERCE VS. BRICK-AND-MORTAR STORES

- The typical nicotine pouch user is from an older demographic and began using pouches at age 33.
- Although the majority of survey respondents perceived online channels as being of greater risk for underage access, brick and mortar stores were the number one source of nicotine pouches for underage users, with 56% of underage pouch users saying they had bought from a corner shop.

### THE VELO BRAND AND MINT FLAVOUR DOMINATE THE MARKET

- Velo remains the clear market leader in the UK. Among the major brands, Velo, On!, Zyn, and Fix all grew faster than the overall market in 2024.
- Velo Ice Cool Mint Slim Strong is the top-selling product for the second year in a row.
- Mint is by far the most popular flavour, found in 58% of cans sold.

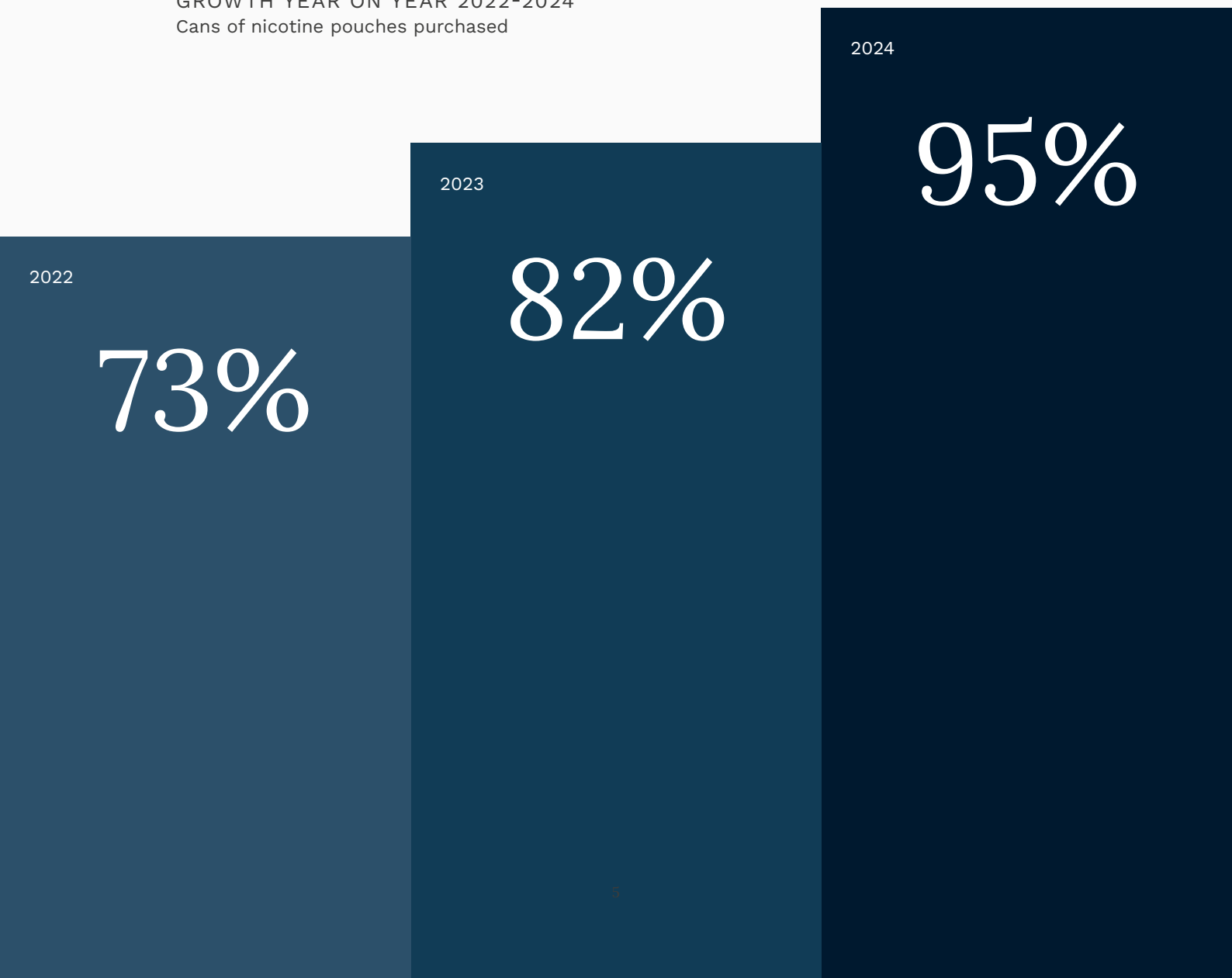
# The UK Nicotine Pouch Market 2025

# Swedish-born, thriving in the UK

Inspired by snus – a product deeply rooted in Swedish folk tradition dating back to the 17th century – nicotine pouches are gaining traction in the UK nicotine market. Since their introduction in 2019, nicotine pouches have seen a sharp rise in popularity. Use of nicotine pouches almost doubled in 2024 alone, with sales on major platforms like Haypp.com and Northerner.com increasing by 95%.

A key difference between nicotine pouches and traditional nicotine products – including Swedish snus – is that nicotine pouches do not contain tobacco and rarely have a tobacco flavour. This means that they do not have the negative health effects associated with smoking tobacco.

GROWTH YEAR ON YEAR 2022-2024  
Cans of nicotine pouches purchased

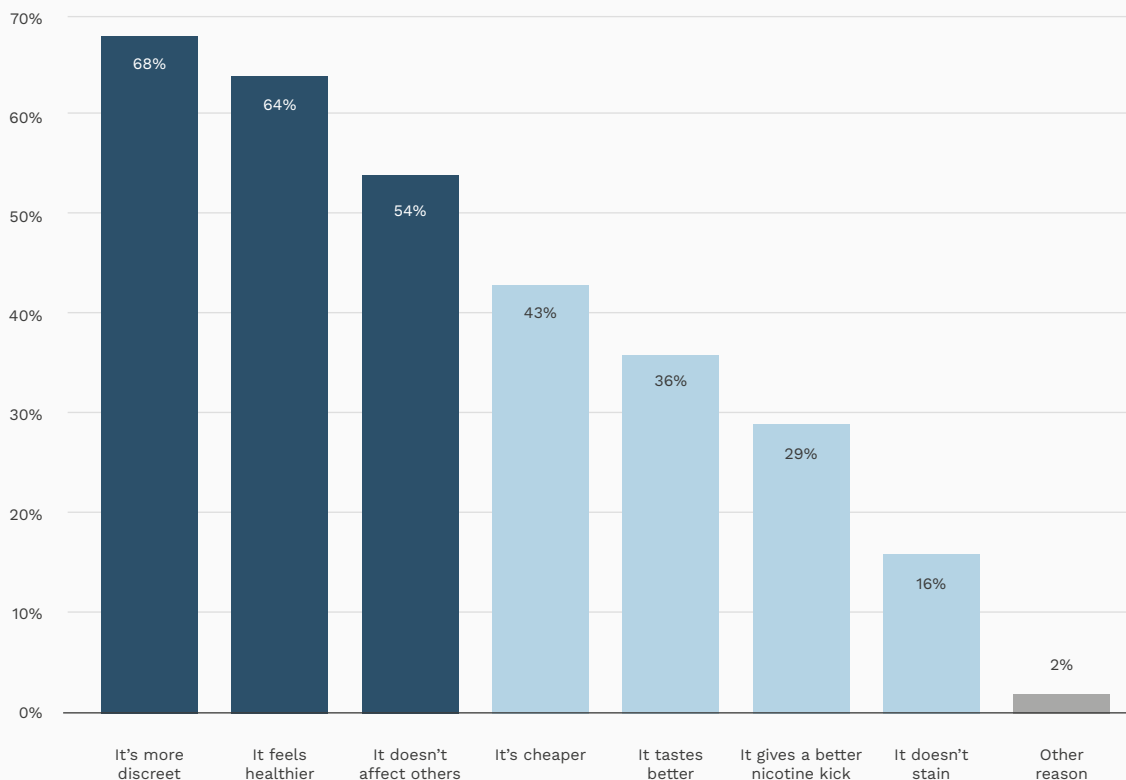


## Why are UK nicotine users turning to nicotine pouches?

UK pouch users highlight several advantages of nicotine pouches over other nicotine products. Over two-thirds (68%) say that pouches are more discreet, and 64% perceive them as being a healthier option compared with other nicotine products. More than half (54%) value that they do not affect people around them.

The benefits that UK nicotine pouch users care most about differ by age and gender. Younger users are more likely than older ones to perceive nicotine pouches as being healthier than other nicotine products. Women are more likely to see them as discreet and appreciate that they do not cause staining or discolouration of the teeth. Men are more inclined to say that nicotine pouches feel healthier, offer a stronger nicotine kick, and are more affordable than other nicotine products.

### ADVANTAGES OF USING NICOTINE POUCHES COMPARED TO OTHER TYPES OF NICOTINE PRODUCTS, ACCORDING TO USERS



# Drivers of Growth in the UK Nicotine Pouch Market

Several factors are combining to fuel rapid growth in the nicotine pouch market. These include a widespread shift among UK smokers to alternative nicotine products, social factors such as increased awareness and acceptance of nicotine pouches, and new market entrants bringing a range of innovative products to consumers. In addition, the introduction of new legislation to regulate nicotine pouches is building trust and legitimacy for the product.

## Drivers of growth



NICOTINE POUCHES REPLACING CIGARETTE SMOKING AND VAPING



SOCIAL ACCEPTANCE AND CULTURAL INFLUENCE



COMPETITION, INNOVATION AND GROWING CONSUMER OPTIONS



IMPROVED TRANSPARENCY AND AWARENESS



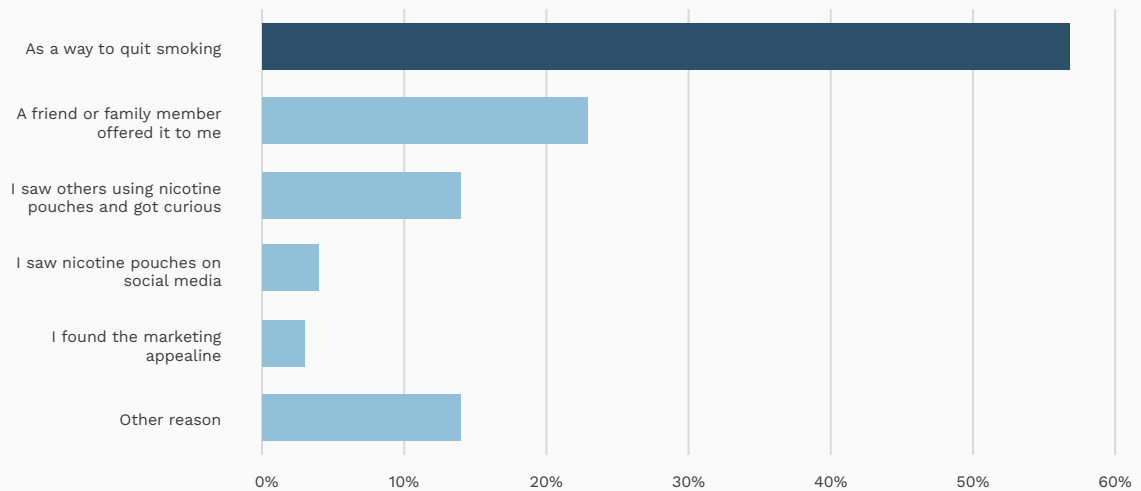
LEGISLATION BUILDS TRUST AND DRIVES NEW MARKET SHIFTS

## Smokers switching to nicotine pouches

In the UK, in 2023, 11.9% of adults smoked, which equates to around 6.0 million people in the population. Smoking is the leading cause of preventable deaths in the UK. According to the NHS, 75,000 people in the UK died from smoking-related causes in 2019, accounting for 15% of all deaths. Over the past ten years, the UK has seen large numbers of smokers switch to alternative nicotine products such as vapes, and consequently, a significant reduction in the overall smoking rate.

44% of nicotine pouch customers at Haypp.com and Northerner.com are former smokers. Nearly six in ten nicotine pouch users (57%) say quitting smoking was their main reason for using nicotine pouches, making it the most common motivation by far.

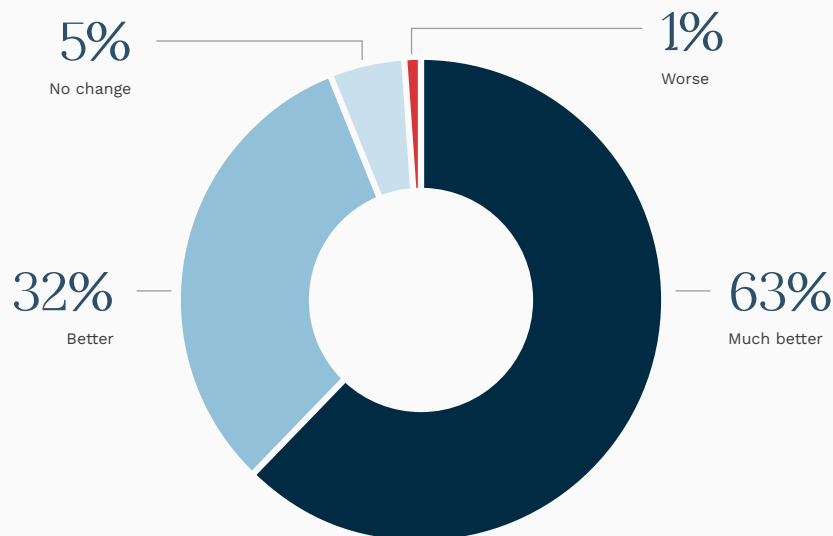
## WHY DID YOU START USING NICOTINE POUCHES?



## Switching from smoking to pouches increases feelings of well-being

The vast majority of those who switch from cigarettes to nicotine pouches report feeling better overall – 95% say their well-being has improved. Nearly two-thirds (63%) say they feel “much better”, 32% feel “better”, and just 5% report no change. In this context, it is worth noting that it is not only the individual who benefits from quitting smoking. For every smoker who quits, there is a societal gain, such as less pressure on the healthcare system and reduced sick days at work.

## FEELINGS OF WELL-BEING AFTER SWITCHING FROM CIGARETTES TO NICOTINE POUCHES





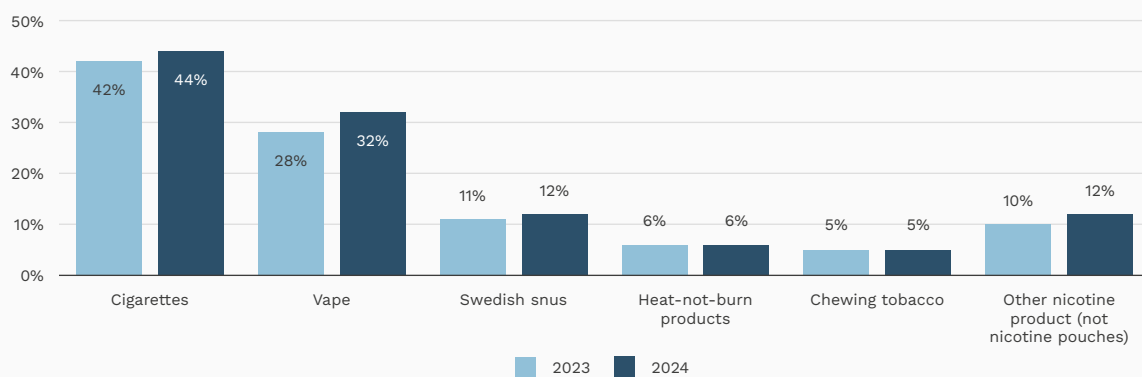
## A path to pouch? Growing numbers of vapers are switching to pouches

Over a quarter of nicotine pouch users (27%) say they began using pouches to quit nicotine products other than cigarettes. 70% of this group said they were using pouches to try to quit vapes. Overall, the rise in nicotine pouch use reflects a broader shift in the UK from smoking to alternative nicotine

products. For some people, the transition happens in stages. Many of the pouch users who previously vaped began as cigarette smokers. Nearly one-third (32%) of Haypp and Northerner's UK nicotine pouch customers are former vape users – up from 28% in 2024.

### FORMER USERS OF VARIOUS TOBACCO AND NICOTINE PRODUCTS AMONG NICOTINE POUCH USERS

Base: Customers of Haypp.com and Northerner.com



## Nicotine Pouches and Perceptions of Risk

Is there truth to Shakespeare's line that "There is nothing good or bad but thinking makes it so"? Ultimately, our perceptions of risk shape how we act.

As increasing numbers of UK smokers are turning to alternative nicotine products as a means to quit, they are seeking to assess the relative risks of new products and identify what alternatives will work best for them.

In terms of estimating risk, the nicotine pouch users surveyed tended to greatly overestimate the relative risk of nicotine pouches compared with cigarettes and other nicotine products. On a ten-point risk scale — where 1 means "completely harmless" and 10 means "very dangerous" — nicotine pouch users rate tobacco-free nicotine pouches at an average of 3.9. Nicotine-free pouches are seen as the least harmful, with an average score of 3.1, while cigarettes top the list at 8.9, followed by chewing tobacco (7.7) and heat-not-burn

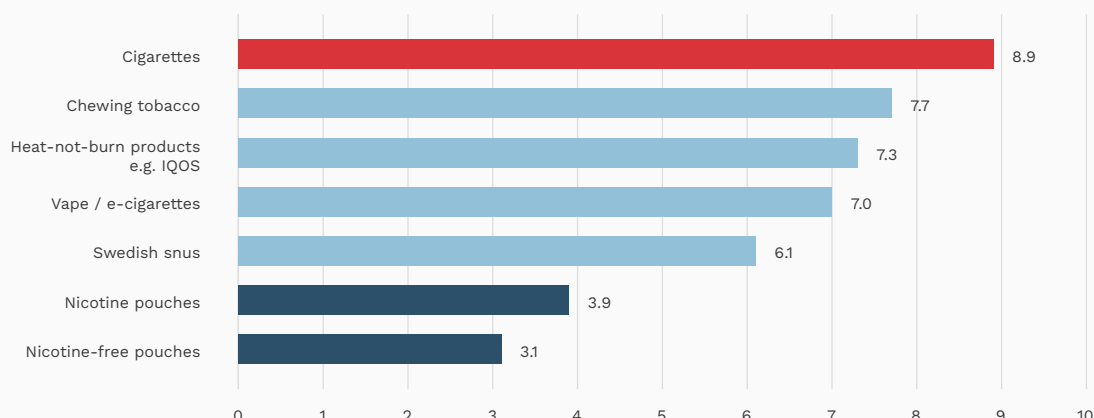
products (7.3). While the ranking is accurate, the scores are not, as cigarettes are many times more harmful than nicotine pouches.

As a relatively new product, the evidence on the effects of long-term nicotine pouch use is still limited. However, the product has been used extensively in Sweden since 2016 and is considered one of the factors in the exceptionally low smoking and lung cancer rates.

One of the reasons for UK pouch users overestimating the relative risk of pouches may be the very negative coverage of the product that has begun to appear in the UK media. The coverage is often inaccurate and not supported by evidence. Alarmist media stories can make for eye-catching headlines but confuses consumers and can discourage smokers from considering alternative products.

## POUCH USERS' PERCEIVED RISKS OF NICOTINE AND TOBACCO PRODUCTS

Average between 1 and 10, where 1="completely harmless" and 10="very dangerous"



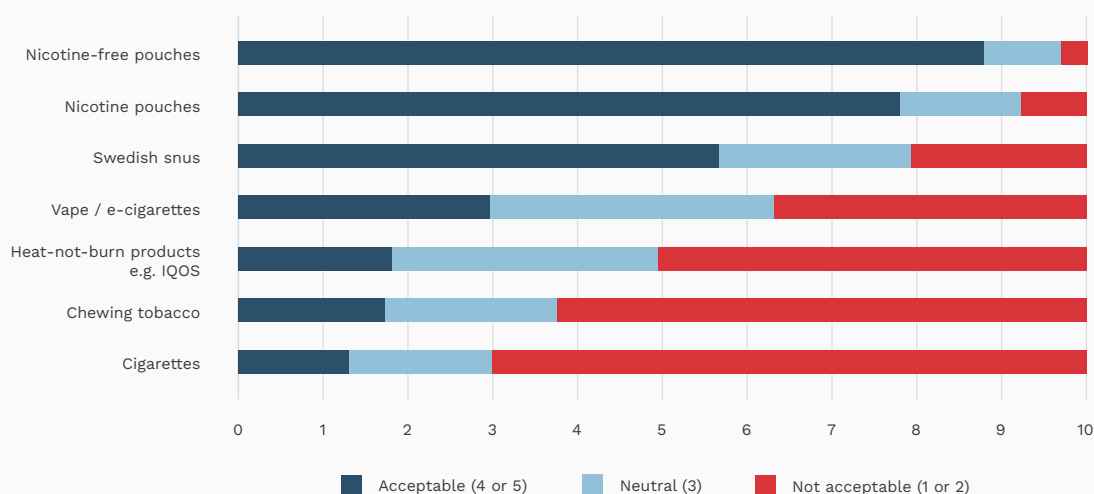
## Social acceptance and cultural influence

Social factors inevitably influence why people begin using nicotine pouches. One in four pouch users (24%) were introduced to pouches after being offered one by a friend or family member. One in seven (14%) became curious after seeing others using them. In contrast, just 3% say they were influenced by marketing. Rather than direct advertising, UK consumers may be influenced by cultural or sporting figures – such as well-known footballers – who are users of nicotine pouches.

Among UK consumers, nicotine pouches are already considered socially acceptable compared with other nicotine products. This high level of acceptability is likely partly driven by the fact that pouches do not harm others. Unlike smoking, oral nicotine does not expose people nearby to second-hand smoke, unpleasant smells, or other negative side effects. Over half of pouch users (54%) cite this as one of the key benefits of nicotine pouches compared to other nicotine products.

## SOCIAL ACCEPTANCE FOR DIFFERENT NICOTINE AND TOBACCO PRODUCTS

Pouch users' grading on a scale on which 1 means "not acceptable at all" and 5 means "completely acceptable"



## Cultural Influence – Are Football Icons Behind the Surge in Nicotine Pouch Popularity?

The public use of these products by top athletes – including footballers Jack Grealish and Jamie Vardy – has helped to shape the modern UK nicotine pouch culture. These high-profile examples may reinforce the idea of pouches as a way to relax without the need to use alcohol or cigarettes, while also staying fit and mentally sharp ahead of matches.

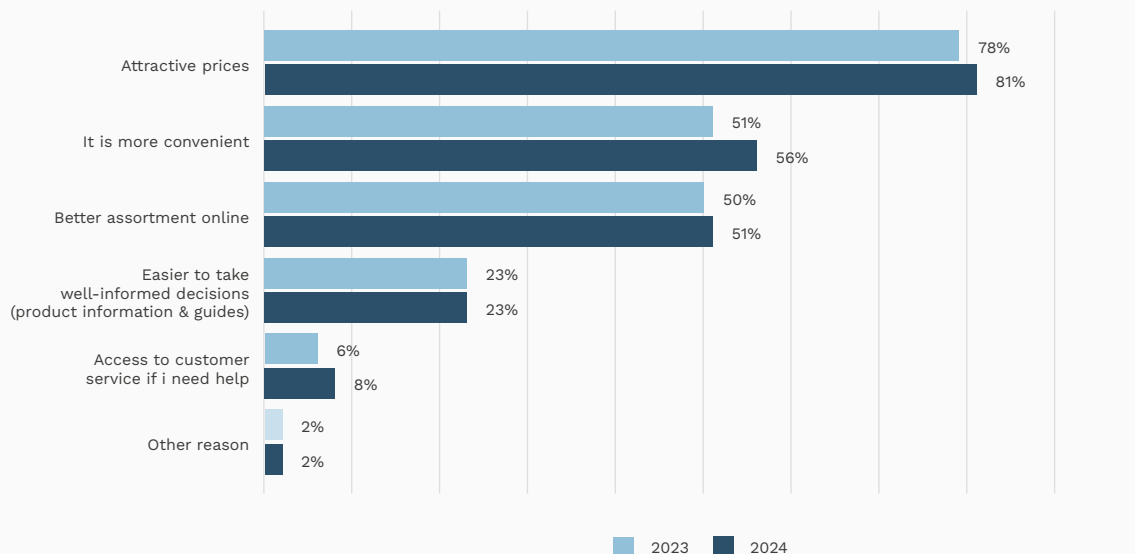


## New market entrants, product innovation, and the rise of online retail

The UK market for nicotine pouches is growing fast, driven by new market entrants, product innovation, and the rise of online sales. As a result, consumers now have access to an ever-expanding range of nicotine pouch products. In 2024 alone, 182 new nicotine pouch products were launched on Haypp.com and Northerner.com — including products with new flavours, strengths, and formats. In addition, at least 11 new brands entered the UK market.

A key reason for this growth in product choice is the increasing availability of nicotine pouches through online channels, which can offer consumers a far broader assortment than traditional brick-and-mortar stores. Online shoppers point to price (81%), convenience (56%), and product variety (51%) as the main advantages of buying nicotine pouches online.

### WHY DO YOU BUY YOUR NICOTINE POUCHES ONLINE?



## Improved market transparency and consumer information

As the UK nicotine pouch market matures, consumers and regulators are demanding higher-quality product information. Transparency around product content and standardised product information will help drive higher product quality standards and protect consumers. It can also help drive further product innovation.

The online channel has an important role to play in educating and informing consumers. It creates new opportunities for sharing information — not only about brands, flavours and strengths, but also about product safety, quality, and testing. More than half of online nicotine pouch buyers (51%) check product quality and safety information before making a purchase, compared to 32% in physical stores. One explanation for this difference is that online shoppers are under less time pressure and can take their time to review the information. Another factor is that better product information in a more easily accessible format is available for consumers online, compared with having to rely on the knowledge of a staff member in a store.

Haypp Group tests all nicotine pouches before placing them on the market to ensure they meet the highest quality and safety standards. All test results are made publicly available on the [Nicoleaks.com](https://nicoleaks.com) website.

### SHARE OF CONSUMERS WHO CHECK INFORMATION ABOUT PRODUCT QUALITY AND SAFETY BEFORE BUYING NICOTINE POUCHES



## New legislation is shaping the future of the nicotine pouch market

The *Tobacco and Vapes Bill*, which is progressing through Parliament at the moment, marks the most significant overhaul of nicotine regulation in years. Nicotine pouches will be subject to new regulations. Sales of nicotine pouches to individuals under 18 will be banned across the UK, closing previous loopholes that allowed minors to access these products. The bill will prohibit the advertising and sponsorship of all nicotine products, including vapes and nicotine pouches, aligning with existing tobacco restrictions. The government will have powers to regulate the flavours, packaging, and display of all nicotine products, including nicotine pouches. In addition, retailers will need a licence to sell nicotine and tobacco products.

Haypp has long called for robust regulation of the nicotine pouch market in the UK. The Tobacco and Vapes Bill provides a regulatory framework that will bring clarity and certainty for responsible nicotine pouch retailers and introduce barriers to entry and penalties for rogue operators.

Additionally, the Disposable Vapes Ban came into force on 1 June 2025. This bans the sale of single-use vapes. The ban is a response to the damaging environmental impact the incorrect disposal of single-use vapes has had in the UK. Disposable vapes were also considered to be more attractive to underage users.

A likely outcome of these regulatory changes is continued growth in nicotine pouch use. As disposable vapes disappear from the market, many vapers will look for alternatives, and pouches represent a convenient, discreet, and accessible option. At the same time, stronger regulation is expected to increase public trust and the perceived legitimacy of nicotine pouches, further encouraging adoption.

# Preventing Underage Access

Underage access to nicotine pouches has become a common topic for discussion in the UK media. As these products are intended for adults only – especially smokers seeking alternatives to cigarettes – concerns have been raised about underage access, particularly via online channels.

With the Tobacco and Vapes Bill due to come into force this year, nicotine pouches will be subject to much stricter regulation in the UK. The new rules are expected to include measures to help prevent youth access, including a licensing scheme for retailers selling nicotine products and penalties for those who sell nicotine pouches to anyone under 18. New regulation is only as effective as its enforcement, but a combination of robust enforcement, smart digital solutions, and responsible behaviour by retailers can

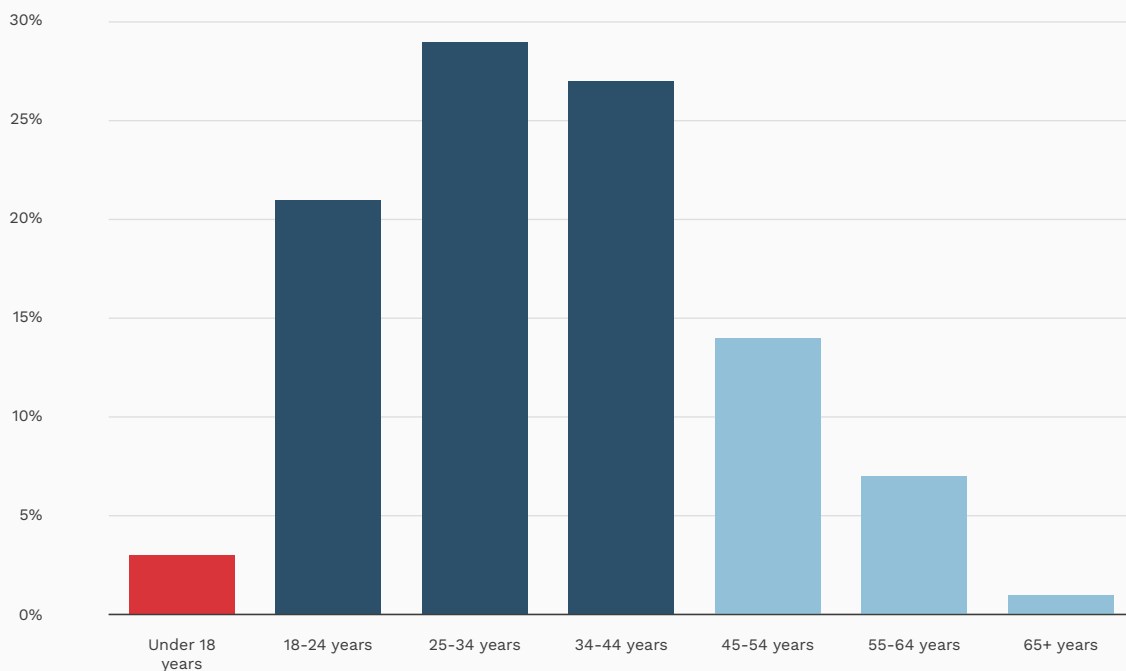
create a market for nicotine pouches where adult freedom of choice and youth protection go hand in hand.

## The typical first-time pouch user is 33 years old

The typical first-time user of nicotine pouches is 33 years old, i.e. well into adulthood. Only 3% of pouch users report having started using nicotine pouches before the age of 18.

This stands in contrast to other adult products such as cigarettes or alcohol, which are often introduced in adolescence. For instance, according to the NHS, young people are typically introduced to alcohol between the ages of 13 and 14.

### FIRST TIME USE OF NICOTINE POUCHES



## How minors access nicotine pouches: perception versus reality

The majority of survey respondents – 61% – believe it is easier for minors to buy nicotine pouches online rather than in brick-and-mortar store. This perception, however, is likely influenced by the broader public debate about the influence of social media and does not necessarily reflect reality.

In fact, the majority (56%) of nicotine pouch users who say they purchased products while under 18 obtained them from corner shops. Furthermore, 31% sourced them from friends, and 17% acquired them from supermarkets. 21% said they purchased them online. The predominance of corner shops as a source for minors may be partly due to the sheer number of such shops selling nicotine pouches, with many of them likely to have less stringent age-verification practices compared to regulated online retailers.

61%

...believe it is easier  
for minors to obtain  
nicotine pouches online

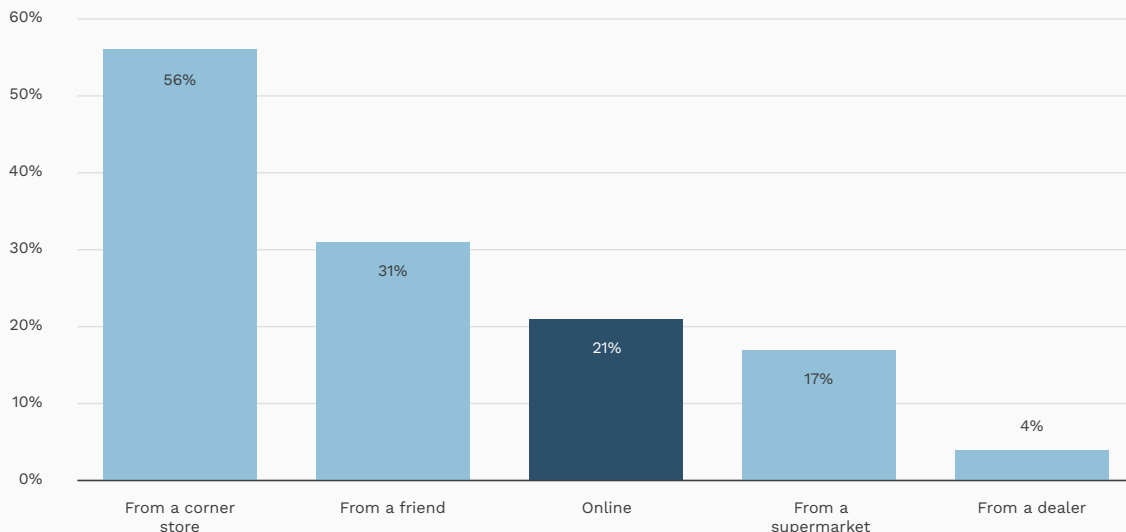
56%

...of those who bought  
pouches when underage  
got them in a corner shop

73%

...the total that bought  
from brick-and-mortar  
stores

### HOW MINORS ACTUALLY GET HOLD OF NICOTINE POUCHES



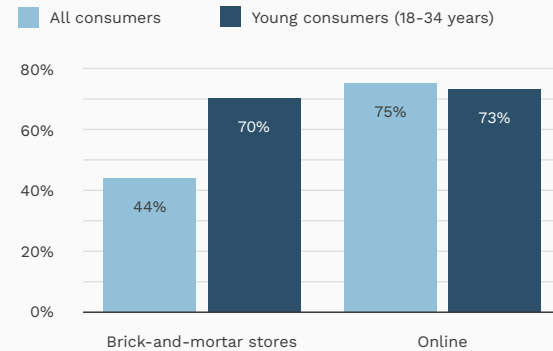
## More consistent age verification processes online

A key element in the prevention of underage access is having robust and reliable age verification procedures in place. In brick-and-mortar retail stores, age checks are typically performed face-to-face by staff, whereas online sales rely on digital age verification systems. These systems can enforce mandatory checks more consistently and leave a traceable record, whereas in-store verification depends on staff discretion, which can be inconsistent, bypassed, or prone to human error.

More survey respondents report being asked to verify their age when buying nicotine products online (75%) than in physical stores (44%). Most of the gap can be explained by more universal standards and protocols online, where checks are typically applied even to older consumers who would normally not be asked for an ID in-store. Online verification processes remove the potential for human error or discretion when assessing a potential customer's age. This ensures consistent application of the legal age verification requirements.

Preventing underage access is a priority for Haypp Group, and so both Haypp and Northerner operate 100% customer age verification before any orders can be placed online. This robust process is market-leading and puts Haypp at the forefront of efforts to prevent underage access in the UK.

## HAVE YOU EVER BEEN ASKED TO VERIFY YOUR AGE IN STORE/ONLINE?

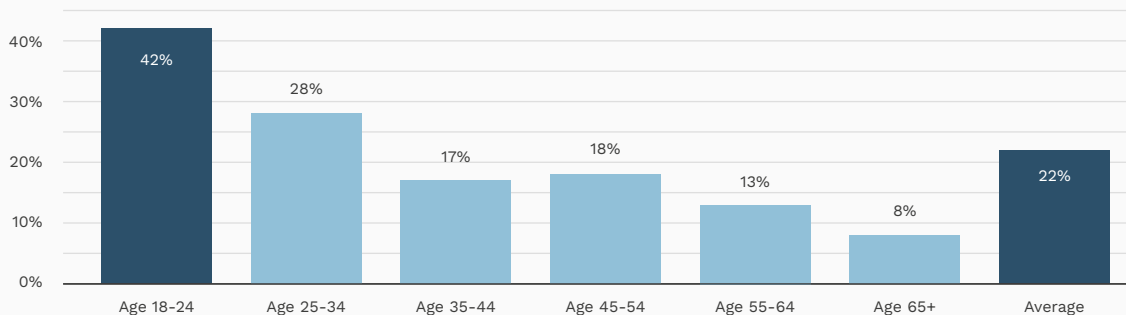


## The complex role of social media in the UK nicotine pouch market

Social media plays a complex role in exposing young people to adult products such as nicotine pouches. Around one in five nicotine pouch users (22%) report typically seeing nicotine pouches on social media, a figure that rises to around two in five among those aged 18 to 24. When used responsibly, social media platforms can help to educate consumers about alternative nicotine products and responsible consumption. However, when used irresponsibly, social media can amplify risky behaviours and promote access to adult products among underage people. Haypp Group does not believe in promoting alternative nicotine products via social media.

## DO YOU REGULARLY SEE NICOTINE POUCHES ON SOCIAL MEDIA?

Share of users responding with a “yes”



# A Closer Look at the Nicotine Pouch Consumer

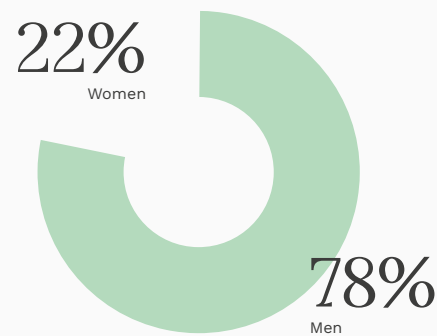


According to a study published in *Nicotine and Tobacco Research*, around 5% of the UK adult population has tried nicotine pouches, but only 1% are current pouch users.<sup>1</sup> Nicotine pouch users span the full adult age range – from 18 to over 90 years – and are found across all regions of the country.

People aged 35 and over make up more than half of the online market for nicotine pouches. The market is currently dominated by the brand Velo, which holds just over a third of the market share at 35%. Mint remains the most popular flavour among nicotine pouch users.

## The Nicotine Pouch Gender Gap

Men currently make up the vast majority of the online market for nicotine pouches, accounting for 78% of all purchases. In 2024, growth was strong across the board – 99% among men and 82% among women. This is in contrast to Sweden, where the gender split among nicotine pouch users is 62% male and 38% female.

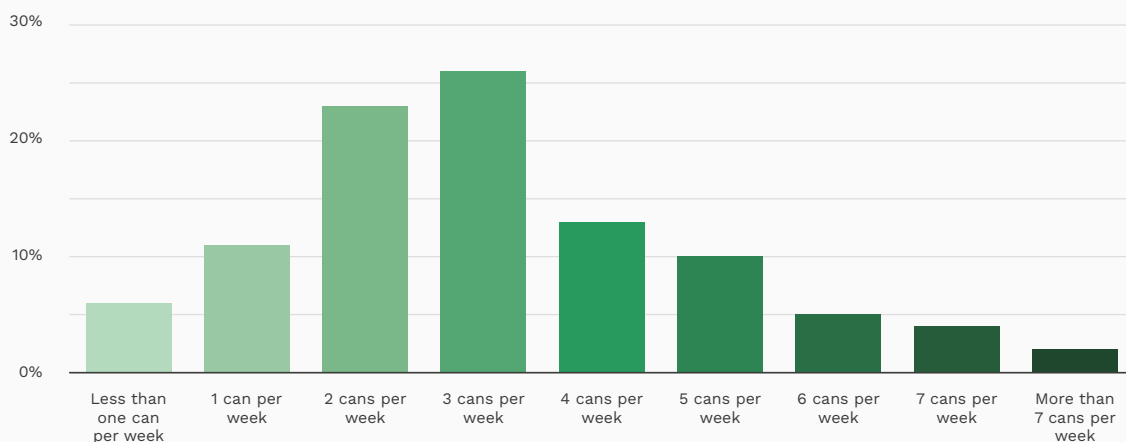


## High-Frequency Use Most Common in Scotland

The average nicotine pouch user consumes three cans per week. One in five pouch users can be classified as “high-frequency user” – someone who uses five or more cans per week.

Scotland reports the highest average consumption, at 3.3 cans per week, while the North East of England has the lowest, at 2.8 cans. Scotland also has the largest share of high-frequency pouch users – one in four (24%) report using five or more cans weekly.

### HOW MANY CANS OF NICOTINE POUCHES DO YOU USE PER WEEK



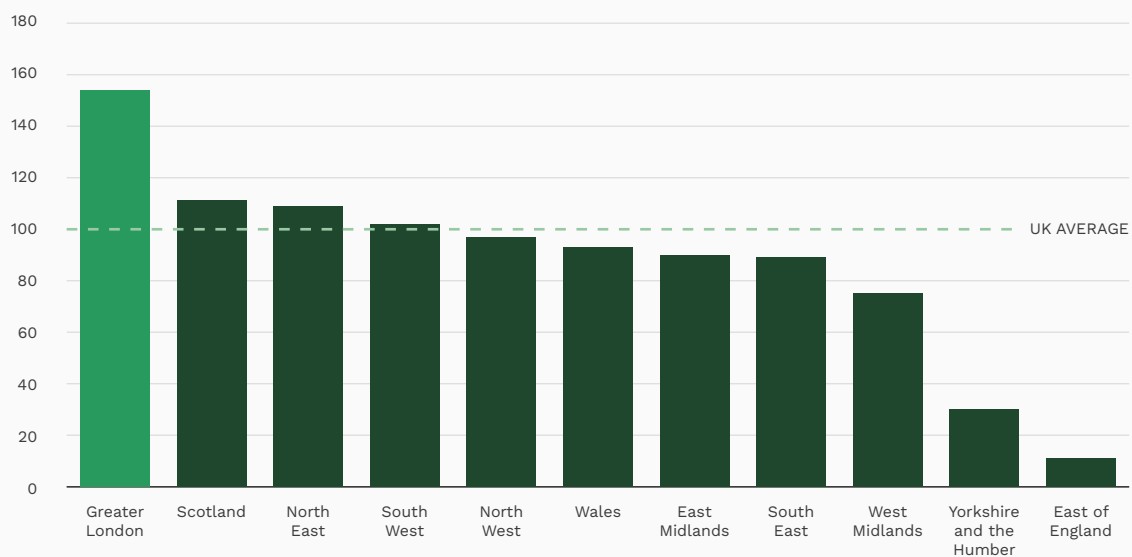
<sup>1</sup> Brose, L. Bunce, L. and Cheeseman, H (2025). *Prevalence of Nicotine Pouch Use Among Youth and Adults in Great Britain—Analysis of Cross-Sectional, Nationally Representative Surveys*, *Nicotine & Tobacco Research*, XX, pp. 1–10.

## Londoners Lead Online

When looking at per capita sales from Haypp.com and Northerner.com, the most frequent buyers are based in the Greater London area. This may be because Londoners are well accustomed to online shopping and the region has a population younger than the UK average. By contrast, the lowest number of cans sold per capita online is found in the East of England.

### REGIONAL POUCH PURCHASING LEVELS IN 2024

UK average = 100



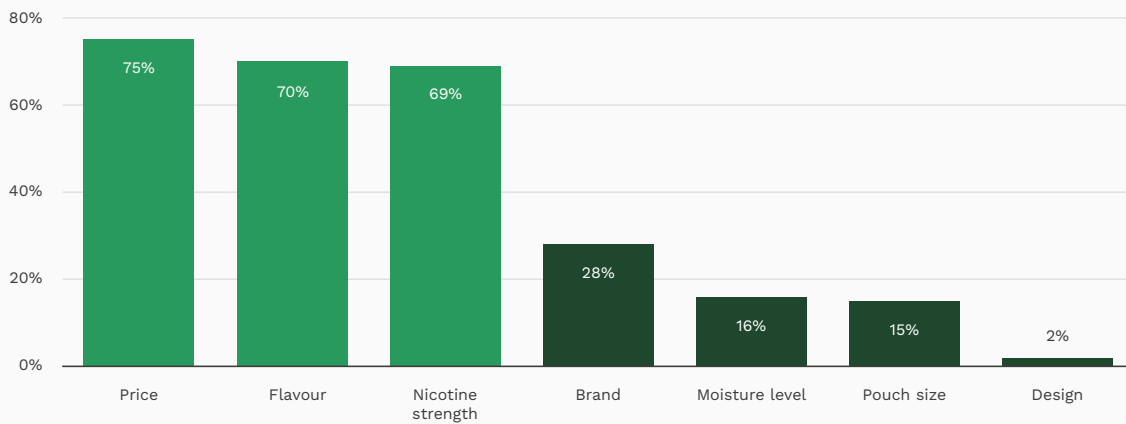
## Price, Taste and Strength – Key Factors in the Purchase Decision

Three in four nicotine pouch users (75%) say price, and seven out of ten (70%) cite taste, as one of the three most important factors when choosing a nicotine pouch. A similar share (69%) say that nicotine strength plays a decisive role in their selection.

For both men and women, price is the number one factor, followed by taste and nicotine strength. However, nicotine strength matters more to men, while brand preference is more important to women. Among older nicotine pouch users, strength, price, and flavour tend to rank higher.

## THE MOST IMPORTANT FACTORS WHEN BUYING NICOTINE POUCHES

Three alternative possible

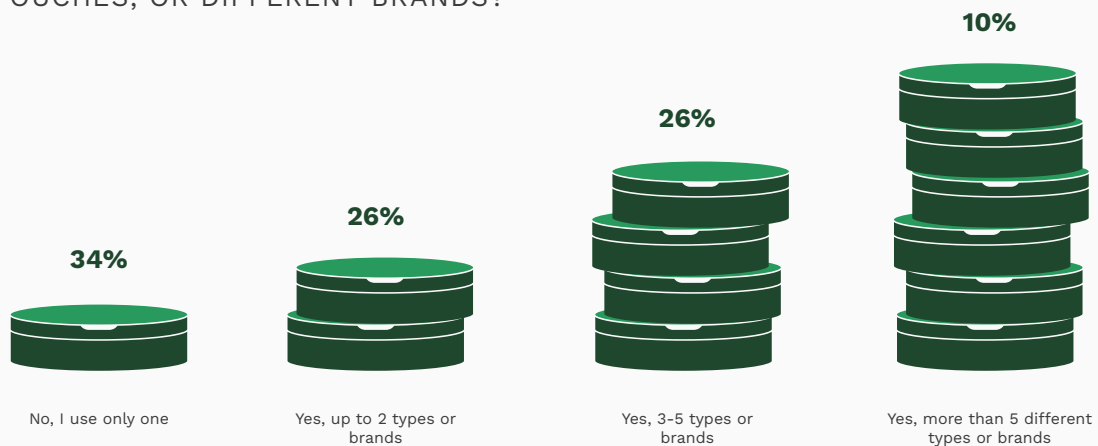


## Switchers Outnumber Product Loyalists

Just over a third of nicotine pouch users (34%) stick consistently with the same product, while 66% rotate between two or more. As the market is still relatively new, many consumers have not yet developed strong brand loyalty.

The most common reason for switching products – cited by 57% of nicotine pouch users – is simply the experience of trying new varieties and brands. For six in ten pouch users (59%), price is the main motivation to try a new product. A third (32%) are tempted by new flavours, while a similar share (31%) say they are likely to try something new when their favourite flavour appears in a different format or strength.

## DO YOU BUY DIFFERENT TYPES OF NICOTINE POUCHES, OR DIFFERENT BRANDS?



# Products on the Podium in 2024

The leading brand in 2024, in terms of units sold, was Velo, followed by Nordic Spirit and On!. Together, these three accounted for 57% of all cans sold on Haypp.com and Northerner.com during the year.

Velo had the strongest growth among the top brands, solidifying its number one position. On! also grew rapidly, overtaking Loop to claim third place. Loop ended the year in fifth, reflecting a drop in market share despite growth in absolute numbers.

While all top-tier brands saw strong gains in an expanding market, several outpaced the overall market growth rate of 95% — particularly Velo, On!, Zyn, and Fix.

THE BRAND THRONE		
Brand & market share		
Velo	Nordic Spirit	On!
35%	12%	9%

## Brits Like It Strong

Nicotine pouches are available on Haypp.com and Northerner.com in four strength levels – from “less intense” to “extra strong” – plus a separate nicotine free category. Extra strong pouches are the clear favourite, accounting for 48% of all cans sold. “Normal” strength ranks second at 29%, followed by “strong” at 16%.

It should be noted that Haypp Group supports and follows the policy of the Swedish Institute for Standards, which recommends a [maximum amount of nicotine per pouch of 20mg](#).

We believe higher levels of nicotine do not lead to higher levels of customer enjoyment, and for some people, it may lead to a poor experience. Therefore, Haypp Group does not sell any nicotine pouches that contain over 20mg nicotine strength.

TOP STRENGTHS		
Strength & market share		
Extra strong	Normal	Strong
48%	29%	16%

TOP POUCH SIZES		
Size & market share		
Slim	Mini	Large
83%	16%	1%

## Mint is by Far the Most Popular Flavour

Unlike many traditional nicotine products, which are typically tobacco-flavoured, nicotine pouches come in a wide variety of flavours. Mint is by far the most popular in the UK, found in six out of ten cans sold (59%).

Fruit flavours come in second place, making up 22% of cans sold, followed by citrus at 8%.

TOP FLAVOURS		
Flavour & market share		
Mint	Fruit	Citrus
59%	22%	8%





# The UK Regional Nicotine Pouch Map

## **East of England - Flavour Explorers**

People in the East of England are more likely to try new pouches because of new flavours – 40% say this, compared to 32% across the UK.

## **East Midlands - Cigarette quitters**

East Midlanders are more likely to use nicotine pouches to quit smoking – 68% started for this reason, compared to 57% nationally.

## **Greater London - Brand-driven pouch users**

Londoners care more about brands – and less about nicotine strength or price – than nicotine pouch users in other parts of the UK.

## **North East - Price hunters**

People in the North East are more likely to try new products because of low prices – 71% vs 59% across the UK.

## **North West - Less price sensitive online**

North Westerners shop online less for price reasons – 71% say so, compared to 81% nationally.

## **Northern Ireland - Online value seekers**

Northern Irish pouch users are the UK's most active online buyers – 66% buy all their pouches online (vs. 51% UK average). Price matters a lot to Northern Irish consumers, which helps explain their high online activity.

## **Scotland - Values choice and convenience**

Scots shop online for better product selection (60% vs. 50% UK average) and buy in-store when they need pouches immediately (71% vs. 57%).

## **South East - Discrete pouch users**

People in the South East value the discretion of nicotine pouches – 71% use them for this reason, compared to 61% nationally.

## **South West - Multi-can pouch users**

South Westerners use more pouches per person – 67% go through at least three cans per week (vs. 59% UK average).

## **Wales - Flavour lovers**

Taste matters most in Wales – 84% say flavour is a top 3 reason when choosing products, compared to 70% across the UK.

## **West Midlands - Informed online shoppers**

Nicotine pouch users in the West Midlands rely more on product information and guides – 33% mention this as a reason to shop online, compared to 23% nationally.

## **Yorkshire and the Humber - High frequency nicotine pouch users**

People in Yorkshire and the Humber exhibit the largest proportion of everyday use (93 %) among Haypp.com's and Northerner's customers.

# Detailed Toplists

Brands, Products, Flavours, Strengths and Pouch Sizes

## MOST PURCHASED BRANDS IN 2024 – TOP 10

Ranking	Brand	Change compared to 2023
1	Velo	-
2	Nordic Spirit	-
3	On!	+1
4	Zyn	+1
5	Loop	-2
6	XQS	+4
7	Helwit	-1
8	Fix	+5
9	White Fox	-
10	Klint	-3

## MOST PURCHASED PRODUCTS IN 2024 – TOP 10

Ranking	Product	Change compared to 2023
1	Velo Ice Cool Mint Slim Strong	-
2	Velo Freeze Slim Strong	-
3	Velo Freeze Max 17mg	+2
4	Velo Polar Mint Slim Normal	+7
5	On! Mint 3mg	+17
6	Nordic Spirit Spearmint Regular	+3
7	Nordic Spirit Mint Regular	+3
8	Velo Ruby Berry 10mg[JA1.1]	NEW
9	Zyn Citrus Mini Strong 6 Mg Uk	NEW
10	Nordic Spirit Spearmint Strong	+5

## MOST PURCHASED NICOTINE POUCH FLAVOURS IN 2024 – TOP 10

Ranking	Flavour	Change compared to 2023	Share
1	Mint	-	59%
2	Fruit	-	22%
3	Citrus	-	8%
4	Spices	+4	5%
5	Coffee	-1	3%
6	Liquorice	-1	1%
7	Tobacco	+1	0%
8	Other	-	3%

## STRENGTHS 2024 – TOP 4

Ranking	Format	Share
1	Extra Strong	48%
2	Normal	29%
3	Strong	16%
4	Less Intense	6%

## POUCH SIZES 2024 – TOP 3

Ranking	Format	Share
1	Slim	83%
2	Mini	16%
3	Large	1%



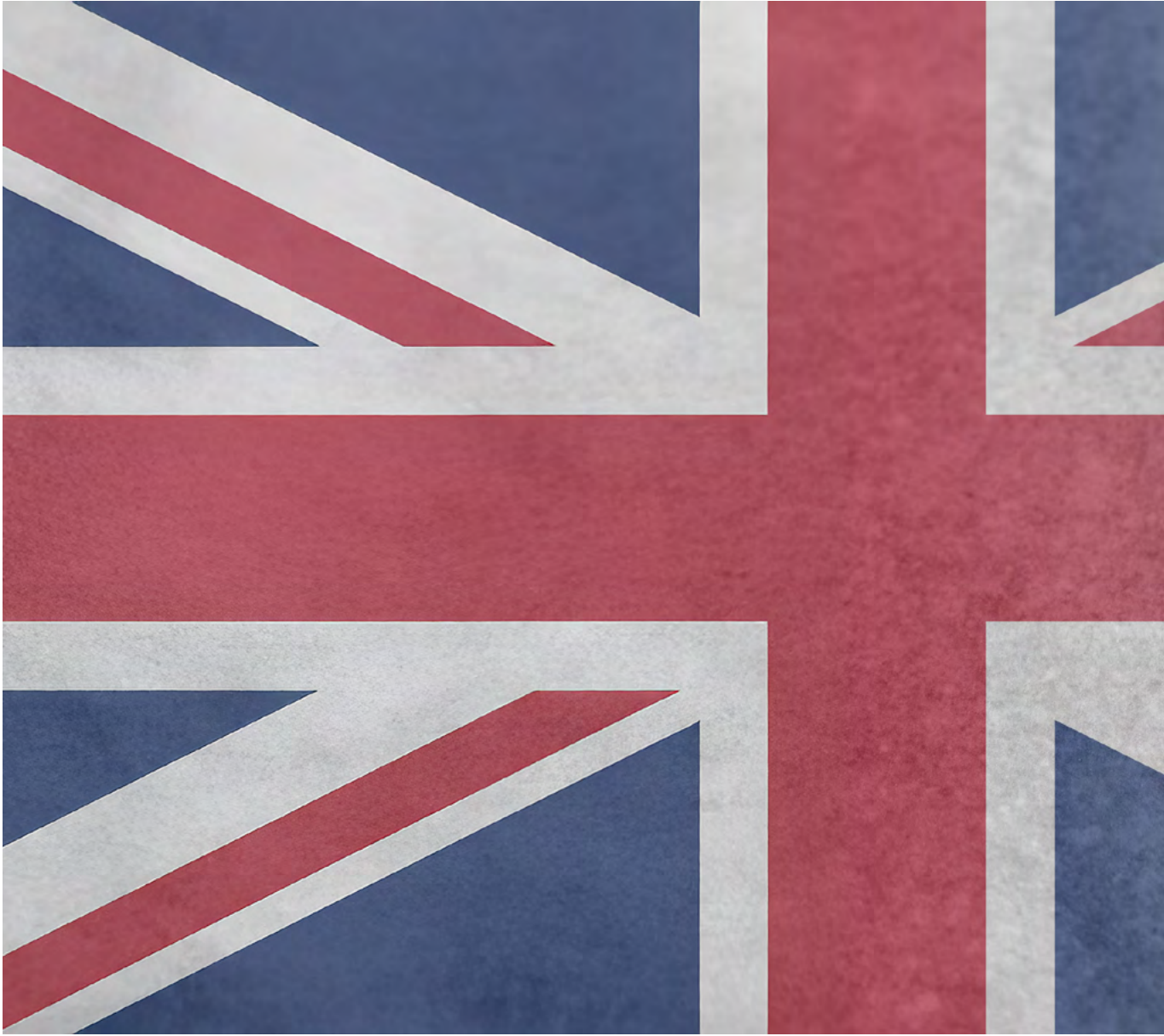
# About Haypp Group

Haypp Group is 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 seven countries and has almost one million active customers. Listed on the Nasdaq First North 25 Index, Haypp is the number one online retailer of Swedish snus style nicotine pouches in the UK.

Haypp tests all nicotine pouches before placing them on the market to ensure they meet the highest quality and safety standards. The testing takes place at the Ecofins laboratory in Sweden, where nicotine strength, pH levels, listed ingredients, and presence of foreign substances are all tested.

As a responsible retailer, Haypp does not sell any products or flavours that are targeted at underage users. At Haypp, 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 so results are made publicly available on our Nicoleaks.com website.



# HAYPP

[HAYPP.COM](https://haypp.com)