

Carbon Arc Prisms Highlights Velo's Gains in Growing Tobacco-Free Category

Velo's share of oral nicotine spend has doubled in twelve months while Zyn and on! grew single digits and Rogue declined. Tobacco-free pouches now take 45% of convenience-store oral nicotine spend, up from under 1% in 2019.

DATASET

Carbon Arc POS — Convenience Stores

CATEGORY

Oral nicotine pouches

TOBACCO-FREE SHARE OF CATEGORY

0.9% in 2019 → 44.8% in July 2026

**5.5%**

OF BAT U.S. SALES

Tobacco-free products are becoming increasingly critical to nicotine brands. Velo's rise has driven modern oral to 5.5% of British American Tobacco's U.S. sales, up from minimal revenue in 2023.

GROWTH**275**

Velo's July 2026 spend index is 175% above year-ago, vs. single-digit gains or Y/Y declines for its largest rivals.

Which nicotine products are growing the fastest in point of sale spend at convenience stores?

Growth

Share

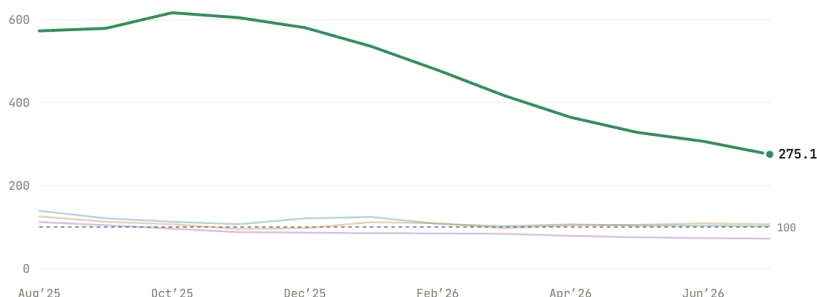
This month

Historical

Compare

Solo

Zyn 88 Velo 227 on! 97 Rogue 62

**SHARE****22.9%**

Velo's share of oral nicotine spend is up 12 pp from 2025, gaining share from every other competitor.

Which nicotine products have the largest share of point of sale spend at convenience stores?

Growth

Share

This month

Historical

Compare

Solo

Zyn 62% Velo 23% on! 10% Rogue 4%

