

# Tobacco, vaping & accessories

NEW

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JTI UK

# The ultra-value opportunity

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Consumer behaviour continues to evolve, with buying habits increasingly influenced by price. This is largely due to the ongoing cost-of-living crisis, paving the way for value brands to heavily influence the future of the tobacco market. In fact, ultra-value tobacco has grown by 27.3% since 2021<sup>1</sup>.

“We know that, for an increasing number of existing adult smokers, price is a key factor when deciding which brand to purchase, which is why we have continued to invest in our ultra-value range,” says Mark McGuinness, marketing director at JTI UK. “By offering well-known brands, like Benson & Hedges and Mayfair in the ultra-value segment, retailers have been able to capitalise on both products’ brand heritage, while also offering a competitive price point.”

It is important for retailers to stock the right ultra-value products for their customers, like JTI’s Sovereign Blue range, which earlier this year was repositioned to align with the manufacturer’s ultra-value offering, and Mayfair Silver, says McGuinness. “Sales of Mayfair Silver have soared recently, generating £24.3m in retail sales over the past 12 months alone<sup>2</sup>. What’s more, Mayfair Silver sells approximately 272 packs per hour in the UK<sup>3</sup>, so it’s a strong product to stock,” he reveals.

As well as repositioning products, JTI also continues to innovate its ultra-value range, as seen earlier this month when it launched Mayfair Gold. Joining Mayfair Silver, Mayfair Gold has an RRP of £11.60 – making it JTI’s joint lowest-priced cigarette brand. The product offers the same premium quality Virginia blend that is synonymous with the Mayfair brand and is available now. “The new pack design includes rounded corners and we’ve



“For an increasing number of adult smokers, price is a key factor when deciding which brand to purchase, which is why we have continued to invest in our ultra-value range”

modernised the outer packaging,” explains McGuinness. “This will also be available on Mayfair Silver.”

**Capitalising on ultra-value tobacco**

To make the most of the ultra-value opportunity, retailers should ensure key brands have a clear home in the gantry, to make them easier to find by store staff, and deliver strong customer service to existing adult smokers. Retailers should also undertake regular inventory checks to maintain high levels of availability, which will help increase and maintain customers’ trust and drive repeat purchase.

JTI’s Business Advisers (BAs)\* help retailers navigate the tobacco category and leverage opportunities by sharing knowledge, insights and advising on which products to stock. “When we transitioned our sales force to Business Advisers last year, the team was allocated smaller, dedicated catchment areas with each BA responsible for every trading channel within it – from independent and convenience stores to key multiple grocers and wholesale.

“So, retailers now receive a more bespoke service, with BAs able to identify commercial opportunities specific to their trade partners to an even greater extent,” says McGuinness.



**Source**

<sup>1</sup> Circana to May '23  
<sup>2,3</sup> Circana Market Place, Value Sales, Mayfair Silver, Total UK, MAT To 09.04.23

\*Retailers can find out more about the ultra-value opportunity by speaking with their local JTI Business Adviser.

Analysis



# Value focus and vaping's dilemma

**Consumer interest in value is guiding recent NPD, while vaping stays firmly in the media spotlight**

**U**K Prime Minister Rishi Sunak took a decisive step towards the Government's 2030 smokefree ambition for England earlier this month, as he announced a plan to raise by one year every year the age at which people can buy cigarettes and tobacco<sup>1</sup>. Describing it as "the biggest public health intervention in a generation", Sunak's goal is that, eventually, no one in the UK will be able to buy tobacco.

In fact, the whole of the tobacco and vaping sector has come under increasing scrutiny, with recent media attention focused on the apparent promotion of vapes to under-age consumers. So, at the same time as announcing the above plan, Sunak said

the Government would also consider restricting the sales of disposable vapes and would look at the flavourings and packaging of devices to tackle the rising rates of children using them.

The warning signs for the tobacco and vaping industry have been there for some time. In *The Grocer's* first Guide to Tobacco, Vaping & Accessories<sup>2</sup> for 2023, Chris Allen, CEO of special scientific consultancy and contract research organisation Broughton, urged the vaping industry to self-regulate or face the potential of regulation being thrust upon them. Now, it seems, a potential ban on disposable vapes is drawing closer as pressure mounts to curb both under-

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The tobacco and vaping industry is coming under increasing fire from a variety of sources, including local authorities, health watchdogs and, now, the UK Government. Yet, while tobacco continues to generate significant tax revenue for the government, the vaping sector is flourishing, with suppliers continuing to argue its role as a transitional solution away from traditional nicotine. So, how is the industry responding to the current heat it is facing?	
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age and illicit vaping. Yet, against all of this intervention, both the tobacco and vaping industries continue to generate considerable revenue for retailers, as well as tax revenue for the Government itself. So, suppliers are urging for a responsible approach from both the industry and retailers to get the issues currently surfacing under control.

### Category performance

● **Tobacco:** As JTI UK sales director Gemma Bateson notes, with the value of tobacco in the UK totalling £14.1bn in the last year<sup>3</sup>, the category remains strong and profitable for retailers. JTI is the No.1 tobacco manufacturer in the UK and holds a combined market share of 44.3%<sup>4</sup>, she adds. With existing adult smokers increasingly influenced by price, the company has continued to innovate its value product offering, launching new products to meet demand and help retailers to drive sales, she says. “As well as new launches, we have repositioned multiple brands to align with our new ultra-value offering.”

Worth £14bn each year before tax<sup>5</sup>, the tobacco category continues to hold a significant amount of value for retailers, agrees Imperial Tobacco UK&I head of consumer marketing Tom Gully. “The market share split between factory made cigarettes (FMC) and roll your own (RYO) is at 54% and 45% respectively<sup>6</sup>,” he says. “With more consumers looking for ways to reduce spending amid soaring household costs, we’re seeing a shift towards value propositions across the entire tobacco category. We’ve seen shopper demand for value gain momentum as a result of the cost-of-living crisis and we’re now seeing the lower-priced tiered products account for the largest proportion of tobacco sales. For example, the sub-economy segment now makes up 63% of FMC sales, while the economy segment accounts for just over half (56%) of RYO and these segments are showing strong growth at 3% and 5% YOY respectively<sup>7</sup>.”

● **Cigars/cigarillos:** JTI UK’s Bateson says there is also notable growth in the UK for cigars and cigarillos, which she estimates are now worth £283m<sup>8</sup>. “Cigarillos currently lead the way with a market share of 49.7%<sup>9</sup>, showcasing the opportunity available to retailers,” she adds. As such, the company expanded its cigarillo portfolio in April this year,

introducing Sterling Dual Double Capsule Leaf Wrapped, featuring a blend of peppermint and berry mint capsules.

Within the cigar market each year, the company says buying habits when it comes to cigar sales are directly impacted by seasonal changes – more specifically with spikes in December, as existing adult smokers purchase items they wouldn’t usually buy in their day-to-day routines. “Retailers who are seeking to maximise the potential of this category should continue stocking these products, especially during periods of seasonal interest,” she adds.

● **Accessories:** The tobacco accessories market is also in rude health, growing at 6.8% and now worth £353m<sup>10</sup>, reports Gavin Anderson, sales & marketing director at Republic Technologies UK. “The bulk of this growth is coming from the rolling papers segment, which makes up more than 31% of category sales and is growing at 13.3%<sup>11</sup>,” he says. “Our 100% vegan papers brand, OCB has shown consecutive growth over the past three years and, in the past 12 months, has increased its share by 1.5%<sup>12</sup>.”

The accessories category is full of opportunities for retailers, he notes. After papers, matches are the second fastest-growing area (+2.8%<sup>13</sup>) and are worthy of focus for retailers ahead of the colder months. Meanwhile the third biggest area is the filters segment with sales of £90m<sup>14</sup>, he adds.

As the demand for RYO tobacco grows in light of the rising consumer appetite for value, the tobacco accessories category provides a substantial sales opportunity for retailers, says Imperial Tobacco’s Gully. Recent figures show that filter tips are worth a sizeable £114m of sales<sup>15</sup> and, while regular papers account for £44m, kingsize papers at £29m and combi papers at £33m are also proving to be popular<sup>16</sup>. “With this in mind, we strongly recommend stocking a wide range of products across each of these segments.”

### Exploring alternatives

Smoking alternatives now make up 12.4% of the total nicotine category (including FMC and RYO tobacco) with e-cigarettes, heated tobacco and oral nicotine the only nicotine categories to show growth in the past year<sup>17</sup>, reports Richard Cook, director of national accounts at Juul Labs UK. E-cigarettes



have added £71.7m to its category value in tracked channels, while heated tobacco and nicotine pouches, have risen £1.8m and £2.4m respectively<sup>18</sup>.

● **Heated tobacco:** Now worth £105m (in the last year in traditional retail)<sup>19</sup>, the heated tobacco category is seeing sales in supermarkets reach £59m<sup>20</sup>, reveals JTI UK marketing director Mark McGuinness. In light of this, the company recently launched Ploom X Advanced, an updated version of its Ploom X device released in October 2022. The new edition features an optimised HeatFlow system with higher vapour volume during initial puffs, and faster charging, he says.

He notes that heated tobacco sticks are not only more cost-effective for consumers, but also offer higher margins to retailers when sold at RRP.

● **Nicotine pouches:** Nicotine pouches continue to grow rapidly, with the



# £14.1bn

The value of tobacco in the UK in the last year<sup>3</sup>

*Circana Marketplace*

# 12.4%

of the UK's total nicotine category is made up of smoking alternatives<sup>17</sup>

*IRI*

# £353m

Value of the tobacco accessories market<sup>10</sup>

*EXT IRI Marketplace*

# 4.3m

The number of vapers in the UK in 2022<sup>25</sup>

*ECig Intelligence Market Database*

category currently accounting for a monthly value of £4.8m<sup>21</sup>, equating to an annual figure of approximately £58m a year<sup>22</sup>, says JTI UK portfolio brand manager Bruce Terry. “Over recent years, we have noticed an increased demand for higher-strength nicotine pouches, with existing adult smokers in the UK market favouring extra strong strengths, which hold a 40.7% share in comparison to regular strength that holds a 16.6% share<sup>23</sup>,” he says.

● **Vaping:** It has not been the easiest few months for the vaping industry. Increasing scrutiny of disposable vapes and their marketing has drawn criticism from many quarters, with the UK Government eventually drawn into the fray in a call for evidence<sup>24</sup> (from 11 April to 6 June 2023), seeking information on a number of themes related to under-

age vaping in order to make eventual policy decisions. Criticism has been levelled at some vaping companies on their legal compliance, their promotion of vape products (using appearance and characteristics that could appeal to children), and the impact of disposable vapes on the environment.

Yet responsible vape suppliers continue to be reason that vaping’s role is to help existing adult smokers to quit nicotine-based tobacco products, and point out that vaping is continuing to surge in terms of both volume and value – evidence of its growing popularity among UK consumers.

As more consumers seek out alternative nicotine solutions, the vape market is continually expanding with the number of UK vapers increasing from 3.7m in 2021 to 4.3m in 2022<sup>25</sup>, reports Imperial Tobacco’s Gully. “In

the UK alone, the category is now worth around £1.2bn and is expected to reach £1.4bn in the next three years<sup>26</sup>.”

He says the company does not believe a ban on disposable vapes is the answer. “However, we welcome the UK Government’s decision to strengthen the regulation of disposable vape devices. We have long stated that the UK Government, industry and enforcement authorities must work together to create a regulatory framework that both supports the important role vapes can play in helping adult smokers quit, while preventing the appeal and access of these products to under-18s.”

He notes that in response to the Government’s recent call for evidence, Imperial Tobacco urged the Government to establish a new retailer licensing scheme, review vape flavour

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naming convention, strengthen the regulations for online advertising and promotion and raise product quality and safety standards.”

At AKS Holding, owner of the Insta Fill vaping brand, sales director Stan Chng says the vaping industry is increasingly in the spotlight due to environmental concerns and the “troubling rise in teenage vaping, particularly through the easy availability of single-use disposables”. “This situation raises valid concerns across the entire industry,” he says. “However, we hold a strong conviction that any type of ban on vaping would likely result in consumers reverting to smoking, a habit we know to be harmful and life-threatening.”

Although government action on the issue of under-age vaping has been restrained so far, AKS Holding’s commitment to advocating for stricter penalties against retailers who sell vaping products to minors remains steadfast, adds Chng. “We call on the relevant authorities to consider establishing licensing programs and the imposition of significant fines on those who breach the rules.”

Juul Labs’ Cook agrees that the priority must be to ensure the vaping industry is acting responsibly in order to help adult smokers transition away from cigarettes and reduce the harms from tobacco while combating under-age use. “We want to build a responsible vaping industry with tougher rules on packaging, flavours and promotions, to prevent these products getting into the hands of those who are under-age. We look forward to seeing the Government set out further measures to tackle under-age vaping following their recent call for evidence.”

### Value: the ongoing trend

Value is likely to remain the dominant trend shaping sales across the tobacco category, but it’s really important for retailers to remember that value means different things to different people, says Imperial Tobacco’s Gully. “For some, convenience will remain a priority, with shoppers seeking out tobacco solutions that offer added value... or the addition of papers and tips in RYO. Others will be looking for a leading brand that offers the reassurance of a brand name they know they can trust that also delivers on price. Thanks to our wide portfolio of leading brands that deliver



on value across every category, we’re in a strong position to help retailers cater for these trends in the months and years ahead.”

“With price remaining a key factor for existing adult smokers within the tobacco category, we’ve seen that value tobacco continues to be a key trend, with 58.7% of all sales volumes currently in the value or ultra-value ready-made cigarettes (RMC) and RYO sectors<sup>26</sup>,” reports JTI UK’s Bateson. The company has responded by expanding its ultra-value RMC range with the launch of Mayfair Gold, reveals marketing director Mark McGuinness. The company also repositioned its Sovereign Blue brand to align with its other ultra-value offerings to a “competitive RRP of £10.65”, he adds.

In addition, says Bateson, the company reformatted its Sterling Essential Rolling RYO brand, “the UK’s leading value RYO brand<sup>27</sup>”, which now features “rolling papers, an enhanced blend and a convenient zip pouch”.

Over the last two years, the Office for National Statistics reports that the

average price of a pack of cigarettes in the UK has increased by 26.6% – at £14.45 in Q2 2023 vs £11.41 in Q2 2021<sup>28</sup>, notes Juul Labs’ Cook. “Smoking is a very expensive habit and recent Juul Labs research shows that the average smoker (based on 9 cigarettes per day) could save over £1400 annually by switching to Juul,” he says. “In addition, Juul is trialling 4-packs of its Juul Crisp Menthol and Virginia Tobacco Juulpods, offering a saving of £1 vs two 2-pack purchases in selected multiples to offer greater value to customers.”

With the cost-of-living crisis as a backdrop FMC shoppers are switching to RYO products for a better value alternative, says Republic Technologies’ Anderson. “Retailers that offer key brands – such as Zig-Zag, OCB and Swan – and position them on the counter (where legislation allows) have a great opportunity to signal that they are a place where smokers can find great value. We aren’t seeing shoppers cut costs when it comes to the quality of tobacco they like, but they are buying

# The pursuit of sustainability

In the UK, the member companies of the Tobacco Manufacturers' Association – British American Tobacco UK, Imperial Tobacco and Gallaher (a member of the Japan Tobacco Group of companies) agreed to provide grant funding of £10m a year (£30m over three years) to CleanStreets Community Investment Company (CIC) to design and deliver a comprehensive programme of activities to prevent and reduce cigarette litter in public places across the UK, reveals Imperial Tobacco's Gully. "The objective

of the three-year programme is to reduce cigarette littering (as reported by item count) by 20% by 2025 against a 2021 baseline. In years one and two CIC has engaged Keep Britain Tidy to support and deliver this program, which is run wholly independently of the tobacco industry. The public-facing campaign launched across England on 14 November 2022, with the program extending further in the UK in 2023."

In terms of vapes, Imperial Tobacco is continuing to explore further options to help increase recycling opportunities in-store

and offers a take-back disposal scheme for its blu devices, blu bar disposables and vape pods/e-liquid bottles on blu.com, that allows consumers to dispose of them responsibly. The webpage features a QR code for easy return via Royal Mail and further information on how this process works, he adds.

Last month, Material Focus found that the number of disposable vapes thrown away has quadrupled from 1.3 million to five million per week in the past year, equivalent to eight per second<sup>i</sup>, reveals Juul Labs'

Cook. "Juul devices are not single-use devices and can be reused and recharged, unlike disposable vapes." Each device comes with a two-year warranty and, if needed, the battery part of the device can be recycled with other electronic waste, he adds. "We are committed to improving the sustainability of our products and, over the last 18 months, have been operating a take-back scheme where users can return their Juul pods to us at no additional cost. We will continue to develop this initial pilot, which we hope to expand over time."

it less often. Retailers can fill this gap by training till staff to prompt tobacco customers to consider accessories."

## Ongoing challenge of illicit trade

With the cost of living increasing, there's a risk the illicit tobacco trade could gain further ground in the UK, with retailers feeling the sting from cheap imports and counterfeit products, says Nicky Small, corporate affairs & communications director UK at JTI UK. "We continue to find illegal products sold in convenience stores across the UK, often alongside authentic versions," she says. "Also, we are seeing more online 'shopfronts' from social media marketplaces to auction sites and hurriedly registered domains selling illicit items."

Sales of illegal tobacco products can result in the suspension or revocation of a premise's licence, fines and prison sentences, notes Small. "Legislation introduced last year provides HMRC officers with powers to apply 'on-the-spot' fines of up to £10,000 against those dealing in illegal tobacco products and to revoke the

registrations required under track & trace legislation. Our 'Don't Be Complicit in Illicit' campaign has seen the removal of over 45 tobacco gantries from retailers found to be selling illegal tobacco, as well as more than 20 private prosecutions against sellers of illegal tobacco products."

Illicit trade remains a huge challenge within the category, reports James Hall, anti-illicit trade manager at Imperial Tobacco UK&I. "The current cost-of-living crisis and rising tobacco taxes are driving illicit trade in the UK, with many consumers seeking cheaper products, which can mean purchasing from illegal sources. In fact, new figures show that 73% of smokers bought illicit tobacco within the last year (vs 71% in 2021)<sup>29</sup> and nearly four in 10 consumers claimed that increased living costs had impacted their purchasing habits and where they now choose to buy 'cheaper' (illicit) tobacco<sup>30</sup>."

He estimates that, since 2000, the UK Government has lost £51.3bn in tax revenue as a result of non UK duty-paid

cigarettes or rolling tobacco being sold in the UK<sup>31</sup>, with £2.5bn of that being lost between 2020-21. "The sale of illicit tobacco is a global industry that harms honest traders and damages communities and we firmly believe it shouldn't be tolerated," he says.

Now, with the demand for vape products rising, there is also an increase in illicit trade in that category. "With a growing number of news stories appearing on seizures of illegal vape products, it's imperative that retailers and their staff remain vigilant and notify the relevant authorities of any illicit trade in their area," adds Hall. "Disposable vapes have seen impressive growth over the last year and this popularity has made them an area of focus for illicit traders. As a result, we're seeing an increasing number of non-compliant vape products come to market that are disguised to appear as something else to avoid detection, such as a recent seizure which saw an illicit vape product made to look like a highlighter pen. These products often feature

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names that are seemingly designed to appeal to children, such as fidget spinners, gummy bears and ice lollies.”

“By their nature, illicit sales are difficult to monitor and while we welcome the government’s £3m investment in enforcement squads, we believe more should be done to tackle illicit products and the retailers who sell them,” says Juul Labs’ Cook.

### Future prognosis

With demand for disposables now worth an impressive 83% of all vape sales<sup>31</sup>, this is an area that Imperial Tobacco’s Gully expects to go from strength to strength in the year ahead. And, as the cost-of-living crisis continues, Gully advises retailers to stock a wide range of leading RYO brands to cater to ongoing demand for value tobacco products.

The ultra-value tobacco market is destined for significant expansion in light of the current cost-of-living crisis, agrees JTI UK’s McGuinness. “With household budgets under strain, consumers are increasingly inclined to seek out economical options, making ultra-value tobacco products a priority,” he says. “As evidenced by the sector’s remarkable growth, which has surged by an impressive 27.2% since 2021<sup>32</sup>, the ultra-value segment has emerged as a top priority in both RMC and RYO tobacco categories, solidifying its position as the fastest-growing segment in the market.” However, while ultra-value tobacco is key, he says it’s still important for retailers to stock a wide range of options, such as heated tobacco and nicotine pouches to maximise sales opportunities.

Republic Technologies’ Anderson says he expects value to remain a key consideration for shoppers as they navigate economic inflation. “RYO products have always been synonymous with value, but this looks set to increase as more shoppers tighten the belt and look to cut costs without making major lifestyle changes,” he notes.

Next-generation products such as tobacco pouches and heated tobacco are experiencing a notable surge in popularity, says AKS Holding’s Chng. “Without a doubt, we are poised for a wave of exciting innovations in these product categories.” The company’s Insta Fill brand is on the cusp of introducing the “world’s very first TPD-compliant 3500 puff hybrid system”,



## Flavours

Disposables over-index in the fruit and sweet flavour segments, with over 95% of sales coming from these profiles<sup>ii</sup>, while 56% of closed system refills comprise more traditional flavours of tobacco, menthol and mint<sup>iii</sup>, says Juul Labs’ Cook. The company has added Blackcurrant Tobacco variant to its Juulpod range, with Cook noting it has a limited range of flavours, which it markets responsibly in order to give adult smokers options while limiting its appeal to those who are under-age.

Meanwhile, three new flavours have joined Imperial Tobacco’s blu bar range – Tropical Mix, Apple Ice and Mint Ice, reveals Gully. “Collectively, these flavour characteristics, including apple, pineapple, mint and mango accounted for 10.75% of all vaping sales over the last six months<sup>iv</sup>, with their share of contribution almost doubling vs the same period a year ago,” he notes.

“This really demonstrates the significant consumer demand for these particular flavour profiles.”

he reveals. “This cutting-edge product not only guarantees exceptional performance, but is also designed with environmental sustainability in mind, all while providing significant cost savings for consumers.”

With the UK Government recently completing a call for evidence in to youth vaping, disposables have been under political scrutiny and the media interest intensifies, says Juul Labs’ Cook. “But views vary widely on the depth and scale of regulatory intervention required across the category. Quality products, focusing on sustainability/environmental impact, with responsible marketing and advertising practices, will be best-placed in any future regulatory configuration,” he says. “We await the Government’s response to the call for evidence with interest.”

### Sources

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- <sup>5</sup> ITUK EPOS to w/e 29.08.21, p1 Retail & Wholesale
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- <sup>10-14</sup> EXT IRI Marketplace, 52 w/e 06.08.23 vs YA
- <sup>15/16</sup> EPOS & ITUK internal estimates, March 2022-2023
- <sup>17/18</sup> IRI, Total Market Value Sales, 4 wks to 30.07.23 vs YA
- <sup>19</sup> Circana Marketplace, Value Sales, Total T-Vapour Category, Total UK, MAT & Mar 2023 vs Mar 2022
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- <sup>21/22</sup> Circana Marketplace, Value Sales, Nicotine Pouch category, Total UK Mar 23 (21) and annualised figure based on Mar 2023 (22)
- <sup>23</sup> Circana Marketplace, Volume Share, Nicotine Pouch category, Total UK Mar 23
- <sup>24</sup> <https://tinyurl.com/yenkk988>
- <sup>25/26</sup> ECi Intelligence Market Database estimates, Sept ‘22
- <sup>27</sup> Circana Marketplace, Volume Share, RYO/MYO, Total UK, March 2023
- <sup>28</sup> ONS, RPI Ave price - Cigarettes, 20 king-size filter
- <sup>29/30</sup> TMA Anti-Illicit Trade Survey 2022
- <sup>31</sup> HMRC Measuring Tax Gaps, 2022 Edition
- <sup>32</sup> ITUK EVP Report on Trade, Jan 2023
- <sup>33</sup> Circana May 2023

### Sustainability and Flavours

- <sup>i</sup> <https://www.materialfocus.org.uk/press-releases/number-of-disposable-single-use-vapes-thrown-away-have-in-a-year-nearly-quadrupled-to-5-million-per-week/>
- <sup>ii</sup> IRI Total Market Value sales, Latest week to 02.07.23 vs YA
- <sup>iii</sup> Retail EOPS p1 KAs & Indies, 6 months to June 2023

## Philip Morris Limited

# Heated tobacco: the next level

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**IQOS ILUMA PRIME**  
**IQOS ILUMA ONE**

It is estimated that, globally, there are around one billion smokers today, and the World Health Organization has projected there will still be roughly the same in 2025<sup>1</sup>. In the UK, nearly seven million people continue to smoke<sup>2</sup>. The best choice for any smoker is to completely quit tobacco and nicotine products. However, many don't.

“At Philip Morris, we believe these people deserve a pragmatic approach and a sensible solution that moves them away from cigarettes,” says the company. “Vaping has made some headway – but its progress is slowing. Between a third and half of all vapers are still dual-using with combustible tobacco products, and while 83% of current adult smokers in Great Britain have tried vaping, just under a quarter have stuck with it<sup>3</sup>.”

“It's time to give smokers a chance and provide them with a range of effective alternatives if we want to eradicate cigarettes, faster.”

### IQOS: leader in heated tobacco

Heated tobacco is one of many credible alternatives to help smokers switch away from cigarettes for good. The majority of smokers who switch to Iqos completely quit cigarettes<sup>4</sup>, reveals the company.

PMI's heated tobacco technology, Iqos, is the world's leading heated tobacco brand<sup>5</sup> and is the result of more than a decade of research and \$10.5bn-worth<sup>6</sup> of investment.

Heated tobacco is also seeing huge momentum growth in the UK, at a staggering +400% in the last three years<sup>7</sup>. Data also shows that Iqos has a higher conversion rate for smokers



The new  
IQOS ILUMA  
ONE device

“It's time to give smokers a chance and provide them with a range of effective alternatives if we want to eradicate cigarettes, faster”

versus vaping, at almost three-quarters (72%) globally with users who have stopped smoking<sup>8</sup>.

### A next-level product

“Now, Philip Morris Limited is taking heated tobacco to the next level with the new Iqos Iluma, a truly revolutionary product that will see a massive step-change for the category in the UK,” notes the company.

“The bladeless innovation of Iqos Iluma delivers an impeccable product experience, providing the user with an enhanced draw and a real tobacco taste. It's also effortless, as the robust design and lack of blade means there's no chance of blade breakages, and no need to clean the device – ever,” it adds.

The Iqos Iluma series comprises three innovative devices – Iqos Iluma Prime, Iqos Iluma and Iqos Iluma One. All three are built with the same revolutionary technology at their core but have been designed to address varied preferences and different price points.

“Iqos Iluma offers cigarette-like satisfaction<sup>9</sup>, but heats the tobacco rather than burning it,” explains the company. “This means Iqos Iluma emits on average 95% lower levels of harmful chemicals than cigarettes<sup>10</sup>. For smokers who don't quit smoking but are looking to switch to reduced-risk products, it's therefore an exciting option.”

### Source

- <sup>1</sup> WHO global report on trends in prevalence of tobacco use 2000-2025, p. 28
- <sup>2</sup> ONS: Adult smoking habits in the UK
- <sup>3</sup> ASH: August 2023, p. 5
- <sup>4</sup> PMI Financials or estimates, IQOS user panels and PMI Market Research.
- <sup>5</sup> PMI Q2 Results published July 20, 2023, p. 12
- <sup>6</sup> PMI Q2 Results published 20.07.23
- <sup>7</sup> The heated tobacco category has grown by 406% between January 2020 to June 2023 (Nielsen offtake independent and symbol general data)
- <sup>8</sup> PMI Q1 2023 earnings, p. 7
- <sup>9</sup> Based on clinical studies, aerosol chemistry and declaration of satisfaction level from 600 adult consumers in Japan, 2022.
- <sup>10</sup> “95% less” represents the average reduction in levels of the 9 chemicals recommended for reduction in cigarette smoke by the World Health Organization, which do not include nicotine. Important information: This does not necessarily equal a 95% reduction in risk. IQOS ILUMA is not risk-free. See important information on: <https://www.iqos.com/gb/en/iluma-smartcore-induction-technology.html>.

## Imperial Tobacco UK&I

# Continued demand for vaping

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Communications Executive

### KEY BRANDS

blu  
Embassy Signature  
Richmond  
Riverstone  
Players JPS

Already worth £1.2bn, the vape category is continuing to expand, with the market expected to reach £1.4bn in the next three years<sup>1</sup>. In fact, the percentage of vapers in the UK has increased from 8.3% in 2022 to 9.1% in 2023<sup>2</sup> – the highest rate ever recorded. Imperial Tobacco’s head of marketing UK&I, Tom Gully, takes a look at how retailers can tap into the sales opportunities this category presents and what they need to be stocking in order to maximise sales.

“To effectively tap into this flourishing category and retain loyalty from vaping customers, retailers need to stay up-to-date on the latest key trends, whether it’s the boom in disposables like blu bar or the popularity of pod-mod devices such as blu 2.0,” says Gully. “Those retailers that respond and stock the products that tie into these key trends will be in a better position to meet the changing needs of consumers and, in turn, drive sales. Imperial’s leading blu brand has the perfect range of products ideal to help retailers do just that.”

### Rising growth for disposables

With 31% of vapers in the UK now using disposables compared to just 15% in 2022<sup>2</sup>, it’s clear there will be continued demand from consumers for disposables throughout 2023 and far beyond, he notes. “In order to tap into this trend, we’d recommend that retailers stock a range of leading disposable products, like our blu bar range. Available to buy at an RRP of just £5.99\* in 13 different flavour variants, our blu bar range is fully compliant, has been extensively tested and comes from a trusted manufacturer and brand that consumers know and trust.”



“With 31% of vapers in the UK now using disposables, compared to just 15% in 2022<sup>2</sup>, it’s clear there will be continued demand for these throughout 2023 and far beyond”

Despite the rising demand for disposables, pod-mod systems still remain popular, with 17% of vapers using the devices in 2023<sup>2</sup>, reveals Gully. “Our simple-to-use, next-generation pod mod device, blu 2.0, provides retailers with the quality pod-mod vaping experience consumers are looking for. Available in six different flavours, blu 2.0 is available in 9mg/ml and 18mg/ml nicotine strengths with an MRRP of £9.99\* for the device and £6.99\* for a pack of two liquidpods.

### The importance of trusted brands

“It’s clear both disposables and pod-mods remain popular among vapers, so retailers need to ensure that they are dedicating plenty of space in their store for vaping products,” he adds. “However, given that every store is different, it’s important to stock the right range for their customer base, including vape products from brands consumers know and trust, like blu.”

### Source

<sup>1</sup> Sep-22 ECigIntelligence Market Database Estimates  
<sup>2</sup> Action on Smoking and Health (ASH). Fact Sheet: Use of e-cigarettes (vapes) among adults in Great Britain. August 2023

\* Based on ITUK RRP as at October 2023. For the avoidance of doubt, customers are free at all times to determine the selling price of their products.

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FLAVOURS

**NEW** blu<sup>®</sup> bar  
DISPOSABLE VAPE

**BOOST** YOUR SALES  
WITH THE BLU BAR FAMILY NOW WITH **3 NEW FLAVOURS**



**18+**  
OVER 18 ONLY

FOR EXISTING ADULT SMOKERS & VAPERS ONLY.

This product contains nicotine, 18+ only.  
Not a smoking cessation product. © Fontem 2023.

blu<sup>®</sup>

Insta Fill

# Experience vaping's future

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Insta: Instafill.disposable  
LI: Insta Fill (Page)

KEY CONTACTS

**Stan Chng**  
Sales Director

KEY BRANDS

Insta Fill

Are you ready for a vaping revolution?

Insta Fill is the world's very first TPD-compliant 3500 puff device and is poised to make its debut in the UK market, reveals AKS Holding sales director Stan Chng.

"The brand is a game-changer, setting new standards in the vaping world," he says. "Crafted to meet the most rigorous standards and designed with environmental friendliness at its core, it's more than just a device.

"Insta Fill doesn't just talk the talk; it walks the walk. It's not only about performance; it's about savings too. Imagine cutting your costs by up to 60% compared to standard 2ml disposables. That's money in your pocket without compromising on quality."

**Complete experience**

However, Insta Fill doesn't stop there, he adds. "It's not just a product; it's a complete experience. We go beyond mere supply. We offer retailers comprehensive support, from informative literature to user-friendly digital displays. We believe in empowering our consumers with knowledge, ensuring that you not only enjoy our products but use them effectively too."

The company's dedication to innovation and technology is unwavering, he notes. "Insta Fill proudly features a rechargeable and reusable battery, a transparent tank, and a chamber that lets users see the future. It even boasts a cotton-less 0.8ohm mesh coil that eliminates e-liquid waste, setting it apart from



**“It's not just a product; it's a complete experience. We go beyond mere supply; we offer retailers comprehensive support, from informative literature to user-friendly digital displays”**

disposable devices that squander up to 20% of liquid.”

**Eco-design**

What's more environmental sustainability is at the very essence of the brand, he says. "It's the driving force behind our product development. While many companies are taking commendable steps to reduce their environmental footprint through product innovation or the placement of recycling bins nationwide, we're proud to actively incorporate eco-conscious design into our core identity.

"We're not resting on our laurels; we're just getting started," he adds. "The next generation of products will be unveiled next year, promising even more exciting advancements.

"So, embrace the future of vaping with Insta Fill, because our entire team are committed to delivering an experience that's cutting-edge, cost-efficient, and environmentally conscious.

"Get ready to vape the future. Get ready for Insta Fill."

# INSTAFILL

# 3500 PUFFS

TPD COMPLIANT



[www.insta-fill.com](http://www.insta-fill.com)



## COST SAVINGS

1x INSTAFILL IS EQUIVALENT TO 6x DISPOSABLES

## RECHARGEABLE, REUSABLE BATTERY

LEVELLING UP OUR SUSTAINABILITY GAME



550mAh  
Battery Capacity



20mg  
Nicotine Salts



2ml  
Tank Capacity



Advanced  
Mesh Coil

For sales enquiries please contact:  
✉ [sales@insta-fill.com](mailto:sales@insta-fill.com)

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 **IGATE**

IVG

# Sustainable innovation

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 Marketing Manager

**KEY BRANDS**

IVAPEGREAT

**↓** IVG, a leading global brand, and Preston-based manufacturer of e-liquids, is aiming to revolutionise the disposable vaping market. The new IVG2400 is a first-to-market disposable vape bar in the UK and EU, the benefits of which are aimed at pressing social and economic issues, reveals Rhett Morrissey, marketing manager at IVG.

“We are delighted with this new product,” he says. “It targets key issues, discussed through regular media coverage highlighting under-age vaping, illegal vapes and the environmental negativity of disposables. Significant investment, ground-breaking R & D and close liaison with the MHRA and Trading Standards have meant that this unique patented product is fully TPD compliant. This is important for retailers, as it gives them a weapon against illegal vapes, and its price-positioning and design targets adults, making it less attractive to minors. Its innovative characteristics also mean that less plastic and battery waste will be created compared to standard legal disposables.”

The IVG2400 is different from other single 600 puff disposables in that the device holds 4 x 600 puff pods, giving the availability of a total of 2,400 puffs. Only one 2ml pod can be vaped at any one time and, as soon as it runs out, the consumer can easily move to the next pod without having to carry spare disposables, notes Morrissey. “This is extremely convenient for the consumer and creates much less waste,” he says. “Another benefit for those who enjoy variety are the multi-flavoured



**“This new product targets key issues discussed through regular media coverage highlighting under-age vaping, illegal vapes and the environmental negativity of disposables”**

pod options, where the consumer can switch between flavours as and when they want – something not available in any other disposable.

“This is cutting-edge design,” he adds. “We’ve really thought about current issues, and worked hard to come up with responsible solutions. The consumer will be using only one battery in 4; the plastic used overall, is much reduced; the technology and flavours within the device offer a supreme vaping experience, making it easier for adult smokers to transition to vaping. Plus, retailers can relax, safe in the knowledge that what they are selling is of the highest quality and, above all, legal.”

IVG reports that consumer feedback, since the launch, has been outstanding. Customers have remarked on the excellent vaping experience and been delighted by the quality of the flavours. “The convenience and cost effectiveness are also a winner, as the retail price sits at around half the price of four single disposables,” adds Morrissey. “This is an exciting shift in the disposable market, solidifying IVG’s position as an industry leader and innovator,” he says. “Major distributors and retailers have already listed the range, such as EG, One Stop, Parfets, Morrisons and Best, to name a few. Our partners have already recognised the compelling benefits of the proposition and early signs are excellent.”

The IVG2400 will be available across the UK, in-store and online.

**UK & EU'S FIRST TPD COMPLIANT**

**BIG PUFF**

**IVG**

**2400** **TPD COMPLIANT** **30 FLAVOURS AVAILABLE**



**BEST**  
**UK E-LIQUID BRAND**  
 2019 | 2021 | 2022

**BIG PUFFS BIG SAVINGS**



# IVG<sup>®</sup>

# 2400

**30**  
FLAVOURS  
AVAILABLE

# 1st

**TPD COMPLIANT**  
UP TO **2400** PUFF  
DISPOSABLE



Disposable 1750 mAh  
Up to 2400 puffs  
20 mg/mL nicotine

**This product contains nicotine which is a highly addictive substance.**



TPD APPROVED



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TRADING STANDARDS APPROVED

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Juul Labs UK

# Responsibility through action

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Director of National Accounts

KEY BRANDS

**JUUL2**  
– Starter Kit  
– Single device

**JUUL2pods**  
– Virginia Tobacco  
– Polar Menthol  
– Crisp Menthol  
– Autumn Tobacco  
– Ruby Menthol  
– Summer Menthol  
– Blackcurrant Tobacco

For more information on the responsible retailing of e-cigarettes, scan below



Smoking remains the leading cause of preventable death and disease in the UK, and Juul Labs remains committed to transitioning even more adult smokers away from combustible cigarettes, while combating underage use.

“Responsibility is at the heart of everything Juul Labs does – from product quality and providing retailers with legislative guidance, to putting in protocols that ensure products do not appeal and are not accessed by those other than whom they are intended for – adult smokers and existing nicotine users,” says Richard Cook, director of national accounts at the company. “Below are some of the initiatives we operate to ensure our products are produced, marketed and sold in a responsible manner.”

● **Product quality:** The Juul2 vape is a pod-based e-cigarette that has a rechargeable and reusable device, unlike single-use disposable products. “We test products extensively and have a robust quality assurance process in place with manufacturing governed by a medical device-level quality system (ISO 13485 certified)” says Cook. “Also, the e-liquids in Juul2pods comprise pharmaceutical-grade ingredients and we conduct extensive non-clinical chemistry and toxicological testing of our products, as well as clinical studies among adult smokers.”

● **Packaging & marketing:** Juul products do not feature any irresponsible cartoon imagery or flavour descriptors, which could be construed as ‘child friendly’. “All Juulpod flavours are conservatively named and are based on tobacco and menthol profiles to support adult smokers to switch,” Cook notes. “Our marketing activities are also designed to target adult smokers only and go above and beyond current legislative guidelines.”

● **Challenge 25 policy:** Juul Labs does not want any non-nicotine users, especially those underage, to try its products. “Retailers play an active role in curbing underage access to age-restricted products,” says Cook. “Since its inception in 2018, Juul Labs has mandated a Challenge 25 policy



“All Juulpod flavours are conservatively named and are based on tobacco and menthol profiles to support adult smokers to switch”

for all UK stockists of Juul products and conducts mystery shopping to ensure retailers comply with its age-verification programme; those who fail successive audits are reported to Trading Standards.”

● **Retailer resource centre:** “It is imperative that retailers trade vaping products responsibly and are aware of regulations regarding their legal sale,” he adds. “We have developed JuulLabsRetailer.co.uk – a resource centre that provides retail partners with guidance on how to determine legal products from illicit ones, plus extensive information on combating youth sales and usage. Underage use prevention and tackling the illicit trade in vaping products are both critical to building consumer, regulatory and stakeholder confidence in the industry.”

● **Sustainability:** Juul devices are reusable and rechargeable, and each one has a two-year warranty. Regarding consumables, Juul Labs has been operating a take-back scheme on its Juulpods for two years and is committed to exploring ways – including recycling – of making its products more sustainable in the future.

# JUUL<sup>®</sup>



Winner Vaping & Heated Tobacco Category. Survey of 8,000 people by Kantar.

## Product of the Year delivers quality and dependability right off the shelf.



JUUL2 is tested against rigorous quality standards.



For more information on the responsible retailing of vapour products, scan the QR code.

Designed for adult smokers. Not for sale to minors.

JUUL is an e-cigarette. This is an age restricted product and age verification is required at sale. TM and © 2023 JUUL Labs, Inc. All rights reserved.



**WARNING: This product contains nicotine which is a highly addictive substance.**

**NEW**

# IQOS ILUMA

**Next level tobacco.  
Next level sales.**

IQOS is the leader in the heated tobacco category which has grown +400% in the last 3 years.\*



\*The heated tobacco category has grown by 406% between January 2020 to June 2023 (Nielsen offtake independent and symbol general data). In June 2023, HEETS for IQOS had a 99.14% share of market in the heated tobacco category (Nielsen offtake independent and symbol general data). IQOS ILUMA™ is only compatible with TERE™ sticks. Using TERE™ sticks with previous IQOS™ generations may cause damage to your device. TERE™ sticks contain a metal part; do not disassemble. Keep out of reach of children. This material is restricted to those who are involved in the business of the sale or distribution of tobacco who are aged 18 years and over. This material should not be made available to the public or sent to anyone else.



Don't miss out. Stock up now.



IMPORTANT INFORMATION: This product is not risk-free and provides nicotine, which is addictive. Only for use by adults.

## Republic Technologies (UK)

# Consistency amid uncertainty

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Sales & Marketing Director

### KEY BRANDS

OCB  
Swan  
ZIG-ZAG  
Bryant & May  
Cook's  
By candlelight  
lumière

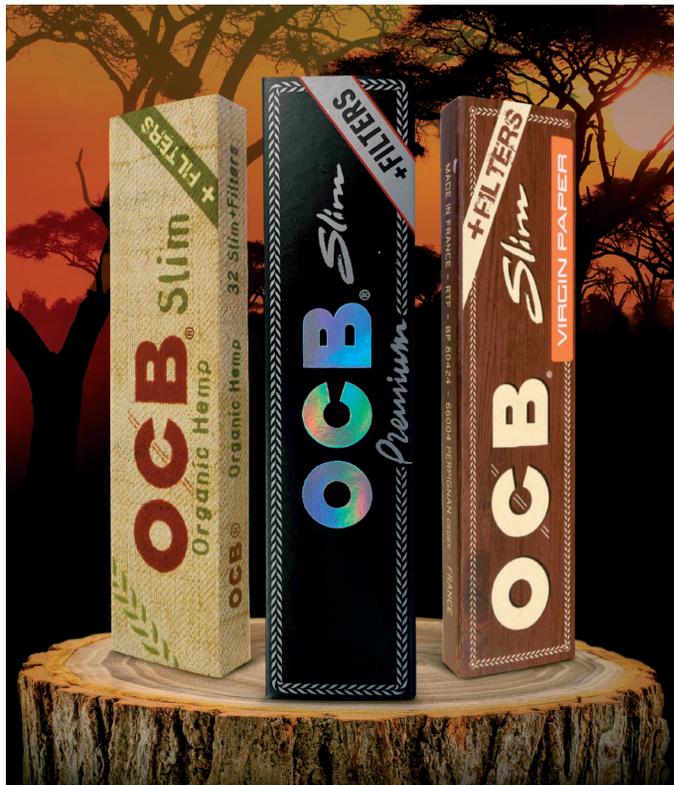
Despite surges in legislation, restrictions and challenges that have shaped the tobacco market over the years, one area is providing consistency for retailers. The tobacco accessories category is worth £352m and is growing at 6.8%, buoyed by some of the most profitable sectors of the market – papers, growing at 13.3%, and matches, growing at 2.8%<sup>1</sup>.

The category is valued highly by those shoppers switching from factory-made cigarettes to roll-your-own tobacco. “Republic Technologies UK offers shoppers a value alternative that enables them to make a switch and save money,” says Gavin Anderson sales & marketing director at the company.

“Triple-digit growth is hard to find in the tobacco and accessories market, but OCB papers are flying in independent and symbol stores,” he reveals. “The brand has soared in the past three years against a market that has grown by 29% at the same time<sup>2</sup>. These impressive results for OCB come off the back of heavy promotional activity within popular wholesalers, where we’ve seen retailers truly understanding the opportunities of the market and the integral role it plays in their stores.”

From the south west of England to the top of Scotland, there is not a single region in the UK where the brand hasn’t had year-on-year growth in 2023<sup>3</sup>, he notes. “We believe this stems from the premium nature and affordability of the product. OCB Virgin and Organic Hemp are 100% vegan and are made using sustainable fibres, ticking crucial boxes for the demographic most likely to buy into the category,” Anderson says.

Within filters, Swan is providing stability with share of sales remaining broadly flat<sup>4</sup>. Swan is the No.1 best-



“Republic Technologies continues to invest in a category that presents so many opportunities for retailers, so we urge them to reach out and find out how we can help”

seller in the category, with more than 90% of volume sales, making it a safe bet for retailers, says Anderson.

Matches – the second-fastest growing area of the accessories market – is a segment retailers should focus on now to get a strong range in place ahead of the colder months, he adds. “Whether it’s Bonfire Night fireworks, tealights for Halloween pumpkins or scented candles for a cosy night in, matches are the secret ingredient to many autumn occasions,” he says. “By working with Republic Technologies, your store can be part of them. Our brands – Bryant & May, Cooks, Swan and Ship – are the top four match brands respectively<sup>5</sup>, driving the importance of stocking matches to suit all occasions.

“Republic Technologies continues to invest in a category that presents so many opportunities for retailers, so we urge them to reach out and find out how we can help. Our iconic brands – such as Swan, Zig-Zag and OCB – will continue to receive support to ensure they keep delivering for retailers, offering store owners consistency in an uncertain market for years to come.”



### Source

- 1 EXT IRI MarketPlace, 52 w/e 06.08.23 vs YA
- 2 Circana EXT2, Symbols & Independents, Volume, 156 w/e 06.08.23
- 3 Circana EXT MarketPlace, Volume 52wks MAT to 06.08.23
- 4 EXT IRI MarketPlace 52 w/e 06.08.23 vs YA
- 5 Circana INT2, excl. Unaffiliated Independents, Volume, 52wks MAT to 06.08.23

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\* (EXT IRI MarketPlace  
Volume 52wks  
MAT 06/08/23)

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Vapes-Bars

# Success prompts next stage

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KEY BRANDS

**Found Mary® FM600**  
**Ghost® Wizz**  
**Ghost® Click**  
**Ghost® Salts**  
**Diamond 600**  
**Diamond Click**

When Found Mary burst onto the scene, it wasn't merely a new product – it was a revelation, says brand owner Vapes-Bars.

“Captivating retailers and consumers alike, it set high standards in the vaping industry, becoming the reference point for others in the sector,” notes the company. “Found Mary’s success wasn’t a stroke of luck, but a testament to innovative thinking and a profound understanding of the vaping landscape. Retailers who recognised its potential reaped the rewards, experiencing boosted sales and solid customer loyalty.”

Now, as the vaping sector continues to evolve, standing out is essential, it adds. “That’s where Ghost Click and Ghost Salts come in,” it says. “These aren’t just products; they are a retailer’s ticket to leading the next wave of innovation in vaping.”

“Adding Ghost Click and Ghost Salts to a retailer’s inventory means more than just expanding their product range. It means seizing a substantial market share and resonating with consumers eager for cutting-edge solutions and progress. Partnering with these pioneers implies not only immediate returns but also future-proofs your business, ensuring sustained success in an ever-evolving landscape.”

**Ghost Salts: 30 flavours to explore**

Understanding that consumers crave variety and richness in their vaping experience, Ghost Salts stands out by offering an extensive selection of 30 unique flavours, adds Vapes-Bars. “This wide range of options not only caters to diverse preferences but also allows users to explore and discover new



“Ghost Click and Ghost Salts are a retailer’s ticket to leading the next wave of innovation in vaping”

tastes, making every vaping session an exciting adventure,” it says. “Ghost Salts’ unique blends and carefully curated collection provide an intense and effortlessly smooth experience, ensuring user satisfaction.”

**Why opt for Ghost Click?**

Ghost Click is more than just a pod device; it’s an identity, according to Vapes-Bars.

“Its design doesn’t merely shout novelty; it resonates with individuals looking to make a statement, seeking an accessory as unique as they are. While its captivating design draws users in, its top-notch functionality ensures they stay. Ghost Click offers everything a vaper could desire: smooth puffs, consistent flavour and a robust build.

“No compromises, just a seamless and satisfying vaping experience.”



# GHOST

CLICK EDITION



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