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The Grocer Guide to...

The Grocer

Tobacco, vaping & accessories



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Analysis

Steering a course for the future



As the single-use vapes ban comes into force, suppliers reveal how they are pivoting to meet ongoing legislative and market challenges

➔ Barely has the latest wave of legislation – in the form of the single-use vapes ban – rolled out of Whitehall, than the tobacco, vaping and accessories category finds itself waiting for the next tsunami to hit home.

And, sure enough, May's news brought reports of a proposed UK-wide crackdown on nicotine pouches¹ after a Scottish Government Minister revealed they would form part of the government's Tobacco and Vapes Bill. The comments followed reports that free nicotine pouches were being handed out at Edinburgh's Waverley rail station, raising immediate alarm among harm reduction experts.

This, of course, has heightened debate on both sides of the fence as to what actually constitutes a safer way for smokers to transition away from

traditional cigarettes – the role that vaping was supposed to, and still does, play despite the continual challenges the sector has faced of late. And, as Vaping Post points out², the argument for and against nicotine pouches will land on whether the UK chooses science-based evidence (largely from Scandinavia) on their benefits in the fight against smoking, or the fear that these smokeless, vapour-free products will become subject to misuse by underage consumers and thus become the latest target of the country's policy-makers, egged on by media-inflamed consumer concerns.

Meanwhile, in March this year, the Tobacco and Vapes Bill, largely supported by both sides of the House of Commons, has quietly completed its report stage and third reading stage³,

advancing the government's vision of a smoke-free future in the UK.

While the industry tackles one battle after the other, it continues to pivot towards new technologies and new products that will meet the increasing burden of legislation imposed upon it, while still satisfying shoppers' demands for products that will fulfil their ongoing desire to consume nicotine in some form or another. And, for retailers, the money keeps rolling in – although how that revenue will pan out in the next few months remains to be seen.

Category performance

The UK tobacco category is estimated to be worth more than £22bn each year⁴, says Andrew Malm, UK market manager for Imperial Brands.

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“Accounting for the biggest share of all tobacco sales (70%)⁵, the cigarette category holds a huge amount of value for retailers.

“Meanwhile, we’ve seen the share of the market for value roll-your-own (RYO) products increase by nearly two percentage points year on year (YOY)⁶, making it the fastest-growing segment, now accounting for more than a fifth (24%) of all RYO sales⁷.

For the cigars and cigarillos sector, latest data from Scandinavian Tobacco Group UK (STG UK) shows the total cigar category to be worth just over £324m – a YOY value growth of 5%⁸, reveals head of marketing Prianka Jhingan. Within this, cigarillos now account for over 57% of cigars sold in volume terms⁹, she notes.

The hunt for value

With more consumers looking for ways to reduce spending amid soaring household costs, Imperial Brands is seeing a shift towards lower-priced propositions in both RYO and factory-made cigarette (FMC), says Malm. “The search for value is very much a long-term trend, and smokers are shopping around to find a product they enjoy smoking without it hitting them too hard in the pocket,” he says. “With products in the lowest pricing tiers (economy and value) now worth 72% of all FMC sales in the UK¹⁰, it’s clear that sales in the category are very much driven by demand for value.”

With that in mind, last year Imperial Brands introduced Paramount, a new cigarette brand targeting adult smokers who are “seeking high quality at exceptional value”, adds Malm. With the value cigarette market growing by 5% in the last year¹¹ and now accounting for 30% of UK sales¹², Paramount addresses rising demand in this segment, he says. “Since its UK launch last year Paramount has become the fastest-growing brand in FMC in FY25¹³.” That said, while value and economy products account for more than half of sales in the RYO tobacco sector, the premium price sector still holds the largest share of the market at 36%¹⁴, making it clear that many adult smokers remain willing to pay a premium for a familiar, trusted brand, he adds.

The search for value is also nothing new in cigars and there will always be some customers who are shopping on



price and looking for the lowest-cost options, or perhaps 10 packs instead of larger pack sizes, agrees STG UK’s Jhingan. “However, while value can be a motivating driver of purchase in the cigar category, many adult smokers often like to take the opportunity to ‘trade up’ to more premium or larger format cigars at certain times of the year,” she says. “One such cigar is, of course, our Henri Wintermans Half Corona brand, which is by far the UK’s best-selling medium/large cigar¹⁵ and often given as a gift on special occasions, such as birthdays, Father’s Day or Christmas.”

“Compliant pod systems look set to be the top product of choice for the majority of adult vapers going forwards”

Change in vaping tactics

In the vapes market, the impact of the single-use ban is already being felt. “Disposable vapes currently account for 36% of the electronic vapour product (EVP) market, dropping 11.5% from last year¹⁶,” says Imperial Brands’ Malm. “The value of disposable vapes within the retail channel has also dropped significantly, from £108m (November 2023) to £85m (November 2024)¹⁷,” he reveals.

However, research shows that the total value of new pod sales has grown by +161% since the beginning of 2024, with next-generation products accounting for 48% of the sales value of all closed systems¹⁸, notes Malm. “Indeed, compliant pod systems look set to be the top – and in many cases only – product of choice for the majority of adult vapers going forward, with 75% of consumers intending to switch to a new pod system alternative because of the ban¹⁹.”

Beyond the single-use vapes ban

With the single-use vapes ban brought into force earlier this month (1 June 2025), the consumer media is full of speculation about the impact of the ban, the potential for illicit vapes, and whether the ban was an ill-thought out piece of legislation¹.

Yet, whatever the views of consumers and industry observers, suppliers and retailers are having to adapt to a new reality.

Those who previously used disposable vape products have had to consider alternatives in the light of the ban on these, says Imperial Brands' Malm. "To navigate the challenges of the dynamic vaping

marketplace with the disposable vape ban now in effect, retailers should focus on key areas like product stocking (including vape flavour variety), customer feedback (addressing both concerns and preferences), and ensuring staff training remains up to date."

Imperial Brands' rechargeable blu bar kits, launched last summer, provide consumers with an ideal replacement in the form of a compliant device that mirrors the same flavour experience and offers a similar convenience that has driven the demand for disposables, he says. "This year we have expanded the range

with the addition of an exciting range of new flavours to the rechargeable blu bar kit vape line, following increasing demand from customers for more flavour options, particularly fruity flavours. Customers can now buy and try a total of 15 flavours across the range."

STG UK believes the ban on disposable vape products represents a good opportunity for nicotine pouch brands, as many next-gen nicotine users will look elsewhere for different products – and pouches offer a very credible alternative, says Jhingan.

"This is largely because, unlike

vapes, nicotine pouch users can enjoy them on public transport, at work, at sporting events, concerts or anywhere they like," she says. "We certainly expect nicotine pouches to be one of the main beneficiaries of the disposable vapes ban. Pouch sales in the UK have started to really take off now as consumers increasingly understand how to use them and benefit from their versatility.

"The UK can look to Sweden, where XQS originates, as a country where next-gen nicotine has enjoyed great success, so we feel confident pouches can play a similar role in the UK," she notes.

Meanwhile, at Elux Europe, the company reports that its nicotine salts have been well received in both the UK and international markets, with steady growth occurring thanks to its focus on innovation, quality and customer satisfaction. Despite regulatory challenges, such as the ban on single-use vapes, the company explains that it is committed to staying ahead of the regulatory curve, focusing on reusable, sustainable and high-quality products to ensure its ongoing success.

Steady progress for pouches

In terms of nicotine pouches, STG UK's Jhingan says the category is worth just over £140m in annual retail sales²⁰ – and this doesn't include sales taking place online. "This reflects YOY growth of 77% in volume terms²¹, offering clear evidence of its growing popularity and consumer demand," she says.

Positive performance for accessories

Republic Technologies (UK) reports that the tobacco accessories market is now valued at over £433m²² and growing at 15%²³.

The company's sales and marketing director Gavin Anderson says that it is continuing to drive increased consumer demand for its brands of choice, including Swan, OCB and Zig-Zag, boosted by the launch of OCB Rice last year.

Tobacco accessories remain a big profit driver for retailers, he observes, with shoppers still wanting quality and value, and he believes that the accessories sector will continue to be a major sales opportunity for retailers.

"Last year was our best ever year for sales," reveals Anderson. "Filters, papers, lighters and matches account for 68% of the value of the accessories market²⁴ – and this should be reflected in the space allocated to them," he notes.

Republic Technologies' focus is on natural credentials for its OCB brand, which Anderson says is really resonating with RYO purchasers. Meanwhile, the company has also reinforced its sustainability commitment in the filters sector, introducing Just Paper plastic-free Swan filter tips, which he says are the first 100% plastic-free filter tips in the UK market.

Tackling the challenge of illicit trade

Across the board, suppliers are concerned by the potential for a rise in illicit trade in the UK, and advocate a united approach from suppliers and retailers to tackle the problem and achieve a sustainable market for the long-term.

Susanna De Lesu, commercial director at BAT UK&I, says: "Moving forward, it is incumbent on our industry and retailers to act responsibly. The categories we and

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others offer are designed to provide smokers with an alternative to cigarettes and we must therefore proceed in a responsible manner.

“Without a responsible and consistent approach among all stakeholders, we risk severely damaging the reputation of these products and jeopardise the UK’s 2030 smoke-free ambitions,” she notes. “BAT UK has long called for better regulation of the vaping and nicotine pouch industry. It is the only way to ensure a sustainable, responsible market in the long term.”

De Lesu points to the example of retail licensing, where she says the majority of retailers are sensible and law-abiding. “However, there are a few rogue, unscrupulous ones all over the country who continue to flog illicit products and also continue to sell to those who are underage,” she adds. “That is why we continue to call for an immediate introduction of a retail licence system [for our category].”

“You will also see us to continue to advocate that nicotine products sold into the UK must first undergo comprehensive pre-market testing in an independent laboratory.

“At BAT UK, this is something we take seriously. We know where our products are designed and what is in them. The same rigorous standards must, however, apply across the industry. Consumers must be able to trust that the products available to them in their local store meet stringent UK standards and mandatory pre-market testing is the only way to achieve this.”

Illicit trade remains a huge challenge within the tobacco and vaping category, agrees Imperial Tobacco’s Malm. “Rising tobacco taxes, along with the cost-of-living challenge, are driving illicit trade in the UK – with many consumers seeking cheaper products. In some cases, this means turning to illicit sources for their tobacco and vaping needs.

“In fact, figures show that 83% of smokers had bought illicit tobacco in 2024 – higher than in 2023 (80%) and 2022 (73%)²⁵.

“The sale of illicit tobacco is a global industry, that harms honest traders, and damages communities, and we firmly believe it should not be tolerated,” he adds. “In the 2022/23 tax year, estimates show that 6.9% of cigarettes and 33.3% of rolling tobacco



were non-UK duty-paid, meaning the Government lost £2.2bn in tobacco tax revenue²⁶. We’d always advise retailers to check their supply sources rigorously and continue to be wary of potential suppliers offering products which may be illicit.”

The rise of the illegal market is one of the most pressing issues facing the vaping and tobacco industries today, says Elux Europe. “Unregulated products not only endanger public health but also undermine the efforts of responsible manufacturers and retailers working hard to comply with legislation. We are deeply concerned

“ Figures show that 83% of smokers bought illicit tobacco in 2024 – higher than in 2023 (80%) and 2022 (73%)²⁵”

about the scale at which illicit products are entering the market and the risks they pose – particularly to younger consumers.

“That said, we are encouraged by the steps the UK Government has recently taken. The announcement of £30m in additional annual funding for enforcement... is a positive move. However, more needs to be done. The industry is calling for consistent, nationwide enforcement, stronger penalties for non-compliant retailers and more collaboration between regulators and legitimate businesses. The upcoming introduction of a national registration scheme for retailers, as recently proposed by the Government, could be a game-changer, providing authorities with greater oversight, while giving compliant sellers a clearer framework within which to operate.”

Elux Europe agrees that suppliers, retailers and government need to

Education and retail merchandising

As the key link between suppliers and the public, retailers hold the key to explaining the varied nicotine offer to consumers, with education and clever merchandising the tools for success.

At Elux Europe the company recommends focusing on educating consumers about the benefits of reusable products “as these not only align with environmental goals but also tend to offer higher margins”, it says. “Maintaining product diversity and offering products that are both compliant and consumer-friendly will help retailers navigate the recent regulations [on disposable vapes]

successfully.”

With refillable e-cigarettes, high-puff disposable vapes and vape tanks remaining popular, Elux Europe adds that retailers can increase their sales success by focusing on consumer education, clear product displays and ensuring their range includes both affordable and premium options. “At Elux, we’re introducing innovative designs and new accessories that complement our vaping products, and we’re encouraging retailers to offer a diverse range of accessories to cater to different tastes and budgets. Highlighting sustainability and eco-friendly options

will also become a key driver of sales.”

Malm from Imperial Brands points out: “It’s important to remember that not every customer who walks into a store is an experienced vaper, so retailers and staff that can provide relevant information and advice that will help customers make an informed purchasing decision and, ultimately, build trust in the store. Being well-versed and knowledgeable about the products you can offer is vital, and we are supporting retailers in this through our Ignite app – where they can keep up to date on regulatory changes as well as new and popular products.”

Although retailers like to stock an extensive range of vape products, Malm advises careful display to promote a minimalist look “as it can simplify the shopping process and make it easier for customers to decide what they want to purchase. “This will also help retailers, and their staff, to maintain stock levels effectively,” he says.

As for accessories, Anderson says that Republic Technologies provides a broad range of POS, such as stands and counter-top units which enable retailers to drive impulse sales in-store, and advises using brand-blocking to merchandise products effectively.

be working on the challenge of illicit trade together. “Ultimately, tackling the illegal market must be a shared responsibility,” it says. “The Government must continue to lead with policy, funding and enforcement while legitimate brands remain committed to high standards, education and transparency. Only through a unified approach can we protect consumers and ensure the long-term sustainability of the legal market.”

Flavour development

Despite all the controversy swirling around the regulatory challenges in the market, suppliers are continuing to develop on-trend flavours that they hope will attract increased consumer attention and sales.

Flavour preferences within the pod-based systems market reveal some interesting trends and can help retailers know what to offer, notes Imperial Brands’ Malm. “In the UK, for example,

fruity flavours take the majority sector share within pods – climbing from just under 41% at the end of 2023 to 65% at the end of 2024²⁷. And, according to recent research, the top 10 most popular flavours amongst UK users of disposable vapes are fruit-based²⁸ – with Lemon & Lime, Pineapple Ice and Strawberry Ice coming in as the top three.

“Mint and menthol flavours take the second-biggest share at 16%; however, this is a marked drop from 28% in the previous period²⁹.

“This is backed-up by customer preference data revealing that almost two-thirds (64%) of UK adults prefer fruit flavours when it comes to vaping³⁰. With this in mind, retailers should be thinking about the flavour options they are stocking.”

Meanwhile, nicotine pouch users are motivated by flavour more than anything, observes STG UK’s Jhingan. “This is one of the reasons we feel so

confident in the future for our XQS brand, which we launched in May last year. It has certainly got off to a flying start and there are over 1m cans now in the market.”

Looking ahead

As this supplement goes to press, the single-use vaping ban is less than a week old and, amid all of the ongoing media hullabaloo around the ban, it can be easy to forget that product development in the overall tobacco, vaping and accessories sector remains at pace.

Trend forecasters in the US are suggesting that smart vaping devices with Bluetooth connectivity, nicotine-free flavoured vaping, functional e-liquids and herbal vaping, eco-friendly products and coil technology are all on the cards for the future³¹. However, in the UK, all brands are reassessing their position and offer in the market to satisfy rapidly changing

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consumer demands and comply with the evolving legislation.

For example, Republic Technologies is extending its credentials in the accessories category to the vaping sector “to keep up with trends and shopper habits”, reveals Anderson. In what the company sees as a “category-boosting first for the market”, its Smarter range, including Smarter Mini and Smarter 6K, incorporates new infinite coil core technology, aligning with UK legislation and offering “a sustainable, cost-effective choice for shoppers”, he says.

Meanwhile, despite the fact that next-gen products will play an important role in the future of the market, Elux Europe says vaping remains a preferred choice for many consumers due to its variety and satisfaction. And it points out: “Like all emerging products, nicotine pouches and heated tobacco will face regulatory scrutiny, which may impact their growth. However, their development shows promise, especially with advancements in quality and consumer awareness. We are focusing on educating both retailers and consumers about the benefits of vaping, while keeping an eye on the rise of next-gen products.”

The company believes smart vaping

devices and eco-friendly products will be significant trends in the future. “The integration of technology, such as Bluetooth connectivity, will offer consumers more control over their vaping experience, such as tracking usage, nicotine levels and device performance,” it says. “Additionally, we anticipate a continued shift towards sustainability with biodegradable materials and reusable devices. At Elux, we are already developing products that align with these trends and are committed to offering innovative solutions that meet the evolving needs of our customers. We also plan to introduce new flavours, technologies and eco-friendly packaging to stay ahead of the market’s demands.”

At Imperial Brands, Malm notes that market agility will be key to retaining business success in the future. “The key for both manufacturers and retailers will be to remain agile, developing and offering products that are aligned with changing consumer preferences,” he says. As an example, he cites the company’s addition of flavours to its blu bar kits, bringing the total number of options up to 15 “in response to industry research on flavour preferences”. This, he notes, is just one example of how Imperial Brands responds to the

market and delivers products that consumers find attractive and are, most importantly, compliant with legislation.

There is plenty of water still to go under the bridge before the UK’s Tobacco and Vapes Bill, due to be enacted on 1 January 2027, comes into force. The bill has now proceeded to the House of Lords for further debate. However, it is a rare example of a policy supported on both sides of government – and that, in itself, is likely to ensure it will continue to have legs. Meanwhile, the complexities of enforcing the single-use vapes ban will be the main preoccupation of authorities in the months to come. That, alone, should make for an interesting year ahead.

Sources

^{1&2} <https://tinyurl.com/24t754cj>

³ <https://tinyurl.com/huvshc9j>

⁴ Statista, The tobacco industry in the UK – statistics & facts, 18.12.24

⁵ ITUK, Report on Trade, November 2023

^{6&7} ITUK data, October 2024

^{8&9} IRI Marketplace, Cigars, Value and Volume sales, w/e 16.02.25

¹⁰ Nielsen/Syndicated Data, with November 24 actuals

^{11&12} ITUK, Report on Trade, May 2024

¹³ IMB, Report on Trade, January 2025

¹⁴ See 6+7

¹⁵ See 8+9

¹⁶ See 6+7

¹⁷ See 10

^{18&19} See 11+12

^{20&21} IRI Marketplace, Nicotine Pouches, Value and Volume sales, w/e 16.02.25

^{22&24} EXT IRI Marketplace, Total Market, w/e 16.02.25

²⁵ TMA, Anti-Illicit Trade Survey, 2024/2023/2022

²⁶ HMRC, Measuring Tax Gaps, 2024 Edition

²⁷⁻²⁹ See 10

³⁰ VapeHub flavour data, collected between July 2024 and January 2025

³¹ <https://tinyurl.com/57Tsyy4f> and <https://tinyurl.com/3je88yyw>

Single-use vapes ban

¹ <https://www.bbc.co.uk/news/live/cp8d99qvm6nt>

Get Smarter in vaping

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KEY BRANDS

Smarter

↙ Republic Technologies (UK) is creating a point of difference in the UK vaping market with its new Smarter product range. In a category-boosting first-to-market, Smarter incorporates new technology (patent-pending) featuring the UK's first vaping range with a no mesh coil pod system, reveals Gavin Anderson, sales and marketing director at the company.

The Smarter range comprises two competitively-priced products: the compact Smarter Mini, providing up to 800 puffs per replaceable pod; and the long-lasting Smarter 6K, which enables users to enjoy up to 6,000 puffs per refill, with a 2ml + 10ml rechargeable tank. Both conform to UK legislation covering disposable vapes, with the Smarter Mini incorporating a replaceable, longer-lasting ceramic coil (as opposed to a mesh coil) which sits outside the pod.

They come in the 12 most popular vaping flavours, according to research. "The Smarter range is breaking



“The Smarter range is breaking new ground by using innovative smart technology,” notes Anderson. “Their sleek design and packaging will appeal to consumers looking for the best quality, cost-effective vaping experience. Users can switch pods with little or no residue and the eco-friendly devices will reduce wastage. “They are backed by extensive POS to drive in-store visibility and awareness.”

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KEY BRANDS

VELO
Vuse
Rothmans
Pall Mall
Dunhill
Vogue
Cutters Choice Original
Cutters Choice Extra Fine

↙ The disposable vapes ban now come into force. From this point on, the sale and supply of single-use vapes in the UK is now illegal and retailers will be handed fines if they are caught breaking this law.

“As the largest UK-based vaping manufacturer, BAT UK is well-prepared for these changes,” says Susanna De Lesu, commercial director, BAT UK&I. “In line with our overarching ambition to build, BAT UK has developed a solid portfolio of options for adult smokers looking for an alternative to traditional cigarettes.

“Our recent focus in the vapour market has been on rechargeable closed or pod-based systems and Vuse is now the UK’s No.1 rechargeable vape brand¹,” she notes. “As part of our ongoing Vaping Done Right campaign, we’ll soon be bolstering our Vuse portfolio even more with the new Vuse Ultra. This rechargeable and refillable device has met our most stringent safety and quality standards, and the liquids themselves are made with no added sucralose, vitamin e acetate or acetoin. It’s our most advanced vape yet, underlining our commitment to delivering the best product possible for adult smokers.

“We’ll also still be stocking our Vuse Pro in addition to the Vuse Go Reload 1000, a modern device equipped with a long-lasting battery. Both Vuse Pro and the Vuse Go Reload can be used with the same Vuse Pro Pods and Vuse Pro Extra Intense Flavour pods, all of which offer consumers the same flavour sensation they have come to



“In line with our overarching ambition to build, BAT UK has developed a solid portfolio of option for adult smokers looking for an alternative to traditional cigarettes”

expect from disposable vapes.” With the new laws now in force, BAT expects more consumers to turn towards premium non-disposable options. “To prepare for this transition, I recommend retailers to get in touch with their local BAT representative (directly or via our My BAT Rewards platform),” advises De Lesu. “Our local representatives are well trained on all of our products and categories and are there to offer support through any challenges ahead this year. This can include support in the form of POSM, with the placement inside and outside of their stores, to help ensure that our brands are displayed to adult nicotine consumers visiting your store.

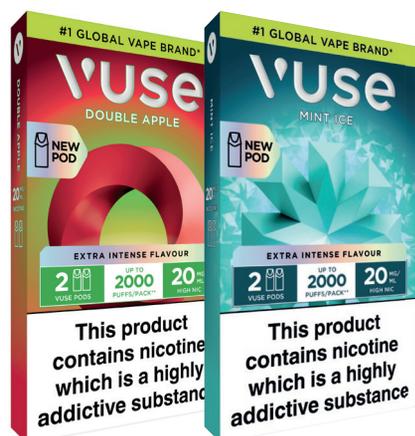
As for category display, BAT has a range of unitary solutions in various sizes and formats – from countertop units to back-wall gantry displays – which help to organise, create space and prevent against theft and youth access, she adds. “We also participate in regular trade media activities where we meet with retailers from up and down the country, to discuss to our product ranges and latest developments.

“One product range where we continue to see strong growth is nicotine pouches – the fastest-growing category in the UK market over the last year or so². We are proud to say that our brand Velo, is the UK’s No.1 nicotine pouch brand³ and we are in the process of further reinforcing this portfolio.”

Source

¹ Based on NielsenIQ RMS data for the Closed System Nicotine Devices category for the 18-month period ending 02.11.24 for the UK total retail market. For more information please visit <https://www.vuse.com/gb/en/claim-substantiation>
² Based on NielsenIQ RMS data for the Nicotine Pouches category for the 12-month period ending 03.05.25 for the UK total retail market
³ Based on NielsenIQ RMS data for the Nicotine Pouches category for the 18-month period ending 31.10.24 for the UK total retail market. For more info, please visit [velo.com](https://www.velo.com)

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*Based on independent third-party assessment of Vuse volume share in measured retail as of November 2024.



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*Based on NielsenIQ RMS data for the Nicotine Pouches category for the 18-month period ending 31/10/2024 for the UK total retail market (Copyright © 2024, Nielsen IQ). For more info, please visit velo.com

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VERIFY



Growing nicotine replacement

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KEY BRANDS

Nicotinell
– **24 Hour Patch** (7-pack, 21 pack)
– **Lozenge** (12s, 96s, 144s, 204s)
– **Gum** (96s & 204s)
– **Spray** (150ml & 300ml – duo pack)

 Dr. Reddy's Laboratories, a global pharmaceutical leader headquartered in Hyderabad, India, is expanding its nicotine replacement Therapy (NRT) with the launch of Nicotinell Spray in the UK, reveals the company. This follows the company's acquisition of Haleon Group's global consumer healthcare portfolio in June 2024.

Nicotinell is the second-biggest NRT brand globally (excluding the US) and holds 1st or 2nd position in 14 of the top 17 global markets, with the lozenge/mini-lozenge format holding the top position globally¹.

Support to break free from nicotine

According to the World Health Organization, of the 1.3bn tobacco users globally, as many as 60% have expressed the desire to quit; however, only 30% have access to the tools to help them do so successfully².

“With tobacco use claiming eight million lives annually³ and driving severe health risks like cardiovascular disease, lung disorders, and cancer, Dr. Reddy's is on a mission to support more people in breaking free from nicotine dependence. And leading the charge is Nicotinell Spray, the latest innovation in fast-acting NRT,” it notes.

Why Nicotinell Spray stands out

Designed for rapid craving relief on the go, Nicotinell Spray is setting a new benchmark in the quit-smoking and quit-nicotine-vaping category, says the company.

“Also in the Nicotinell range are the UK's best-selling NRT Lozenge, Gum and Patches – proven solutions that



“Dr. Reddy's is on a mission to support more people in breaking free from nicotine dependence. And leading the charge is Nicotinell Spray”

have already helped thousands on their quit journey,” it adds. “Now, Nicotinell Spray adds even more choice for smokers and vapers looking for fast-acting support.”

According to Dr. Reddy's, clinical studies show:

- It starts working in just 30 seconds to relieve cravings for smokers and vapers⁴;
- No other spray starts to work faster to relieve smoking and/or vaping cravings⁵;
- Over 9 out of 10 smokers reached 25% reduction in cravings after a single dose⁶.

Growing demand for solutions

“With significant investment in media, Nicotinell is gearing up for a high-impact launch this June, aiming to elevate brand visibility and drive retail growth,” adds the company. “For retailers, this presents a strong opportunity to tap into a growing demand for effective, accessible smoking cessation solutions.

“As consumers increasingly look for convenient, fast-working quit aids, Nicotinell Spray delivers precisely what they need – support in the moments that matter most.”

Source

¹ Business Wire , based on 2022 retail sales value – <https://tinyurl.com/jhtpeb6w>

^{2,3} World Health Organization: <https://www.who.int/news-room/fact-sheets/detail/tobacco>

⁴ Nicotinell Rapid relief 1 mg/ spray oromucosal spray, solution – <https://www.medicines.org.uk/emc/product/100169/smpc>

⁵ SmPC Nicotinell Rapid relief 1mg/spray Oro mucosal spray, solution – <https://www.medicines.org.uk/emc/product/100169/smpc#ref>. Tobias Danielsson et al. Effect of nicotine mouth spray on urges to vape: A randomised, placebo-controlled, pharmacodynamic clinical trial in exclusive e-cigarette users. *Addiction*. 2025; 120:95–105

⁶ Open label craving study in 61 healthy smokers. 3Nicotinell Rapid relief 1 mg/spray oromucosal spray, solution – <https://www.medicines.org.uk/emc/product/100169/smpc>



Introducing NEW Nicotinell Spray

Starts to
relieve
cravings
in just
30
seconds



**NOW from
Dr. Reddy's Consumer Health**

Product Name - Nicotinell Rapid Relief 1 mg/spray oromucosal spray Active ingredients - One spray delivers 1 mg nicotine in 0.07 ml solution. 1 ml solution contains 13.6 mg nicotine Product licence holder Dr. Reddy's Laboratories (UK) Ltd, 410 Cambridge Science Park, Milton Road, Cambridge, CB4 0PE, UK Indication Treatment of nicotine dependence, as an aid to smoking cessation onjunction with a behavioral support program. Supply classification GSL

For trade enquiries please contact Ceuta Healthcare Ltd.

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Offering diversity and flavour

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KEY BRANDS

Elux Legend Nic Salts

Over the past year, the tobacco, vaping, and accessories market has experienced steady growth, despite regulatory changes and economic challenges. During this time, Elux has experienced a period of sustained growth and success in the vaping market, says the company.

“Our products, especially the Elux Legend Nic Salts range, have gained significant traction due to their premium quality, satisfying flavours, and exceptional reliability,” it notes. “We are particularly proud of our innovative approach to providing a diverse range of nicotine strengths and flavours that cater to different preferences, helping smokers and vapers to transition smoothly. Our customer base has expanded, both in the UK and internationally, and our brand has become synonymous with quality, trust, and satisfaction in the vaping industry.”

Expanded portfolio

In response to increasing legislation in the vaping industry, Elux has focused on introducing reusable, sustainable and high-quality products that align with both current market needs and regulatory changes, it says. The company has expanded its product range with high-puff devices, ensuring it caters to consumers who are looking for longer-lasting options.

Innovation remains at the heart of Elux’s business, and over the past year, the company has also focused on enhancing its product offerings with a



“Our products, especially the Elux Legend Nic Salts, have gained significant traction due to their premium quality, satisfying flavours and exceptional reliability”

greater variety of flavours and nicotine strengths, it says. “Our new product lines have been met with enthusiasm, and we continue to explore emerging trends in the vaping industry.”

Future insight

While next-gen products like nicotine pouches and heated tobacco will play an important role in the future of the market, Elux believes they will not completely replace vaping. “Smart vaping devices and eco-friendly products will be significant trends in the future,” it says. “The integration of technology, such as Bluetooth connectivity, will offer consumers more control over their vaping experience, such as tracking usage, nicotine levels, and device performance. Additionally, we anticipate a continued shift towards sustainability with biodegradable materials and reusable devices.

“Looking forward, we plan to introduce more eco-friendly accessories and devices, as sustainability is becoming an increasing priority for consumers. We are also investing in smart vaping technologies and exploring the use of biodegradable materials to ensure we meet the evolving needs of environmentally conscious customers. These innovations will continue elevate our brand and provide our consumers with the best possible vaping experience.”



ELUX

BEST E-LIQUID

RANGE WINNER

LEGEND NIC SALTS

NICOTINE STRENGTH:
10 mg & 20 mg

50

Flavours
Available

10ml

50/50

10/Box

Order your
FREE
display
unit today

*Request from
your local supplier



Welcome to the world of FUMI

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Manager – United
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KEY BRANDS

FUMI

– **Minty Blueberry:** A space to be subtle

Refreshing mint meets sweet blueberry notes for a cool berry sensation.

Strong 8 mg/pouch

– **Fiery Mango:** A space to be striking

A sweet, tropical mango flavour with a subtle fiery twist.

Strong 8 mg/pouch

– **Tangy Strawberry:** A space to be summery

Sweet strawberry taste balanced by a tangy twist.

Strong 8 mg/pouch

– **Freezy Mint:** A space to be open

Brisk and refreshing mint flavour.

Extra-strong 11 mg/pouch

With nine bold flavours and a range of nicotine strengths, Fumi delivers quick flavour release and a long-lasting taste experience in slim, premium pouches, says the company.

“But we don’t just create products – we carve out space,” it says. “In a world that tells you who to be, we believe in something else: curiosity over convention. A place not shaped by rules, but by you. A space for stillness, mischief, meaning. A space to be – you. A space to explore.”

Nicotine pouches: growing potential

Nicotine pouches are a growing category – and Fumi has the bold flavour experiences your customers will return for, explains the company. “With a range of nicotine strengths, Fumi delivers quick flavour release and a long-lasting taste experience in slim, premium pouches. Its strong margins can boost your business and its carefully curated range caters to every preference.”

Unlock the returns

Smart ranging and strategic merchandising are key to maximising profits in this rapidly growing category, it adds. “Independent retailers are seeing significant returns from nicotine pouches, with the category offering strong cash margins and increasing consumer demand,” it says. “The key to success lies in strategic stock selection and placement that caters to your customers’ evolving preferences.



“Retailers are seeing significant returns from nicotine pouches, with the category offering strong cash margins and increasing consumer demand”

“With nicotine pouches increasingly chosen for their discretion during travel, work and leisure activities, positioning premium brands near the till point can significantly boost impulse sales. Current UK market trends show mint and fruit variants driving category growth – strategic placement of these flavours can help maximise returns.

Profit-driving strategies for retailers

- 1. Premium positioning:** Place high-margin SKUs at eye level to drive value sales. This simple adjustment can really impact your category returns.
- 2. Range innovation:** Be first to market with new flavours. Early NPD adoption helps establish your store as a category destination, building loyal custom.
- 3. Smart secondary siting:** Create additional purchase opportunities by strategic placement beyond the main fixture. Till-point positioning has been shown to increase impulse sales.
- 4. Impactful POS implementation:** Utilise supplier-provided POS materials effectively to drive awareness and create interest. Well-placed POS can influence purchase decisions and boost category engagement.



HEALTH WARNING

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

STOCK UP WITH FUMi.

- Nicotine pouches are a **growing category** — and FUMi has the bold flavour experiences your customers will return for.
- With **strong margins** to boost your business and a carefully curated range that caters to every preference, Swedish-made FUMi is the perfect addition to your assortment.



With nine bold flavours and a range of nicotine strengths, FUMi delivers quick flavour release and a long-lasting taste experience in slim, premium pouches.



MADE IN SWEDEN

This product contains nicotine which is a highly addictive substance.



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Staying ahead of the game

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blu
Golden Virginia
JPS Players
Lambert & Butler
Paramount
Regal
Richmond
Riverstone
Rizla

Imperial Brands’ products – both combustible and non-combustible – continue to perform strongly on the UK market, reveals Andrew Malm, UK market manager for the company.

“In factory-made cigarettes (FMC), our best performers are JPS Players, Richmond, L&B Blue, Lambert & Butler and Embassy, while the best-sellers in roll your own (RYO) are Golden Virginia, Gold Leaf JPS, Riverstone and Players¹,” he says.

A key recent introduction in FMC is Paramount, a new cigarette brand targeting adult smokers who are seeking high quality at exceptional value. “Paramount features premium, full-flavour Virginia sun-ripened tobacco, catering to the UK market where the majority of cigarettes feature Virginia blends²,” explains Malm.

“With the value cigarette market growing by 5% in the last year³ and now accounting for 30% of UK sales⁴, Paramount addresses rising demand in this segment. Available in both king-size and super king-size formats, the brand leverages its success in European markets, including Germany, where it was the fastest-growing cigarette product⁵.

“An area where we hold the largest share of the UK market is cigarette papers⁶, thanks to the ongoing appeal of the iconic Rizla brand,” adds Malm.

“A recent introduction to the Rizla range is the addition of a new Classic King Size Combi variant. Available at an RRP of £1.40*, Rizla Classic King Size Combi includes 32 unbleached king-size papers and tips to appeal to the rising number of smokers looking for papers with a more natural look and feel with the added benefit of tips in the same pack. This ensures



“Imperial Brands has recently introduced an exciting range of new flavours to its rechargeable blu bar, while Paramount is a key launch in the FMC sector”

Rizla Classic King Size Combi offers everything smokers will need for the perfect, authentic rolling experience.”

“In vape products, our market share continues to grow thanks to our commitment to innovation and ability to bring to market products that meet evolving customer preferences.”

New flavours brought to vaping

With the vape market in the UK continuing to be driven by flavour choice and ease of use, Imperial Brands recently launched an exciting range of new flavours to its rechargeable blu bar kit vape line. The launch includes three new blu bar kit flavours: Watermelon Ice, Blueberry Ice, and Blueberry Sour Razz. Each kit comprises a rechargeable blu bar device and replaceable pod for intense flavour delivery and up to 1,000 puffs per pod.

In addition, 11 new blu pod pack flavours have been added to the range – Blueberry Ice, Lemon Lime, Strawberry Ice, Berry Mix, Kiwi Passionfruit, Mint, Apple, Grape, Banana Ice, Blueberry Cherry, and Triple Melon – giving customers can buy and try a total of 15 flavours across the range. The blu pod packs each contain two replaceable pods allowing a total of 2,000 puffs*.



Source

¹ ITUK data, October 2024
² ITUK EPOS & EDFM data, as at August 2024
³ ITUK, Report on Trade, May 2024
⁴ NielsenIQ data, Fastest growing brand in Germany in the FMC category (excl. private label) based on absolute volume of sticks during the period [July 2023 to June 2024]
⁵ EPOS data, July 2024

* Based on ITUK RRP as at March 2025. For the avoidance of doubt, retailers are free at all times to determine the selling price of their products.

NEW blu[®]
barkit

£5.99**



FLAVOUR, RECHARGED

INTENSE FLAVOURS. UP TO 1000* PUFFS PER POD.



18+
only

*Puff count is a maximum estimate of 1 second puffs per pod based on lab testing of newly manufactured products. Actual number of puffs may vary depending on individual usage and flavour.

**RRP: For the avoidance of any doubt, retailers are free at all times to determine the selling price of their products.

THIS PRODUCT CONTAINS NICOTINE.

For existing adult smokers and vapers only. 18+ only.
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DETAILS

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KEY BRANDS

IVG Pro
IVG Savr
IVG 2400 4in1
IVG Smart Max
IVG Intense Salts

Over the past year, IVG has continued to set new standards in the vaping industry, offering products that meet evolving consumer preferences and the needs of retailers, says the company. “Our commitment to innovation and sustainability has driven the launch of groundbreaking devices, all designed to meet the market’s shifting demands, considering recent regulatory changes, while offering continued value for retailers,” it says. Recent innovations include:

- **The IVG Pro:** this sets a new benchmark in the premium vape category, combining high performance with a sleek design. Offering up to 10,000 puffs, a 1000mAh rechargeable battery, and an LED battery screen, the IVG Pro ensures a reliable and satisfying user experience. With 15 intense flavours and a replaceable pod system (sold separately), it creates opportunities for repeat purchases, making it a high-margin, fast-moving product for retailers looking to expand their premium offerings.
- **IVG Savr:** For retailers seeking a cost-effective solution without sacrificing quality, the IVG SAVR is an excellent choice. Offering up to 3,000 puffs at an attractive RRP of £5.99, this device features a 650mAh battery and is available in 30 popular flavours. Its replaceable pod system (sold separately) encourages repeat sales and reduces waste, making the IVG SAVR a strong, value-driven option for retailers seeking high volume and strong margins.
- **The IVG 2400 4in1 & Reload Pods:** this revolutionary device offers four flavours in one device with a 1750mAh rechargeable battery. Available in 45 editions and 10 mix-and-match single flavours, it has unmatched versatility. With reload pods (sold separately), the IVG 2400 is a sustainable, rechargeable option that allows for extended use and repeat sales, making it an ideal choice for B2B partners seeking both convenience and high margins.
- **IVG Smart Max:** this takes vaping to the next level with up to 10,000 puffs and a powerful boost mode for a customisable experience. Featuring a 1000mAh battery, it delivers intense



“We have introduced some groundbreaking devices, designed to meet the market’s shifting demands”



performance in 20 premium flavours, with replaceable pods (sold separately) that ensure long-term sustainability. Designed for modern vapers, the Smart Max is a high-quality, repeat-purchase device that provides strong sales potential for retailers.

● **IVG Intense Salts:** offering a smooth, satisfying nicotine experience, IVG Intense Salts are available in 10mg and 20mg strengths. With 30 intense flavours, these salts cater to both new and experienced users, making them an ideal product for retailers looking to meet the demand for premium nicotine salts while offering robust flavours and repeat sales.

Leading the charge in the market

“IVG continues to lead the way with innovative, high-quality products that meet the demands of both consumers and retailers,” it says “By introducing rechargeable devices and sustainable solutions, IVG is leading the charge in an increasingly regulated market. We remain committed to supporting our retail partners with products that drive sales, foster customer loyalty, and meet the needs of today’s discerning vapers.”



AWARD WINNING
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SAVR

UP TO 3K PUFFS

6

Strawberry Raspberry Cherry

This product contains nicotine which is a highly addictive substance.

3000 PUFFS
FOR RRP **£5.99**

2400

4 FLAVOURS IN 1 DEVICE

8

4 in 1

Ice Blue
Ice Blue
Blueberry Fusion
Blue Raspberry Ice

This product contains nicotine which is a highly addictive substance.

WHY HAVE ONE WHEN YOU CAN HAVE 4 in 1

FLAVOURS DEVICE

PRO

READY TO USE

12

DOUBLE MANGO

10K PUFFS

This product contains nicotine which is a highly addictive substance.

ADVANCED TECHNOLOGY
HIGH PERFORMANCE

MEETS THE NEW ERA OF VAPE STANDARDS

INTENSE SALTS

INTENSE SALTS

SOUR GREEN APPLE

This product contains nicotine which is a highly addictive substance.

INTENSE
Flavour in Every Drop

SMART MAX

READY TO USE

12

BOOST A TASTE A

10K PUFFS

Retro Orange

This product contains nicotine which is a highly addictive substance.

BOOST YOUR SMART TO THE MAX

RELOAD

2400 RELOAD

Flava Cherry
Plum Blue Razz
Graphite
Black Razz Cherry

4 in 1 PURPLE EDITION

PODS IN 1 PACK

This product contains nicotine which is a highly addictive substance.

X2 PODS

WATERMELON ICE

This product contains nicotine which is a highly addictive substance.

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UK Head of Marketing

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Signature Moments
Henri Wintermans
XQS

 The nicotine category is currently undergoing significant change, as traditional tobacco sales continue their gradual decline, while many next-gen nicotine options are growing in popularity and increasingly impacted by legislation. Within this category evolution, one current trend coming to the fore is the importance of flavour for many nicotine users, observes Scandinavian Tobacco Group (STG) head of marketing Prianka Jhingan.

“Cigarillos are the current success story within cigars,” she says. “This segment only really started five years ago with the arrival of these smaller, peppermint-flavoured products, but sales are now worth nearly £150m¹ and they account for more than half of all cigars sold in volume terms². In the last 18 months or so, distribution has improved, and sales for our Signature Action cigarillo brand have more than doubled since last year³, with adult smokers appreciating the great flavour and cheaper price point, compared to other brands in the market.”

To further capitalise on the surge in demand for flavoured cigarillos, at the start of this year STG added Signature Action Mix cigarillos to its offer, which contain two capsules and combine the flavours of Berry and Mint. “These come in 10-packs with an RRP of just £5.85, which is lower than competitor brands, but still offer an attractive margin to retailers,” says Jhingan.

“Nicotine pouch sales are becoming too big to ignore,” she adds. “With the impact of upcoming legislation on disposable vapes now imminent,



“Nicotine pouch sales are becoming too big to ignore. Brands like XQS offer a very credible and attractive alternative to vapes due to their exciting flavours, discreet nature and ease of use”

many vape consumers will be seeking out alternative next-gen products. So, nicotine pouch brands like XQS are likely to see a further surge in sales as they offer consumers a very credible and attractive alternative due to their exciting flavours, discreet nature and ease of use. Also, pouch users are motivated by flavour more than anything, which is one of the many reasons we feel so confident in the future for our XQS brand, launched a year ago. The predominant flavour of choice is definitely mint, but fruity flavours are also proving increasingly popular with consumers too.

“To meet this growing demand, we’ve recently introduced three fresh new fruity flavours to our growing XQS nicotine pouch portfolio, which now stands at eight,” she adds. “The latest arrivals – Raspberry Blackcurrant, Strawberry Kiwi and Berrynana Twist – have all been available to retailers from April. Raspberry Blackcurrant offers a vibrant blend of juicy raspberries and bold blackcurrants for a perfect mix of sweetness and tartness. Strawberry Kiwi has a refreshing and vibrant mix of strawberries and tangy kiwi, while Berrynana Twist gives users a smooth mix of ripe berries and creamy banana for a rich and balanced fruity taste.”



Source
^{1,2,3} IRI Marketplace, Value and Volume Sales, w/e 16.02.25

NEW ACTION

MIX



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