

9 OCTOBER 2021

The Grocer Guide to...

The Grocer

Tobacco, Vaping & Accessories



BACKED BY SCIENCE



OUR VAPES ARE TESTED FOR 1000s OF HOURS BY MORE THAN 50 SCIENTISTS BEFORE REACHING CONSUMERS' HANDS.



VUSE IS A PIONEER IN VAPOUR SCIENCE

- ✓ Consumers are at the heart of product development. That's why our specialist vape team of technical, scientific and engineering experts carefully craft our devices and E-Liquids.
- ✓ We're proud to have pioneered vapour technology since 2014.



OUR VAPOUR TESTING

- ✓ We carefully select our liquid ingredients and optimise our liquid for maximum compatibility with high quality standards in mind. Therefore, we test our liquid pods and devices together to ensure high quality standards.
- ✓ An important part of this is vapour testing. Before a new product is launched, we collect and analyse the vapour using analytical testing methods.



ABOUT OUR INGREDIENTS

- ✓ Vuse takes ingredient selection seriously. Just because an ingredient is used in food doesn't mean it's suitable for vaping. Therefore, every single ingredient in our liquids is carefully reviewed by a team of toxicologists.
- ✓ Vuse E-Liquids are made of high-quality pharmaceutical and food grade ingredients.



VUSE IS ISO 9001 CERTIFIED*

- ✓ 'Good enough' isn't good enough. That's why we have an ISO 9001 certification*



SCAN ME

KNOW YOUR VAPE

VUSE CHARGE BEYOND

FOR MORE INFORMATION, PLEASE CONTACT YOUR SALES REPRESENTATIVE

*By ISO 9001 certification we mean ISO 9001:2015 (Quality Management Systems), certified by an independent third party; for the research and development activities involved in the design of Vuse electronic devices (e-cigarettes) and associated liquid formulations (e-liquids), based in UK R&D.



This product contains nicotine which is addictive.



Analysis



Leading lights

While tobacco continues to be resilient, all categories continue to fight for sector leadership

There's a certain irony in the fact that this tobacco, vaping and accessories supplement is being published during the UK government's latest Stoptober campaign, which is calling on smokers in England to make the attempt to quit smoking. According to gov.uk, more than six million adults in England still smoke, and a recent nationwide survey¹ of 2000 smokers from Public Health England, conducted by Opinium from 20-31 August 2021, found that nearly half (45%) have been smoking more since the first lockdowns began, with key reasons cited as boredom (43%) or anxiety (42%). Yet the same study also found that over half of smokers (54%) want to quit,

with 55% citing physical health and 52% citing money. Indeed, smoking combustible cigarettes has become an expensive habit, with the ONS revealing the average price of 20 King Size filter cigarettes is now at £11.46 (August 2021) compared to £6.60 10 years ago (August 2011)². Notably, the government is still reaping a sizeable £9.96bn in tobacco duty tax receipts in the UK in 2020/21, jumping up from £8.8bn in 2019/20³. Perhaps more worryingly for government and health officials, data from the monthly UCL Smoking Toolkit Study also indicates a large increase in smoking among the under-35s since the pandemic to 24% versus 18% in 2019⁴.

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Analysis

And so, the UK government's battle to achieve a smoke-free Britain by 2030 continues.

The past 18 months have had a mixed impact on the tobacco, vaping and accessories sector. While, on the one hand, the stresses of the whole Covid-19 situation and the convenience of smoking at home have prompted some consumers to smoke more, efforts by others to adopt a healthier lifestyle have resulted in a move away from combustibles to other potentially less harmful alternatives⁵.

Yet despite everything that has happened over the last year, the tobacco market continues to be one of the biggest in FMCG, says Ross Hennessy, sales vice president at JTI UK. "The value of tobacco in the UK totalled £15.7bn in the last year⁶, thus continuing to be one of the most resilient FMCG categories in the UK and one that drives footfall and revenue for stores nationwide.

"Existing adult smokers continue to seek good-quality tobacco at an affordable price – including RYO brands. Within the RYO category, value RYO is the leading sector with a 50.6% share⁷, providing a significant opportunity for retailers to maximise sales. Retailers should therefore stock up on value RYO products, such as Kensitas Club, which has an annual sales value of £163.3m⁸."

"Many industries have suffered during the pandemic, but traditional tobacco has continued to perform above expectations over the past 18 months," notes British American Tobacco (BAT) UK & Ireland head of B2B Khurram Durrani. "On top of that, new categories, such as vapour and oral nicotine pouches continue to grow rapidly."

Republic Technologies head of sales Gavin Anderson points to an increase in people moving from factory-made cigarettes to RYO. "This was a shopper behaviour shift that we were already seeing, partly prompted by legislative changes, but it has accelerated since the pandemic began," he says. "Recent research from gov.uk shows that almost half of smokers have been smoking more since the first UK lockdown last year⁹ due to having more time at home."

According to Marcus Saxton, CEO of Totally Wicked Group, "through 2020, vaping numbers grew by just over 10% to 3.6m [consumers]¹⁰", and he



“Through 2020, vaping numbers grew by just over 10% to 3.6m [consumers]¹⁰”

forecasts this trend will continue. He ascribes some of this performance to “the arrival or resurgence of disposable vaping devices latterly”, which he says “will undoubtedly have provided huge growth to the category, as both smokers and social smokers have found a plethora of devices that now deliver a great experience in a format as simple as combustibles, but 95% safer¹¹”.

On its website, Totally Wicked also points to the relatively cheaper cost of vaping compared to combustible cigarettes, saying: “The average 20-a-

day smoker will ... fork out around £3,869 each year. When you make the switch to vaping the average annual cost (based on higher strength e-liquid, starter kits, 10 bottles of e-liquid per month, plus accessories is just £633.60. When smokers make the decision to quit cigarettes and switch to e-cigs there tend to be several reasons.

Health, general well-being and, for a lot of smokers, money is a big concern. This is an often-overlooked benefit of switching from smoking to vaping.”

Meanwhile, JTI UK head of reduced risk products Gemma Bateson reckons the vaping category in the UK was worth £318m in the last year in traditional retail¹², with growth of 18.3% year-on-year¹³ and £196m in supermarkets alone¹⁴. “At first, more people were inclined to visit their local shop because of convenience and their



£15.7bn

Value of tobacco in the UK over the past year⁶

IRI Marketplace

45%

of UK consumers have been smoking more since lockdowns began¹

Public Health England

£318m

Vaping category's value in traditional retail¹²

IRI Marketplace

£18.6m

Value of the nicotine pouch category in the UK¹⁹

IRI Marketplace

perceived safeness," she says. "When vape stores were allowed to reopen on 15 June 2020, sales of e-cigarettes in traditional retail remained 7% higher¹⁵ than pre-pandemic levels and, in November last year, sales boosted again, increasing by 8% in traditional retail¹⁶ and 13% in independent stores¹⁷.

Laith Sheena, sales director at Acme Vape Labs, which launched its IVG Bars to the market in July this year, describes the vaping market as "dynamic", with vapers often looking for the latest trends. Next-generation disposable devices or bars are no exception, with "unprecedented demand" seen for the company's new Bar, especially across the convenience and petrol forecourt station outlets, he says.

"The vaping markets has definitely opened up in the past year to the point where devices and accessories have

become universally available across retailers," says BAT's Durrani. "But, while vaping stores have less of an influence in terms of volume, they still have a very important role in helping to educate existing nicotine consumers. Vuse has shown consistent growth in the closed vape segment, including a 6.5 percentage point rise in the share of the independents and symbols sector¹⁸."

"The specialist vape channel plays a different role to that of supermarkets and convenience stores," agrees Juul Labs UK sales director John Patterson. "Vape stores offer a level of knowledge, experience and expertise not necessarily found in other channels. Like all industry members we welcomed the reopening of vape stores, as they play an integral role in helping our mission of transitioning adult smokers away from cigarettes and eliminating

their use. Indeed, these stores are often the first stage of an adult smoker's journey away from tobacco."

Totally Wicked Group's Saxton agrees "retail has played – and always will play – a critical role in educating new consumers" in the vaping category. As such, the reopening of retail and the steady return of workers to offices has been beneficial, he says. However, the ability to reopen the company's stores... has been "well overdue, with the pandemic taking its toll and not all independent vape businesses surviving".

Alternative options

"The nicotine pouch category has made waves over the last year and shows no sign of slowing," says Paul Shakespeare, portfolio brand manager at JTI UK. "The category in the UK is now worth £1.5m a

Analysis



month, approximately £18.6m a year¹⁹. Now, more than ever, UK-based existing adult smokers and vapers are looking for convenient, discreet products that can be used when smoking or vaping might not be possible.”

He notes that the company’s Nordic Spirit brand commands a 71.2% share²⁰ of the nicotine pouch brand category in traditional retail in the UK and an 85.5%²¹ market share in the convenience channel. Nordic Spirit nicotine pouches are tobacco-free and smoke-free, so designed to be used on the move – at work, at home or on public transport – as they are discreet and easy to use, he adds.

BAT’s Durrani is also seeing positive developments in the nicotine pouch sector: “Our focus on our nicotine pouch, Velo, has delivered strong growth, from a 0.4% share of the

“Adult smokers tend to purchase the same brand at the same stores on a regular basis”

nicotine pouch category to 16.4% and growing²²,” he says. BAT has also worked on its safety messaging, aimed at helping independent retailers prevent access by underage people to tobacco and alternative nicotine products, with an updated nationwide programme, called Verify.

Online business

Companies in the category have continued to find online routes to market despite the reopening of retail.

According to Totally Wicked Group’s

Saxton, the company already operated a “multi-faceted business” prior to the pandemic and was therefore “well-positioned to capitalise on the shift to e-commerce, including a very popular subscription service”.

He says: “We also offer a call and collect service in our retail stores, which maintained an important role for those customers who chose not to transition to online, as well as leading to a number of new customers who have now remained with us.”

In addition, he says, convenience and multiple partners – among them EuroGarage forecourts, Asda and Sainsbury’s – also saw a significant increase in vaping trade (>50%), which has to a large extent been retained.

Offering adult smokers vaping options in a location where they already buy combustible cigarettes

Innovation mirrors the market



A research study by reportlinker.com forecasts that users of next-generation tobacco products – heated tobacco, vaping, pouches and e-cigarettes – in the global market will more than double by 2030, to 114.2 million, up from 41.2m users in 2020¹.

While new product development in the UK's tobacco, vaping & accessories sector has been somewhat sporadic this year, as some companies appear to have adopted a wait-and-see approach, others are forging ahead with new products that meet both market trends and transitioning objectives.

This spring JTI UK introduced a new member to the Sterling tobacco family – Sterling Rolling Tobacco Essential 30g. “Available at an RRP of £12.35 it offers the lowest price point in the Sterling Rolling family,” reveals sales vice president Ross

Hennessy. “It comes in a paper insert pouch packaging, which contains less aluminium while the blend generates less leaf waste compared to other RYO brands due to its unique whole leaf blend.”

Juul has just launched its next-generation Juul2 system “with new technology offering adult smokers a more consistent vapour experience”, says Juul Labs vice president EMEA Dan Thomson. The new device features a larger, long-lasting battery and larger pods containing a Juulpod ID, which helps to combat underage use and counterfeit pods, says the company. It has been made available on the company's website from 30 September and will roll out to retail in early 2022.

Acme Vape Labs plans to build on the IVG Bar brand, launched in July this year, by adding a second version in Q4 this year, which UK sales director Laith Sheena says

will be available as a price-marked pack and offered “in six new unrivalled flavours”.

Totally Wicked Group's focus has been on introducing simpler/simple products, which it feels will be attractive to current smokers, says CEO Marcus Saxton. “No need to press buttons, change settings and with very limited maintenance – hence, most recently we have added the Totally Wicked Disposable and The Totally Wicked Refillable Vape Kit. Both are incredibly simple, self-executing packs... in flavours and format that are perfect for the smoker to vaper journey.

“Vaping has been proven to be the most successful quit aid and, as a result, we are confident that as we continue to develop and launch our simple yet effective solutions to make the transition for smokers as seamless as possible, we have the right product set to attract the 6.9m smokers.”

means speaking directly to an already captive audience.

While Juul's Patterson says it continues to offer its products to adult smokers on its website and through approved retail partners, it notes that adult smokers “tend to purchase the same brand at the same stores on a regular basis. By offering these smokers alternative products where they purchase their tobacco, retailers can introduce them to options that are potentially less harmful than cigarettes,” he points out.

“During the lockdown, there has been an obvious upsurge in e-commerce purchasing by consumers,” says BAT's Durrani. “We continue to evolve our platforms and innovate to give our consumers the very best experience online – for example, subscription services, better delivery

options and easier shopping journeys.

“However, despite the rise in e-commerce, most consumers will continue to shop offline. And we know that the vast majority (89%) are comfortable in making trips to retail destinations²³.”

While Republic Technologies has offered support and managed initiatives remotely through the lockdowns, via platforms such as Zoom and Teams to ensure sustained strong sales performance, there is clear delight that the team is now able to “get back out on the road in recent months, conducting face-to-face field visits with retailers and running regionally targeted ‘City Blitz’ sales drives to reach a wider audience”, says Anderson. The latter initiative allows the team to meet lots of existing and new retailers and offer samples of its latest counter-top

display units, as well as give advice on more effective merchandising, he says.

Merchandising & education

Suppliers agree that high visibility in retail locations is key to maximising sales opportunities – and they have a raft of options to support retailers in this regard.

“Across independent and multiple retailers, the same golden rules apply,” says BAT's Durrani. “It's about always keeping availability high and products visible. Our BAT gantries, designed to boost visibility and placed in a considerable number of retail outlets across the UK, have provided fantastic results for retailers. A well-lit, well maintained, well stocked and clearly price-marked unit drives considerable growth for a retailer. Retailers should make sure they and their teams are

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knowledgeable about their products and talk regularly with consumers about the products they want.”

“Like any other category, customer demand should largely dictate the products stocked,” agrees Juul’s Patterson. “If there is no customer demand, products are just taking up valuable shelf space. So the majority of the gantry display should be dedicated to the leading brands and proven best-sellers in each sub-sector of the smoking alternatives category, while leaving some space for regional/local variations or customer-specific requests. Closed pod refills and e-liquids tend to work best in multiples and convenience, given they are premixed and simple to use, and should form the majority of the space on the fixture, with at most 20% given to hardware.”

For retailers there is now a larger category solution available, which includes backlighting where vaping, next-gen and tobacco products can be stored in the same gantry, says JTI UK’s Bateson. “The solution incorporates the entire category and is available in a variety of widths. For smaller stores or those looking to introduce next-gen products for the first time, a counter-top display solution is a viable option to test consumer response to the introduction of the category,” he adds.

Saxton at Totally Wicked points to free-standing display units, which allow free access/browsing to shoppers, as well as permitting a good breadth and depth of range in a small footprint, as recommended solutions. “[We offer a] small counter-top unit that supplies our brand of disposable vape products, easily positioned at till point for convenience, with a high return-on-sale,” he adds.

Acme Vape Labs’ Sheena notes that its IVG Bar and Disposables are classic impulse purchases and, as such, “they belong on the counter”. The company offers various counter units and other merchandising options to retailers and engages with them through the company’s field sales team, telesales team, trade press and educational POS and experiential activity, he adds.

Educating retailers is also in focus at JTI, says Hennessy, where the company works closely with its retail partners to help them maximise profits in the vaping and next-gen categories.



“We are constantly monitoring sales data to ensure that our range matches the latest trends”

“We are constantly monitoring sales data to ensure that our range – and any new products – match the latest trends to help retailers meet customer demand. Our reps are also on hand to assist retailers and answer questions that are specific to them. We would also advise retailers to look at regionalised data to ensure their reps are giving the best and most pertinent advice.”

He also points to the company’s online resource, JTIAdvance.co.uk, where retail staff can find news, peer-

to-peer and expert advice, prices lists and comprehensive training modules, which he says can serve as a one-stop-shop for staff to consolidate their industry knowledge.

AT BAT, the company is making “consistent upgrades” to its B2B sales platform, MyBATRewards – a “rich and valuable source of education for retailers and their teams, including information on sustainability trends and all our products” – which is now also accessible via a new Android app, explains Durrani. “It’s a fantastic tool for retailers to remain informed, provides access to critical category-based training and, more importantly, provides an opportunity for retailers to win sought-after prizes, including trips and top tech.

“We’ve added a ‘rate your rep’ feature, allowing retailers to give



valuable feedback and we intend to add new features to the platform on a continuous basis," he adds.

In the accessories market, driving visibility – of NPD in particular – is key to increase shopper awareness, and encourage impulse sales, says Republic Technologies' Anderson. "One example of Swan's innovation is the Swan Menthol counter-top display unit, launched last year, which displays five packs of each of the four Swan menthol SKUs and enables retailers to showcase the breadth and choice in flavour and format from the filter brand."

Meanwhile, Clipper UK claims its carousel counter display for its refillable lighters can increase sales by up to 50% more²⁴ than a standard gantry display, just by increasing visibility of the colourful lighter collections.

Sustainability

As with other FMCG industries, the tobacco, vaping and accessories sector is well aware of the increased consumer focus on sustainability in recent times.

"Shopper habits continue to reflect an increasing demand for more sustainable products, including natural ingredients, reduced packaging, and removal of single-use plastics across all categories," says Republic Technologies' Anderson. "As sustainability continues to rise up the convenience shopper's agenda, Republic Technologies is offering more choice in this fast-growing area... [with] a surge in demand for category-boosting products, such as OCB Virgin and OCB Organic Hemp Slim Papers and Slim & Tips. The unbleached papers are 100% vegan and made using OCB natural gum, which is sustainably sourced from African acacia trees.

"There is also growing interest in the UK's most environmentally-friendly filter, Swan Eco Loose, which degrades three times faster than standard cellulose acetate filters."

AT BAT, meanwhile, the company's innovation on sustainability has helped its Vuse brand become "the first global vape brand to be certified carbon neutral²⁵", reveals Durrani. "Its packs are now made from 100% recyclable cardboard and we continue to work hard on finding new ways to reduce the environmental footprint of all our products and help retailers understand how they can operate more sustainably."

Future outlook

"The tobacco and nicotine market will continue to diversify beyond traditional, combustible tobacco," notes BAT's Durrani. "We're seeing a shift by traditional smokers to alternative nicotine products, such as vapour and oral nicotine pouches.

"Retailers will likely continue to see fewer adult consumers asking for tobacco and a greater number enquiring about alternative nicotine products – it's another great opportunity to continue growing our sales to adult nicotine consumers."

"The impact of UK lockdowns and Covid-related restrictions has resulted in acceleration of growth for the buoyant tobacco accessories market," says Republic Technologies' Anderson. "New products will continue to have a major

role to play in ensuring the category grows and achieves its sales potential for retailers. Timely, category-boosting NPD enables retailers to meet fresh demand among shoppers and we are confident it can continue to add valuable growth to the broader category."

"Vaping will, conservatively, grow by 13%²⁶, and this is likely to be much higher given the considerable growth of disposables, which have been additive to the category in the past three months," says Totally Wicked Group's Saxton. "Traditional vape stores will continue to reduce in numbers and consolidate around a core and stable base of operators, made up of chains and independent specialists. Convenience and supermarkets have the opportunity to grow much faster," he notes, "and those retailers that continue to evolve their category behind the market leaders, which provide the products consumers demand, as well as advice, expertise and leading merchandising solutions, are sure to lead the pack."

Sources

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- ⁸ IRI Marketplace, Value Sales, Kensitas Club RMC, Total UK, MAT to 11.07.21
- ⁹ Gov UK, 20 September 2021
- ¹⁰ Action on Smoking and Health, use of e-cigarettes among adults in GB, June 2021
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- ¹⁹ IRI Marketplace, Value Sales, Nicotine Pouch Category, Total UK, Annualised figure based on June 2021
- ²⁰ IRI Marketplace, Volume Share, Nicotine Pouch Category, Total UK, YTD to June 2021. For more information or to verify comparison, contact Nordic Spirit on Facebook or Instagram: @nordicspirit_uk or on its website at nordicspirit.co.uk/contact
- ²¹ IRI Marketplace, Volume Share, Nicotine Pouch Category, Convenience channel, YTD June 2021. For more detail or to verify comparison contact Nordic Spirit on details above (4b)
- ²² BAT internal sales data
- ²³ Springboard, UK Retail Consumer Report, August 2021. A survey of UK consumers to understand their shopping patterns in a post-Covid retail landscape
- ²⁴ Clipper UK, Customer panel 2021
- ²⁵ Based on ePod, ePen, eTank mini, Alto devices and consumables internal sales forecast (calculated March 2021) for 12 months, starting from April 2021
- ²⁶ Euromonitor, June 2021

Innovation sidebar

¹ <https://tinyurl.com/xkpuemfs>

British American Tobacco UK & Ireland

The next level for vaping

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Ten Motives
Cirro

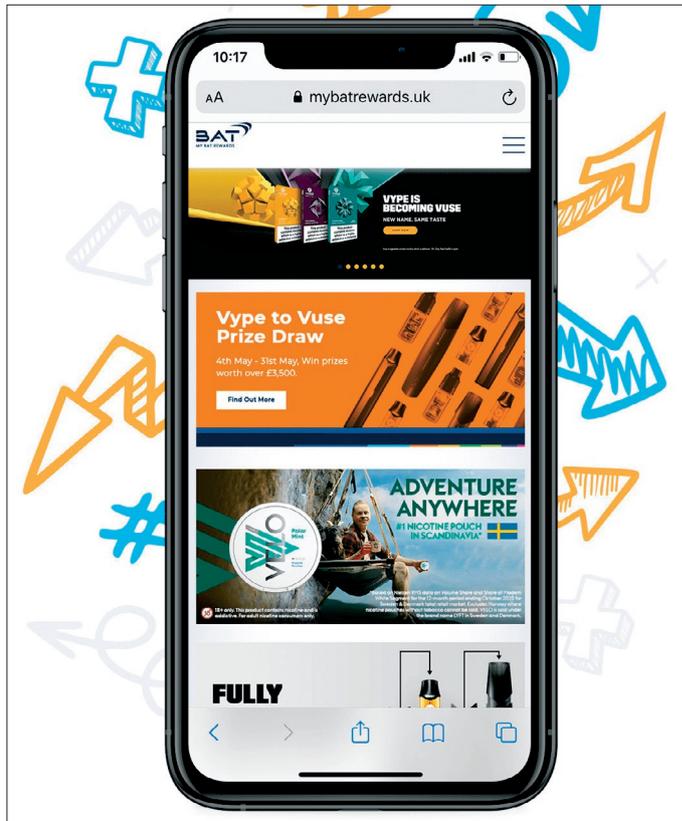
➔ The past year has seen more diversification of the tobacco and nicotine market beyond traditional combustible cigarettes and BAT's alternative nicotine products feature strongly with retailers and consumers, says the company.

“Our products in both the vape and oral pouches categories, Vuse and Velo, have seen steady growth in that time,” it says. “Nicotine pouches volume has grown 283% so far this year vs the same period last year (SPLY) in the total UK retail landscape¹, and Velo more than doubled its share, from 11% in July 2020 to 28% in July 2021¹. Closed system vape has grown 38% so far this year vs SPLY and increased its share from 39% in July 2020 to 41% in July 2021¹.”

Vuse has taken the company's highly successful Vype brand to the next level, it reveals. “We made the transition as simple as possible for adult vapers – including 100% compatibility between Vuse and Vype – so consumers can mix and match pods and devices easily.”

“As an increasing number of traditional smokers seek out alternative products, Vuse and Vape are top choices,” it adds. “To ensure no retailer misses out on this exciting shift in consumer preferences from traditional to new categories, we're innovating to make sure we reach as many retailers as possible and support them every step of the way. That means continuous improvements to our B2B sales platform, My BAT Rewards, to make it as accessible and engaging as we can.”

Sustainability is increasingly important to consumers – and retailers need to embrace it too, says BAT.



“Vuse is the world's first global vaping brand to achieve carbon-neutral status². To get there, we made several positive changes”



“Technology and innovation play a continuous role in driving up the sustainability standards of all our products, including Vuse, to ensure they leave less of a carbon footprint. Vuse is not only an innovative vapour product – it's also the world's first global vaping brand to achieve carbon-neutral status²,” reveals BAT. “To get there, we made several positive changes. Among them, Vuse packs are now made from 100% recyclable cardboard, and we have removed all silicone caps from Vuse ePen pods. We've also committed to eliminating single-use plastics from Vuse by the end of 2022 – last year we saved around 100 tonnes, the equivalent of four million plastic bottles³.”

“We won't stop there. We continue to look for ways to innovate our devices, batteries and flavours, as well as make our supply chain more sustainable.

“By talking to and working with our retailers and adult nicotine consumers, we will improve our support for them, including essential information, raising awareness and helping to reduce their overall environmental footprint.”

Source

¹ Nielsen, Total Coverage YTD to 21.08.21, measured in units)
² Based on ePod, ePen, eTank mini, Alto devices and consumables internal sales forecast (calculated March 2021) for 12 months, starting from April 2021
³ ePen/ePen 3 pods for Vuse/Vype are now silicone cap-free in all Vuse/Vype markets except Mexico and Colombia. Plastic film has been removed from all new Vuse/Vype ePod starter kits and pod packs in all Vuse/Vype markets. Plastic saving per annum was calculated from 2020 volumes and the plastic bottles comparison was based on a 22.9g bottle weight, representative weight of 500ml commercially available soft drink bottles (May 2020). Results have been verified by an independent body.

ADVENTURE EVERYWHERE

#1 NICOTINE POUCH
IN SCANDINAVIA*



YOU'VE GOT VELO



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*Based on Nielsen RMS data on Volume Share and Share of Modern White Segment for the 12-month period ending October 2020 for Sweden & Denmark total retail market. Excludes Norway where nicotine pouches without tobacco cannot be sold. VELO is sold under the brand name LYFT in Sweden and Denmark.



18+ only. This product contains nicotine and is addictive. For adult nicotine consumers only.

Clipper UK

Boost sales with a carousel

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Clipper Refillable Lighter

Recent market data¹ places Clipper as a leader in value of the UK lighter market. The total market is worth upwards of £76m², reveals the company. “Despite the market decreasing 15%, Clipper is thriving; our brands are leading with 42.5% of that share with a three percentage point increase MAT³,” it says.

Carousel success

“One of the main reasons for Clipper’s success is the original Clipper carousel counter display, which increases sales by more than 50%⁴ compared to standard sales in the gantry, just by making the popular lighter collections visible,” it notes.

As the No.1 consumer brand for reusable lighters in the UK⁵, Clipper continues to produce more than 4,000 different lighter designs per year worldwide and is always adapting to fit new design trends and ideas, making them collectable to the consumers. These on-trend collections are the driving force behind the Clipper brand, says the company.

Beyond the lighter

“In addition to the Classic Clipper reusable lighter, Clipper continues



“The Clipper carousel increases sales by more than 50%⁴ compared to standard sales in the gantry”

to offer a wider range of lighters and accessories, which are all developed with the same premium quality and highest safety standards. “Clipper is proud to be one of the few brands that take pride in reusability. Clipper lighters give consumers nearly unlimited lights as the worn-out parts can be replaced: refill the gas, replace the flint, reuse the lighter.

Staying power

“Clipper has been an iconic brand in the UK since its launch in the 1970s and was quickly recognised as a world leader,” adds the company. “Teaming premium quality with the highest safety, the classic Clipper lighter has proved to stand the test of time and will continue to do so.”



Source
^{1,2,3,5} [RI] Data, MAT to 13.06.21
⁴ Clipper UK Customer Panel 2021

CLIPPER®

reusable

Carousel display

now with **20**
free
lighters!

Total of 164 lighters

12 different designs

Maximise counter space

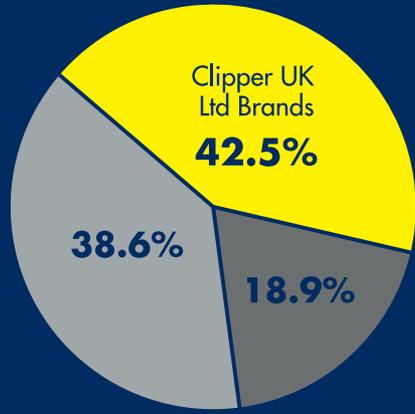
and increase sales



*Designs may vary

UK's #1 Lighter!

Total Lighter Market by Value



- Manufacturer #2
- Other Manufacturers

Source: IRI Data MAT to 13/06/21
Total Lighters Market 76,016,784 GBP

I Vape Great

Broadening consumer choice

DETAILS

I Vape Great (IVG)

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w: ivapegreat.com

KEY CONTACTS

Kawar Yadh
Commercial Director

KEY BRANDS

I Vape Great (IVG)

↙ The pandemic has played a key role in changing consumer shopping and purchasing habits when it comes to vaping, with a preference towards convenience, says Laith Sheena, UK sales director at IVG Premium E-Liquids, owned by Acme Vape Labs. “Dedicated vape stores remained shut, allowing for convenience stores to pick up a lot of unique footfall and presenting an opportunity to independent retailers to range products more commonly found in vape stores that appeal to both smokers and vapers,” he says.

“In such a dynamic market, vapers are often looking for the latest trends, with next-generation disposable devices or ‘bars’ being no exception. IVG Bars launched in July 2021 and have seen unprecedented demand, especially across the convenience and petrol filling station (PFS) sectors. As a business, we have adapted to the preference towards convenience by making IVG Bars available in over 3,000 independent c-store and PFS operators, as well as national wholesalers and key accounts, including McColl’s, Eurogarages, Parfett’s and Bestway Retail.”

IVG is a lifestyle brand, proudly manufactured in the UK and deeply rooted in the UK vape sector, he says. “As a company, we want to stay true to our roots, but also be adaptable to cater to adult smokers and vapers looking for the latest, most convenient technology to help them quit smoking or reduce their nicotine intake. We offer a total vaping solution, whereby we can continue to offer more diverse and niche products through the UK vape sector, as well as now offering a core, impulse range – IVG Bar. The support that leading vape brands like ourselves are receiving from the FMCG sector is ultimately increasing consumer choice and accessibility for reduced-risk products and, as an industry, this can only be seen as a good thing.



“We want to be true to our roots, but also be adaptable to cater to adult smokers and vapers looking for the latest technology”

“We have seen unprecedented growth over the past 12 months of trading and especially in the past quarter due to the recent boom in disposables,” he adds. “The first national retailer we onboarded was selling on average 50 devices, per site, per day.

“As a business, we take the consumer education piece very seriously. We have a vast array of POS, display options and NO2Minors free-print material. Perhaps most importantly, we offer full staff training through our field sales team and after-care department.

“Innovation is at the heart of what we do and we are a consumer-led company. We are overwhelmed with the positive reaction to our initial IVG Bar flavours and are now launching six new flavours including Energy Ice, due to popular demand. We are also working on version 2 of IVG Bar, which will be available towards the end of Q4 2021, in price-marked packs and offered in a next-generation style and design.”





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PREMIUM E-LIQUIDS



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Full Marketing Support & CDU's FOC

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- | | | | | | |
|---|---|---|---|--|---|
| <p>Raspberry Lemonade</p>  <p>INSTANT IVG -BAR-
RASPBERRY LEMONADE
READY TO VAPE DISPOSABLE</p> <p>This product contains nicotine which is a highly addictive substance.</p> | <p>Raspberry Orange Mix</p>  <p>INSTANT IVG -BAR-
RASPBERRY ORANGE MIX
READY TO VAPE DISPOSABLE</p> <p>This product contains nicotine which is a highly addictive substance.</p> | <p>Strawberry Raspberry Pink Apple</p>  <p>INSTANT IVG -BAR-
STRAWBERRY RASPBERRY PINK APPLE
READY TO VAPE DISPOSABLE</p> <p>This product contains nicotine which is a highly addictive substance.</p> | <p>Fuji Apple Melon</p>  <p>INSTANT IVG -BAR-
FUJI APPLE MELON
READY TO VAPE DISPOSABLE</p> <p>This product contains nicotine which is a highly addictive substance.</p> | <p>Energy Ice</p>  <p>INSTANT IVG -BAR-
ENERGY ICE
READY TO VAPE DISPOSABLE</p> <p>This product contains nicotine which is a highly addictive substance.</p> | <p>Peach Rings</p>  <p>INSTANT IVG -BAR-
PEACH RINGS
READY TO VAPE DISPOSABLE</p> <p>This product contains nicotine which is a highly addictive substance.</p> |
|---|---|---|---|--|---|



If you're looking to stock these in your store get in touch with I Vape Great!

Juul Labs UK

Help UK smokers transition

DETAILS

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KEY CONTACTS

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John Patterson
 Sales Director
Richard Cook
 Head of National Accounts
Steve Lintott
 Head of Field Sales

KEY BRANDS

JUUL devices
 JUULpods

Smoking remains the largest cause of preventable death worldwide but, despite the harm reduction potential of the vaping category expressed by health authorities and academia, the past year has seen a decline in adult smokers' perception of the tobacco harm reduction potential of the category.

According to Action on Smoking and Health¹, 32% of smokers believe vaping is equally or more harmful than smoking, and a further 25% are unsure. Correcting these misperceptions is incredibly important. Without clear, risk-based communication from trusted sources, there is less of an incentive to transition away from cigarettes. It is imperative that alternative products can compete with combustible cigarettes and that adult smokers have clear information on a product's relative risk compared to smoking.

Smokers should, first and foremost, quit. Those who have not successfully quit should switch to potentially less harmful alternative nicotine products. Retailers can also play their part in helping adult smokers transition by familiarising themselves and their staff on the alternatives to combustible cigarettes and the options available.

Category performance

A recent report from University College London and Cancer Research² suggests that, during lockdown, there has been an increase in smoking, particularly among young people, which is concerning as smoking is the leading cause of preventable death both in the UK and globally. However, data from IRI suggests that the e-cigarette category has grown by around 25% over the past 18 months³. Juul has outperformed the market with a year-on-year sales rise of 44%⁴. Closed pod systems, such as Juul, are now the leading segment in the category, with multiple retailers in particular embracing these as part of their alternative offer for adult smokers.

Juul's performance

Since its launch into traditional retail in November 2018, IRI data shows that Juul is now the number one vaping



“It is imperative that alternative products can compete with combustible cigarettes and that adult smokers have clear information on a product's relative risk”

brand by value in the category⁵. Juul Labs has recently launched its next generation Juul2 system, with new technology offering adult smokers a more consistent vapour experience to transition even more adult smokers away from cigarettes. The new Juul2 device features a larger, long-lasting battery and larger pods containing a Juulpod ID, helping to combat underage use and counterfeit pods. Juul2 will be available for purchase from 30 September on Juul.co.uk, with a retail roll-out to follow in early 2022.

Retailing responsibly

Juul Labs does not want any non-nicotine users, especially those underage, to try our products as they exist only to transition the world's one billion adult smokers away from combustible cigarettes. Its robust age verification Challenge 25 programme is in place to ensure Juul products are only sold to adult smokers and existing nicotine users and never to those underage. It remains committed to working with regulators and stakeholders to combat underage use and transition adult smokers from combustible cigarettes.

Source
¹ ASH, Use of e-cigarettes among adults in Great Britain, June 2021
² Addiction: Moderators of changes in behaviour associated with the first Covid-19 lockdown in England, August 2021
³ IRI, Value Sales total category, 18 months to 25.07.21
⁴ IRI, YOY sales, 12 weeks to 08.08.21
⁵ IRI, Value Sales, 4 Weeks to 08.08.21

Top performing
JUULpod
flavours bring in
more revenue.

- Menthol JUULpods are U.K.'s #2 refill kit in independent shops.⁴
- Berry JUULpods are the U.K.'s #1 fruit flavour.²
- Mint JUULpods are the U.K.'s #1 closed pod refill kit.¹
- The JUUL Starter Kit is the U.K.'s #1 closed system in supermarkets.³



JUUL

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.

1. IRI total market, value sales, 12 weeks to 11/04/21 sales comparison of top four performing JUUL skus versus the top four performing SKUs of our nearest competitor. 2. Based on additional sales of Mango, Golden Tobacco and Rich Tobacco JUULpods, IRI total market, value sales, 12 weeks to 11/04/21. 3. IRI total market, value sales, Supermarkets, 12 weeks to 11/04/21. 4. IRI total market, value sales, Symbols and Independnets, 12 weeks to 11/04/21.

18+

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

Nordic Spirit

Nicotine pouches gain speed

DETAILS

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KEY CONTACTS

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Portfolio Brand
Manager, JTI UK
Sarah Connor
Communications
Director, JTI UK

KEY BRANDS

Nordic Spirit
– a 100% tobacco-free nicotine pouch, available in three flavours: Mint, Bergamot Wildberry and Elderflower, in varying strengths, including regular, strong, and extra strong Mint. Nordic Spirit has an RRP of £6.50*

Source

¹ IRI Market Place, Value Sales, Nicotine Pouch Category, Total UK, Annualised Figure Based on June 2021

² IRI Market Place, Volume Share, Nicotine Pouch Category, Total UK, YTD June 2021. For more information or to verify comparison contact Nordic Spirit on Facebook or Instagram: @nordicspirit_uk or using our details at nordicspirit.co.uk/contact

³ IRI Market Place, Volume Sales, Total Nicotine Pouch Category, Total UK, over the last 12 months to June 2021 (based on slope calculation)

⁴ IRI Market Place, Value Sales, Nordic Spirit, Total UK, Annualised Figure Based on June 2021

⁵ IRI Market Place, Volume Share, Nicotine Pouch Category, Total UK, YTD June 2021. For more information or to verify comparison contact Nordic Spirit on Facebook or Instagram: @nordicspirit_uk or using our details at nordicspirit.co.uk/contact

↘ The 100% tobacco-free nicotine pouch category continues to grow in the UK and shows no sign of slowing down. In the UK, the category is now worth £1.5m a month or approximately £18.6m a year¹.

From a brand performance perspective, Nordic Spirit is the No.1 nicotine pouch brand in traditional retail in the UK². It has been the fastest-growing nicotine pouch brand in the UK over the last 12 months³ and is worth approximately £12.7m a year⁴.

A must-stock for retailers

Paul Shakespeare, portfolio brand manager at JTI UK, comments: “Now more than ever, UK-based existing adult smokers and vapers are looking for convenient, discreet products that can be used when smoking or vaping might not be possible – making them a must-stock for retailers.

“Nordic Spirit is a convenient and discreet 100% tobacco-free nicotine pouch that can be used in situations where smoking and vaping might not be possible. The product has a gum base, which allows the pouch to fit comfortably under the top or bottom lip.”

Nordic Spirit is available in a selection of flavours and strengths to suit every preference, including Mint, Bergamot Wildberry and Elderflower, in regular and strong options. To offer even more choice to customers, an extra strong Mint variant was added to the range this year.

“We know there is a real demand for convenience, choice, and the option to have different products to suit different occasions,” says Shakespeare. “Nordic Spirit offers just that – easy to use and



“Now more than ever, UK-based existing adult smokers and vapers are looking for convenient, discreet products that can be used when smoking or vaping might not be possible”

discreet, it allows users the opportunity to get a nicotine experience in almost any situation.”

The future of Nordic Spirit

Nordic Spirit is “making waves and experiencing strong consumer reputation and brand recognition”, especially after coming out on top of the nicotine pouch category at the Product of the Year awards this year, says Shakespeare.

“We now have an impressive 71.2% market share⁵, and the support we’ve had from retailers has been incremental to the successes we see today. Now is not the time for us to rest, so we’re continuing to innovate and will continue to support retailers on this journey with us.”

If retailers haven’t already done so, they can get in touch with their JTI representative to find out more about stocking Nordic Spirit in their store.

As always, retailers can also visit JTIAvance.co.uk, which offers advice on how to make the most of the category and what to stock if they are looking to start or grow their nicotine pouch range.



THE UK'S No.1 NICOTINE POUCH*

RRP
**
£6.50
FOR 20 POUCHES



**NEW
EXTRA
STRONG**

NO SMOKE,
NO VAPOUR



*Iri Market Place, Volume Share, Nicotine Pouch Category, Total UK, YTD Jun-21. For more information or to verify comparison contact Nordic Spirit on Facebook or Instagram: @nordicspirit_uk or using our details at nordicspirit.co.uk/contact.
**RRP effective as of 28/07/2021. You are, of course, at all times free to sell JTI's products at whatever price you choose.
Winner Nicotine Pouch Category, Survey of 9,865 people by Kantar. *Trustpilot rating correct as of September 2021.



Republic Technologies (UK)

Raise visibility to drive sales

DETAILS

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KEY BRANDS

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

With demand for roll your own accessories at an all-time high, quality, choice and value from leading accessories supplier Republic Technologies (UK) is contributing to strong growth in the sector.

The UK's tobacco accessories market is now worth over £314m¹ – with increasing pressure on suppliers to innovate to make their mark.

“We are passionate about supporting retailers wherever we can, particularly in areas where they feel they need most help,” says Gavin Anderson, head of sales at Republic Technologies (UK). “For a growing number, this now involves information surrounding sustainability, as shoppers are increasingly engaged on this subject,”

As consumer awareness and concerns around individual environmental impact increase, Republic Technologies has been educating retailers on its OCB Virgin and OCB Organic Hemp Slim Papers and Slim & Tips. These products are made using unbleached paper and OCB natural gum, sustainably sourced from African acacia trees and 100% natural, vegan and GM-free.

“Effective product display is also important in this category, where legislation allows, to drive awareness and demand. By stocking a range of products that deliver on quality and brand assurance, while maintaining a focus on innovative display solutions, retailers can drive sales across categories,” he adds.

“Increasing visibility of trusted, market-leading accessories brands is key to increasing shopper awareness and encouraging impulse sales. We advise retailers to move products out of the gantry and use counter-top display units and clip strips, where space allows, to highlight NPD and signpost the wider category.”

Counter-top units are available for



“Effective product display is important in this category for driving awareness and demand”

Republic Technologies’ best-selling ranges, including Swan Menthol Filters and OCB Slim & Tips.

The company is also encouraging retailers to try matches and utility lighters throughout the autumn and winter. “Nearly every UK household has a use for matches or lighters at this time of year, as families enjoy key celebrations such as Halloween, Bonfire Night and Diwali, giving a major opportunity for cross-category sales uplift,” notes Anderson.

As the No. 1 supplier of utility lighters in the UK’s £5.5m market¹, Republic Technologies’ range, available on space-saving clip strips, includes Zig-Zag, By candlelight and lumière candle lighters, which prove particularly popular in the run-up to the festive season. “As consumers look to make up for lost time by celebrating occasions in style this year, we’re giving shoppers the choice, performance and value they’re looking for with our household lighters, which are stylish, top quality and affordable.”



Source
¹IRI, Total Market, 52 w/e
 11.07.21

NEW

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By candlelight[®] AND lumière[®]

A STYLISH NEW RANGE OF REFILLABLE CANDLE LIGHTERS



**BENEFIT FROM THE PHENOMENAL RISE
OF THE CANDLE AND SCENTED CANDLE MARKET**

Stylish product for in-home display

Choice of six metallic colours

Distinctive on-shelf ready packaging (lumière includes clip strip)

**STOCK
UP
NOW**

Log on to our trade website at republictechnologies.co.uk Follow us at @RTUKtrade

Republic Technologies (UK) Limited, Sword House, Totteridge Road, High Wycombe, Bucks, HP13 6DG

Republic
UK Technologies

Totally Wicked Group

Disposable vapes' fall and rise

DETAILS

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KEY CONTACTS

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 CEO
Julian Urry
 Retail Director
Liam Humberstone
 Technical Director

KEY BRANDS

Totally Wicked
TECC
The Electronic Cigarette Company
Urban Chase

“Many of us who have had close involvement with the UK vape sector over its formative years could be excused for being taken by surprise this summer,” says Liam Humberstone, technical director at Totally Wicked Group. “For many, disposable vapes had become an anachronism – a hangover from a previous age – with replacement pod devices making significant inroads into disposables’ sales. The real winners, particularly in the specialist vape sector, were rechargeable/refillable ‘open system’ e-cigarettes and e-liquids – considered the ultimate cost-effective vaping solution, as they suited a huge range of smokers, who rapidly went on to becoming ex-smokers. Why would we need anything else?”

“However, the explosive growth in disposable vape sales this summer indicates we hadn’t seen the full picture. Many of us had missed a customer need for simplicity, ease, convenience and low perceived unit cost. In an independent survey commissioned by Totally Wicked, although 60% of smokers felt vaping was something they might try when they were ready to quit, 30% of them were concerned about excessive complexity and cost.

“So how does a vape company develop a product that suits those needs? It has to be easier to use than lighting a cigarette. It has to work first time, every time, must never leak, be compact and pocket-friendly, and satisfy nicotine cravings as quickly and completely as possible. It has to have a great set of flavours that can be used all day without becoming sickly and, ideally, needs a 10ml e-liquid and open



“The explosive growth of disposable vape sales this summer indicates we had missed a customer need for simplicity, convenience and low perceived unit cost”

tank equivalent, so smokers who find themselves able to quit can graduate to a more cost-effective open system.

“Of course, that covers the ‘hard to crack’ smokers who found vaping too complex, but another group who seem to be enjoying disposable vapes are ‘occasional’ smokers and, for them, disposables really do work.

“It is a happy accident that good disposable e-cigarettes are ideal for the ‘occasional’ or ‘social’ smoker. The entry-level cost means there is no real barrier to trying them instead of smoking, and there is no upkeep. Use it for the weekend and, if it’s spent at the end, dispose of it responsibly; if it still has some life, pop it in the drawer ready for next time. Smoking in pub beer gardens, for example, is likely to decline in favour of disposable vapes.

“Environmental concerns and ‘real life’ running costs mean disposable vapes are not the only answer to the UK government’s desire to reduce smoking rates to 5% or less by 2030. However, vaping as whole is a disproportionate part of that answer, and the powerful resurgence of disposable vapes means they will play an important part in making smoking history.”

DISPOSABLES ARE THE FASTEST GROWING PRODUCTS IN THE VAPING MARKET[†]

supply the demand with the

disposable vape pen

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or email sales@totallywicked.co.uk



The simplest way to vape.



[†]Based on Nielsen data latest 12 weeks total market. *Terms and conditions apply. Subject to availability. Over 18s only. Contains nicotine.

William Reed

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