



## ***Market Performance Report October, 2011***

**Information Resources, Inc. (All Scan), 52 and 12 weeks ending Sep. 18, 2011  
Projection to 146,341 total C-Stores (54,585 Chain, 91,756 Independent)**



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# C-Store Summary (52 Weeks)

- The Total Pocket is growing at +4.3% in dollar sales vs. year ago.
- The Disposable Segment has 96.3% dollar share and is up +4.8%. Refillable Lighters are declining at -8%.
- BIC is America's #1 Lighter with a 88.7% share in the Disposable Lighter Segment, growing +8.5% in dollar sales vs. year ago and gaining +3 share points.
- Non-BIC Disposable Lighters are declining -17.3%.
- BIC has the Top 5 Lighter Brands in Convenience:
  - *BIC Classic is the #1 Disposable Pocket Lighter brand with a 39.5% share.*
  - *#2 Special Edition fuels BIC growth, up +16.3%.*
  - *Mini holds status as a branded quality entry price item, up +10.7%.*
  - *Pro Series posts impressive gains of +12.5%.*
  - *Collectors Series sees strong growth of +94%.*



# C-Store Summary (12 Weeks)

- The Total Pocket Category is growing +4.6% in dollar sales vs. year ago.
- The Disposable Segment has 96.8% dollar share and is up slightly at +5.2%. Refillable Lighters are declining at -8.8%.
- BIC is America's #1 Lighter with a 89.1% share in the Disposable Lighter Segment, growing +9.1% in dollar sales vs. year ago, and gaining +3.2 share points.
- Non-BIC Disposable Lighters are declining at -18.8%
- BIC has the Top 5 Lighter Brands in Convenience:
  - *BIC Classic is the #1 Disposable Pocket Lighter brand with a 39.1% share.*
  - *#2 Special Edition fuels BIC growth, up +12%.*
  - *Mini continues to grow, up +7%.*
  - *Pro Series is up +11.1%.*
  - *Collectors Series sees sustained growth of +52%.*

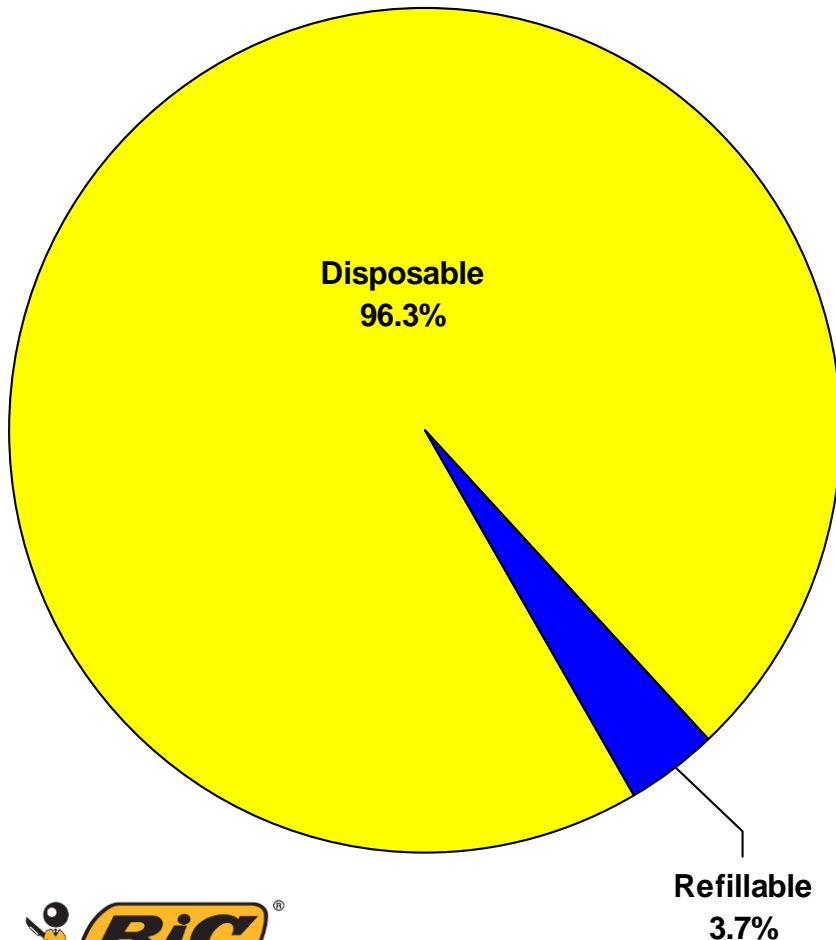


# Total U.S. Convenience Pocket Lighter Segment Share (52 Weeks)

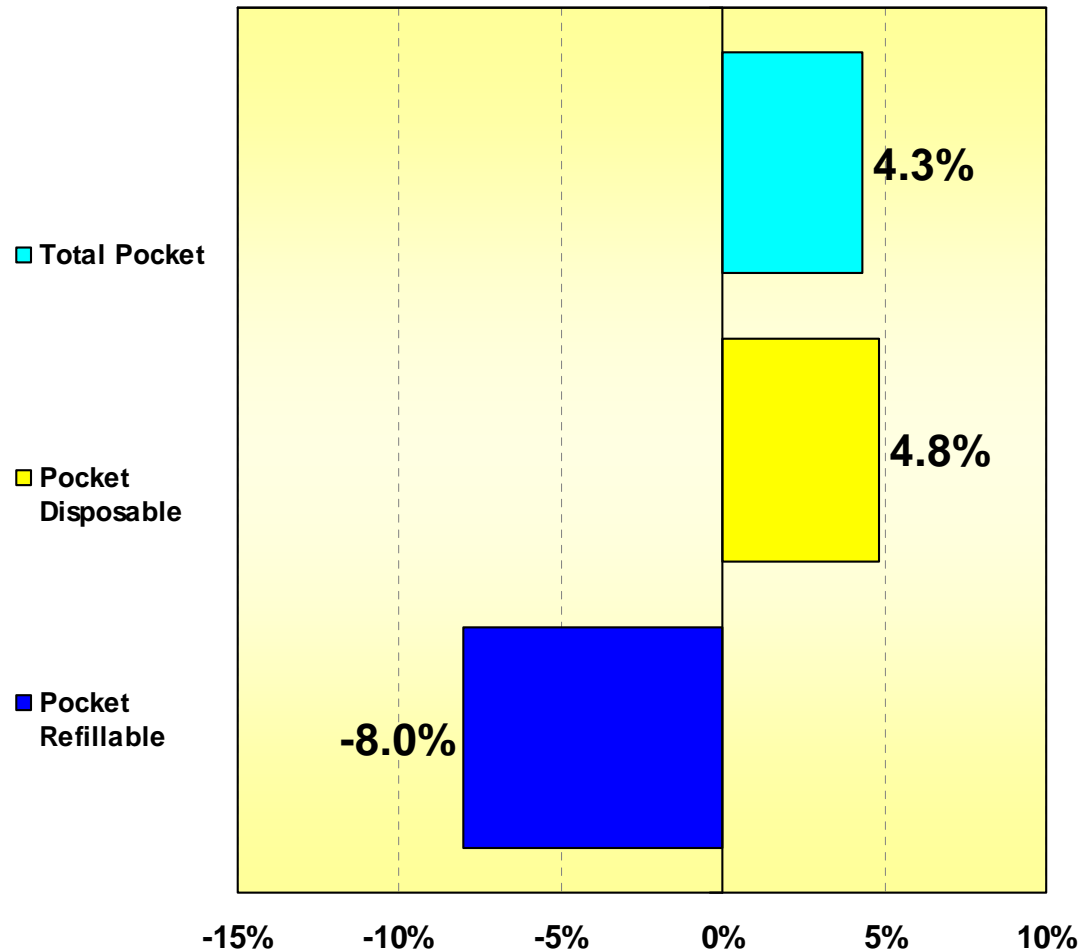
In U.S. Convenience, the Total Lighter Category shows growth of +4.3%, driven by Disposable Segment gains of +4.8%. The Refillable Segment lags behind by 12.3 points, losing \$1.6MM.

Total Pocket Dollar Share

Total Category: \$489MM



Total Pocket Dollar Sales % Chg vs Yr Ago



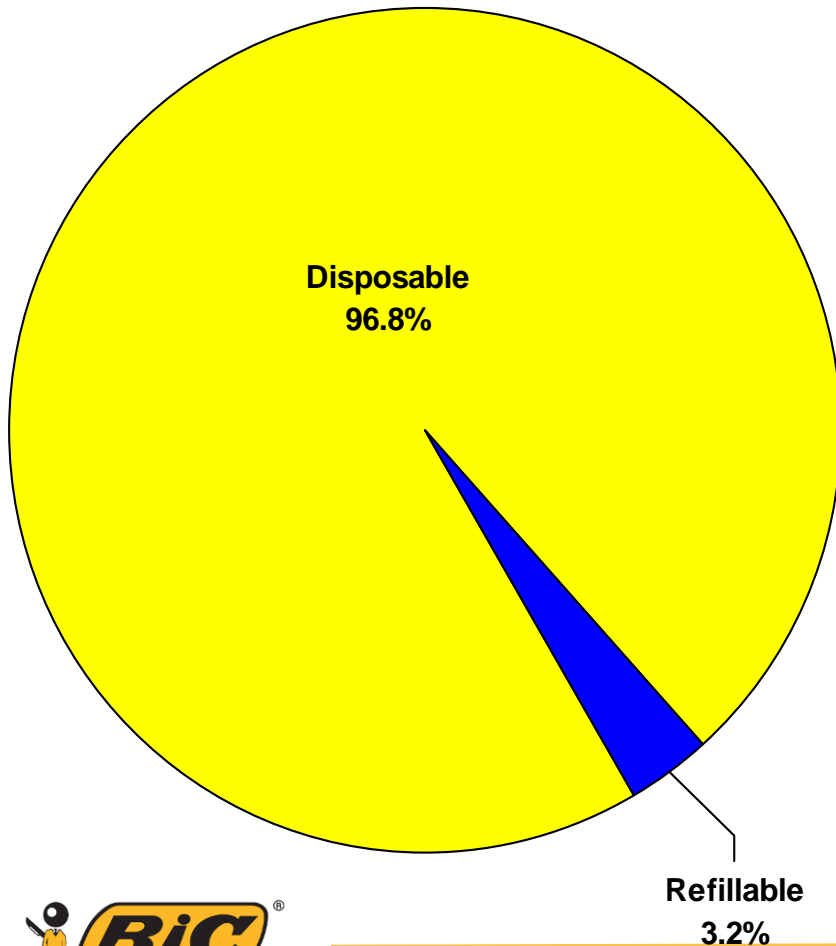
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# Total U.S. Convenience Pocket Lighter Segment Share (12 Weeks)

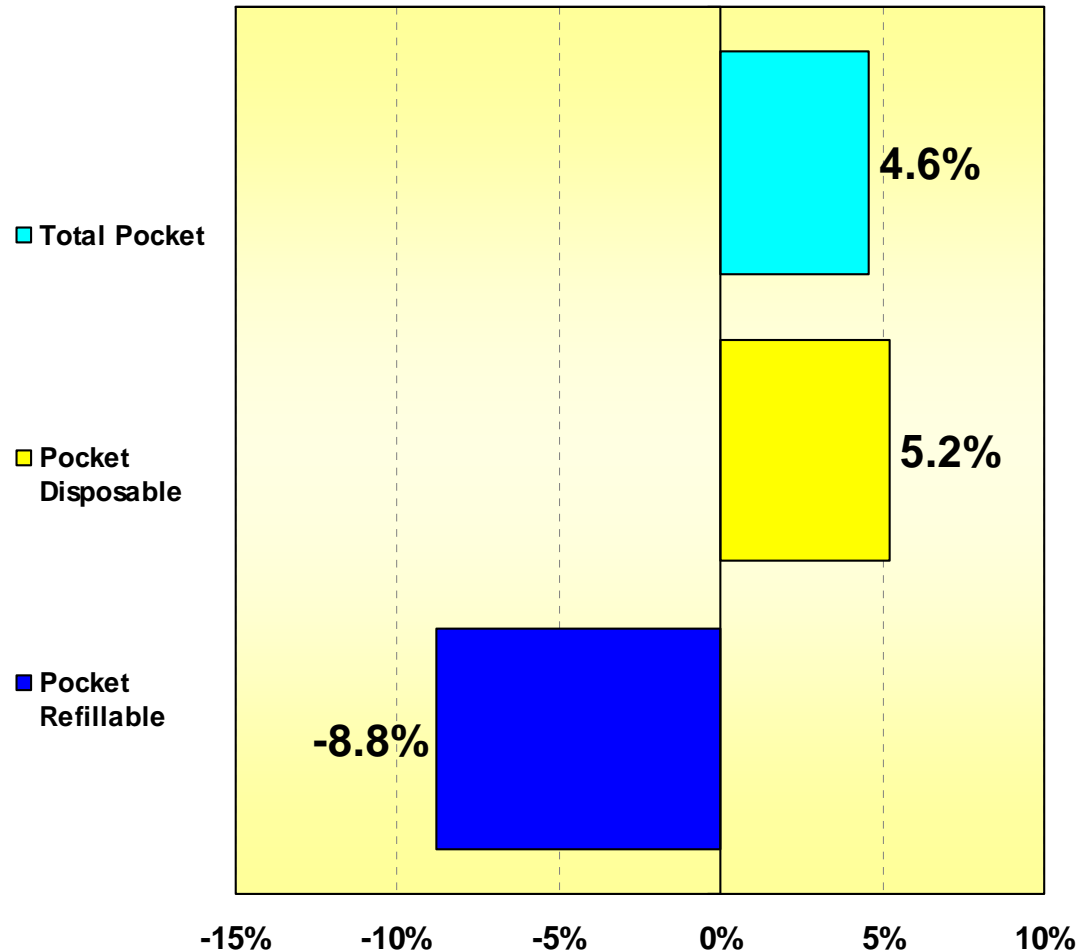
Total Pocket remains stable, up +4.6% as the Disposable Segment gains \$5.9MM. The Refillable Segment continues to lag behind, leaving a gap of 13.4 points.

Total Pocket Dollar Share

Total Category: \$125MM



Total Pocket Dollar Sales % Chg vs Yr Ago



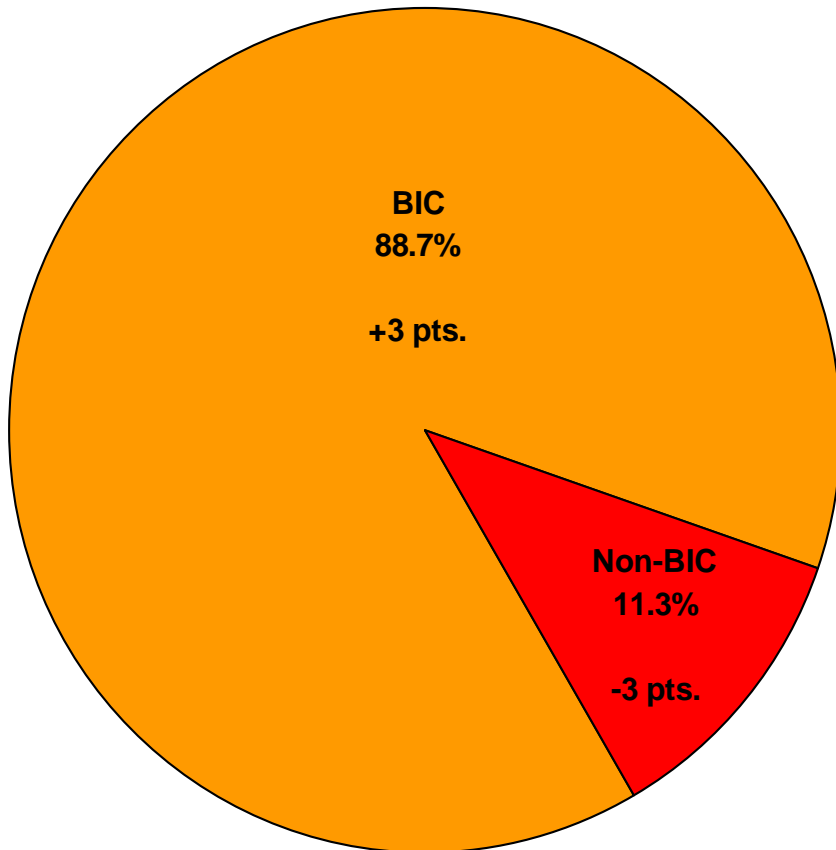
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# Total U.S. Convenience Disposable Pocket Lighter Vendor Share (52 Weeks)

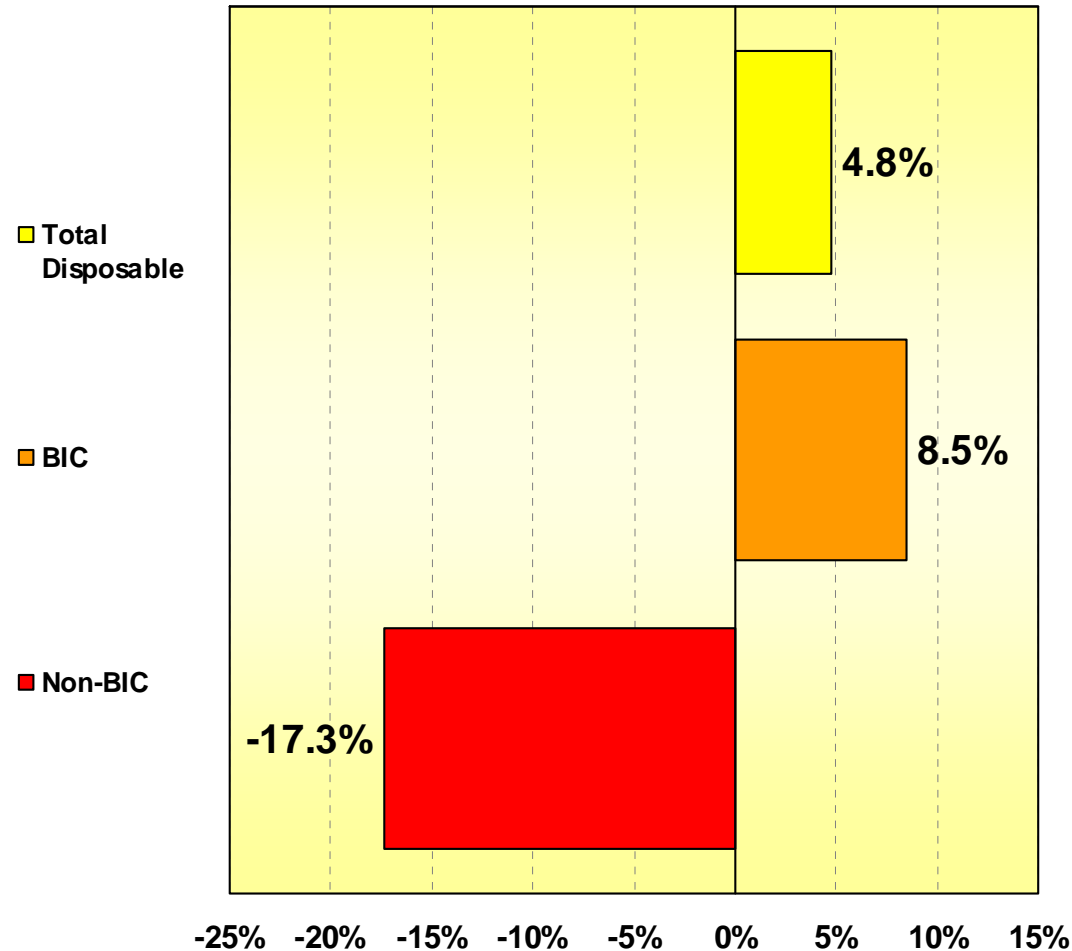
In U.S. Convenience, BIC is driving Segment growth at +8.5% for gains of \$33MM. Non-BIC Disposables are lagging behind Total Segment growth by 22 points, declining \$11MM.

Total Disposable Dollar Share

Total Segment: \$471MM



Total Disposable Dollar Sales % Chg vs Yr Ago



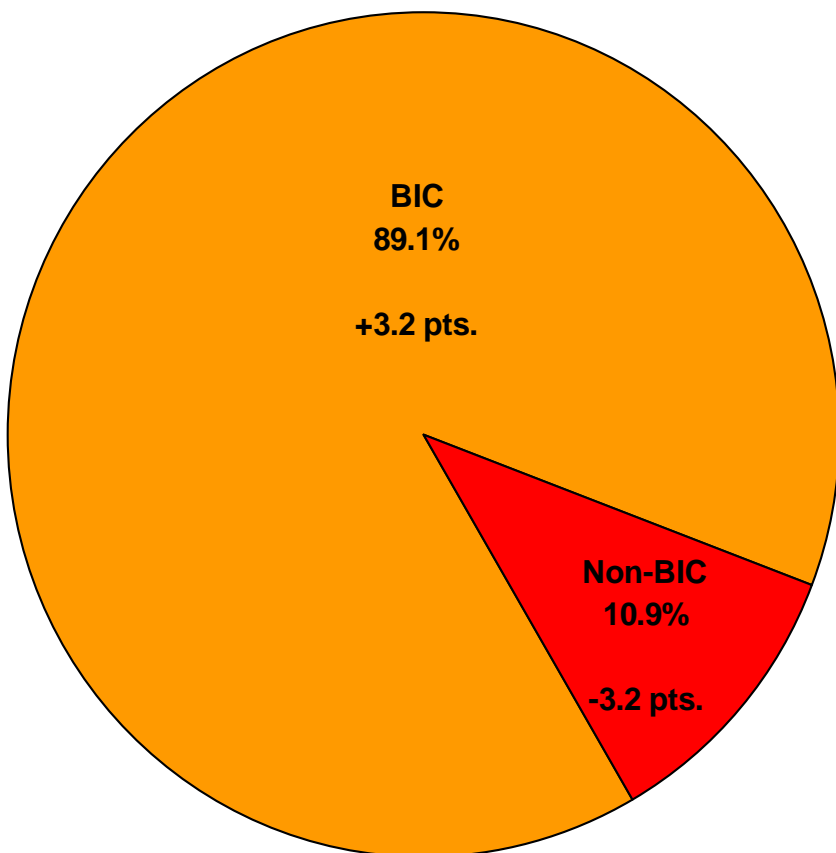
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# Total U.S. Convenience Disposable Pocket Lighter Vendor Share (12 Weeks)

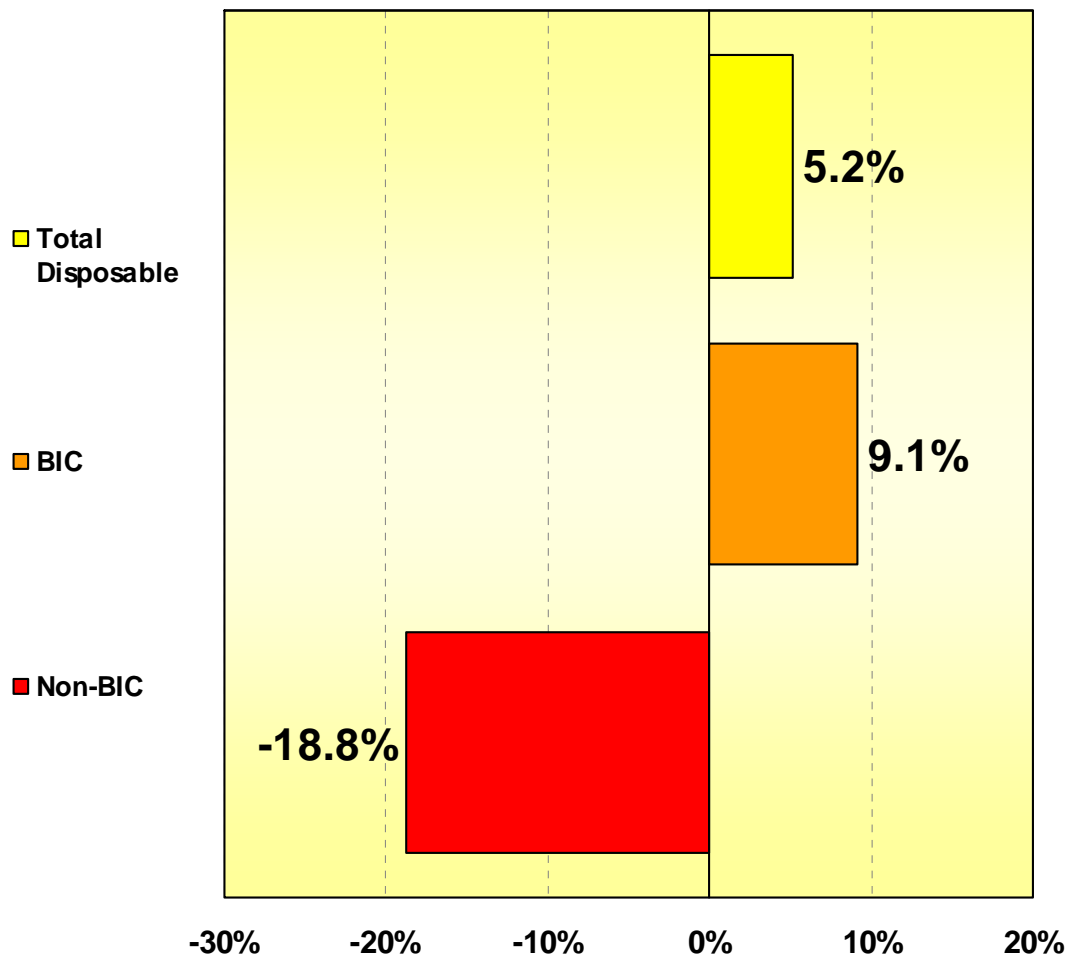
In recent weeks, BIC's share of Total Disposable has increased to 89.3%, and continues to grow +7.6%. Meanwhile, Non-BIC Disposables are declining -25.1% for a loss of \$4.1MM.

Total Disposable Dollar Share

Total Segment: \$121MM



Total Disposable Dollar Sales % Chg vs Yr Ago



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