



Market Performance Report December 2012

**Information Resources, Inc. (All Scan), 52 and 13 weeks ending November 25, 2012
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 Category is growing at +3.8% in dollar sales vs. year ago.
- The Disposable Segment has 97.2% dollar share and is up +4.4%. Refillable Lighters are declining at -12.9%.
- BIC is America's #1 Lighter with an 89.5% share in the Disposable Lighter Segment, growing +5.9% in dollar sales vs. year ago and gaining +1.3 share points.
- Non-BIC Disposable Lighters are declining -6.8%.
- BIC has the Top 5 Lighter Brands in Convenience:
 - *BIC Classic is the #1 Disposable Pocket Lighter brand with +6.2% growth.*
 - *Mini holds status as a branded quality entry price item, up +6.6%.*
 - *BIC Value Added is growing +5.0% driven by Collectors Series growth of +59.7% and solid gains in Pro Series, up +3.1%.*
 - *#3 item Special Edition has declined 3.5%.*



C-Store Summary (13 Weeks)

- **The Total Pocket Category is flat in dollar sales vs. year ago.**
- **The Disposable Segment has 97.5% dollar share and is flat vs. year ago. Refillable Lighters are declining -22.4%.**
- **BIC is America's #1 Lighter with a 89.7% share in the Disposable Lighter Segment, growing +1.3% in dollar sales vs. year ago, and gaining +1.2 share points.**
- **Non-BIC Disposable Lighters are declining at -10.8%.**
- **BIC has the Top 5 Lighter Brands in Convenience:**
 - *BIC Classic is the #1 Disposable Pocket Lighter brand with +3.0% growth.*
 - *Mini continues to grow, up +3.6%.*
 - *BIC Collectors Series has growth of +24.0% driven by the new USO lighter.*

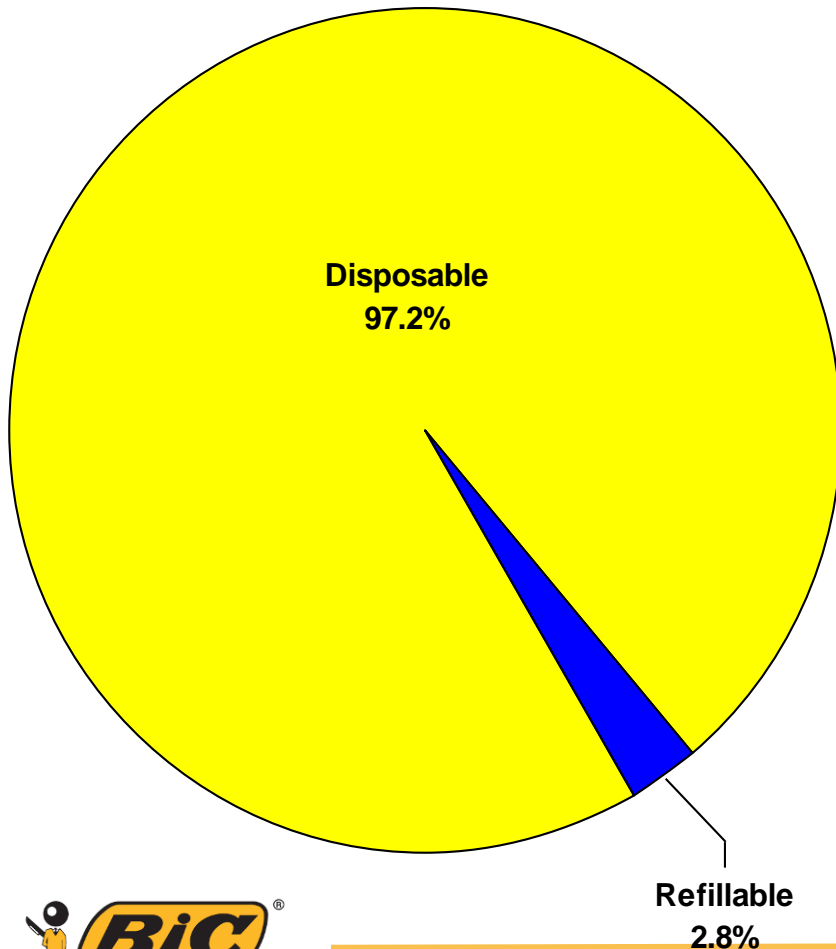


Total U.S. Convenience Pocket Lighter Segment Share (52 Weeks)

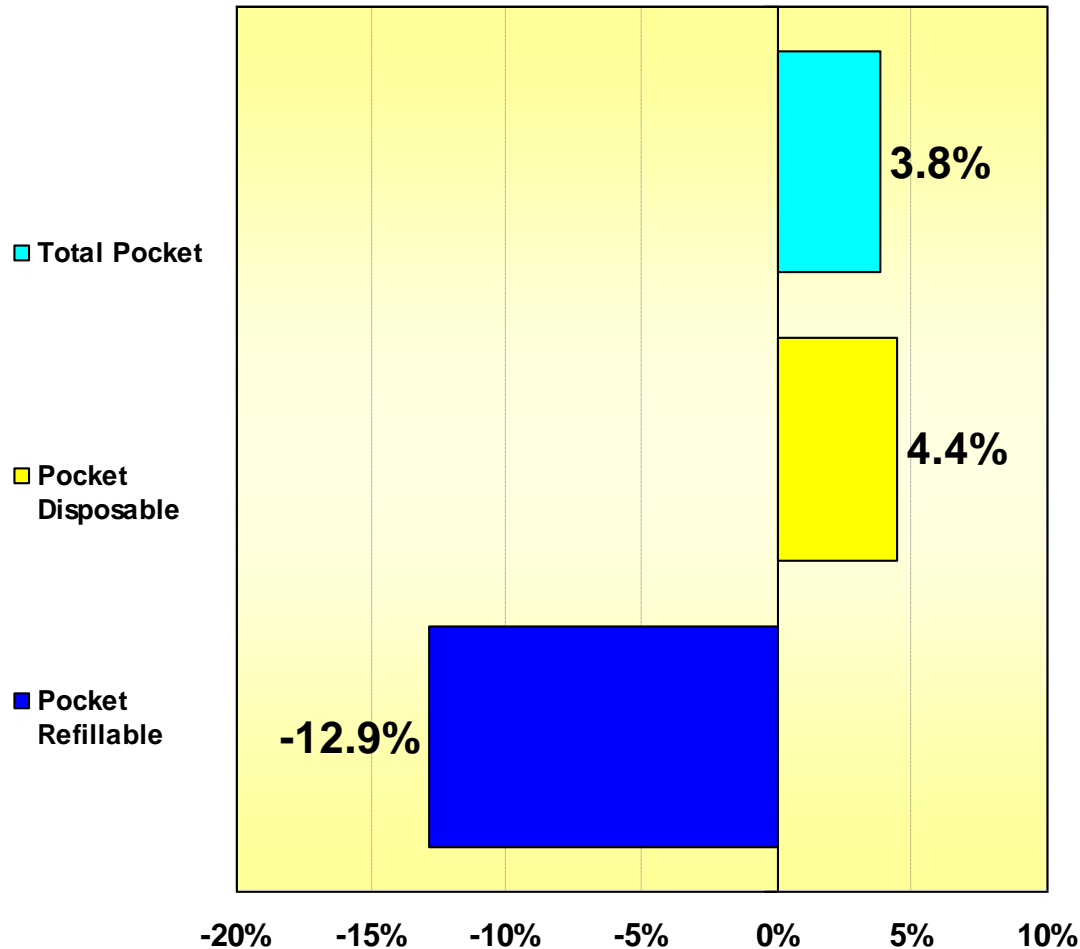
In U.S. Convenience, the Total Lighter Category shows growth of +3.8%, driven by Disposable Segment gains of +4.4%. The Refillable Segment lags behind by nearly 17 points, losing \$2.2MM.

Total Pocket Dollar Share

Total Category: \$518MM



Total Pocket Dollar Sales % Chg vs Yr Ago



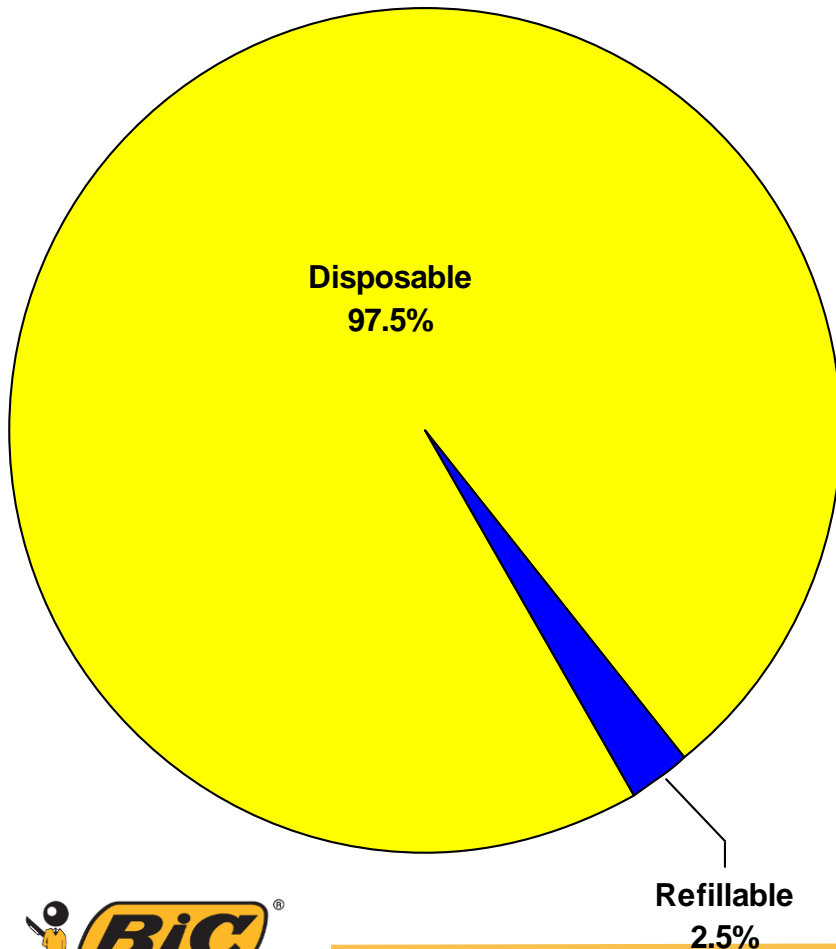
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Total U.S. Convenience Pocket Lighter Segment Share (13 Weeks)

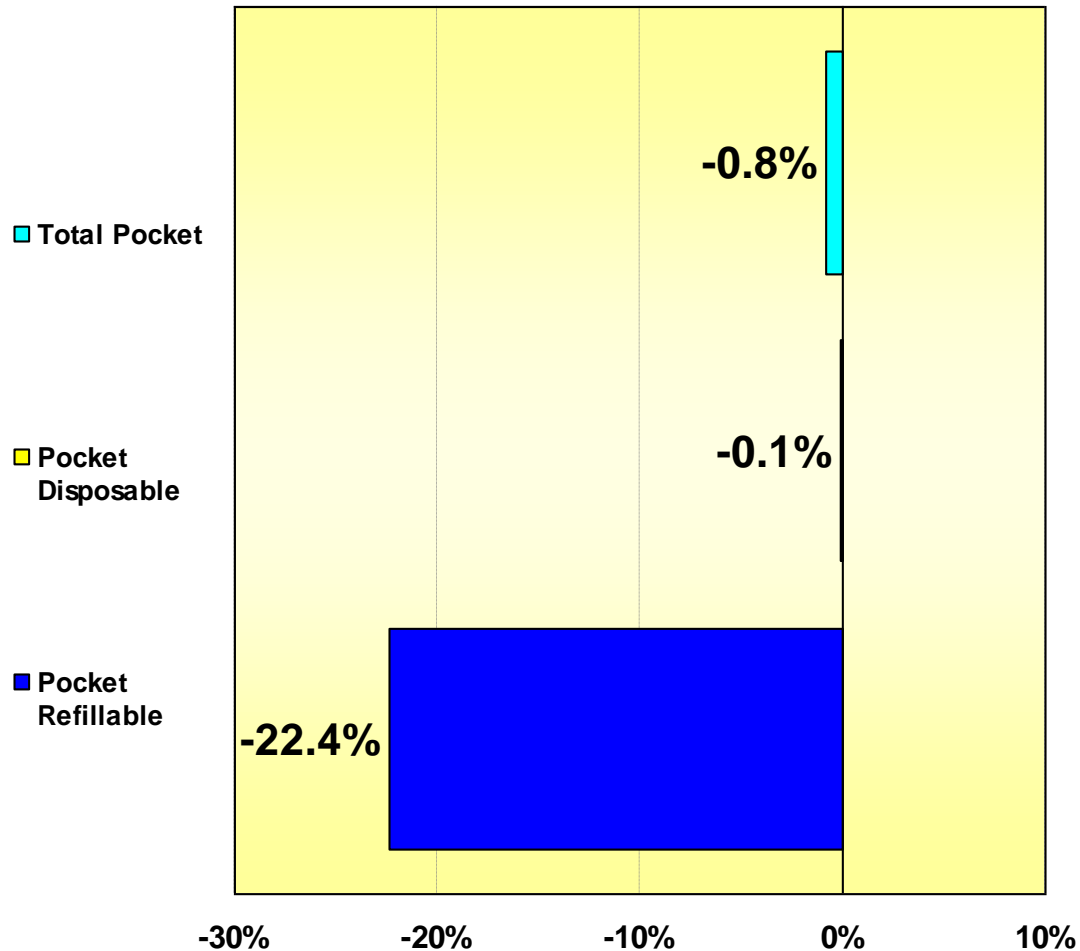
Total Pocket and the Disposable Segment are flat. The Refillable Segment continues to lag behind, leaving a gap of 23 points.

Total Pocket Dollar Share

Total Category: \$130MM



Total Pocket Dollar Sales % Chg vs Yr Ago



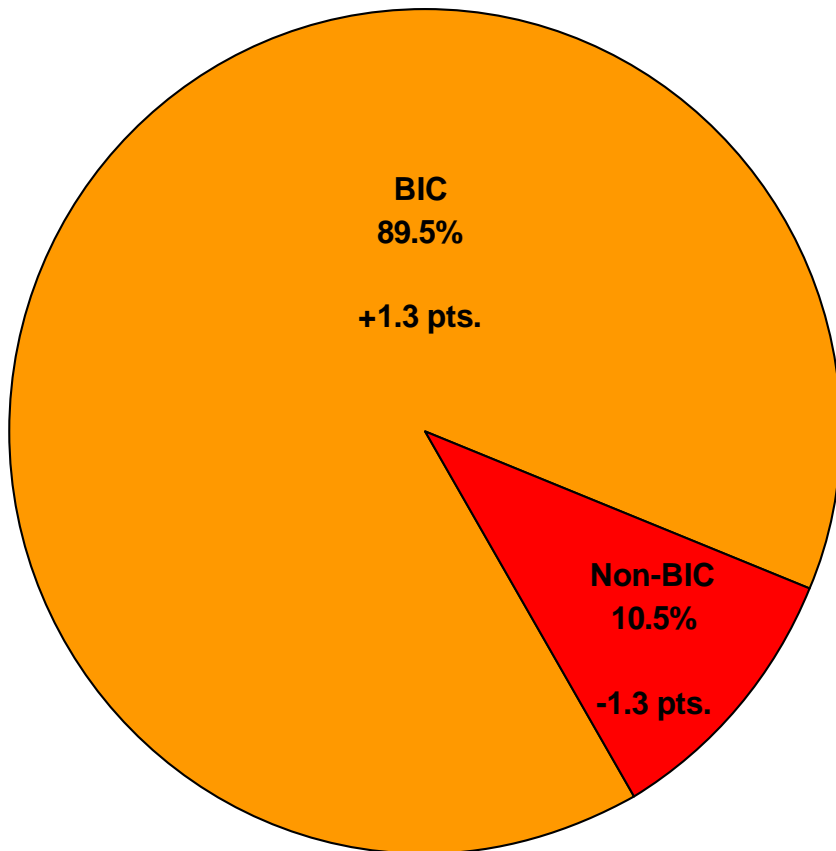
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Total U.S. Convenience Disposable Pocket Lighter Vendor Share (52 Weeks)

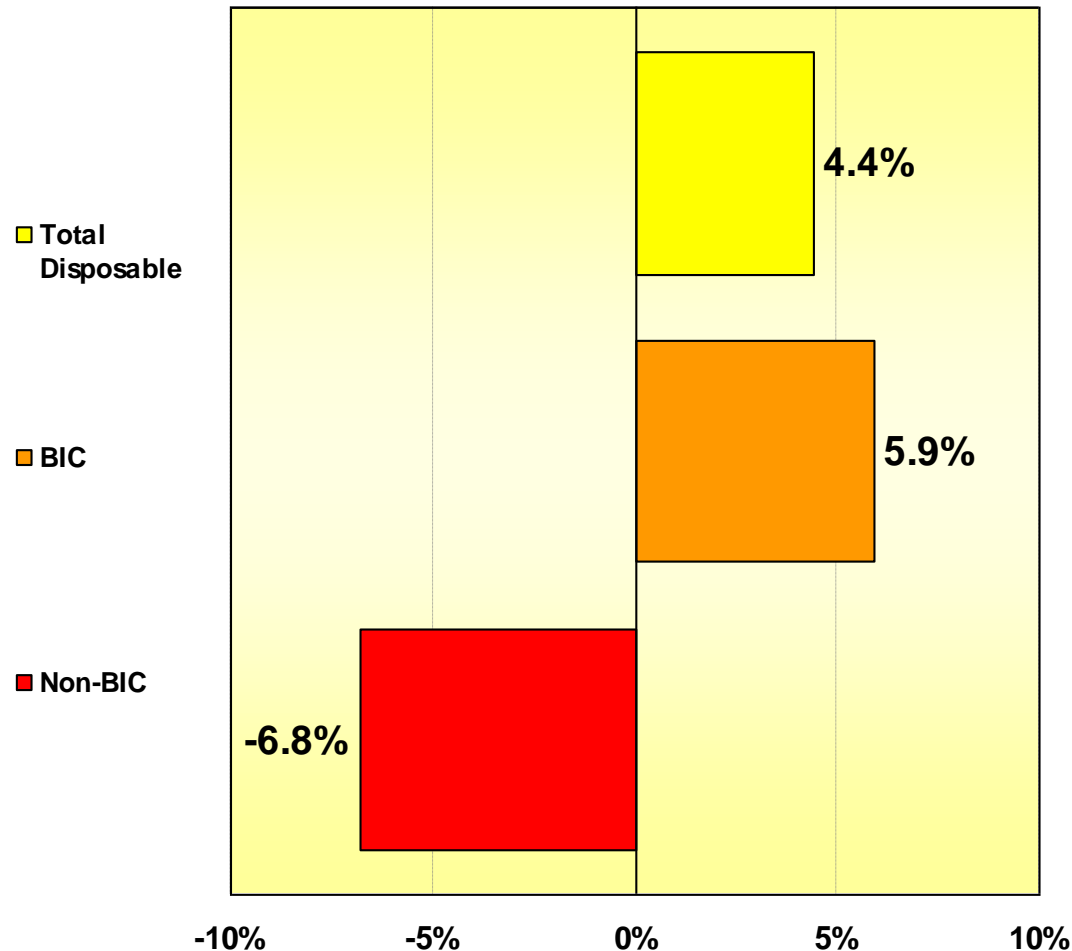
In U.S. Convenience, BIC is driving Segment growth at +5.9% for gains of \$25MM. Non-BIC Disposables are lagging behind Total Segment growth by 11 points, declining \$3.9MM.

Total Disposable Dollar Share

Total Segment: \$503MM



Total Disposable Dollar Sales % Chg vs Yr Ago



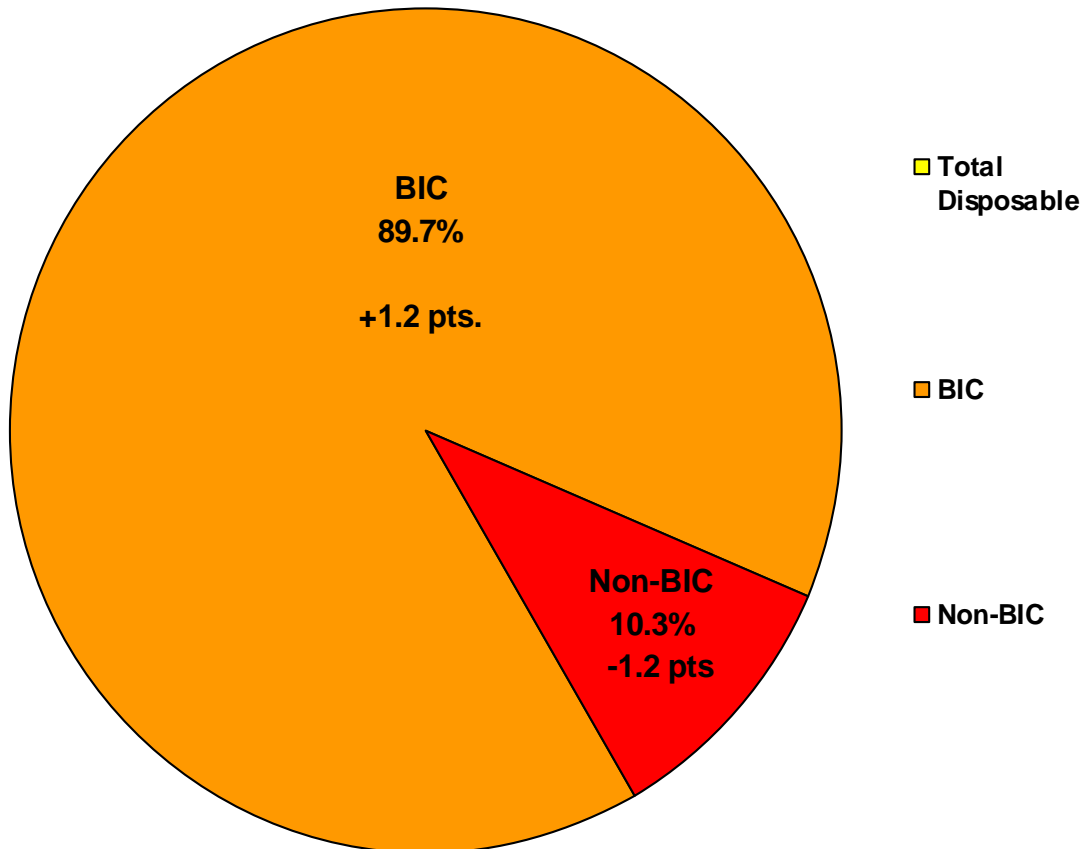
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Total U.S. Convenience Disposable Pocket Lighter Vendor Share (13 Weeks)

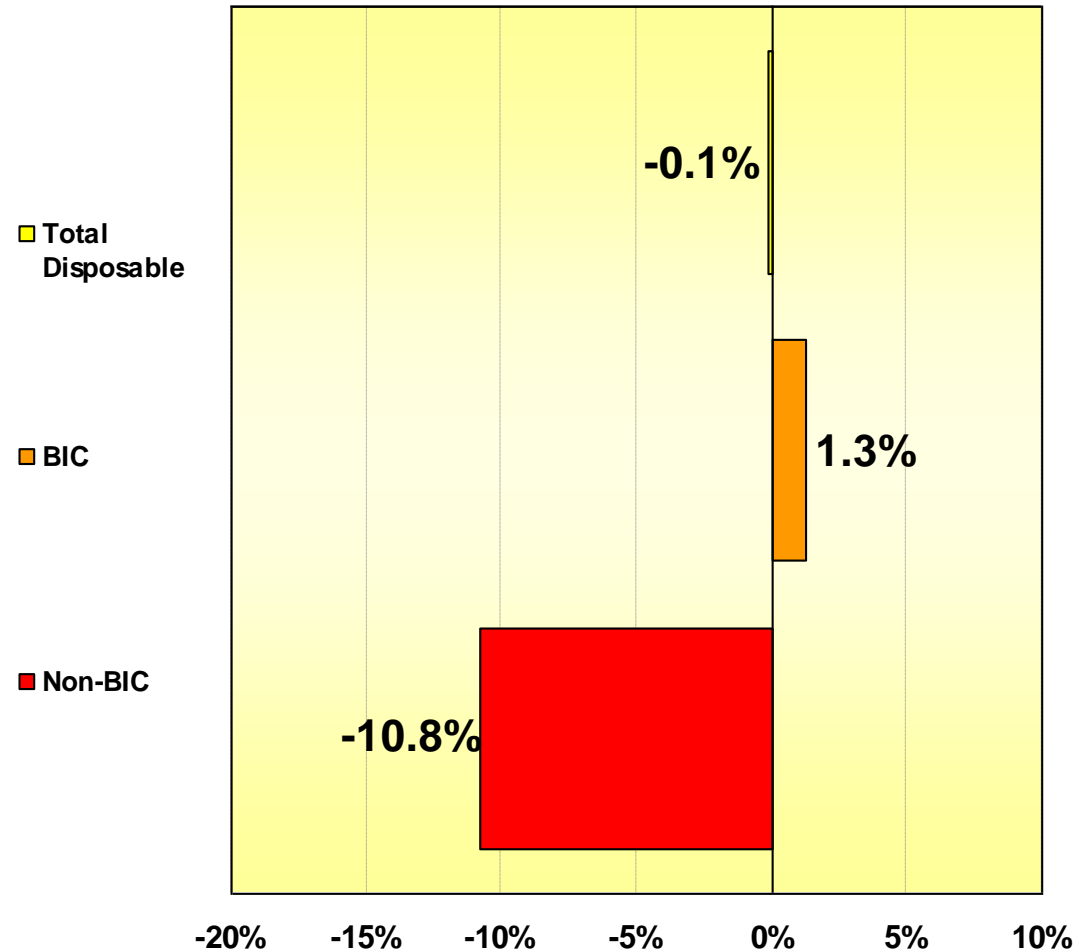
In recent weeks, BIC's share of Total Disposable has increased to 89.7%, and continues to grow +1.3%. Meanwhile, Non-BIC Disposables continue to decline lagging the segment by nearly 11 points.

Total Disposable Dollar Share

Total Segment: \$126MM



Total Disposable Dollar Sales % Chg vs Yr Ago



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