

EXCLUSIVELY



L I G H T E R



BIC Lighter Market Performance Report – August 2010

Information Resources, Inc. (All Scan), 52 and 12 weeks ending July 25, 2010
Projection to 144,541 total C-Stores (54,492 Chain, 90,049 Independent)



C-Store Summary (52 Weeks)

- The Total Pocket is growing at +5.7% in Dollar Sales vs. year ago.
- The Disposable Segment has 95.6% dollar share and is up +6.4%. Refillable Lighters are declining at -8.8%.
- BIC is America's #1 Lighter with a 85.3% share in the Disposable Lighter Segment, up +7.7%. Non-BIC Disposable Lighters are down -0.5%.
- BIC has the Top 4 Lighter Brands in Convenience, all equal to or category growth:
 - *BIC Classic is the #1 Disposable Pocket Lighter brand up +6.4%.*
 - *#2 BIC Mini is up +8.0%.*
 - *Special Edition is fueling BIC growth, up +12.1%.*
 - *Pro Series posts impressive gains of +21.5%.*



C-Store Summary (12 Weeks)

- Recent weeks show Total Category dollar gains of +10.5%.
- Total Disposable is driving Category growth with a 96.1% share, up +12.2%. Refillable Lighters are declining at -19.3%
- BIC is America's #1 Lighter, up +13.2% Non-BIC Disposable Lighters are growing by nearly half as much at +6.8%.
- BIC has the Top 5 Lighter Brands in Convenience, all exceeding category growth:
 - *BIC Classic is the #1 Disposable Pocket Lighter brand up +5.8%.*
 - *#2 BIC Mini is up +16.8%.*
 - *Special Edition is fueling BIC growth, up +15.6%.*
 - *Pro Series posts impressive gains of +28.0%*
 - *Sales of Rock Bands and Playboy increase Collectors Series sales by over +100%.*

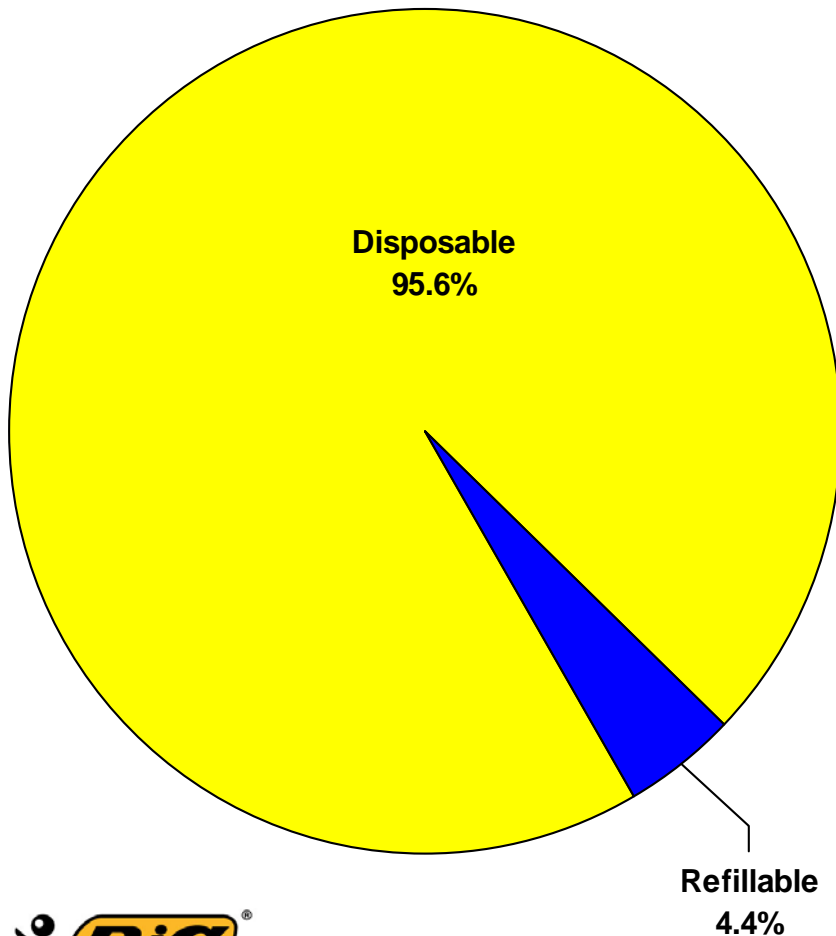


Total U.S. Convenience Pocket Lighter Segment Share (52 Weeks)

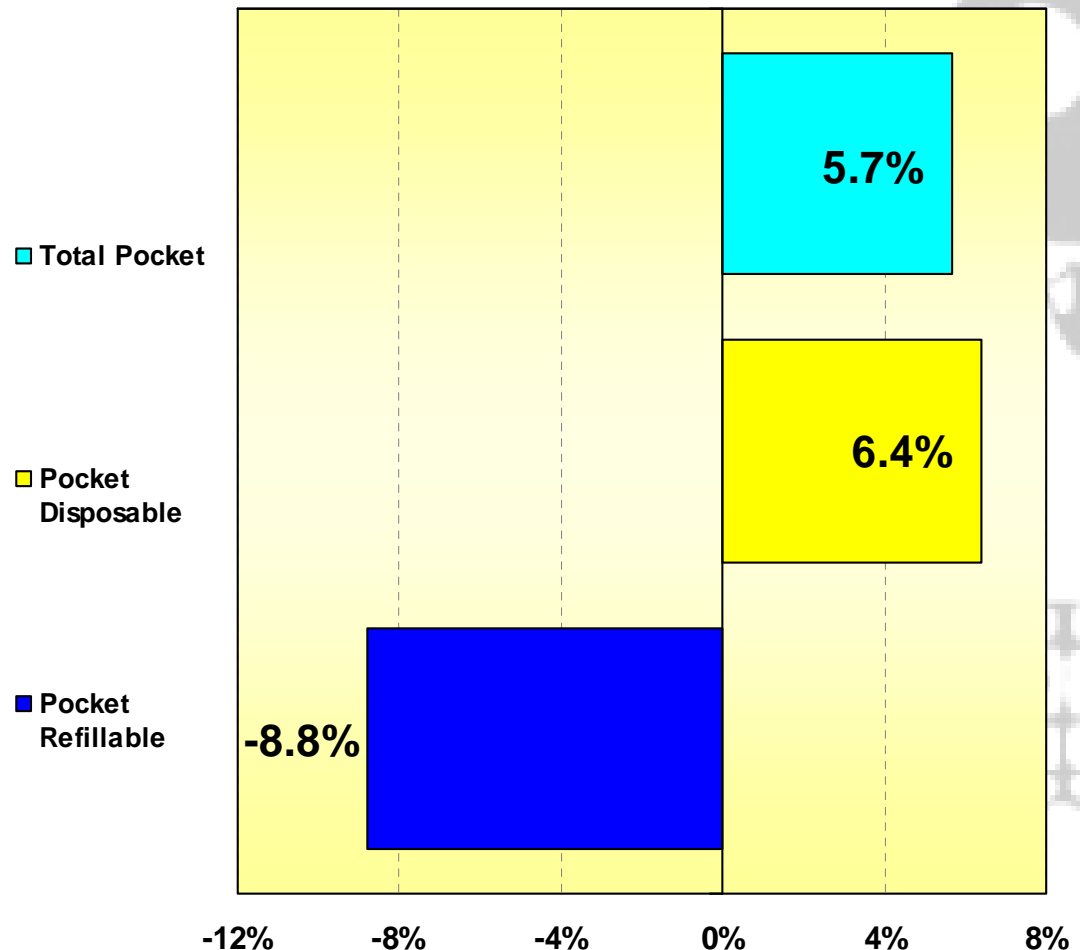
The Total Lighter Category shows growth of +5.7%. The Disposable Segment is growing +6.5% while the Refillable Segment lags behind by 15 points, losing \$1.9M.

Total Pocket Dollar Share

Total Category: \$462.2M



Total Pocket Dollar Sales % Chg vs Yr Ago

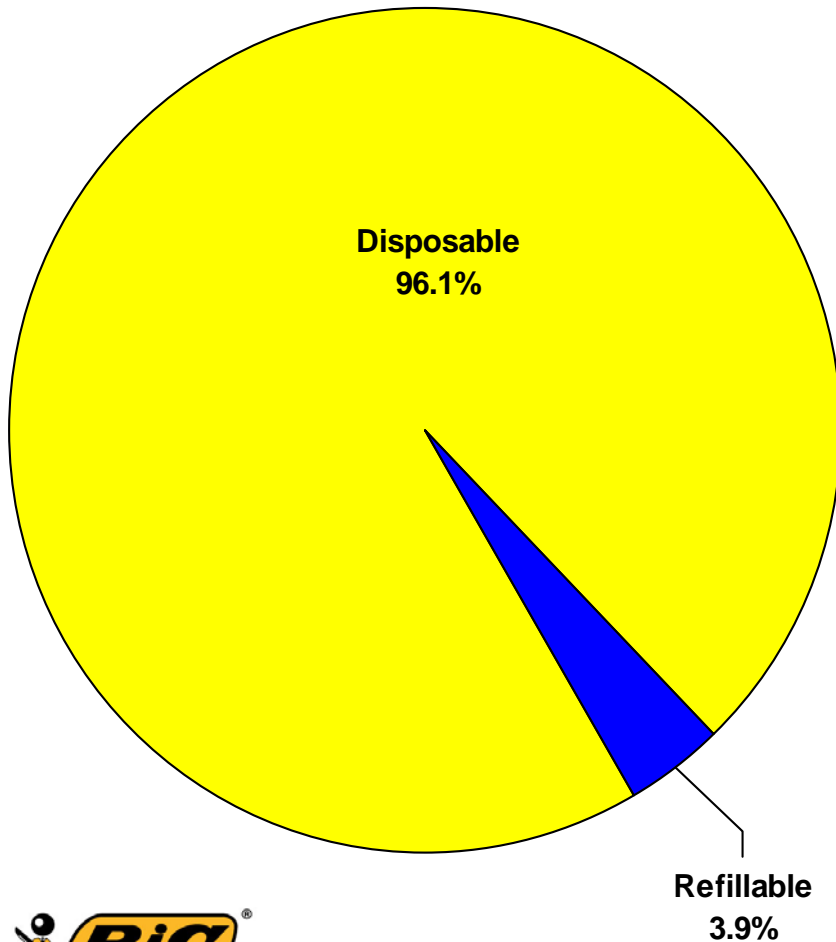


Total U.S. Convenience Pocket Lighter Segment Share (12 Weeks)

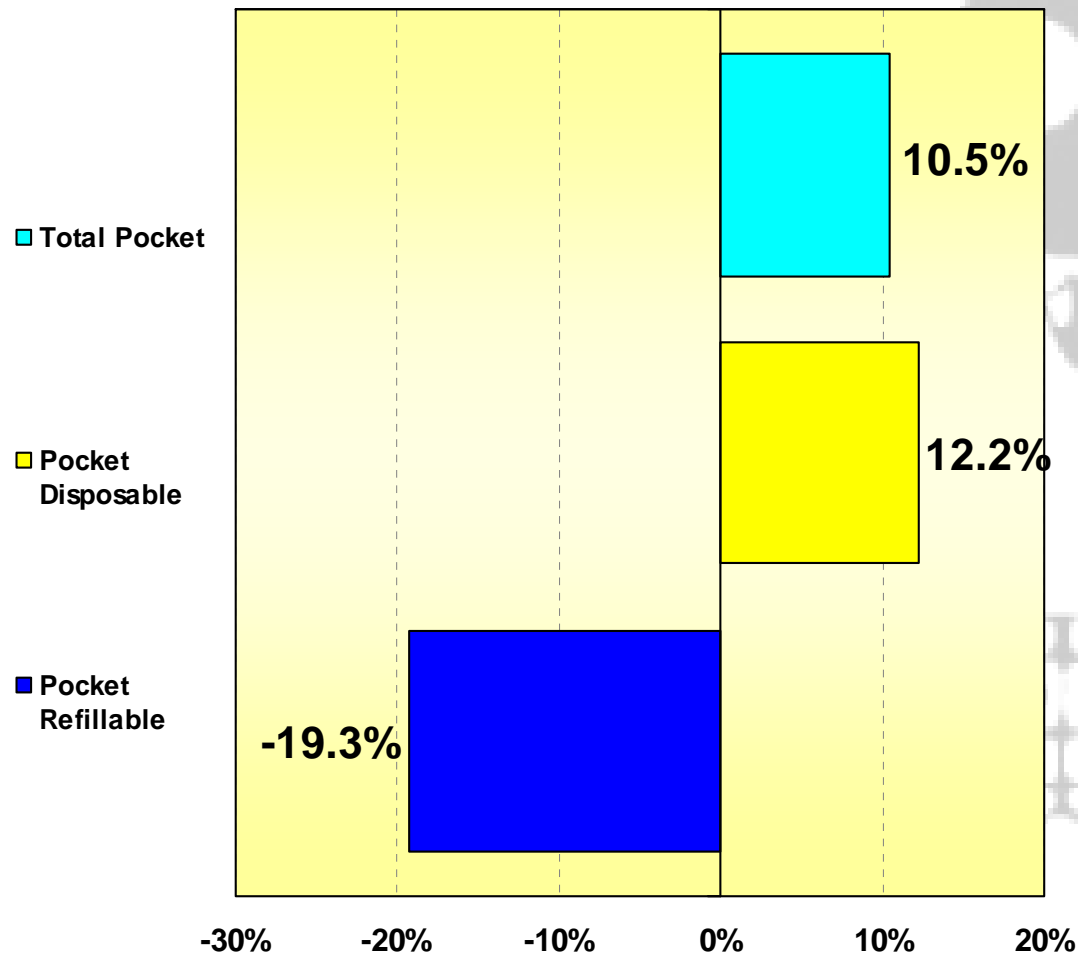
At 12 weeks, Total Pocket growth accelerates to +10.5% with Disposable growing +12.2%. Refillable is declining 30 points behind the Total Market for a loss of \$1.1M.

Total Pocket Dollar Share

Total Category: \$117.0M



Total Pocket Dollar Sales % Chg vs Yr Ago

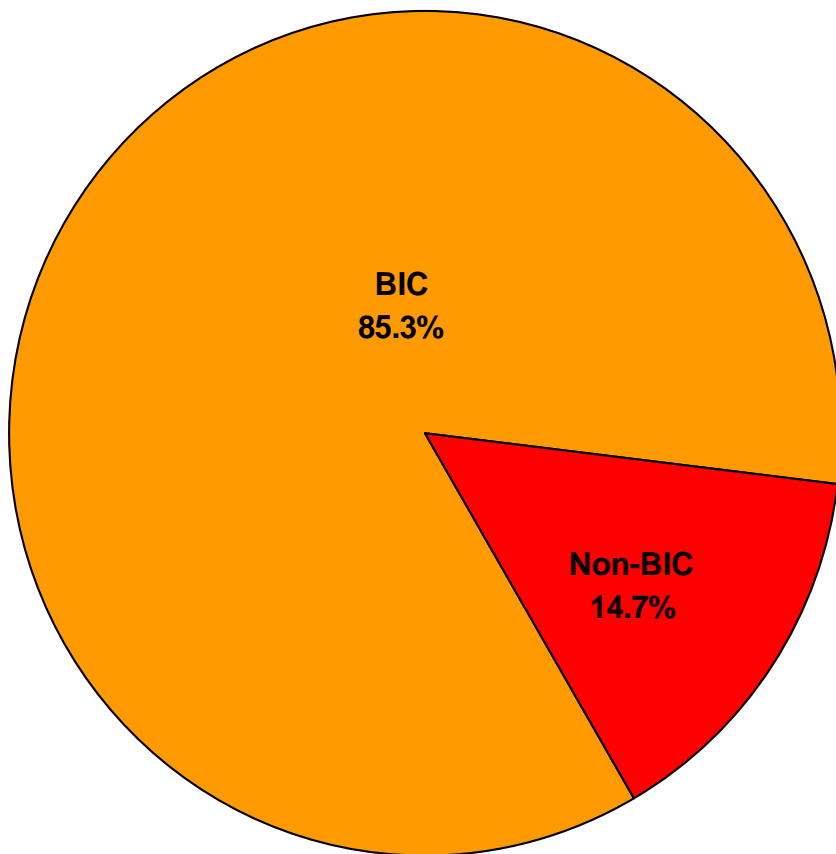


Total U.S. Convenience Disposable Pocket Lighter Vendor Share (52 Weeks)

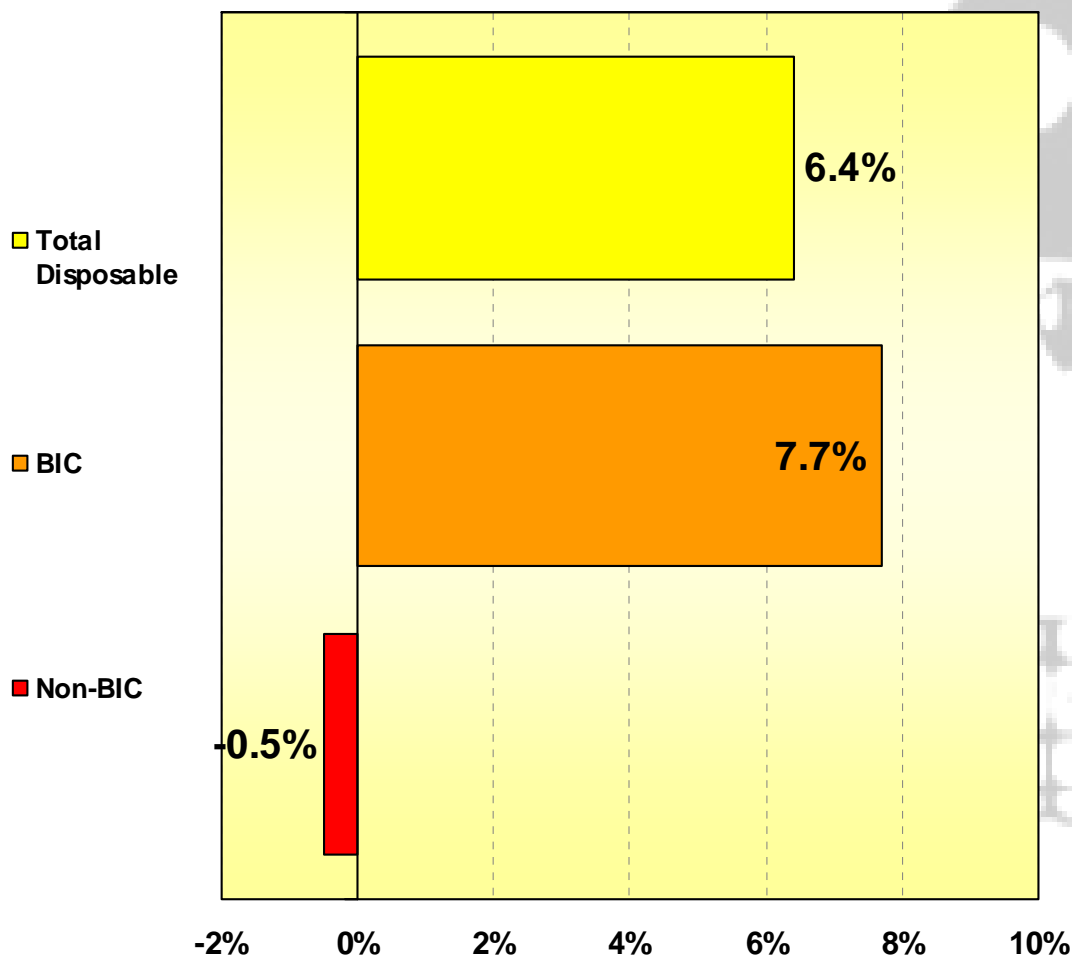
BIC is driving Segment growth at +7.7% for gains of \$27M. Non-BIC Disposables are lagging behind Total Segment growth by more than 6 points, declining -\$349K.

Total Disposable Dollar Share

Total Segment: \$442.0M



Total Disposable Dollar Sales % Chg vs Yr Ago

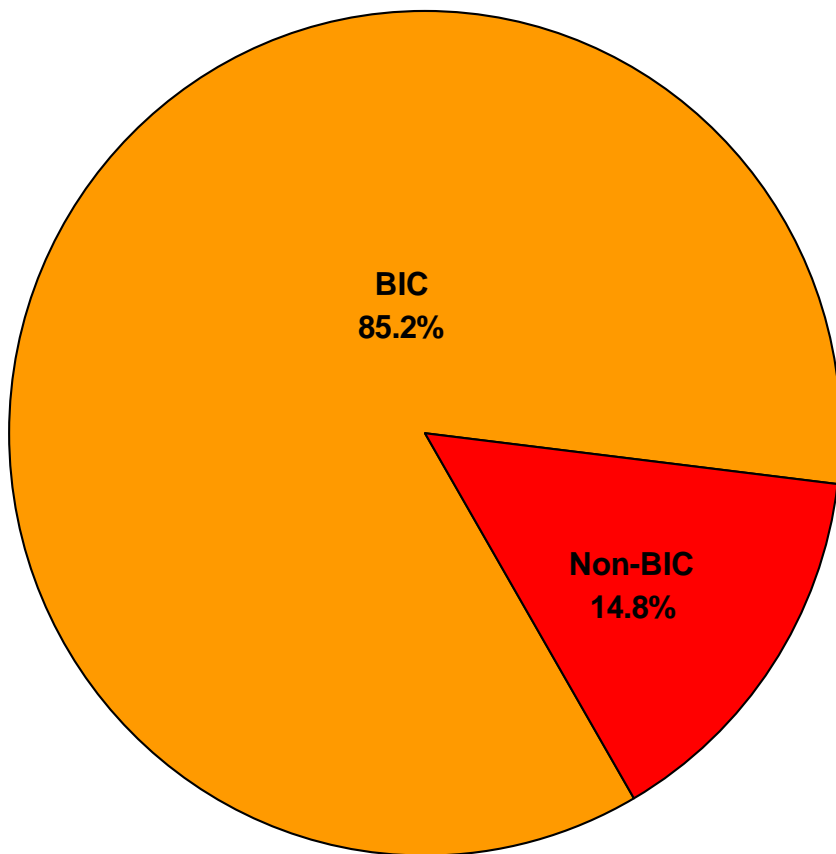


Total U.S. Convenience Disposable Pocket Lighter Vendor Share (12 Weeks)

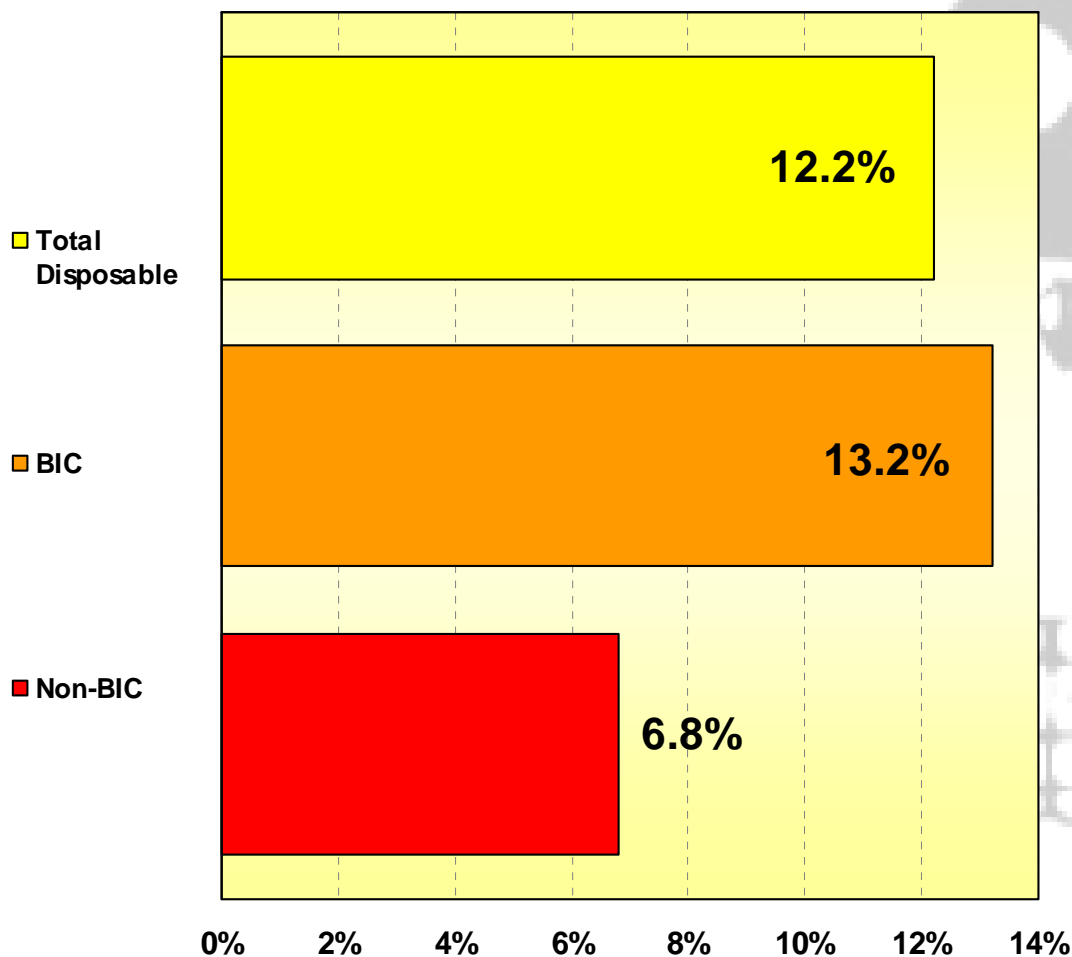
At 12 weeks, BIC sales are up +13.2%, growing nearly twice the rate of all other Disposable Lighters for sales gains of +\$11.2M.

Total Disposable Dollar Share

Total Segment: \$112.5M



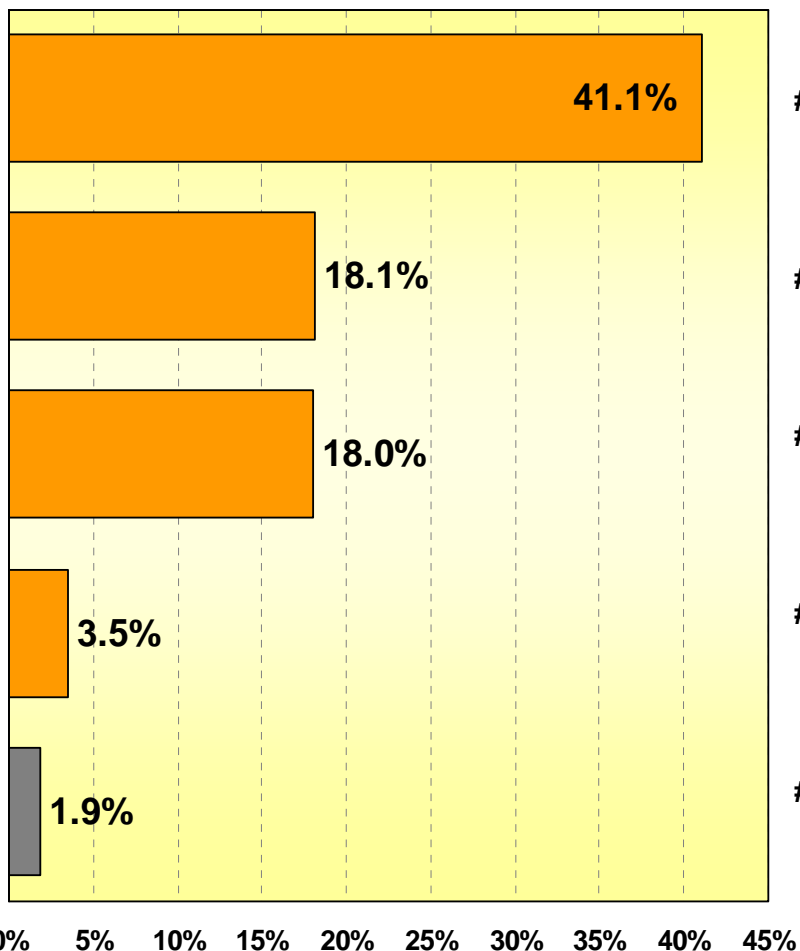
Total Disposable Dollar Sales % Chg vs Yr Ago



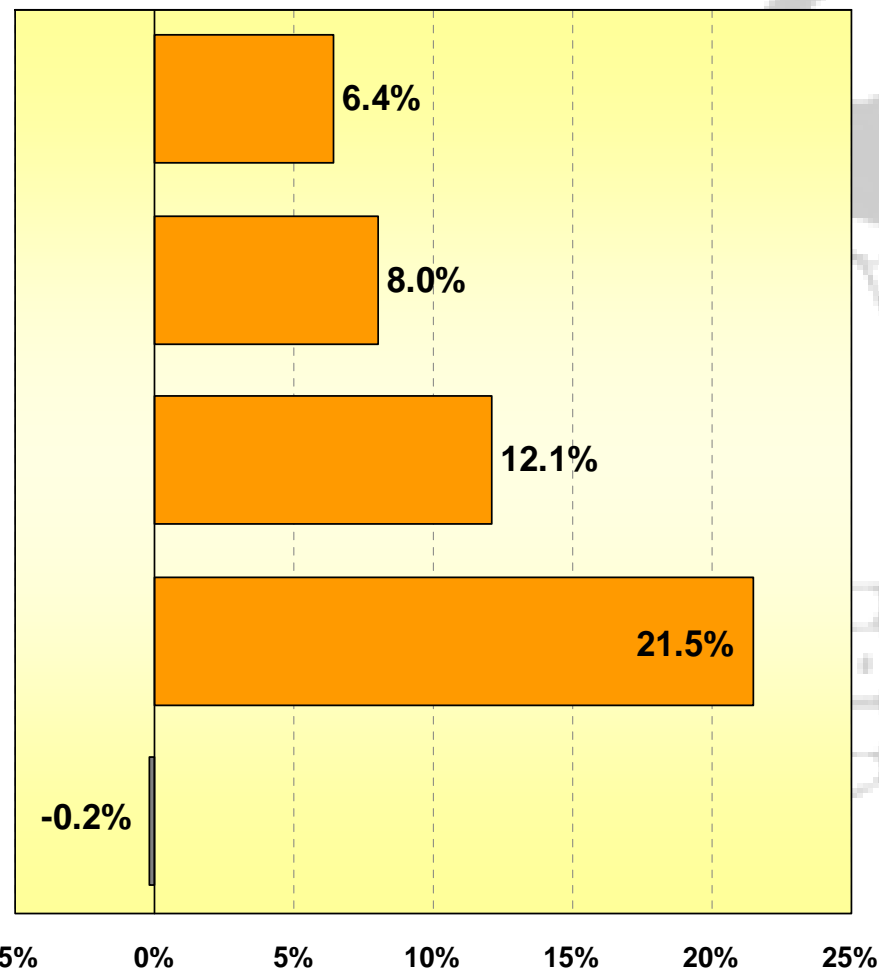
Total U.S. Convenience Top 5 Disposable Pocket Lighter Brand Trends (52 Weeks)

BIC has 4 out of the Top 5 Brands, a cumulative 81% dollar share. Special Edition and Pro Series post accelerated double-digit increases for sales gains of \$11.4M.

Brand Dollar Share



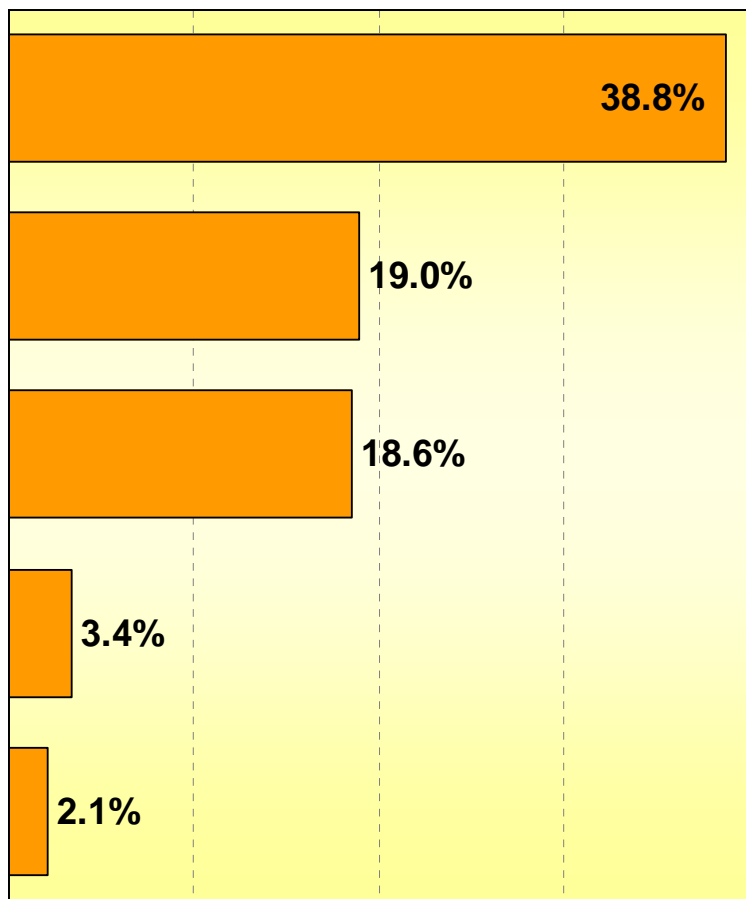
Brand Dollar Growth



Total U.S. Convenience Top 5 Disposable Pocket Lighter Brand Trends (12 Weeks)

At 12 weeks, BIC has the top five best-selling brands in C-Store. Collectors Series sales are up more than +100% due to Rock Bands and Playboy for dollar sales gains of over \$1.9M.

Brand Dollar Share



Brand Dollar Growth

