

FOCUS ON

Reduced Risk

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Discover ZYN's strong range

WORLD'S
NO.1
NICOTINE POUCH BRAND*

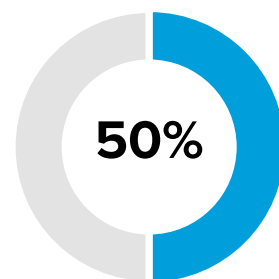


11MG 11MG 16.5MG

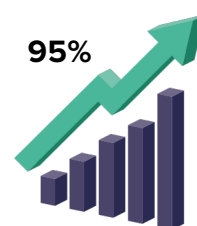
BUY NOW

*PMI reported global shipment volumes and in-market sales estimates of nicotine pouch units, from January to December 2025.

This product is not risk free and contains nicotine, which is addictive. Only for use by adults.



Half of vape sales flow through Symbols & Independents.¹



Nicotine Pouches surge as UK market grows **95%** in the last two years.¹



Market returns to growth after disposables ban, with value up **10%**.¹

1. Nielsen IQ Discover

Focus on Big Puffs

Big puff devices continue to see strong month-on-month growth, showing clear consumer demand for higher value, longer-lasting products. According to AQL International Sales Out Data Big Puffs accounted for over 50% of sales in May 26. Big Puffs and Refills should be at the forefront of any retailers range.

With 66.1% (Source: Nielsen IQ Discover – Latest 4 weeks data to 21/02/2026) of sales for the big puff category coming from refills, they are key to big puff success for any retailer. This shows big puff consumers have a strong focus on refills to achieve better value for money, driven by lower cost per ml and longer-lasting usage.



RANK	LOST MARY BM6000 KITS	%
1	BLUEBERRY SOUR RASPBERRY	16.6%
2	PINEAPPLE ICE	15.8%
3	STRAWBERRY ICE	11.8%
4	TRIPLE MANGO	6.6%
5	CHERRY ICE	5.5%

RANK	LOST MARY BM6000 PODS	%
1	BLUEBERRY SOUR RASPBERRY	17.0%
2	PINEAPPLE ICE	15.8%
3	STRAWBERRY ICE	13.6%
4	CHERRY ICE	8.1%
5	TRIPLE MANGO	7.1%



RANK	IVG PRO 12 KITS	%
1	FIZZY CHERRY	20.4%
2	BLUE RASPBERRY ICE	15.7%
3	BLUE SOUR RASPBERRY	14.0%
4	STRAWBERRY RASPBERRY CHERRY	10.0%
5	LEMON LIME	8.2%

RANK	IVG PRO 12 PODS	%
1	FIZZY CHERRY	20.4%
2	BLUE RASPBERRY ICE	15.7%
3	BLUE SOUR RASPBERRY	14.0%
4	STRAWBERRY RASPBERRY CHERRY	10.0%
5	LEMON LIME	8.2%



RANK	HAYATI PRO MAX+ KITS	%
1	BLUEBERRY RASPBERRY	9.3%
2	LEMON LIME	9.1%
3	STRAWBERRY RASPBERRY ICE	8.6%
4	BLUEBERRY SOUR RASPBERRY	7.9%
5	BLUE RAZZ	7.4%

RANK	HAYATI PRO MAX+ PODS	%
1	LEMON LIME	8.4%
2	BLUEBERRY RASPBERRY	8.2%
3	BLUEBERRY SOUR RASPBERRY	8.2%
4	STRAWBERRY RASPBERRY ICE	7.7%
5	BLUE RAZZ GB	6.7%

Source: Nielsen IQ Discover, UK Vape Market Overview

According to Nielsen data, Lost Mary is the UK's leading vape brand, generating around £29.8m in sales and 22.1% of category volume in the latest four weeks to 16 May 2026. As a result, the Lost Mary BM6000 remains a must-stock product for retailers.

Two other key Big Puff ranges are Hayati Pro Max+ Kits & Refills and IVG Pro Kits & Refills. Hayati Pro Max+ delivered 80.6% of Hayati's sales value and 84.6% of volume, while IVG Pro generated 71.4% of IVG's sales value and 72.5% of volume in the latest four weeks to 16 May 2026. These products are essential for retailers looking to maximise sales in the growing Big Puff category.

Retailer Actions:



Ensure strong availability of refill packs within big puff ranges



Focus on value messaging within big puff categories



Regularly review sales mix to keep stock aligned with consumer behaviour

FOCUS ON

Reduced Risk

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Dear Retailer,

The 'Focus On' guides by Plan for Profit are specifically designed for the independent retailer. Each guide contains expert product and category insight to help you make the most of opportunities in store and meet the needs of your customers.

This edition focuses on reduced-risk products. As the category recovers following the disposable vape ban, retailers must stock bestselling brands, support emerging and priority categories and adapt to changing shopper demand. This issue highlights vape and nicotine pouch performance, offering insight to help retailers identify growth opportunities and make confident range and space-planning decisions.

All copies of the Focus On Guides are available to review on the Plan for Profit website and app. Visit planforprofit.co.uk or search 'Plan for Profit' in your preferred app store.



Callum Atkinson
Category Coordinator, Plan for Profit

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UPCOMING LEGISLATION

1st October 2026

The UK Vaping Products Duty starts, adding a new tax to vape liquids and related products.



1st January 2027 (expected)

A generational ban will stop tobacco sales to anyone born on or after 1 January 2009.

Date to be confirmed

Retailers will need a licence to sell tobacco, vapes, nicotine products and accessories.



PLAN FOR
PROFIT
TIP

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**TOBACCO
AND VAPING
LEGISLATION**



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MARKET PERFORMANCE

Total Market

Traditional retail vape sales are down **19%** over two years, including a **10%** fall last year driven by the disposable vape ban.¹



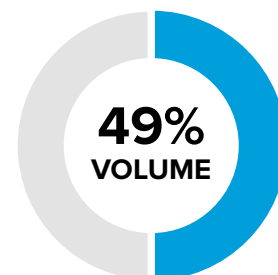
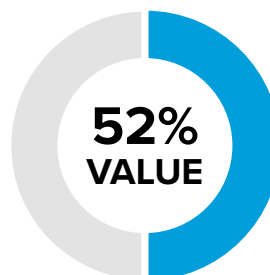
Despite this disruption, the market has returned to growth, with value up **10%** over the past 12 months as shoppers transition into new formats.¹



New Year quit attempts continue to create seasonal dips, mirroring tobacco and nicotine pouches, but overall demand remains strong across emerging vape formats.¹

Symbols & Independents

Collectively, Symbols and Independents remain a key channel for the vape category, delivering **52%** of sales value and **49%** of market volume in the 4-week period to 21/03/2026.¹



This reinforces the importance of vape within the channel, where the category continues to drive footfall and basket spend, with the market now worth around **£71.8m** and continuing to grow.¹

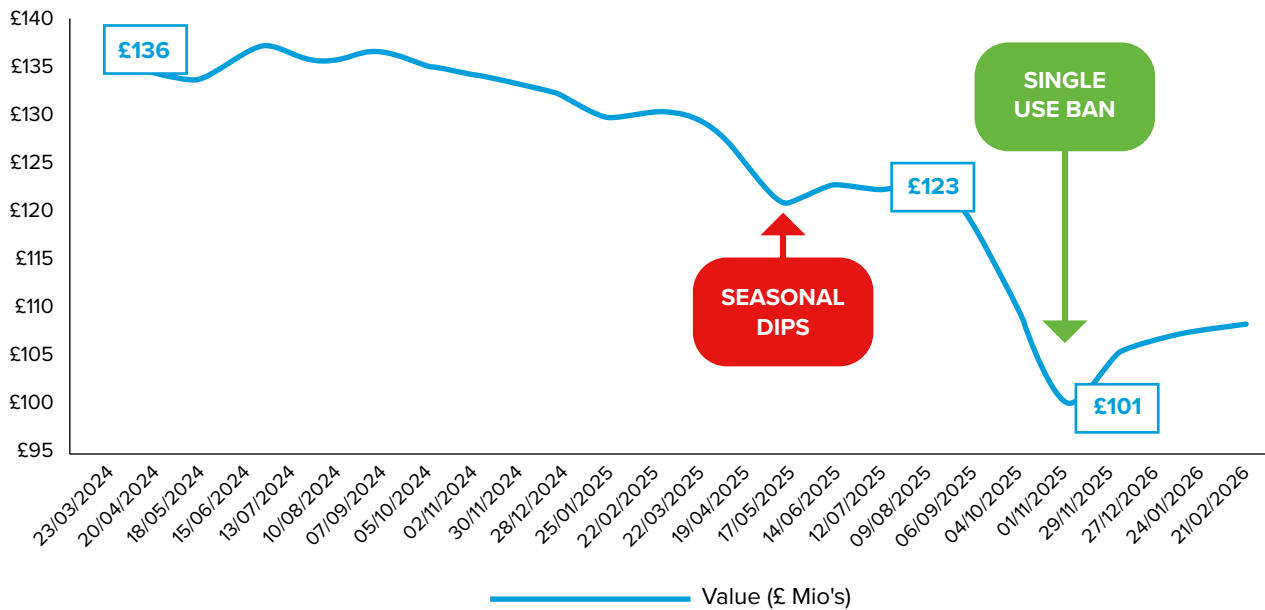


1

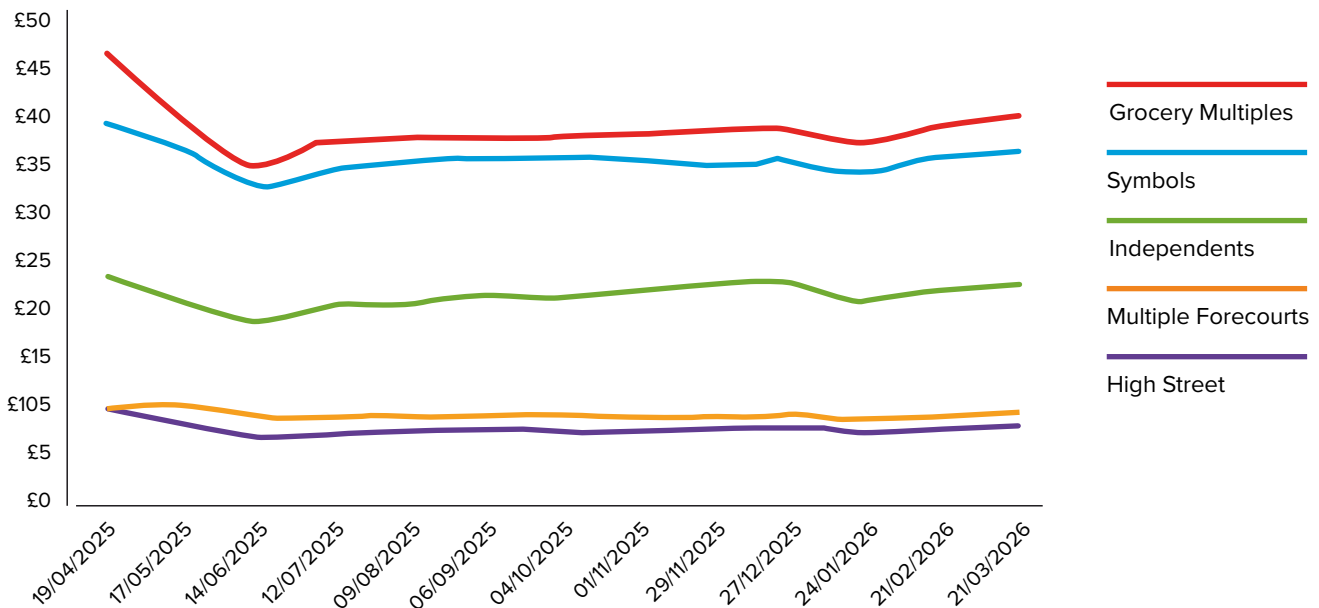
Increase space for fast-growing post-ban formats, including pod kits and refill products.

2

Maintain strong availability of bestselling brands, flavours and formats to minimise missed sales.



Sales Channel Value (£ Mio's)



3

Remove slow-selling or outdated lines to keep the fixture focused on current shopper demand.

4

Review ranges and planograms regularly to ensure the fixture reflects changing shopper behaviour.



AQUAVAPE

Focus on Pod Kits & Refills

Accounting for 40% of sales in May 2026 (based on AQL International Sales Out Data) kits and pods should be at the forefront of any retailers range. Single pod systems have rapidly become one of the UK's leading vape categories, quickly replacing disposables following the ban.

According to Nielsen data Lost Mary is the highest value brand (~£29.8 Mio) and held the highest % of volume (~22.1%) in the latest 4 weeks to 16/05/2026, so the Lost Mary BM600 should be a key product in any retailers range.



RANK	LOST MARY BM600 KITS	%
1	PINEAPPLE ICE	18.1%
2	STRAWBERRY ICE	14.6%
3	BLUEBERRY SOUR RASPBERRY	11.8%
4	TRIPLE MANGO	11.8%
5	DOUBLE APPLE	9.8%

Source: Nielsen IQ Discover, UK Vape Market Overview

Closely followed by SKE Pro 600 Kits & Pods, which combined delivered 62.6% of Value & 65.0% of Volume for the SKE brand in the latest 4-week period to 16/05/2026



RANK	SKE PRO KITS	%
1	LEMON & LIME	23.5%
2	CHERRY ICE	19.1%
3	BLUEBERRY SOUR RASPBERRY	13.0%
4	STRAWBERRY BURST	8.2%
5	BLE RAZZ LEMONADE	6.4%

Source: Nielsen IQ Discover, UK Vape Market Overview

Retailer Actions:



Prioritise shelf space for single pod kits and refills



Keep top-selling flavours and pod refills fully stocked



Monitor trends closely as consumer demand continues to shift rapidly



Reduce slow-selling legacy lines and review ranges regularly



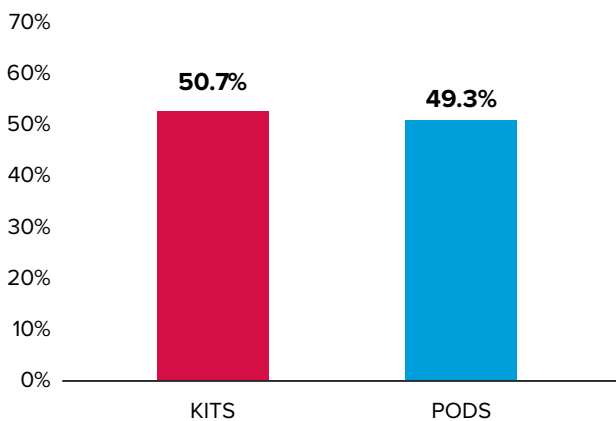
Use trusted suppliers to ensure compliant, fast-moving stock

Kits vs Pods/Refills



Rechargeable 600 puff sales are almost evenly split between kits and pods, suggesting shoppers are still rebuying kits for convenience rather than refilling.¹

600 PUFF

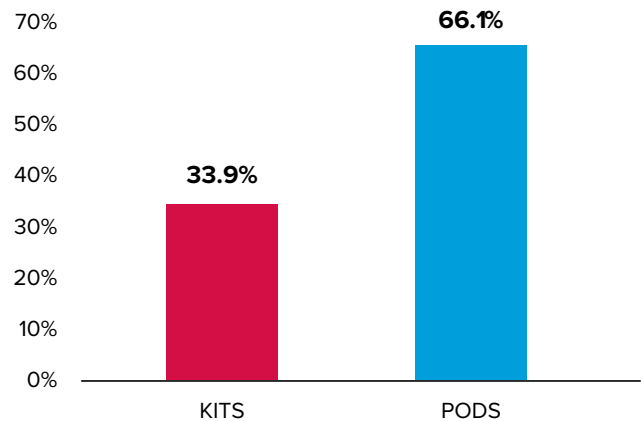


Combined volume of 3 biggest single pod brands
Lost Mary BM 600 / Elfbar 600 & SKE Pro 600



Big puff shows a different pattern, with refills driving **66.1%** of volume as shoppers seek lower cost per ml and longer-lasting usage.¹

BIG PUFF



Combined volume of 3 biggest puff brands
Lost Mary BM 600 / Hayati Pro Max+ / IVG Pro 12

PLAN FOR PROFIT TIP

1



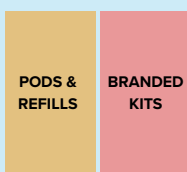
Stock a strong mix of rechargeable 600 puff kits to meet continued demand for convenient, familiar formats.

2



Keep big puff refill packs well stocked to support repeat purchase and value-led shopper missions.

3



Merchandise pods and refills next to the same branded kits to make replenishment easy and drive repeat purchase.

4

CLEAR VALUE MESSAGING

Use clear value messaging on big puff ranges, highlighting lower cost per ml and longer-lasting usage.

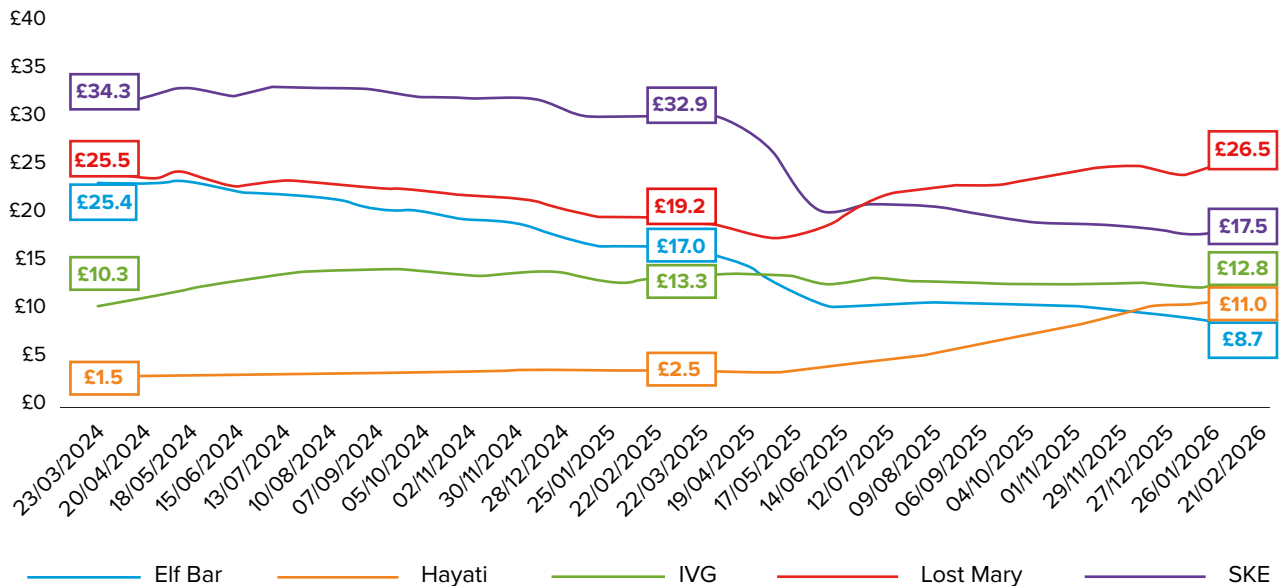
Top performing Brands



SKE has been a long-standing market leader, with products such as Lemon & Lime still strong sellers for many retailers, while Lost Mary has been one of the biggest post-ban winners through BM600 and BM6000.¹



IVG has maintained steady share through innovation, particularly with IVG Pro 12, while Hayati continues to grow rapidly in independent retail, led by Pro Max+.¹



PLAN FOR PROFIT TIP

1



Prioritise top-performing brands and bestselling flavours to protect core category sales.

2



Track fast-growing challenger brands, particularly those gaining momentum in independents.

3



Reduce space for weaker legacy brands that are no longer meeting shopper demand.

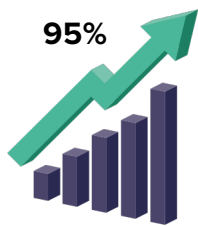
4



Use sales data to keep ranges aligned with fast-moving brand and flavour trends.

NICOTINE POUCHES

UK Nicotine Pouch Total Coverage

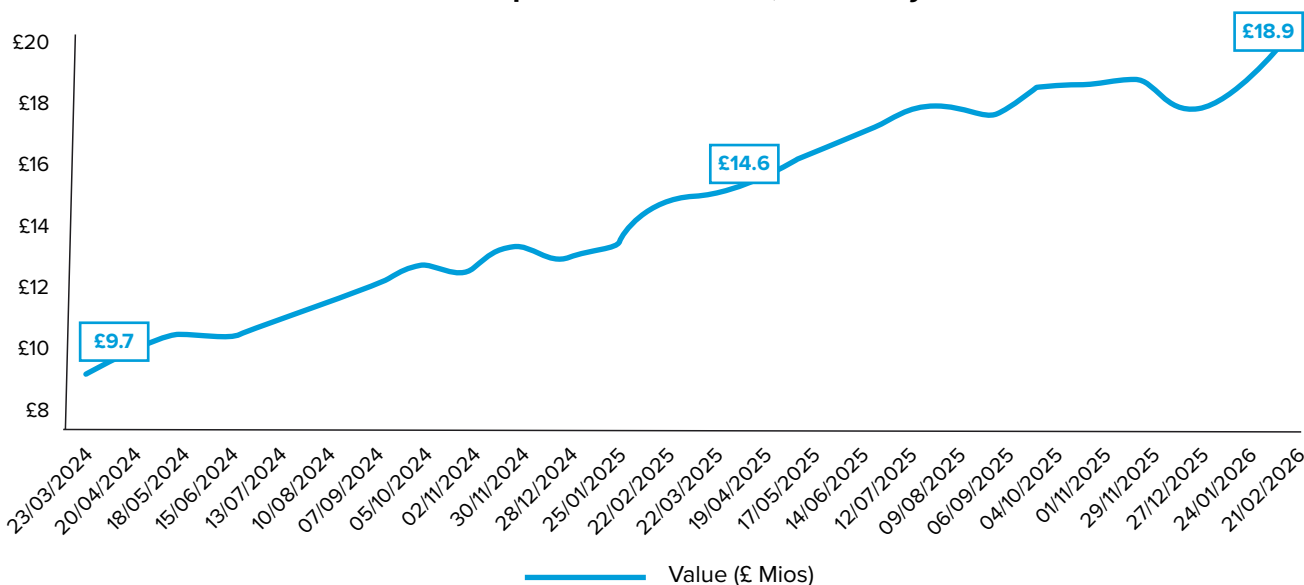


Nicotine pouches continue to be one of the fastest-growing reduced-risk categories in the UK, with the market growing by around **95%** over the last two years.¹



While still smaller than vaping in overall size, the category is expanding rapidly and attracting significant consumer interest.¹

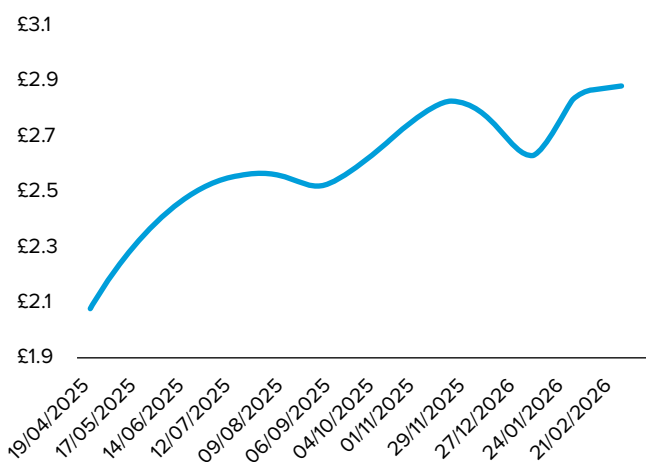
UK nicotine pouch retail value, last two years.



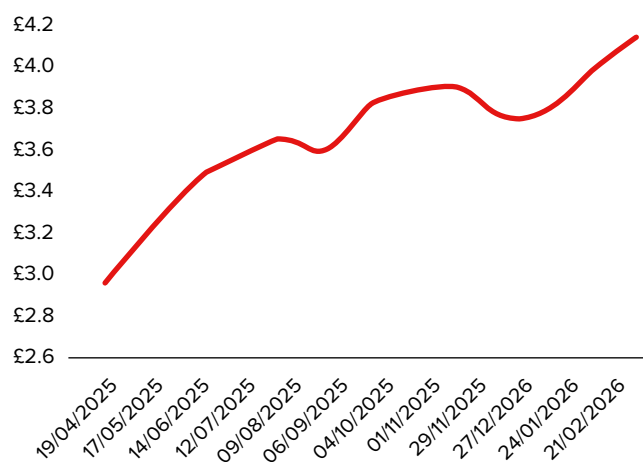
UK Nicotine Pouch Symbols & Independents

Symbols and Independents together delivered **£81.1m** in value and **12.6m** in units sales, highlighting the scale of nicotine pouch demand across convenience retail.¹

Independent - Value Sales (£M's)



Symbols - Value Sales (£M's)



NICOTINE POUCHES

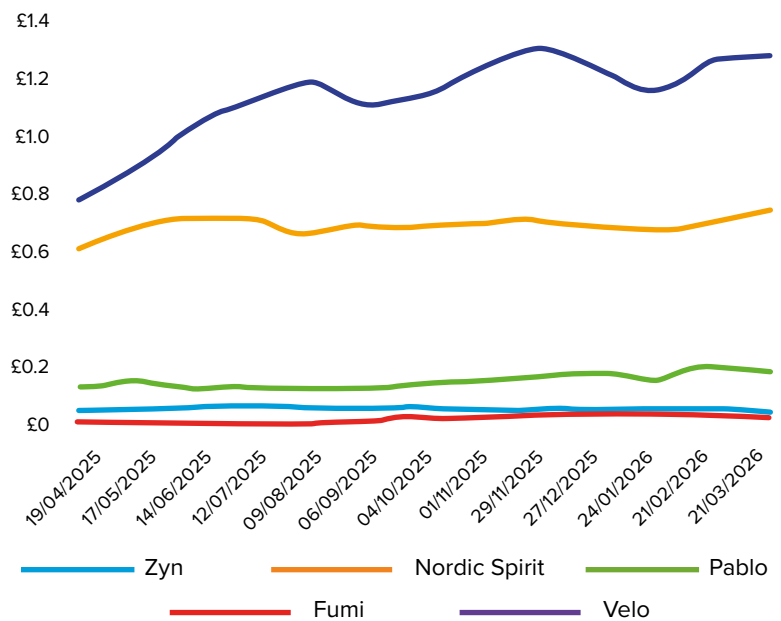
Top performing brands



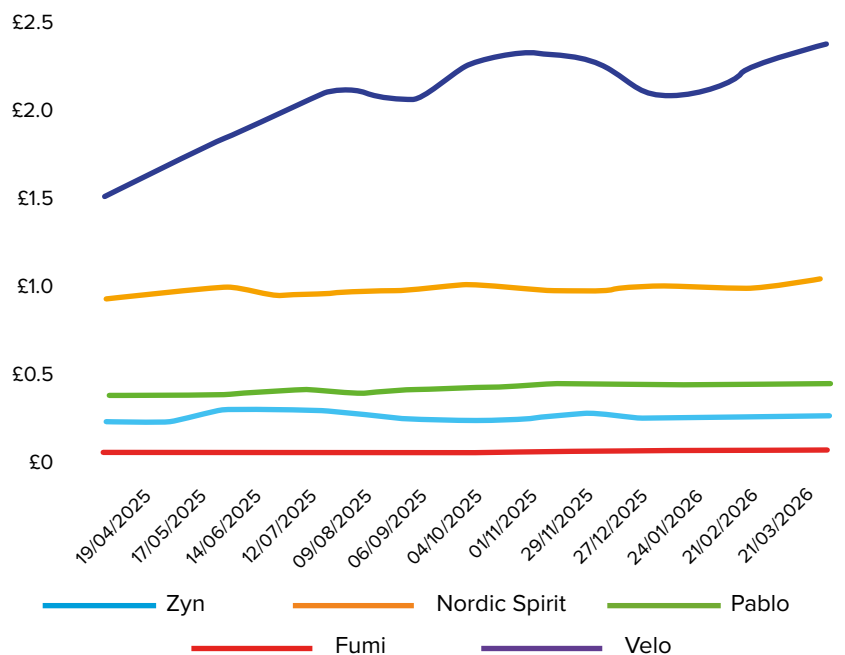
Velo remains the clear market leader due to its early entry into the category, but a growing number of challenger brands are entering the market, creating new opportunities for retailers.¹



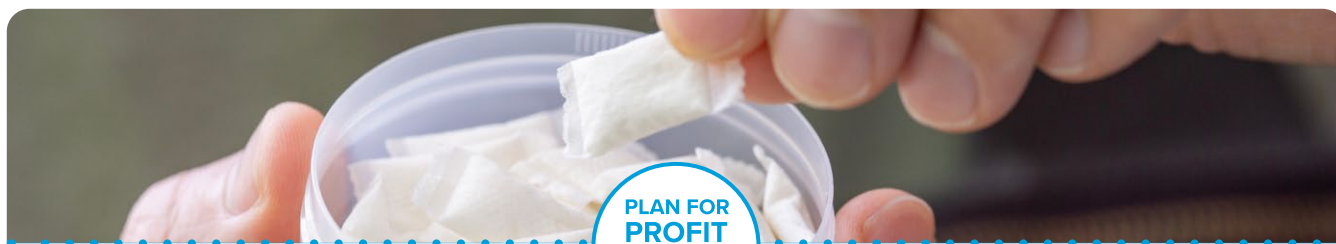
Independent - Top Brands Value (£M's)



Symbols - Top Brands Value (£M's)



1. Nielsen IQ Discover



PLAN FOR
PROFIT
TIP

1

DEDICATED
SPACE

Give nicotine pouches
dedicated space
within the growing
reduced-risk category.

2



Lead with trusted
brands, supported
by selected
challenger products.

3



Focus the range
on bestselling
strengths
and flavours.

4



Monitor growth
closely as awareness
and demand
continue to build.

🎵 **Tap, click, stock, repeat!**

Sourcing your inventory just got **sweet**.

PU
WHOLESALE & DISTRIBUTION



LOST MARY BM6000+
STRAWBERRY RASPBERRY
CHERRY ICE

UP TO
6000
PUFFS

MESH COIL



HAYATI PRO MAX+
RED

600mAh
BATTERY

2ml
CAPACITY



IVG PRO
STRAWBERRY RASPBERRY
CHERRY

UP TO
20000
PUFFS

850mAh
BATTERY



ELUX LEGEND NIC SALTS
BANANA ICE

20
MG/ML

10
ML

50/50
VG/PG



LOST MARY NIC SALTS
WATERMELON ICE

5
MG/ML

10
ML

50/50
VG/PG



JNR NIC SALTS
WATERMELON
BUBBLEGUM

20
MG/ML

10
ML

50/50
VG/PG



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