



Independent
British Vape Trade
Association



www.ibvta.org.uk



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Vape Trade Association

2021 – 2022

Rebirth of the Disposable E-Cigarette

A sector's path through a difficult age

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Totally Wicked - Technical Director



2020 State of Vaping

- Major downturn in 2019 – “EVALI” collateral damage
- 2020 recovery thwarted by lock-down closures
- Bricks and mortar suffered at the expense of online
- ...and convenience/grocery growth in sector
- Which clearly got some people thinking...





2013 Cigalike vs. 2021 Disposable

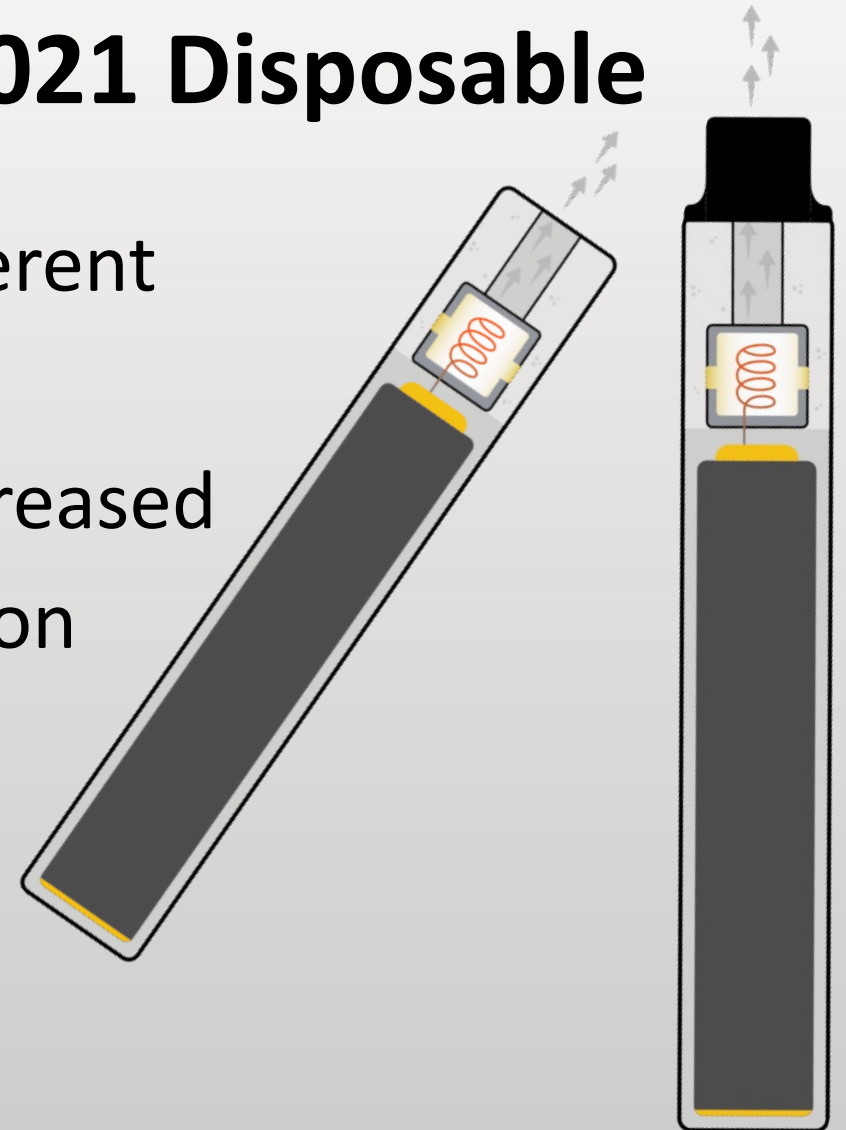
- Aesthetically and ergonomically very different
- Structurally and functionally very similar
- Battery capacity and e-liquid capacity increased
- Extreme difference in flavour concentration
- Technically, all about the e-liquid





2013 Cigalike vs. 2021 Disposable

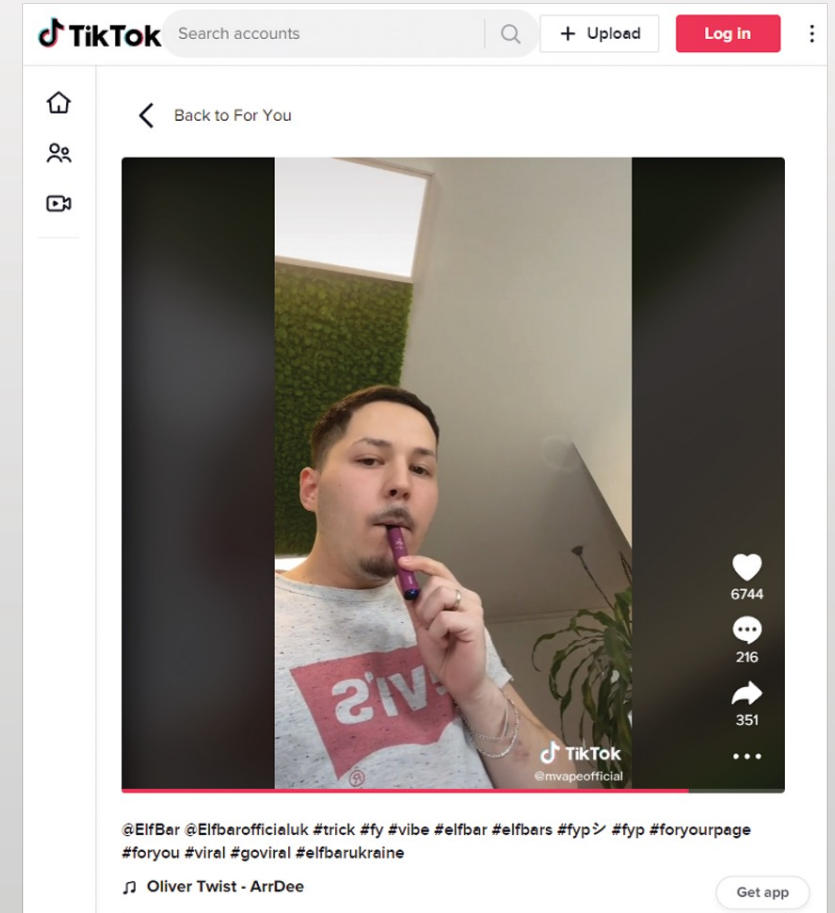
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Style over substance?

- Aggressive social media campaigns led demand
- Consumer demand was real, extant sector had not been demanding enough of itself
- Black market accompanied rise, brand proliferation followed it
- Youth uptake an issue...
- Marketing might enable, but products make markets, easy to use, flavours loved



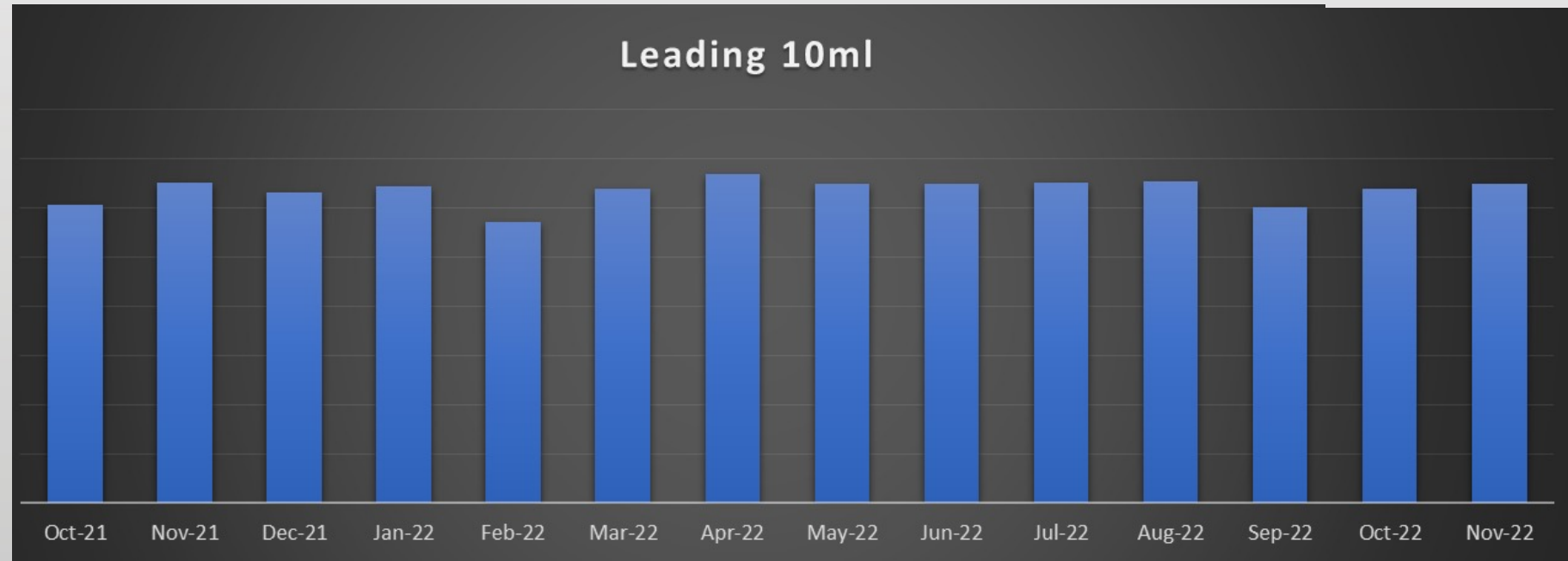


How market growth played out

- Nielsen Total Market Read, 52 weeks @ Nov 19th:

Year	Disposable Vapes	Refill liquids	Refill pods
2020	£10.6M	£107M	£150M
2021	£52.3M	£111M	£198M
2022	£671M	£91M	£180M

- Vape shops:



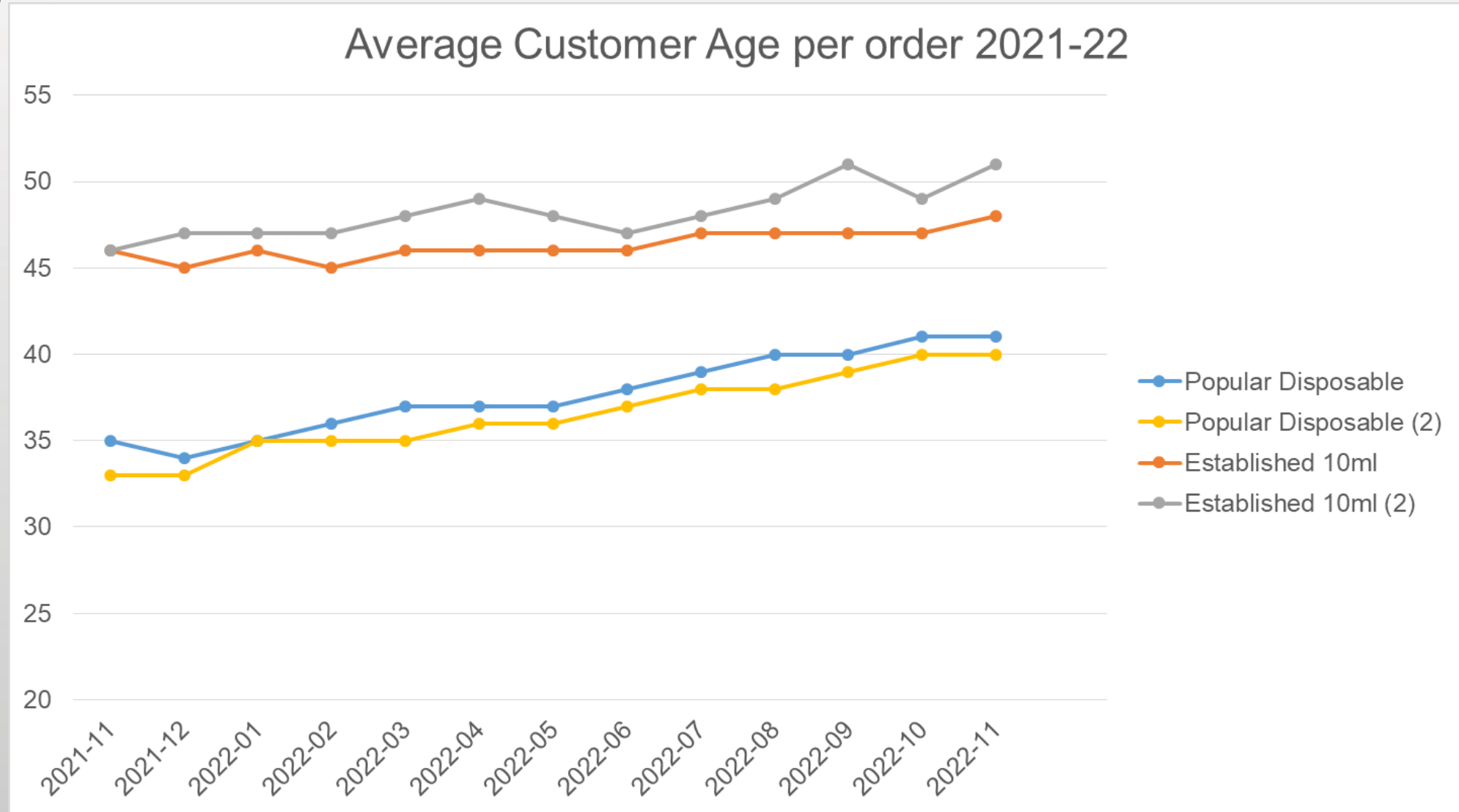


So it's just a youth thing, right?

- All data from 3rd party verified D.O.B. of online consumers
- Tracked per order, not consumer
- Some may have bought more than once in period
- Histograms normalized for probability of purchase
- Averages taken from c.55k orders to 1.2M orders

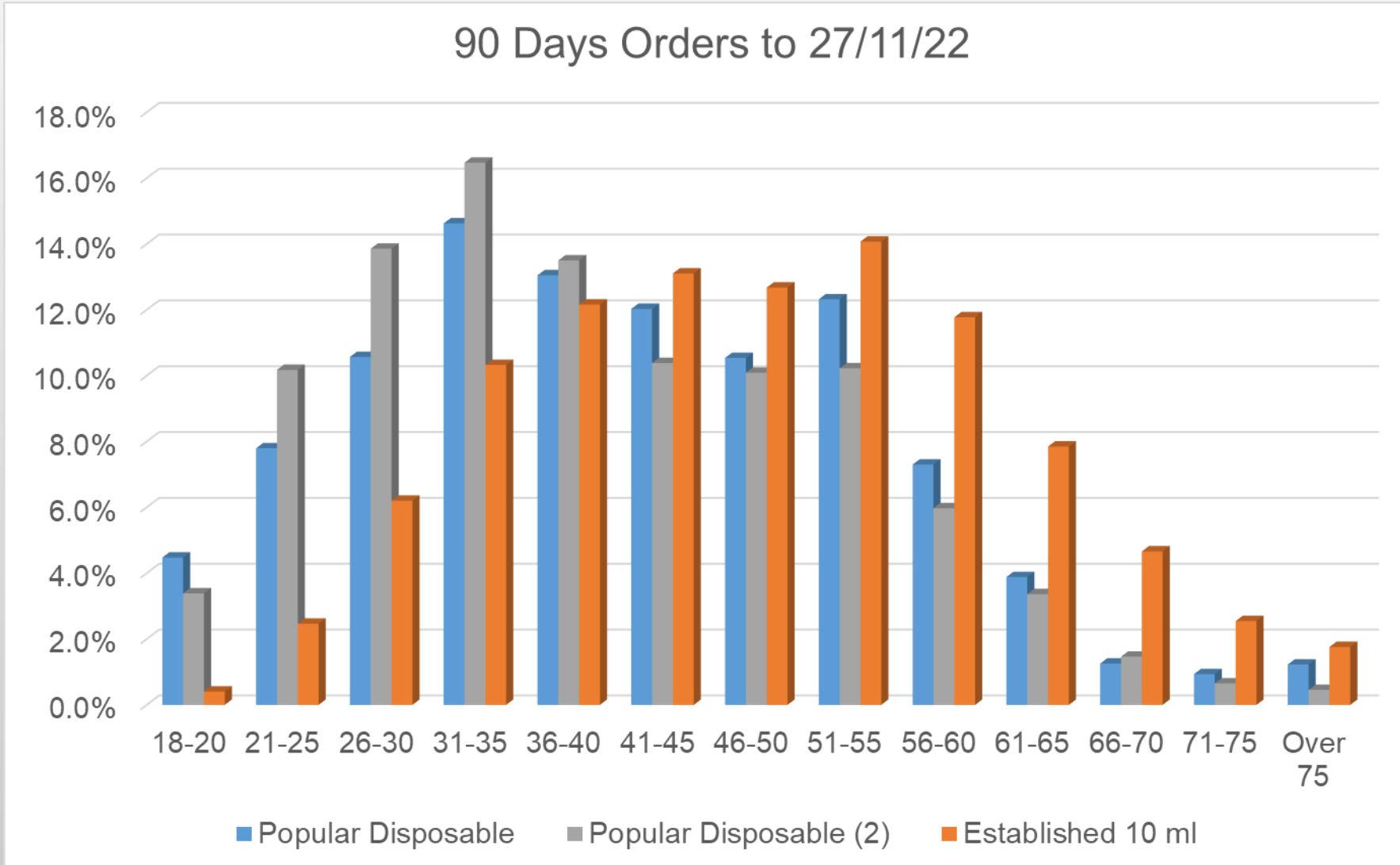


Average purchaser age



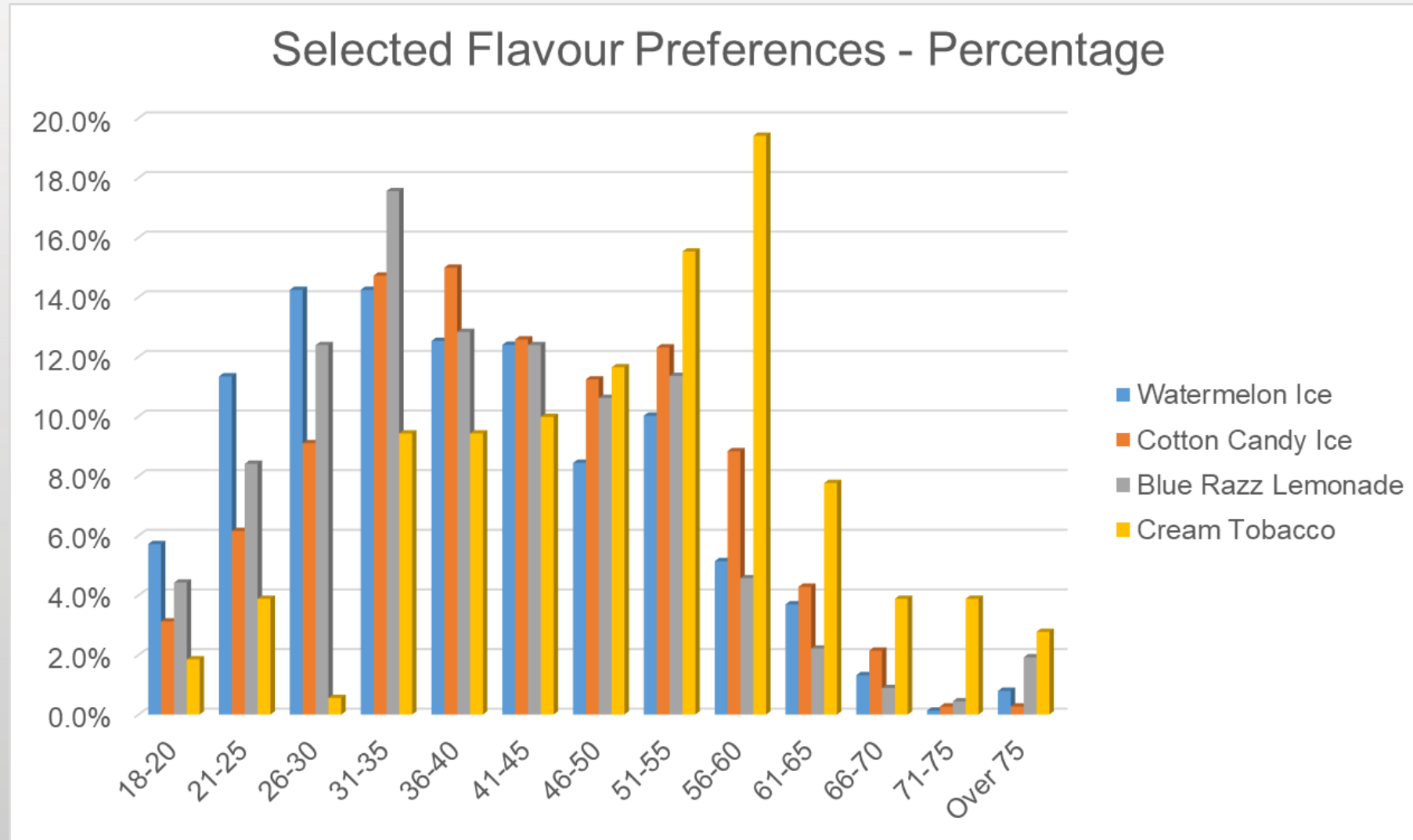


Purchasers per age group



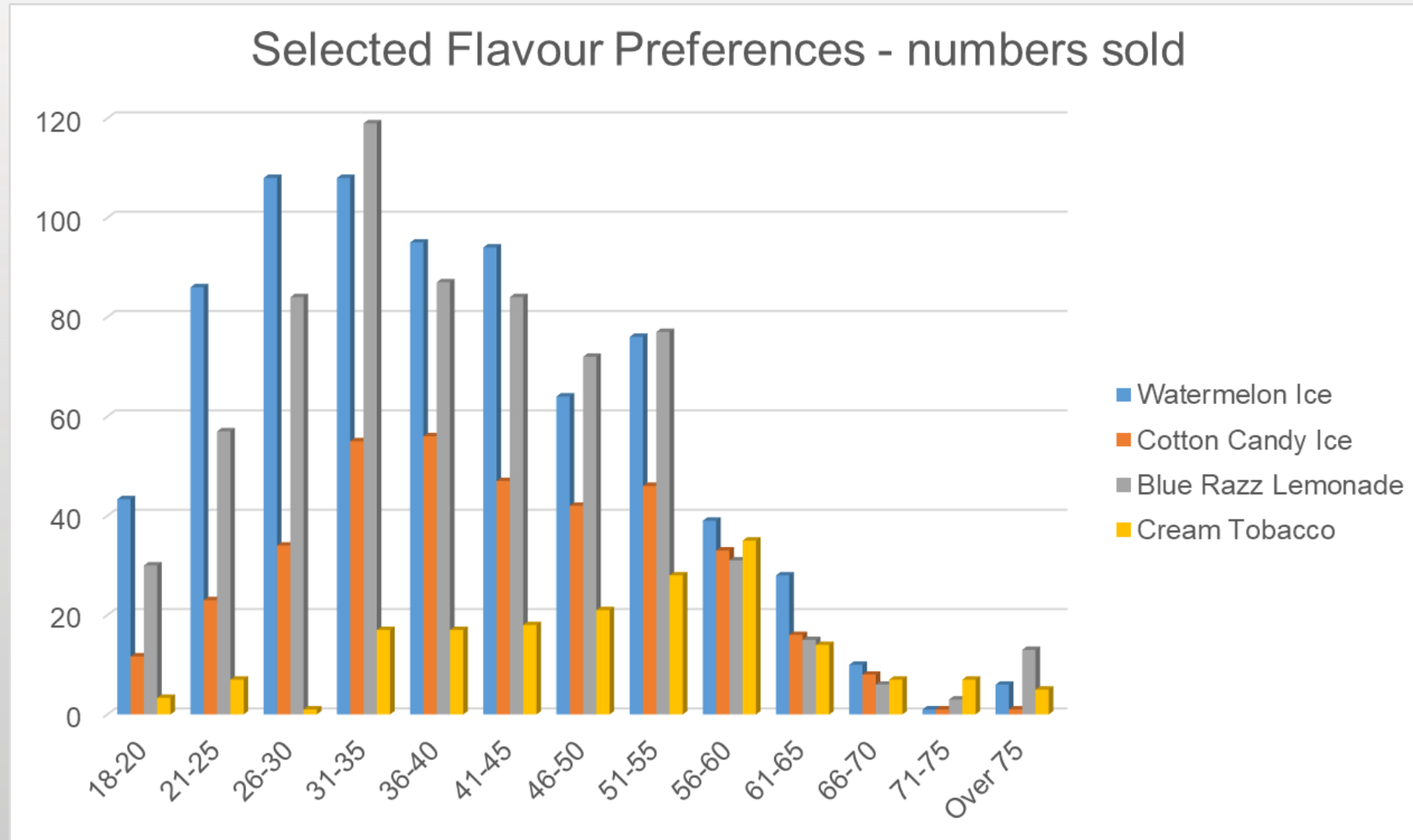


Flavour preferences - proportions





Flavour preferences – actual sales





Regulations

- Should disposable vapes be banned?
- What will TPD3 look like?
- EU Excise review?
- Will action be taken on the review of TRPR?
- OHID Evidence Update / Tobacco Control Plan?





Pleas to stakeholders and policy makers

- Avoid prohibition - consequences are always perverse
- React to misinformation, promote education
- Understand the importance of disposable vapes
- Help us to tackle youth uptake issues
- Remember there is never a time when it is better to smoke than vape



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Thanks for listening

