

Preliminary Country Indicators



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Overview

The Country Fact Sheets aim to describe the "state of smoking" across 36 countries by identifying their policies and actions related to the reduction of harm caused by tobacco use. The Country Fact Sheets provide detailed insight on regulations, industry prevalence and structure, and impacts on society across all nicotine product types available in the market. The Country Fact Sheets provide context for the Company Index by highlighting the regulatory, socioeconomic, and competitive frameworks within which the companies operate across the world.

The 36 countries included in the Fact Sheets represent countries with significant volume consumption of combustible tobacco. Combined, they represented approximately 85% of global sales and consumption of tobacco products.¹ Additionally, these countries were selected to represent regional variations and a mix of income levels so comparisons can be made. This set of 36 countries includes the top 20 countries with the highest smoking rates and the top 20 countries with the highest number of total smokers. Research on each product type focuses on nicotine products relevant in each market.

Focus Countries

Argentina	China	Indonesia	Nigeria	Singapore	Thailand
Australia	Egypt	Italy	Pakistan	South Africa	Turkey
Bangladesh	Ethiopia	Japan	Philippines	South Korea	UK
Brazil	France	Kenya	Poland	Spain	Ukraine
Bulgaria	Germany	Mexico	Russia	Sweden	USA
Canada	India	Myanmar	Saudi Arabia	Switzerland	Vietnam

The Country Fact Sheets leverage both publicly available data and Euromonitor International Passport data for all 36 countries under review. Sources for all data collected will be provided as part of the report publication. The geographic scope, data sources, and indicator coverage set the Country Fact Sheets apart from other sources that are not as exhaustive or as granular in nature. The following section outlines the overlap between the Country Fact Sheets and other country-level tobacco frameworks.

Comparison of Country Fact Sheets with Other Frameworks

The design of the Country Fact Sheets builds on an extensive literature review and other initiatives tracking tobacco control activities of various countries, including the WHO MPOWER Framework, Global State of Tobacco Harm Reduction, and Tobacco Control Laws. The Country Fact Sheets include important new elements such as:

- Analysis of all relevant nicotine product types
- Tobacco industry relevance to national politics and the economy

¹ Euromonitor International Passport Data

- Economic and health impacts of smoking on society

Other comparison frameworks have evaluated certain elements of how selected nicotine products are regulated and their role in the economy. The World Health Organization (WHO) monitors member countries' implementation of the Framework Convention on Tobacco Control via self-reported measures and independently researched reports. The reports use a framework called MPOWER to rate countries' regulation and consumption of cigarettes and, in some cases, other smoking tobacco products like pipe tobacco and cigars. While MPOWER covers some research on reduced-risk nicotine products, the framework stops short of evaluating country-level regulations across product types and the tobacco industry's relevance in each country. Similarly, the Global State of Tobacco Harm Reduction (GSTHR) report also includes research on reduced-risk products across a wide range of indicators but does not touch upon the tobacco industry's prevalence and looks at regulations at a higher level compared to the Country Fact Sheets.

Other initiatives such as Tobacco Control Laws from the Campaign for Tobacco Free-Kids, the Global Adult Tobacco Survey Atlas from the CDC Foundation, and the Tobacco Atlas from the American Cancer Society focus on reviewing regulations, consumption, and harm at a country level for combustible tobacco products but exclude other tobacco product types. The Global Tobacco Interference Index (GTII) produced by Stopping Tobacco Organizations and Products (STOP) focuses on countries' relationships with tobacco companies in terms of lobbying, benefits, and interactions. STOP is an affiliate of Bloomberg Philanthropies which also sponsors the Tobacco Control Laws and the GATS Atlas. Another Bloomberg partner, The Union, created the Index of Tobacco Control Sustainability, which takes a different approach by checking for sustainable government structures that manage tobacco control policy implementation, including budgets and leadership.

The Country Fact Sheets combine all these elements into a comprehensive overview of tobacco regulations, the industry, and impact on society across the full spectrum of nicotine products available.

Summary Table

Category	Subcategory	FCTC	MPOWER Profiles	GSTHR	Tobacco Control Laws	GTII
Regulations	Taxation Policies	X	X	X	X	
	Use in Public Places	X	X	X	X	
	Packaging and Labeling	X	X	X	X	
	Public Awareness and Cessation Programming	X	X			
	Advertising, Promotion, and Sponsorship	X	X	X	X	
	Sales of Tobacco Products to Minors	X		X		
	Restrictions on Content and Features			X	X	
	Restrictions on Reduced-Risk Products			X		
Industry Prevalence and Structure	Market Size of Nicotine Product Formats					
	Industry Relevance					X
	Market Concentration					
	Tax Revenues from Nicotine Products					
Impact on Society	Health Impacts			X	X	
	Economic Impacts					

Country Fact Sheet Design

The Country Fact Sheets capture the following information for each nicotine product format across the following high-risk products: cigarettes, cigars, cigarillos, smoking tobacco, bidis, chewing tobacco, and gutkha; as well as reduced-risk products: nicotine vaping systems, heated tobacco, snus, NRT products, and non-tobacco nicotine pouches.

Summary Table

Category	Subcategory	
1 Regulations	1A	Taxation Policies
	1B	Use in Public Places
	1C	Packaging and Labeling
	1D	Public Awareness and Cessation Programs
	1E	Advertising, Promotion and Sponsorship
	1F	Sales of Tobacco Products to Minors
	1G	Restrictions on Content and Features
	1H	Restrictions on Reduced-Risk Products
2 Industry Prevalence and Structure	2A	Market Size of Nicotine Product Formats
	2B	Industry Relevance
	2C	Market Concentration
	2D	Tax Revenues from Nicotine Products
3 Impact on Society	3A	Health Impacts
	3B	Economic Impacts

1 Regulations

This category assesses the extent to which a country promotes reduced consumption of combustible cigarettes and other high-risk tobacco products and allows access to reduced-risk products.

1A Taxation Policies

Tax policies reflect, among other things, a country's approach to encouraging tobacco users to quit and preventing others from starting to smoke. This indicator includes the extent to which taxes are in place and how they are applied across the different product types. Relative or differential taxation across the product categories is also indicative of government policy.

Indicator	
1	Average total tax burden per unit as a percentage or percentage range (by nicotine product type)

1B Use in Public Places

Measures that restrict nicotine product use in indoor workplaces, public transport, and other public places indicate countries' efforts to reduce the ease of nicotine product use and protect against the impact of exhalants.

Indicator	
2	Educational facilities (by nicotine product type)
3	Public offices (by nicotine product type)
4	Cafés, Restaurants (by nicotine product type)
5	Bars, Nightclubs (by nicotine product type)
6	Sporting venues (by nicotine product type)
7	Recreational venues (by nicotine product type)
8	Bus stands (by nicotine product type)
9	Train stations (by nicotine product type)
10	Public transport (by nicotine product type)
11	Private places (by nicotine product type)
12	Private vehicles with passengers (by nicotine product type)
13	Workplace (by nicotine product type)

1C Packaging and Labeling

Package labeling presenting the health risks associated with the use of tobacco products increases consumer awareness. Messages demonstrating the harm of tobacco use can be effective in convincing users to quit.

Indicator	
14	Deterring pictures/photos (by nicotine product type)
15	Text warning/messages (by nicotine product type)
16	Number of warnings (by nicotine product type)
17	Warnings required to rotate (by nicotine product type)
18	Warning written in local language (by nicotine product type)
19	Warning size as percentage of front of pack (by nicotine product type)
20	Warning size as percentage of back of pack (by nicotine product type)
21	Warning size as percentage of lateral sides of pack (by nicotine product type)
22	Display of qualitative constituents or emissions messages (by nicotine product type)
23	Ban on misleading packaging and labeling including “light” tobacco (by nicotine product type)
24	Plain or standardized packaging (by nicotine product type)

1D Public Awareness and Cessation Programs

Legislative policies that promote and strengthen public awareness of tobacco control programs can encourage movement away from high-risk tobacco products. Additionally, the level of effort by governments in developing campaigns, programs, and/or financing to help citizens quit smoking demonstrates the degree of commitment. These indicators will be limited to information available in the public domain.

Indicator	
25	Availability of government education and public awareness programs/campaigns
26	NGOs delivering education and public awareness programs/campaigns
27	Public investment in government programs/campaigns for smoking cessation
28	Affordability for national government treatment of tobacco dependence
29	NGOs delivering cessation programs

1E Advertising, Promotion and Sponsorship

Restriction of advertising and promotion of tobacco products is a key legislative tool for governments to reduce demand. The level of marketing that a country allows and the products it restricts from advertising channels affects demand for high-risk tobacco products and reduced-risk alternatives.

Indicator	
30	Advertising in the press and other printed publications (by nicotine product type)
31	Advertising on the radio (by nicotine product type)
32	Audiovisual commercial communication (cinema, TV, YouTube) (by nicotine product type)
33	Retail product display (by nicotine product type)
34	Promotional discounts (by nicotine product type)
35	Non-tobacco products or services with tobacco brand names (by nicotine product type)
36	Advertising on third party websites (by nicotine product type)
37	Advertising in-store (by nicotine product type)
38	Sponsorship or events or activities (by nicotine product type)
39	Advertising geared towards teens/children (by nicotine product type)

1F Sales of Tobacco Products to Minors

Governments set the age limits for tobacco consumption. A higher minimum age suggests stronger tobacco controls and more proactive government policy.

Indicator	
40	Minimum age restriction (by nicotine product type)

1G Restrictions on Content and Features

Restrictions on the contents of tobacco products are considered by governments to control the level of risk associated with products. Differences between restrictions on high-risk and reduced-risk products are indicative of the relative level of harm governments associate with the nicotine product categories.

Indicator	
41	Restrictions on flavors (by nicotine product type)
42	Restrictions on nicotine strength/content (by nicotine product type)

1H Restrictions on Reduced-Risk Products

Regulations that restrict sales of reduced-risk tobacco products such as nicotine vaping, snus, and heated tobacco (or their ingredients) vary across countries. Tracking these restrictions allows us to understand governments' regulation of reduced-risk products as part of broader tobacco control strategy.

Indicator	
44	Sale as consumer product permitted (reduced-risk tobacco products only)
45	Sale as medical product permitted (reduced-risk tobacco products only)

2 Industry Prevalence and Structure

This category demonstrates and assesses the relative importance of the tobacco industry in the country's economy and thereby the government's potential incentives in dealing with the industry. These indicators cover the countries and categories available through Euromonitor International's Passport database or publicly available sources.

2A Market Size of Nicotine Product Types

The market size of each nicotine product is a measure of absolute demand by product type. Retail volumes of tobacco products measure consumption of processed consumer tobacco products.

Indicator	
46	Retail volume or value (by nicotine product type)
47	Illicit cigarette volume and percentage of total

2B Industry Relevance

The relative contribution the tobacco industry makes to a country's economy can influence the extent to which governments are willing to take steps to reduce consumption.

Indicator	
48	Annual cigarette and leaf production (2017, 2018 and 2019) (volume and share of GDP)
49	Share of labor force employed in tobacco leaf production and manufacturing activities (2019) (%)

2C Market Concentration

Concentrated markets can lead to strong market power for top companies that can potentially influence the government and/or communities to deprioritize reducing consumption of high-risk tobacco products. State ownership of tobacco may be a disincentive to change.

Indicator	
50	Leading tobacco companies
51	Value market share of leading tobacco companies
52	% of state ownership in tobacco companies

2D Tax Revenues from Nicotine Products

Governments that derive a material portion of their tax revenues from tobacco products could potentially be incentivized to avoid stringent tobacco control policies.

Indicator	
53	Tobacco tax revenue as a percentage of total government revenue (years: 2017, 2018, 2019)

3 Impact on Society

This category evaluates the impact of nicotine product use on the health and economy of societies to understand the outcomes of government policies, consumer behavior and industry activity related to nicotine product use. These indicators cover the countries and categories for which data are available from Euromonitor International's Passport database or publicly available sources.

3A Health Impacts

Health impacts attempt to quantify the cost of tobacco consumption to society. Mortality and the incidence of smoking-related diseases are critical measures that demonstrate the health impacts of smoking tobacco products. Secondary sources will be referenced to provide data in countries where available.

Indicator	
54	Death rate attributed to smoking
55	Incidence of disease attributed to smoking

3B Economic Impact

The health effects of tobacco use can be measured in terms of impact on the economy, in addition to lives lost and disease incidence. Secondary sources will be referenced to collect these data in countries where available.

Indicator	
56	Healthcare costs of treating diseases related to smoking

Appendix

Product Definitions

Product	Type	Definitions
High-Risk Products		
Bidis	Combustible Tobacco	Bidis/beedis refers to non-machine tobacco manufactured tobacco products typically originating in India.
Chewing Tobacco	Smokeless Tobacco	Chewing tobacco consists primarily of two types of product: Asian-style and US-style available in those specific geographic areas and other chewing tobacco available in all other markets.
Cigarettes	Combustible Tobacco	The definition of cigarettes for the purposes of the Index is duty-paid, machine-manufactured white-stick products. This category also includes hand-rolled kretek cigarettes present in Indonesia and other brands of cigarettes that do not use white paper. However, it excludes non-machine-manufactured products such as bidis/beedis (India) and papirosy (Russia), and other smoking products made with tobacco but that either do not resemble cigarettes as recognized in the US or Europe, or those that are not machine-manufactured.
Cigarillos	Combustible Tobacco	Cigarillos are defined as miniature cigars weighing less than 3 g each, with a ring gauge of <29. Ring gauge is usually listed under a brand as Length/Ring and is a number indicating the circumference of the cigar's cross section and is enumerated in sixty-fourths of an inch (64/64 = 1 inch). Length does not matter as much in determining cigarillo vs. small cigar as some cigarillos can be quite long. However, six inches is the maximum length a cigarillo tends to be.
Cigars	Combustible Tobacco	Cigars are made of tobacco wrapped in leaf as opposed to paper. The product varies considerably in terms of price, quality and size. Different terms are used to describe the various types of cigar depending on the country. Cigars generally consist of three sections: the filler, the binder and the wrapper. Cigars are defined as weighing more than 3 g with ring gauges of 30 cm or more.
Gutkha	Smokeless Tobacco	Gutkha is a type of smokeless tobacco that is made in India and is widely used throughout Asia. It is a mixture of tobacco, crushed areca nut (also called betel nut), spices, and other ingredients. It is used like chewing tobacco and is placed in the mouth, usually between the cheek and gum.
Pipe tobacco	Combustible Tobacco	Western-style pipe tobacco includes cut tobacco sold in packaged format for smoking in pipes and available in pouches, tins, and cans.
Roll Your Own (RYO)	Combustible Tobacco	RYO is Fine Cut tobacco sold usually in plastic or foil pouches, metal tins, or plastic tubs. It can also be flavored.
Shisha	Combustible Tobacco	Middle-Eastern style water pipe tobacco is also known as "shisha", "hookah" or "nakhla". Shisha tobacco is also referred to as molasses tobacco and is moist and sweetly flavored – often with fruit.

Product	Type	Definitions
Smoking Tobacco	Combustible Tobacco	Smoking tobacco consists of cut tobacco sold in packaged format for smoking either in pipes or for use in roll-your-own (RYO) cigarettes. This excludes smokeless tobacco, such as snuff (or “snus”) and chewing tobacco.
Reduced-Risk Products		
Cartridges	Vapor Products	This product category consists entirely of the sales of pre-filled pods or capsules for use with a non cig-a-like closed system device. Currently, these are universally proprietary in nature (pods are useable exclusively with a single specific hardware device).
E-liquids	Vapor Products	Liquid tanks used within a vaporizing device. They are inserted into a refillable liquid chamber. E-liquids can have different nicotine levels and flavors.
Heated Tobacco	Vapor Products	Heat-not-burn devices include products, generally manufactured by major tobacco companies, which heat rather than combust tobacco to produce vapor rather than smoke. Tobacco specifically intended for use in heat-not-burn products are included and can come in the form of tobacco pods or in specially designed cigarette sticks.
Moist Snuff	Moist Snuff	Moist Snuff includes snus either loose or pre-portioned in miniature sized 'teabag' pouches that are placed on the gum and sucked on. Swedish-style snus is distinguished from US-style moist snuff by its processing: Swedish-style snus is pasteurized (heat-treated); compared to US-style moist snuff which is fermented.
Non-Tobacco Nicotine Pouches	Non-Tobacco Nicotine Pouches	Non-tobacco nicotine pouches are manufactured in a similar way to snus using ingredients such as filler, flavors, stabilizers, and nicotine but do not contain tobacco.
NRT Products	NRT Products	Nicotine-based products such as gum, lozenges, patches, and inhalators used to aid smoking cessation. It also Includes nicotine-based products sold as capsules, micro-tabs or sprays.
Single Use Cig-a-like	Vapor Products	Cig-a-likes are e-cigarette products which are intended to mimic traditional rolled manufactured cigarettes and which contain a battery and enclosed flavor cartridge. No part can be detached or replaced. It also includes cig-a-like-cartridges.

Sources: Euromonitor International Passport's Tobacco and Consumer Health databases, and the National Cancer Institute's Dictionary of Cancer Terms.

Countries Under Review

Country	Type	Cigarettes Volume Sales 2018 (mn sticks)	Retail Cigarettes Volume Sales 2018 (mn sticks)	Illicit Cigarettes Volume Sales 2018 (mn sticks)	Reported No. of Smokers 2018 ('000)
Argentina	HMIC	39,765.6	34,820.4	4,945.2	7,324.3
Australia	HMIC	14,488.1	12,951.8	1,536.2	2,650.8
Bangladesh	LMIC	94,235.7	91,572.9	2,662.9	n/a
Brazil	HMIC	104,183.0	48,291.7	55,891.2	18,244.7
Bulgaria	HMIC	11,915.2	11,228.1	687.1	1,872.4
Canada	HMIC	34,372.8	27,301.5	7,071.3	4,474.0
China	HMIC	2,466,115.3	2,368,760.3	97,355.0	305,866.6
Egypt	LMIC	100,683.8	96,251.9	4,431.9	17,510.2
Ethiopia	LMIC	8,776.0	6,222.8	2,553.2	n/a
France	HMIC	49,697.0	40,277.4	9,419.6	13,348.2
Germany	HMIC	82,186.0	75,226.1	6,959.9	14,871.5
India	LMIC	108,960.3	82,504.2	26,456.1	58,030.7
Indonesia	LMIC	331,556.1	307,094.1	24,461.9	65,790.9
Italy	HMIC	73,236.9	68,618.2	4,618.8	10,697.2
Japan	HMIC	132,739.3	132,685.0	54.3	18,804.1
Kenya	LMIC	8,136.1	7,301.9	834.3	10,697.2
Mexico	HMIC	35,870.5	29,827.6	6,043.0	15,916.4
Myanmar	LMIC	9,267.1	9,248.0	19.0	n/a
Nigeria	LMIC	22,083.3	17,171.2	4,912.0	10,603.8
Pakistan	LMIC	79,126.4	51,986.9	27,139.4	25,156.4
Philippines	LMIC	72,930.0	64,402.8	8,527.2	15,560.1
Poland	HMIC	47,742.0	42,897.5	4,844.5	7,446.4
Russia	HMIC	258,519.9	236,519.9	22,000.0	38,533.1
Saudi Arabia	HMIC	24,641.0	22,679.0	1,962.0	7,104.6
Singapore	HMIC	2,803.3	2,701.0	102.2	592.1
South Africa	HMIC	22,520.7	16,939.8	5,581.0	7,120.7
South Korea	HMIC	63,990.6	63,350.3	640.3	8,577.6
Spain	HMIC	52,752.9	47,820.5	4,932.4	8,351.8

Sweden	HMIC	5,940.0	5,640.0	300.0	827.9
Switzerland	HMIC	9,740.3	9,209.9	530.4	1,785.6
Thailand	HMIC	41,516.3	39,311.8	2,204.5	11,904.5
Turkey	HMIC	128,405.5	118,541.7	9,863.7	16,055.7
UK	HMIC	34,470.1	30,095.7	4,374.4	7,293.7
Ukraine	LMIC	63,641.7	60,881.7	2,760.0	7,058.7
USA	HMIC	250,468.1	240,888.3	9,579.8	33,952.8
Vietnam	LMIC	98,039.0	80,865.8	17,173.2	15,088.2

Notes: (1) Smoking population refers to the number of adult smokers aged 18 years and over – i.e., people who currently use any nicotine product (smoking and/or smokeless tobacco) on a daily or non-daily basis.

(2) LMICs and HMICs are identified based on classifications from the World Bank. Different income groups are identified using gross national income (GNI) per capita, in US dollars, converted from local currency using the World Bank Atlas method. Estimates of GNI are obtained from economists in World Bank country units, and the size of the population is estimated by World Bank demographers from a variety of sources, including the UN's biennial World Population Prospects. In particular, the World Bank currently divides economies into four income groupings: low, lower-middle, upper-middle, and high. For the scope of the Index, two main income groups have been identified: LMIC (Low-Middle Income Country): GNI per capita of USD12,375 or less; and HMIC (High-Middle Income Country): GNI per capita of USD12,376 or more.

Sources: Data estimates from Euromonitor International Passport's Tobacco database.

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