

SEPTEMBER 2020

# 2020 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.<sup>1</sup> 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.<sup>2</sup> 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	United Kingdom
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's Passport Tobacco database for all 36 countries under review. Sources for all data collected are 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 World Health Organization

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<sup>1</sup> Euromonitor International. (n.d.). Euromonitor's Passport Tobacco Database. <https://www.euromonitor.com>

<sup>2</sup> Ibid.

(WHO) MPOWER Framework, the Global State of Tobacco Harm Reduction (GSTHR) report, and Tobacco Control Laws database. 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.
- Economic and health impacts of smoking on society.

Other comparison frameworks evaluate certain elements of how selected nicotine products are regulated and their role in the economy. The WHO monitors member countries' implementation of the Framework Convention on Tobacco Control (FCTC) 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 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 database from the Campaign for Tobacco Free-Kids, the Global Adult Tobacco Survey (GATS) 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 database 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 prevalence and structure, and impact on society across the full spectrum of nicotine products available.

## Summary Table: Comparison of Country Fact Sheets with Other Frameworks

Category	Subcategory	FCTC	MPOWER Profiles	GSTHR	Tobacco Control Laws	GTII
Regulations	Taxation	X	X	X	X	
	Use in Public Places	X	X	X	X	
	Packaging and Labeling	X	X	X	X	
	Public Awareness and Cessation	X	X			
	Advertising, Promotion, and Sponsorship	X	X	X	X	
	Sale of Tobacco Products to Minors	X		X		
	Product Restrictions			X	X	
Industry Prevalence and Structure	Market Size of Nicotine Product Types					
	Industry Relevance					X
	Leading Tobacco Companies					
Impact on Society	Health Impacts			X	X	
	Economic Impacts					

**Note:** The Country Fact Sheets include analysis of all relevant nicotine product types. Other comparison frameworks evaluate certain elements of selected nicotine products.

## Country Indicators

The Country Fact Sheets capture the following information for each nicotine product type across the following high-risk products: cigarettes, cigars, cigarillos, chewing tobacco, moist snuff, and smoking tobacco; as well as reduced-risk products: cartridges, e-liquid, heated tobacco, nicotine replacement therapy (NRT) products, and non-tobacco nicotine pouches.

### Summary Table

Category	Subcategory	
<b>1</b> Regulations	1A	Taxation
	1B	Use in Public Places
	1C	Packaging and Labeling
	1D	Public Awareness and Cessation
	1E	Advertising, Promotion, and Sponsorship
	1F	Sale of Tobacco Products to Minors
	1G	Product Restrictions
<b>2</b> Industry Prevalence and Structure	2A	Market Size of Nicotine Product Types
	2B	Industry Relevance
	2C	Leading Tobacco Companies
<b>3</b> 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.

### 1.A. Taxation

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 relate to levies applied on country/federal level 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	Tobacco-specific tax burden as percent of final price (by nicotine product type)

### 1.B. Use in Public Places

Measures at a country or federal level 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)

### 1.C. 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 or photos (by nicotine product type)
15	Text warning/message (by nicotine product type)
16	Number of warnings required (by nicotine product type)
17	Warnings required to rotate (by nicotine product type)
18	Warnings 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/labeling including “light” tobacco (by nicotine product type)
24	Plain or standardized packaging (by nicotine product type)

### 1.D. 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 and will be described in a narrative form.

Indicator	
25	Availability of a national cessation strategy
26	Availability of national tobacco cessation clinical guidelines
27	Availability of a national toll-free quit line

### 1.E. 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 both high-risk tobacco products and reduced-risk alternatives.

Indicator	
28	Advertising in the press and other printed media (by nicotine product type)
29	Advertising on the radio (by nicotine product type)
30	Audiovisual commercials (cinema, TV, YouTube) (by nicotine product type)
31	Retail product display (by nicotine product type)
32	Promotional discounts (by nicotine product type)
33	Non-tobacco products or services with tobacco brand names (by nicotine product type)
34	Advertising on third-party websites (by nicotine product type)
35	Advertising in stores (by nicotine product type)
36	Sponsorship of events or activities (by nicotine product type)
37	Advertising geared towards teens/kids (by nicotine product type)

### 1.F. Sale 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	
38	Minimum age restriction for the sale of tobacco products (by nicotine product type)

### 1.G. Product Restrictions

Regulations at a country or federal level that restrict sales of tobacco products such as nicotine vaping, moist snuff, and heated tobacco (or their ingredients) vary across countries. Tracking these restrictions facilitates the understanding of governments' regulation of tobacco products, particularly reduced-risk alternatives, as part of broader tobacco control strategy. Furthermore, 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	
39	Sale as consumer product permitted (by nicotine product type)
40	Restrictions on flavors (by nicotine product type)
41	Restrictions on nicotine strength/content (by nicotine product type)

## 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 Tobacco database, Food and Agricultural Organization's (FAO) FAOSTAT database or other publicly available sources.

### 2.A. Market Size of Nicotine Product Types

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

Indicator	
42	Retail volume and/or value sales (by nicotine product type)
43	Illicit cigarette trade volume as a percentage of total

### 2.B. 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	
44	Tobacco production turnover
45	Annual raw tobacco leaf production volume

### 2.C. Leading Tobacco Companies

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	
46	Top three leading tobacco companies in terms of retail volume sales of cigarettes
47	Cigarettes volume share of top three tobacco companies
48	Percentage of state ownership in tobacco companies

### 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 is available from Euromonitor International's Passport Tobacco database, the Institute for Health Metrics and Evaluation's (IHME) Global Burden of Disease (GBD), the Global Economic Cost of Smoking-Attributable Diseases paper (Goodchild et al., 2018) or other publicly available sources.

#### 3.A. 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	
49	Death rate attributed to smoking per 100,000 of population
50	Disease adjusted life years (DALYs) attributed to smoking per 100,000 of population

#### 3.B. 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	
51	Total economic cost attributable to smoking as a percentage of GDP

# Appendix

## Comparison to Preliminary Country Indicators

In May 2020, the Index team published the Preliminary Country Indicators on the Tobacco Transformation Index website. Feedback received during the public comment review period, additional expert review and data availability were considered in order to finalize the indicators for the Country Fact Sheets. Below is the list of main changes applied per category and related indicators:

- **Regulations:** The Index team included three new indicators, namely Availability of a national cessation strategy, Availability of national tobacco cessation clinical guidelines and Availability of a national toll-free quit line, to provide an overview of governmental education and public awareness programs/campaigns. These indicators replicate the Public Awareness and Cessation Programming indicators present in the Preliminary Country Indicators document given lack of comparable data across countries.
- **Industry Relevance:** Within the Industry Relevance sub-category, Annual cigarette and leaf production (2017, 2018 and 2019; volume and share of GDP) and Share of labor force employed in tobacco leaf production and manufacturing activities (2019) indicators were replaced by Volume of raw tobacco leaf production and Tobacco production turnover, respectively. The Food and Agricultural Organization’s (FAO) FAOSTAT Database, which provides free access to food and agriculture data for over 245 countries and territories, proved to be a reference data source for the indicator analyzing the volume of raw tobacco leaf production across countries in scope. Tobacco production turnover was covered using Euromonitor International’s Passport databases which ensures methodological rigor as well as data consistency and quality. Tax Revenues from Nicotine Products was excluded due to the scarcity of quality data for a number of countries, including China, and the structural composition of excise taxes (often comprising specific excise, ad valorem excise, or mixed excise) on tobacco products which makes it difficult to compile accurate estimates.

## Product Definitions

Product	Type	Definitions
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).
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.

Product	Type	Definitions
<b>Cigarettes</b>	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.
<b>Cigarillos</b>	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.
<b>Cigars</b>	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.
<b>E-liquid</b>	Vapor Products	Liquid tank used within a vaporizing device. It is inserted into a refillable liquid chamber. E-liquid can have different nicotine levels and flavors.
<b>Heated Tobacco</b>	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.
<b>Moist Snuff</b>	Smokeless Tobacco	Moist snuff is either loose or pre-portioned in miniature sized 'teabag' pouches that are placed on the gum and sucked on. Moist snuff is distinguished from Snus by its processing: Moist snuff is fermented; compared to snus which is pasteurized (heat-treated).  Please note that Snus is considered in this category as well.
<b>Non-Tobacco Nicotine Pouches</b>	Smokeless Tobacco	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.
<b>NRT Products</b>	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.
<b>Smoking Tobacco</b>	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.

**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	Total Cigarettes Volume Sales 2019 (mn sticks)	Retail Cigarettes Volume Sales 2019 (mn sticks)	Illicit Cigarettes Volume Sales 2019 (mn sticks)	Reported No. of Smokers 2019 ('000)
Argentina	HMIC	38,952.3	33,166.4	5,785.9	7,210.8
Australia	HMIC	13,679.3	12,116.7	1,562.5	2,573.0
Bangladesh	LMIC	83,480.7	80,767.3	2,713.5	n/a
Brazil	HMIC	115,261.3	51,121.6	64,139.7	18,098.2
Bulgaria	HMIC	11,836.5	11,179.9	656.6	1,863.0
Canada	HMIC	32,462.8	25,433.9	7,028.9	4,409.6
China	HMIC	2,433,483.2	2,345,961.0	87,522.2	308,190.4
Egypt	LMIC	104,561.6	99,332.0	5,229.6	17,839.4
Ethiopia	LMIC	9,705.0	6,838.3	2,866.7	n/a
France	HMIC	46,574.1	37,376.6	9,197.5	12,681.4
Germany	HMIC	81,665.0	74,774.7	6,890.3	14,705.4
India	LMIC	115,040.0	87,041.9	27,998.1	33,658.6
Indonesia	LMIC	331,340.0	306,633.5	24,706.6	67,775.6
Italy	HMIC	70,204.6	65,551.1	4,653.5	10,519.4
Japan	HMIC	125,149.3	125,100.0	49.3	18,509.0
Kenya	LMIC	8,090.3	7,227.4	862.9	3,157.3
Mexico	HMIC	35,516.0	29,410.5	6,105.6	16,074.6
Myanmar	LMIC	8,712.0	8,667.1	44.9	n/a
Nigeria	LMIC	19,105.9	17,034.0	2,071.9	10,477.6
Pakistan	LMIC	74,588.9	46,243.9	28,345.0	26,782.5
Philippines	LMIC	70,147.5	62,217.2	7,930.3	15,974.1
Poland	HMIC	49,318.5	45,031.1	4,287.4	10,052.1
Russia	HMIC	254,874.7	218,491.4	36,383.4	38,052.4
Saudi Arabia	HMIC	25,187.8	23,168.9	2,018.9	7,279.8
Singapore	HMIC	2,766.7	2,665.9	100.8	579.4
South Africa	HMIC	21,436.6	15,949.0	5,487.6	7,117.9
South Korea	HMIC	63,850.0	63,219.2	631.0	9,253.0
Spain	HMIC	52,414.6	48,092.5	4,322.2	9,743.7
Sweden	HMIC	5,517.0	5,257.0	260.0	815.1
Switzerland	HMIC	9,466.8	8,948.3	518.5	1,772.2
Thailand	HMIC	42,207.3	39,711.8	2,495.4	12,036.4

<b>Turkey</b>	HMIC	128,085.7	119,750.8	8,334.9	16,230.7
<b>UK</b>	HMIC	33,287.8	28,786.1	4,501.8	7,487.3
<b>Ukraine</b>	LMIC	54,818.0	51,200.0	3,618.0	9,562.1
<b>US</b>	HMIC	234,895.9	225,528.0	9,367.9	33,770.2
<b>Vietnam</b>	LMIC	97,108.6	79,248.4	17,860.2	15,763.0

**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) Low-medium (LMICs) and high-medium income countries (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: GNI per capita of USD12,375 or less; and HMIC: GNI per capita of USD12,376 or more.

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

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