



What are tobacco companies selling where RRPs are legal? Report

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1. Introduction

Company-Country Report Series

The [company-country report series](#) assesses Index Company activity within the country-level regulatory context in which the companies operate. The report series covers 36 Index Countries organized by four regions: Americas, Asia Pacific, Europe, and Middle East and Africa. The reports assess the 15 Index Companies' sales of high-risk products (HRPs) and reduced-risk products (RRPs) in the context of a country's nicotine and tobacco product regulatory environment. Per capita average disposable income in each country is also taken into account.

About This Report: Index Countries

In this report, we provide an overview of common findings across the four regional company-country reports. For the purpose of identifying specific company product sales activities in relation to the legality of those products, the scope of the report is limited to countries in which sales of heated tobacco, e-vapor products, and (non-tobacco) nicotine pouches were legal in 2021.

This analysis also excludes China, Myanmar, Ukraine, and Vietnam, due to industry structure or geopolitical factors.

These criteria allow us to focus on countries where companies were legally allowed to sell the most common RRP categories in their portfolios in 2021. The following 16 countries are thus included in this analysis:

1. Bangladesh
2. Bulgaria
3. Egypt
4. France
5. Indonesia
6. Nigeria
7. Pakistan
8. Philippines
9. Poland
10. Saudi Arabia¹
11. South Africa
12. South Korea
13. Sweden
14. Switzerland
15. United Kingdom
16. United States

¹ At the time of publication, the government of Saudi Arabia was reviewing the legal status of non-tobacco nicotine pouches.

About This Report: What Are Tobacco Companies Selling Where RRP's Are Legal?

In addition, of the 15 Index Companies included in the company-country reports, only companies that meet the following criteria are included in this report:

- Sold HRPs* in at least five Index Countries in 2021
- Sold RRP's in at least one Index Country in 2021

These criteria permit the report to focus on the most relevant tobacco companies in assessing what they are selling where they are legally allowed to do so. The following six companies are included in this report:

1. British American Tobacco Plc (BAT)
2. Imperial Brands Plc (Imperial)
3. Japan Tobacco Group (JT)
4. KT&G Corp (KT&G)
5. Philip Morris International Inc (PMI)
6. Swisher

* Cigarettes are the leading HRP category for five of the companies; cigarillos are the leading HRP category for Swisher.

About This Report: Objectives

This report goes beyond product offer by taking into account a company's market share of both HRPs and RRP's. Countries are assessed as either high-medium income countries (HMICs) or low-medium income countries (LMICs).

Ultimately, this report focuses on the following questions:

- What products are the companies offering, and what is the market share, in countries where they are legally allowed to sell RRP's?
- How do companies' product offer and market share differ by HMIC versus LMIC?

2. Summary Findings

Companies Do Not Consistently Sell RRPs Where They Are Legally Allowed to Do So

Only two of six multinational tobacco companies sold both RRPs and HRPs in the majority of countries where they were legally able to do so in 2021. British American Tobacco Plc (BAT) and Philip Morris International Inc (PMI) sold RRPs in 88% and 73% of their HRP countries, respectively. Imperial Brands Plc (Imperial) and Japan Tobacco Group (JT) sold RRPs in fewer than half of their HRP countries. For KT&G this figure was one-third, and for Swisher just 9%.

RRP Offer and Market Share Are Concentrated in LMICs

Companies are more likely to sell only HRPs in LMICs, even where RRPs are allowed to be sold. BAT sold RRPs in four of the six LMICs in which it was legally allowed to do so in 2021. PMI sold RRPs in two of six LMICs. The remaining companies covered by the analysis did not sell RRPs in any LMIC, despite being legally allowed to do so. In several cases regarding LMICs, companies had significant HRP market share and did not sell RRPs.

Limited RRP Offer in Nigeria and Bangladesh

None of the companies under review in this analysis sold RRPs in Nigeria or Bangladesh in 2021. In both countries, the three RRP categories (heated tobacco, e-vapor products, and nicotine pouches) were legal in 2021. Both countries are categorized as LMICs.

3. Company Performance at Country Level

Figure 1: Product Offer by Company

Number of Countries in Which Company Offers HRPs and RRP and Where HTPs, E-Vapor, and Non-Tobacco Nicotine Pouches Were Legal in 2021

Company	16 countries (HMICs & LMICs)			6 countries (LMICs)		
	HRP Presence	RRP Presence	Ratio	HRP Presence	RRP Presence	Ratio
British American Tobacco	16	14	88%	6	4	67%
Philip Morris International	15	11	73%	6	2	33%
Japan Tobacco Group	15	7	47%	5	0	0%
Imperial Brands	13	6	46%	4	0	0%
KT&G	3	1	33%	2	0	0%
Swisher	11	1	9%	4	0	0%

Note: Heated tobacco, e-vapor products, and non-tobacco nicotine pouches were legal in 2021 in the following HMICs: Bulgaria, France, Poland, Saudi Arabia, South Africa, South Korea, Sweden, Switzerland, United Kingdom, and the United States. They were legal in the following LMICs: Bangladesh, Egypt, Indonesia, Nigeria, Pakistan, and the Philippines. Analysis excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

British American Tobacco Plc (BAT) in 2021 sold RRP in most countries where it was allowed to do so, and where it also sold HRPs. In Bangladesh and Nigeria, BAT had significant HRP share but did not sell RRP.

Imperial Brands Plc (Imperial) sold RRP in fewer than half of the countries where it was allowed to do so in 2021, and where it also sold HRPs. In Nigeria and South Africa, Imperial had significant HRP share but did not sell RRP.

Japan Tobacco Group (JT) in 2021 sold RRP in fewer than half of the countries where it was allowed to do so, and where it also sold HRPs. In Saudi Arabia, Egypt, and the Philippines, JT had significant HRP share but did not sell RRP.

KT&G sold RRP in one of three countries where it was allowed to do so in 2021, and where it also sold HRPs. Both countries in which KT&G sells HRPs but not RRP are LMICs.

Philip Morris International (PMI) in 2021 sold RRP in around three-quarters of countries where it was allowed to do so, and where it also sold HRPs. The four countries where PMI sells HRPs but not RRP are LMICs.

Swisher sold RRP in only one of the countries where it was allowed to do so in 2021, and where it also sold HRPs. In 10 countries, Swisher sold HRPs but not RRP.

A full assessment of each company’s product offer and market share can be found on the following pages.

Company Assessment: British American Tobacco Plc (BAT)²

2021 Country Presence & Market Share Summary: British American Tobacco Plc (BAT)

Country	Country Categorization	HRP Presence	HRP Leading Category Share	RRP Presence	RRP Leading Category Share
 Bangladesh	LMIC	Yes	85%	No	0%
 Bulgaria	HMIC	Yes	35%	Yes	8%
 Egypt	LMIC	Yes	4%	Yes	0%
 France	HMIC	Yes	16%	Yes	2%
 Indonesia	LMIC	Yes	3%	Yes	100%
 Nigeria	LMIC	Yes	74%	No	0%
 Pakistan	LMIC	Yes	71%	Yes	100%
 Philippines	LMIC	Yes	0%	Yes	0%
 Poland	HMIC	Yes	24%	Yes	55%
 Saudi Arabia	HMIC	Yes	42%	Yes	0%
 South Africa	HMIC	Yes	63%	Yes	76%
 South Korea	HMIC	Yes	13%	Yes	10%
 Sweden	HMIC	Yes	25%	Yes	13%
 Switzerland	HMIC	Yes	35%	Yes	50%
 United Kingdom	HMIC	Yes	9%	Yes	3%
 United States	HMIC	Yes	35%	Yes	36%

Source: Tobacco Transformation Index 2022, and Euromonitor Passport 2022.

Country Scope: Countries listed in alphabetical order. Covers 16 of the 36 Index Countries where heated tobacco, e-vapor products and nicotine pouches were legal in 2021. Excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

Country Categorization: Low-medium income country (LMIC), high-medium income country (HMIC). Based on World Bank data 2021.

Leading Category Share: Showing the % volume or value share in 2021 in the category where the company sells the highest volume/value in that country. % share is rounded to the nearest whole number.

BAT sells RRP in most countries in which it is allowed to do so

- In 2021, BAT sold HRPs in all 16 Index Countries where heated tobacco, e-vapor products, and nicotine pouches were legal.
- BAT sold RRP in 14 of the 16 countries (88%) in 2021.
- In LMICs, BAT sold RRP in four of six countries (67%).
- In LMICs where BAT had a majority RRP market share in 2021, the company had a 100% volume share in nicotine pouches in both Indonesia and Pakistan.
- In HMICs where BAT had a majority market share in 2021, the company had a 76% e-liquid value share in South Africa, a 55% e-liquid value share in Poland, and a 50% chewing tobacco volume share in Switzerland.

Significant HRP share in Bangladesh and Nigeria but no RRP presence

- The two countries in which BAT did not sell RRP in 2021, Bangladesh and Nigeria, are both LMICs.
- BAT had a significant HRP presence in Bangladesh, with an 85% cigarette volume share in 2021. As of 2021, none of the Index Companies offered RRP in Bangladesh.

² Companies are assessed in alphabetical order.

- BAT had a significant HRP presence in Nigeria, with a 74% cigarette volume share in 2021. Of the Index Companies, Swedish Match sells RRP in Nigeria, with an 11% moist snuff volume share in 2021.

Company Assessment: Imperial Brands Plc (Imperial)

2021 Country Presence & Market Share Summary: Imperial Brands Plc (Imperial)

Country	Country Categorization	HRP Presence	HRP Leading Category Share	RRP Presence	RRP Leading Category Share
 Bangladesh	LMIC	No	0%	No	0%
 Bulgaria	HMIC	Yes	7%	Yes	0%
 Egypt	LMIC	Yes	2%	No	0%
 France	HMIC	Yes	16%	Yes	0%
 Indonesia	LMIC	No	0%	No	0%
 Nigeria	LMIC	Yes	56%	No	0%
 Pakistan	LMIC	Yes	0%	No	0%
 Philippines	LMIC	Yes	0%	No	0%
 Poland	HMIC	Yes	14%	Yes	0%
 Saudi Arabia	HMIC	Yes	17%	No	0%
 South Africa	HMIC	Yes	35%	No	0%
 South Korea	HMIC	Yes	11%	No	0%
 Sweden	HMIC	No	0%	Yes	19%
 Switzerland	HMIC	Yes	4%	No	0%
 United Kingdom	HMIC	Yes	44%	Yes	4%
 United States	HMIC	Yes	10%	Yes	9%

Source: Tobacco Transformation Index 2022, and Euromonitor Passport 2022.

Country Scope: Countries listed in alphabetical order. Covers 16 of the 36 Index Countries where heated tobacco, e-vapor products and nicotine pouches were legal in 2021. Excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

Country Categorization: Low-medium income country (LMIC), high-medium income country (HMIC). Based on World Bank data 2021.

Leading Category Share: Showing the % volume or value share in 2021 in the category where the company sells the highest volume/value in that country. % share is rounded to the nearest whole number.

Imperial sells RRP in fewer than half of the countries in which it is allowed to do so

- Of 16 Index Countries where heated tobacco, e-vapor products, and nicotine pouches were legal in 2021, Imperial sold HRPs in 13 countries.
- Imperial sold RRP in six of the 13 countries (46%) in 2021.
- Imperial sold RRP in zero of four LMIC countries.
- Imperial's most notable market share of RRP is in Sweden, where in 2021 the company had a 19% moist snuff volume share.

Significant HRP share in Nigeria and South Africa but no RRP presence

- The eight countries in which Imperial did not sell RRP (but sold HRPs) are a mix of HMICs (Saudi Arabia, South Africa, South Korea, and Switzerland) and LMICs (Egypt, Nigeria, Pakistan, and the Philippines).
- In these eight countries, Imperial had a particularly strong HRP presence in Nigeria (56% cigar volume share in 2021) and South Africa (35% fine-cut tobacco volume share in 2021).
- Among the Index Companies, Swedish Match sells RRP in Nigeria (with an 11% moist snuff volume share in 2021).
- In South Africa, BAT had a 76% volume share of e-liquids in 2021, while PMI had a 97% heated tobacco volume share.

Company Assessment: Japan Tobacco Group (JT)

2021 Country Presence & Market Share Summary: Japan Tobacco Group (JT)

Country	Country Categorization	HRP Presence	HRP Leading Category Share	RRP Presence	RRP Leading Category Share
 Bangladesh	LMIC	Yes	9%	No	0%
 Bulgaria	HMIC	Yes	10%	Yes	3%
 Egypt	LMIC	Yes	38%	No	0%
 France	HMIC	Yes	24%	Yes	1%
 Indonesia	LMIC	Yes	2%	No	0%
 Nigeria	LMIC	Yes	15%	No	0%
 Pakistan	LMIC	No	0%	No	0%
 Philippines	LMIC	Yes	30%	No	0%
 Poland	HMIC	Yes	28%	Yes	0%
 Saudi Arabia	HMIC	Yes	68%	No	0%
 South Africa	HMIC	Yes	12%	No	0%
 South Korea	HMIC	Yes	8%	No	0%
 Sweden	HMIC	Yes	41%	Yes	7%
 Switzerland	HMIC	Yes	16%	Yes	7%
 United Kingdom	HMIC	Yes	36%	Yes	67%
 United States	HMIC	Yes	1%	Yes	1%

Source: Tobacco Transformation Index 2022, and Euromonitor Passport 2022.

Country Scope: Countries listed in alphabetical order. Covers 16 of the 36 Index Countries where heated tobacco, e-vapor products and nicotine pouches were legal in 2021. Excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

Country Categorization: Low-medium income country (LMIC), high-medium income country (HMIC). Based on World Bank data 2021.

Leading Category Share: Showing the % volume or value share in 2021 in the category where the company sells the highest volume/value in that country. % share is rounded to the nearest whole number.

JT sells RRP in fewer than half of the countries in which it is allowed to do so

- JT sold HRPs in 15 of the 16 Index Countries where heated tobacco, e-vapor products, and nicotine pouches were legal in 2021
- JT sold RRP in seven of these 15 countries (47%) in 2021.
- The company sold RRP in zero of five LMICs.
- JT's most notable market share of RRP is in the United Kingdom, where in 2021 the company had a 67% nicotine pouch volume share.

Significant HRP share in Saudi Arabia, Egypt, and the Philippines, but no RRP presence

- The eight countries where JT did not sell RRP (but sold HRPs) are a mix of HMICs (Saudi Arabia, South Africa, and South Korea) and LMICs (Bangladesh, Egypt, Indonesia, Nigeria, and the Philippines).
- In these eight countries, JT had a particularly strong HRP presence in Saudi Arabia (68% pipe tobacco volume share in 2021), Egypt (38% pipe tobacco volume share), and the Philippines (30% cigarette volume share).
- Among the 15 Index Companies, PMI sells RRP in Saudi Arabia and the Philippines, with 100% and 77% heated tobacco volume shares, respectively, in 2021. No Index Company had significant market share of RRP in Egypt in 2021.

Company Assessment: KT&G Corp (KT&G)

2021 Country Presence & Market Share Summary: KT&G Corp (KT&G)

Country	Country Categorization	HRP Presence	HRP Leading Category Share	RRP Presence	RRP Leading Category Share
 Bangladesh	LMIC	No	0%	No	0%
 Bulgaria	HMIC	No	0%	No	0%
 Egypt	LMIC	No	0%	No	0%
 France	HMIC	No	0%	No	0%
 Indonesia	LMIC	Yes	2%	No	0%
 Nigeria	LMIC	Yes	6%	No	0%
 Pakistan	LMIC	No	0%	No	0%
 Philippines	LMIC	No	0%	No	0%
 Poland	HMIC	No	0%	No	0%
 Saudi Arabia	HMIC	No	0%	No	0%
 South Africa	HMIC	No	0%	No	0%
 South Korea	HMIC	Yes	65%	Yes	40%
 Sweden	HMIC	No	0%	No	0%
 Switzerland	HMIC	No	0%	No	0%
 United Kingdom	HMIC	No	0%	No	0%
 United States	HMIC	No	0%	No	0%

Source: Tobacco Transformation Index 2022, and Euromonitor Passport 2022.

Country Scope: Countries listed in alphabetical order. Covers 16 of the 36 Index Countries where heated tobacco, e-vapor products and nicotine pouches were legal in 2021. Excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

Country Categorization: Low-medium income country (LMIC), high-medium income country (HMIC). Based on World Bank data 2021.

Leading Category Share: Showing the % volume or value share in 2021 in the category where the company sells the highest volume/value in that country. % share is rounded to the nearest whole number.

KT&G sells RRP in one of three countries in which it is allowed to do so

- KT&G sold HRPs in three of the 16 Index Countries where heated tobacco, e-vapor products, and nicotine pouches were legal in 2021.
- KT&G sold RRP in one of the three countries (33%) in 2021.
- KT&G sold RRP in zero of two LMICs.
- The company had a 40% heated tobacco volume share in South Korea in 2021.

KT&G sells HRPs but not RRP in Indonesia and Nigeria

- The two countries where KT&G did not sell RRP (but sold HRPs) are both LMICs (Indonesia and Nigeria).
- KT&G had a 2% cigarette volume share in Indonesia in 2021 and a 6% share in Nigeria.
- Among the Index Companies, BAT sells nicotine pouches in Indonesia (with a 100% volume share in 2021), and Swedish Match sells moist snuff in Nigeria (with an 11% volume share in 2021).

Company Assessment: Philip Morris International Inc (PMI)

2021 Country Presence & Market Share Summary: Philip Morris International Inc (PMI)

Country	Country Categorization	HRP Presence	HRP Leading Category Share	RRP Presence	RRP Leading Category Share
 Bangladesh	LMIC	Yes	0%	No	0%
 Bulgaria	HMIC	Yes	18%	Yes	91%
 Egypt	LMIC	Yes	22%	Yes	0%
 France	HMIC	Yes	44%	Yes	100%
 Indonesia	LMIC	Yes	29%	No	0%
 Nigeria	LMIC	Yes	2%	No	0%
 Pakistan	LMIC	Yes	26%	No	0%
 Philippines	LMIC	Yes	70%	Yes	77%
 Poland	HMIC	Yes	33%	Yes	85%
 Saudi Arabia	HMIC	Yes	36%	Yes	100%
 South Africa	HMIC	Yes	82%	Yes	40%
 South Korea	HMIC	Yes	14%	Yes	49%
 Sweden	HMIC	Yes	30%	Yes	100%
 Switzerland	HMIC	Yes	40%	Yes	100%
 United Kingdom	HMIC	Yes	7%	Yes	99%
 United States	HMIC	No	0%	No	0%

Source: Tobacco Transformation Index 2022, and Euromonitor Passport 2022.

Country Scope: Countries listed in alphabetical order. Covers 16 of the 36 Index Countries where heated tobacco, e-vapor products and nicotine pouches were legal in 2021. Excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

Country Categorization: Low-medium income country (LMIC), high-medium income country (HMIC). Based on World Bank data 2021.

Leading Category Share: Showing the % volume or value share in 2021 in the category where the company sells the highest volume/value in that country. % share is rounded to the nearest whole number.

PMI sells RRP in about three-quarters of the countries in which it is allowed to do so

- Of 16 Index Countries where heated tobacco, e-vapor products, and nicotine pouches were legal in 2021, PMI sold HRPs in 15 countries.
- The company sold RRP in 11 of the 15 countries (73%) in 2021.
- PMI sold RRP in two of six LMICs (33%).
- In LMICs where PMI had a majority RRP market share in 2021, the company had a 77% heated tobacco volume share in the Philippines.
- In HMICs where PMI had a majority market share in 2021, the company had a 100% heated tobacco volume share in France, Saudi Arabia, Sweden, and Switzerland, as well as a 99% heated tobacco volume share in the United Kingdom and a 91% share in Bulgaria.

PMI sells HRPs but not RRP in Bangladesh, Indonesia, Nigeria, and Pakistan

- The four countries where PMI did not sell RRP in 2021 (but sold HRPs) are all LMICs (Bangladesh, Indonesia, Nigeria, and Pakistan).
- In these four countries, in 2021 PMI had a material HRP presence in Indonesia (29% cigarette volume share) and Pakistan (26% cigarette volume share).
- Among the Index Companies, BAT sells RRP in both Indonesia and Pakistan, with a 100% nicotine pouch volume share in both countries in 2021.

Company Assessment: Swisher

2021 Country Presence & Market Share Summary: Swisher

Country	Country Categorization	HRP Presence	HRP Leading Category Share	RRP Presence	RRP Leading Category Share
 Bangladesh	LMIC	No	0%	No	0%
 Bulgaria	HMIC	Yes	0%	No	0%
 Egypt	LMIC	Yes	3%	No	0%
 France	HMIC	No	0%	No	0%
 Indonesia	LMIC	No	0%	No	0%
 Nigeria	LMIC	Yes	18%	No	0%
 Pakistan	LMIC	Yes	0%	No	0%
 Philippines	LMIC	Yes	1%	No	0%
 Poland	HMIC	No	0%	No	0%
 Saudi Arabia	HMIC	Yes	1%	No	0%
 South Africa	HMIC	Yes	2%	No	0%
 South Korea	HMIC	Yes	10%	No	0%
 Sweden	HMIC	No	0%	No	0%
 Switzerland	HMIC	Yes	0%	No	0%
 United Kingdom	HMIC	Yes	2%	No	0%
 United States	HMIC	Yes	25%	Yes	12%

Source: Tobacco Transformation Index 2022, and Euromonitor Passport 2022.

Country Scope: Countries listed in alphabetical order. Covers 16 of the 36 Index Countries where heated tobacco, e-vapor products and nicotine pouches were legal in 2021. Excludes China, Myanmar, Ukraine, and Vietnam due to industry structure or geopolitical factors.

Country Categorization: Low-medium income country (LMIC), high-medium income country (HMIC). Based on World Bank data 2021.

Leading Category Share: Showing the % volume or value share in 2021 in the category where the company sells the highest volume/value in that country. % share is rounded to the nearest whole number.

Swisher sells RRP in only one of the countries in which it is allowed to do so

- Swisher sold HRPs in 11 of the 16 Index Countries where heated tobacco, e-vapor products, and nicotine pouches were legal in 2021.
- The company sold RRP in one of these 11 countries (9%) in 2021.
- Swisher sold RRP in zero of four LMICs.
- In 2021, Swisher had a 12% volume share of chewing tobacco in the United States, as well as a 2% share of nicotine pouches.

Significant HRP share in Nigeria and South Korea but no RRP presence

- The 10 countries where Swisher did not sell RRP (but sold HRPs) are a mix of HMICs (Bulgaria, Saudi Arabia, South Africa, South Korea, Switzerland, and the United Kingdom) and LMICs (Egypt, Nigeria, Pakistan, and the Philippines).
- In these 10 countries, Swisher had a material HRP presence in Nigeria (18% cigar volume share in 2021) and South Korea (10% cigarillo volume share in 2021).
- Among the Index Companies, Swedish Match sells RRP in Nigeria (with an 11% moist snuff volume share in 2021).

Companies Not Included in This Analysis

Of the 15 Index Companies, only six companies meet the following criteria for this analysis:

- Sold HRPs in 2021 in five or more Index Countries
- Sold RRP in 2021 in at least one Index Country

The remaining nine Index Companies do not meet the criteria and have therefore been excluded from this analysis:

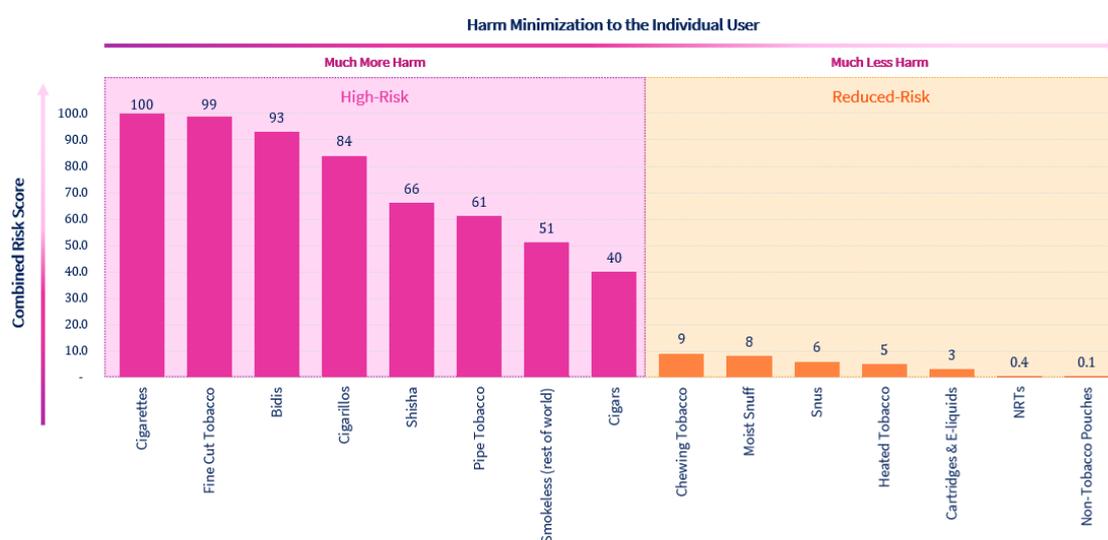
- Altria Group Inc (Altria)—Sold HRPs in one Index Country and RRP in two Index Countries in 2021
- China National Tobacco Corporation (CNTC)—Sold HRPs in four Index Countries and RRP in two Index Countries in 2021
- Djarum PT (Djarum)—Sold HRPs in six Index Countries and RRP in zero Index Countries in 2021
- Eastern Company SAE (Eastern)—Sold HRPs in one Index Country and RRP in zero Index Countries in 2021
- Gudang Garam Tbk PT (Gudang Garam)—Sold HRPs in five Index Countries and RRP in zero Index Countries in 2021
- ITC Limited (ITC)—Sold HRPs in one Index Country and RRP in one Index Country in 2021
- Swedish Match—Sold HRPs in one Index Country and RRP in 10 Index Countries in 2021
- Tobacco Authority of Thailand (TOAT)—Sold HRPs in one Index Country and RRP in zero Index Countries in 2021
- Vietnam National Tobacco Corporation (Vinataba)—Sold HRPs in one Index Country and RRP in zero Index Countries in 2021

4. Appendix

Product Scope

High-Risk Products (HRPs)—Combustible or other high-risk nicotine products, including cigarettes, cigars, cigarillos, smoking tobacco, and bidis, as well as some smokeless tobacco products, such as gutkha.

Reduced-Risk Products (RRPs)—Nicotine products considered to be less harmful than combustible cigarettes and/or other traditional products. Products that are potentially reduced-risk include vapor products (including open and closed vaping systems and their consumables, and heated tobacco), Swedish-style snus, chewing tobacco, moist snuff, nicotine-replacement therapy (NRT) products, and non-tobacco nicotine pouches.



Source: Murkett, R., Rugh, M., Ding, B. (2022). *Nicotine Products Relative Risk Assessment: An Updated Systematic Review and Meta-analysis, Produced for the Foundation for a Smoke-Free World*. London, UK: Biochromex.

Product	Type	Definitions
High-Risk Products (HRPs)		
Cigarettes	Combustible	The definition of cigarettes for the purposes of the Index is duty-paid, machine-manufactured white-stick products. This product 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 USA or Europe, or those that are not machine-manufactured.

Product	Type	Definitions
Cigarillos	Combustible	Cigarillos are defined as miniature cigars, 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 versus cigars as some cigarillos can be quite long. However, six inches is the maximum length a cigarillo tends to be.
Cigars	Combustible	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 cigars, depending on the country. Cigars generally consist of three sections: the filler, the binder, and the wrapper. Cigars are defined as having ring gauges of 30 or more.
Fine Cut Tobacco	Combustible	Fine cut tobacco is usually sold in plastic or foil pouches, metal tins or plastic tubs. It can also be flavored.
Pipe Tobacco	Combustible	Western-style pipe tobacco includes cut tobacco sold in packaged format for smoking in pipes and available in pouches, tins, and cans.
Shisha	Combustible	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.
Reduced-Risk Products (RRPs)		
Chewing Tobacco	Smokeless	For the purposes of this report, chewing tobacco consists primarily of US-style chewing tobacco. Leading brands of US-style chewing tobacco include America's Best Chew (previously Red Man), Stoker's, and Levi Garrett.
Closed-System Vaping Products	Vapor	This product category includes pre-filled pods or capsules for use with a non-cig-a-like closed-system device, as well as single-use (disposable) cig-a-like products. Currently, these are universally proprietary in nature (pods are usable exclusively with a single, specific hardware device).
E-Liquids	Vapor	E-liquids include nicotine and non-nicotine bottled e-liquids are decanted by the consumer into a tank for heating and inhalation. E-liquids can have different nicotine levels and flavors.
Heated Tobacco	Vapor	Heat-not-burn devices include products, generally manufactured by major tobacco companies, which allow the consumer to heat rather than combust a tobacco product. Heated tobacco is the consumable element of heat-not-burn devices, which comes in the form of pods or in specially designated cigarette sticks.

Product	Type	Definitions
Moist Snuff	Smokeless	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 sometimes referred to as "dip". Moist snuff is distinguished from snus by its processing: moist snuff is fermented, compared to snus which is pasteurized (heat-treated). Leading brands of moist snuff in the USA include Copenhagen, Grizzly and Skoal.
Non-Tobacco Nicotine Pouches	Smokeless	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	Smokeless	Nicotine-based products such as gum, lozenges, patches, and inhalators used to aid smoking cessation. Also includes nicotine-based products sold as capsules, micro-tabs, or sprays.
Snus	Smokeless	Snus is either loose or pre-portioned in miniature sized 'teabag' pouches that are placed on the gum and sucked on. Snus is distinguished from moist snuff by its processing: snus is pasteurized (heat-treated), compared to moist snuff which is fermented. Leading brands of snus in Sweden include General, Knox and Göteborgs Rapé.

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

Acronyms

BAT – British American Tobacco Plc

CNTC – China National Tobacco Corp

HRP – High-Risk Product

HMIC – High-Medium Income Country

JT – Japan Tobacco Group

KT&G – KT&G Corp

LMIC – Low-Medium Income Country

NRT – Nicotine Replacement Therapy

PMI – Philip Morris International Inc

RRP – Reduced-Risk Product

TOAT – Tobacco Authority of Thailand

Vinataba – Vietnam National Tobacco Corporation

Sources

[Euromonitor International's Passport Tobacco database](#) (last updated May 2022, covering market share up to 2021)

[Tobacco Transformation Index](#) (published September 2022, covering company activity 2019-2021)

[Tobacco Transformation Index: Country Fact Sheets](#) (compiled March-September 2022, covering legislation in 2021)