

[REDACTED]

From: [REDACTED]
Sent: 05 May 2016 09:07
To: [REDACTED]
Subject: FW: Conference 18/19 June 2015
Attachments: [REDACTED]

Categories: Red Category

From: [REDACTED]
Sent: 26 June 2015 09:58
To: [REDACTED]
Subject: FW: Conference 18/19 June 2015

This may be useful background ahead of standardised packaging legislation going forward

Kind regards

[REDACTED]

From: [REDACTED]
Sent: 26 June 2015 01:41
To: [REDACTED]
Subject: RE: Conference 18/19 June 2015

Hi [REDACTED]
Thanks again for the invitation and for hosting such a great meeting.
I have attached the slides I was going to present on the 4 claims made by the tobacco industry about plain packaging and how our research has found no evidence for them. This is the version [REDACTED] in my team also gave at the World Conference in Abu Dhabi earlier this year. The slides have comprehensive notes included.
All the best,

[REDACTED]
Chief Executive

ASH Scotland
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Edinburgh, EH2 2HB

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Web: <http://www.ashscotland.org.uk>

ASH Scotland's vision is of a healthier Scotland, free from the harm and inequality caused by tobacco.

Tobacco Plain Packaging in Australia: 4 dire predictions

Michelle Scollo, PhD
Centre for Behavioural Research in Cancer



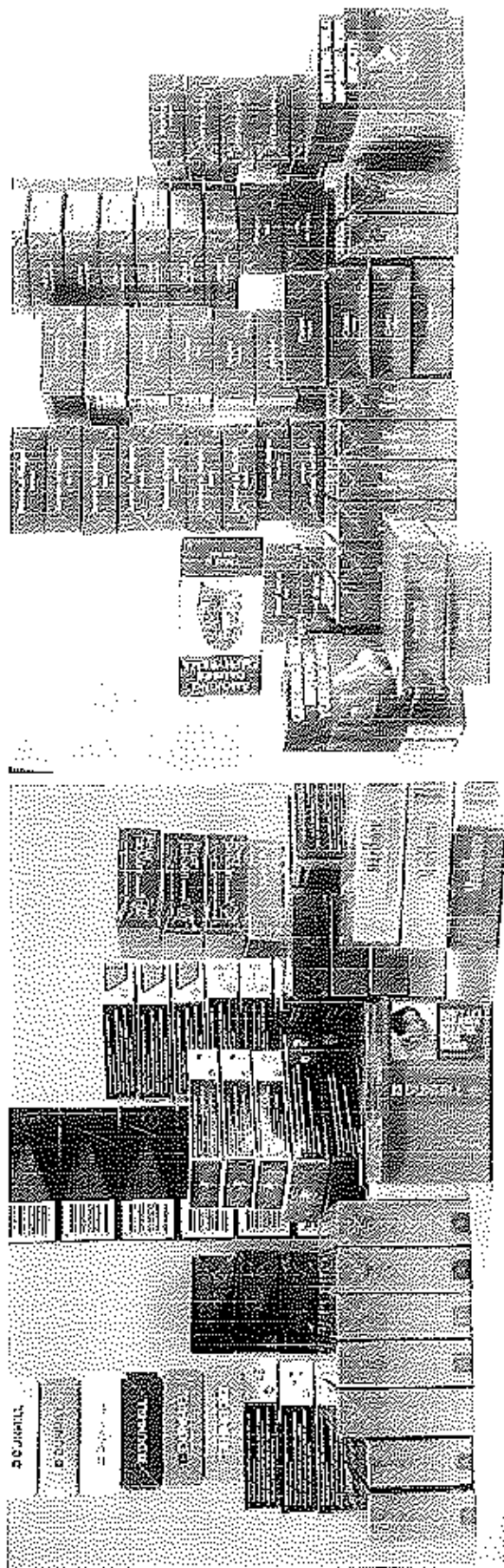
Four dire predictions

- 1. Catastrophic losses for small business**
- 2. An explosion in use of illicit tobacco**
- 3. A collapse in prices and**
- 4. An increase in consumption**

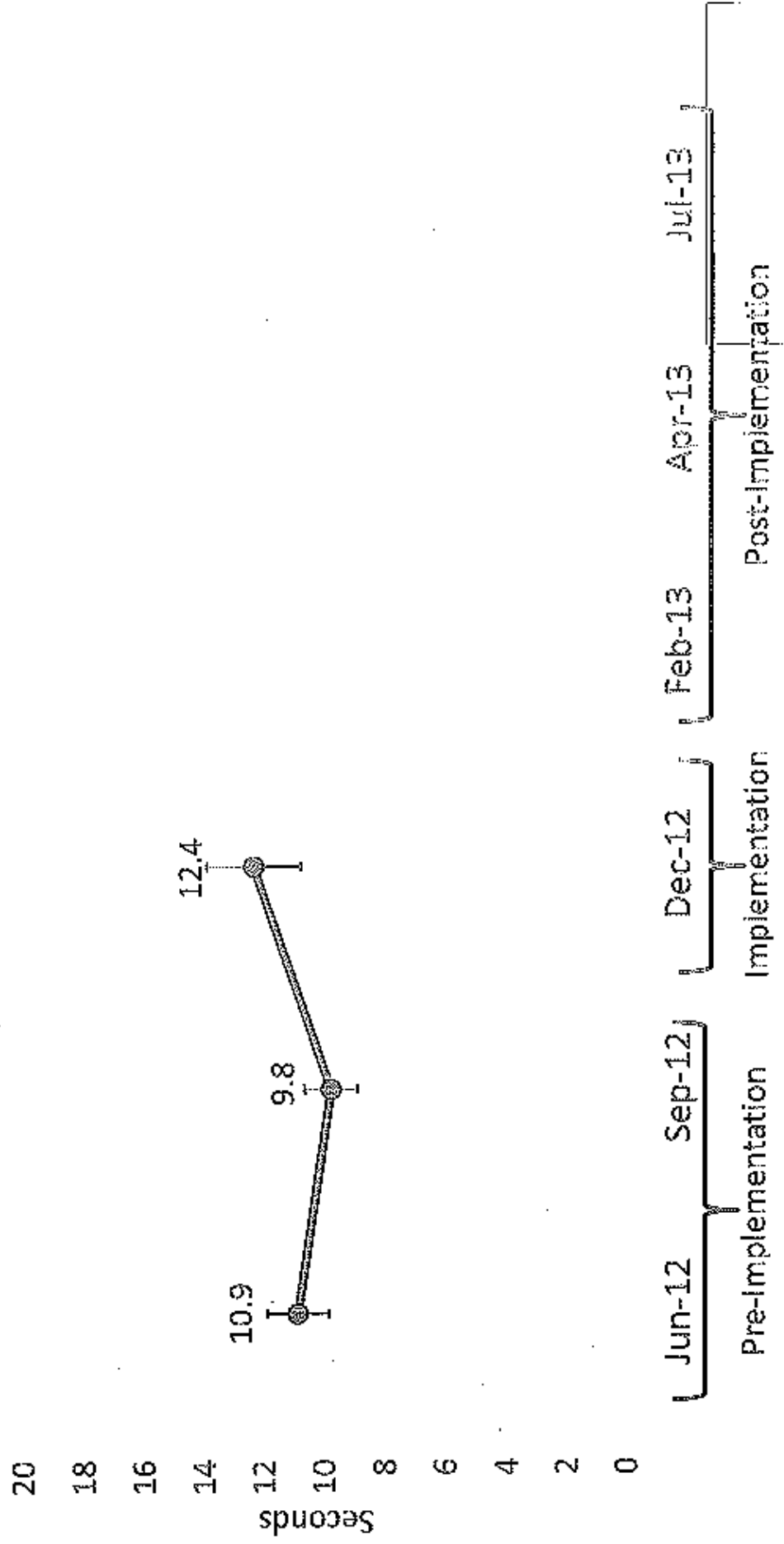
PREDICTION 1:

Catastrophic losses for small business

Difficulty distinguishing stock?

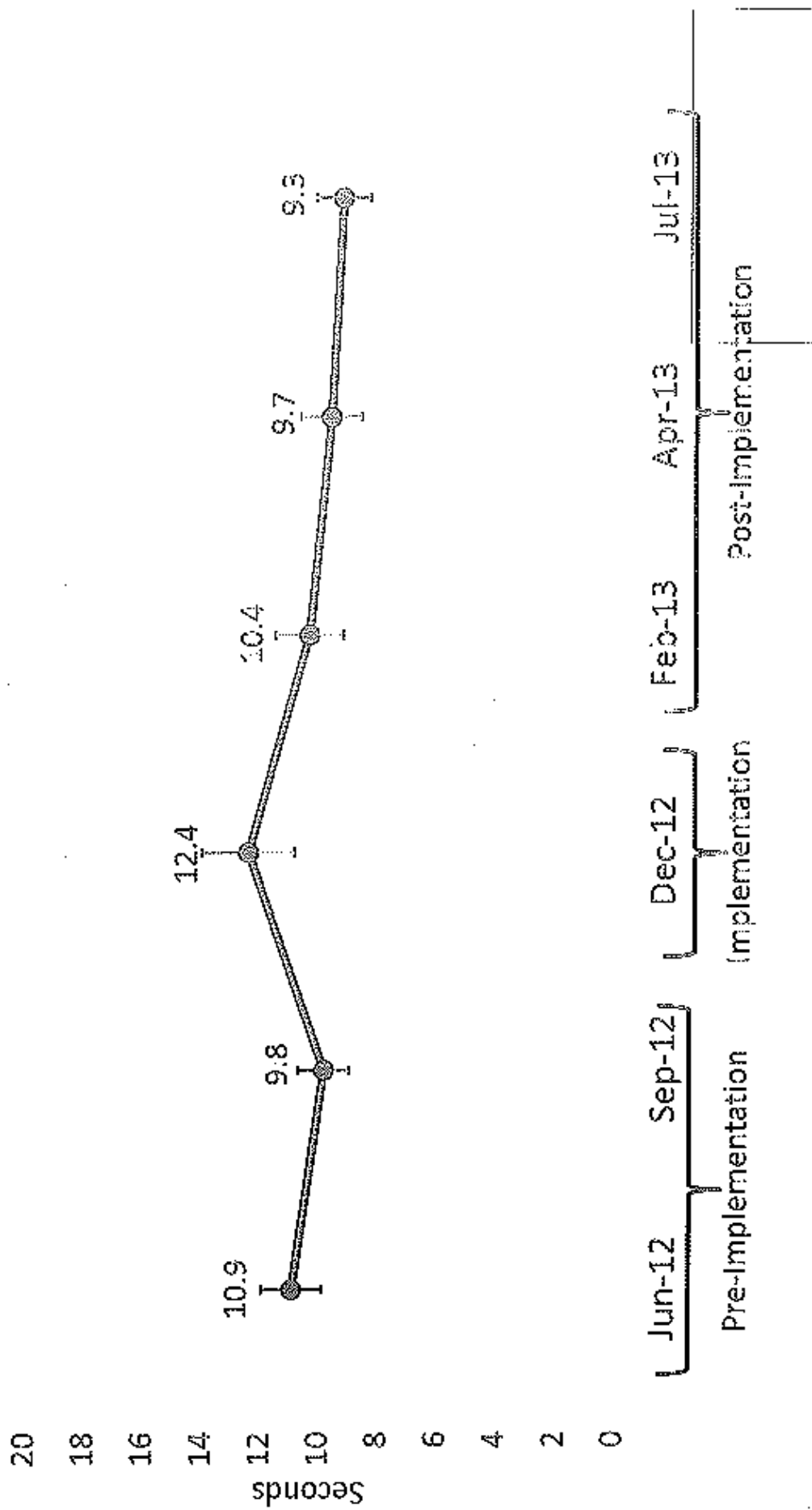


Time taken by retailers to retrieve packs



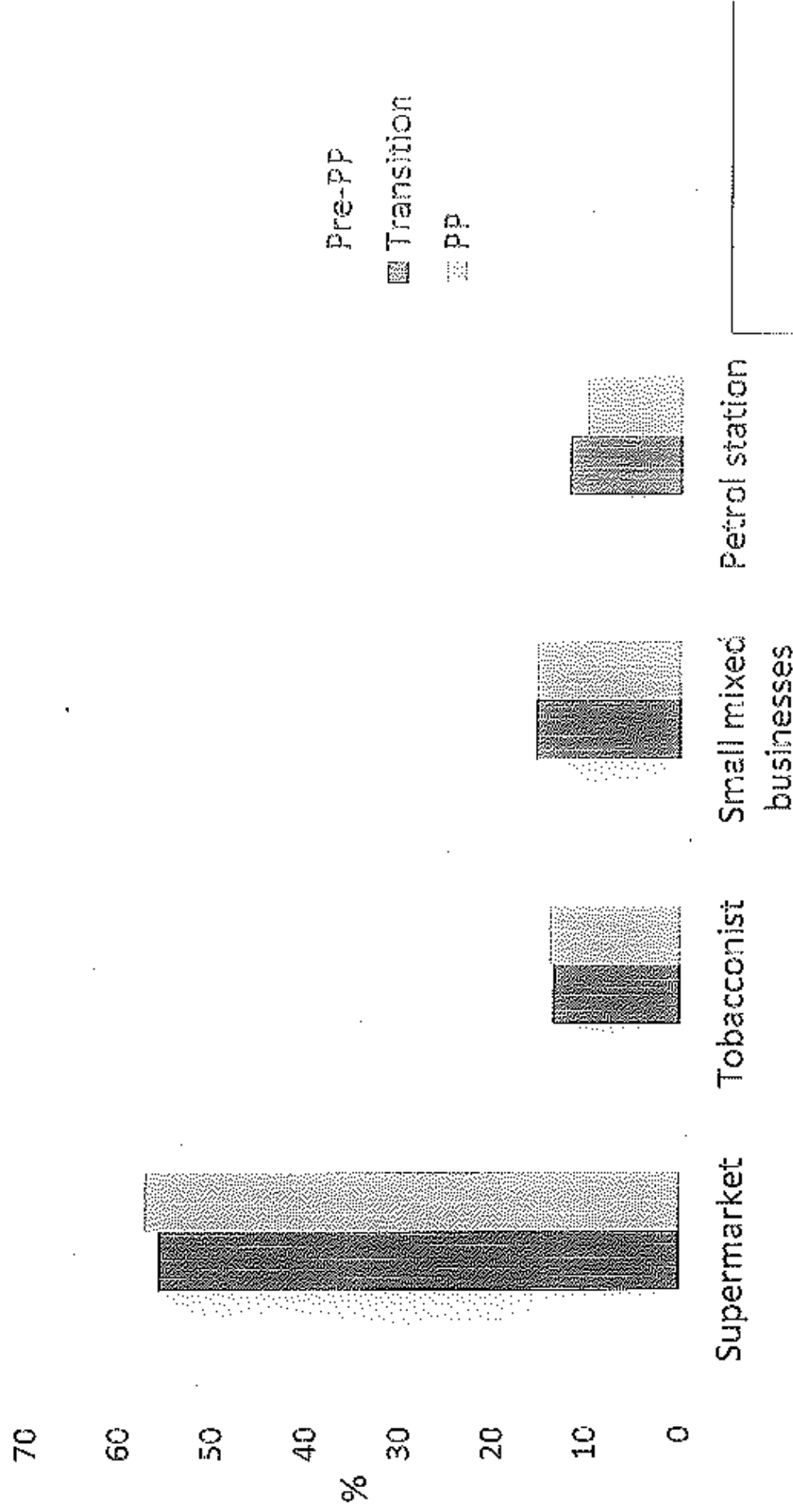
Bayly et al. No lasting effects of plain packaging on cigarette pack retrieval time in small Australian retail outlets. Tobacco Control, 2014.

Time taken by retailers to retrieve packs



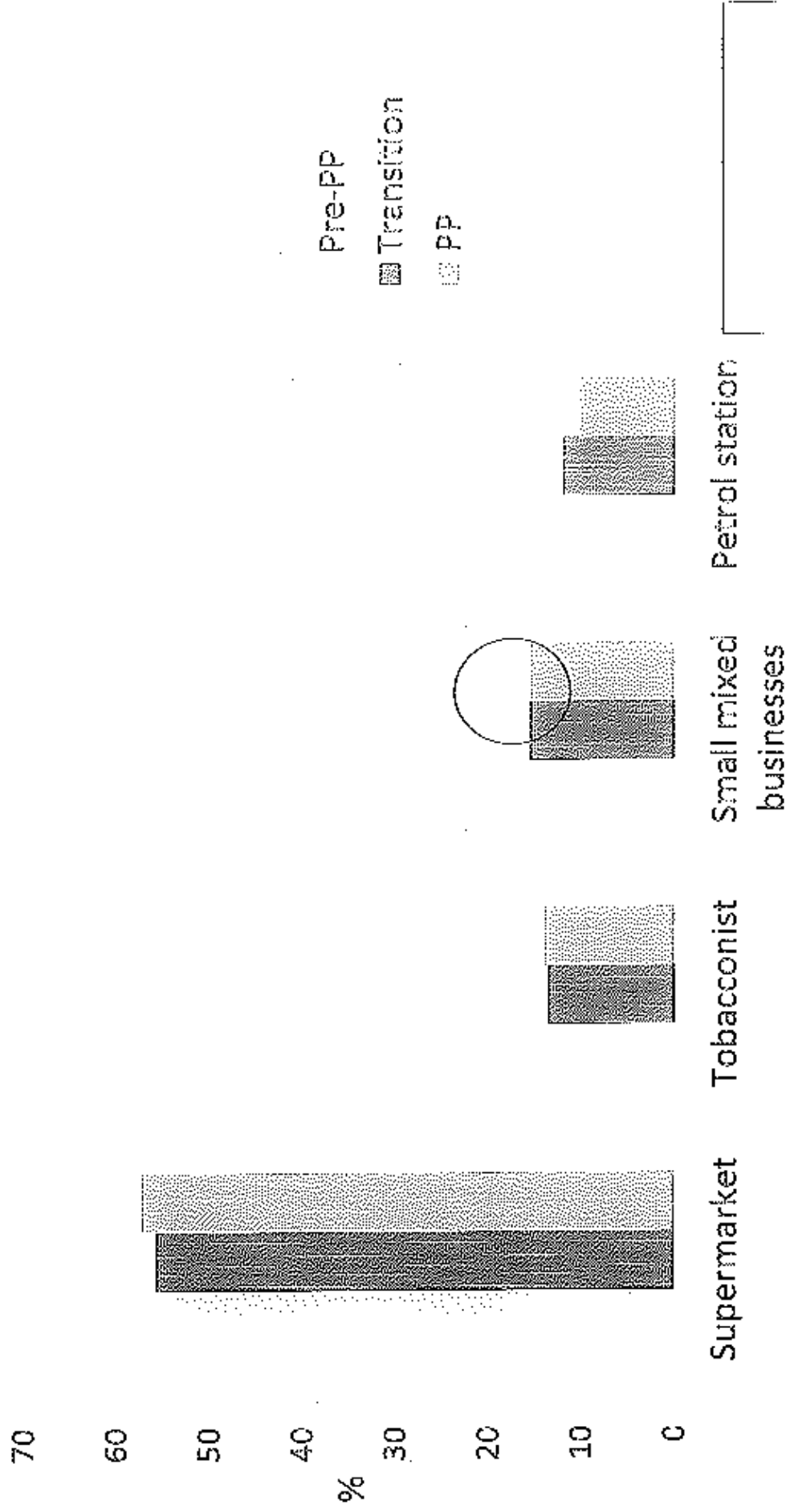
Bayly et al. No lasting effects of plain packaging on cigarette pack retrieval time in small Australian retail outlets. *Tobacco Control*, 2014.

Place of purchase of last pack



Scollo et al. Did smokers shift from small mixed businesses to discount outlets following the introduction of plain packaging in Australia? A national cross-sectional survey. Tobacco Control, 2015; 24:ii98-ii100.

Place of purchase of last pack



Scollo et al. Did smokers shift from small mixed businesses to discount outlets following the introduction of plain packaging in Australia? A national cross-sectional survey. Tobacco Control, 2015; 24:i198-ii100.

PREDICTION 2:

An explosion in use of illicit tobacco

Illicit tobacco in Australia



Unbranded 'chop-chop' tobacco

Illicit tobacco in Australia



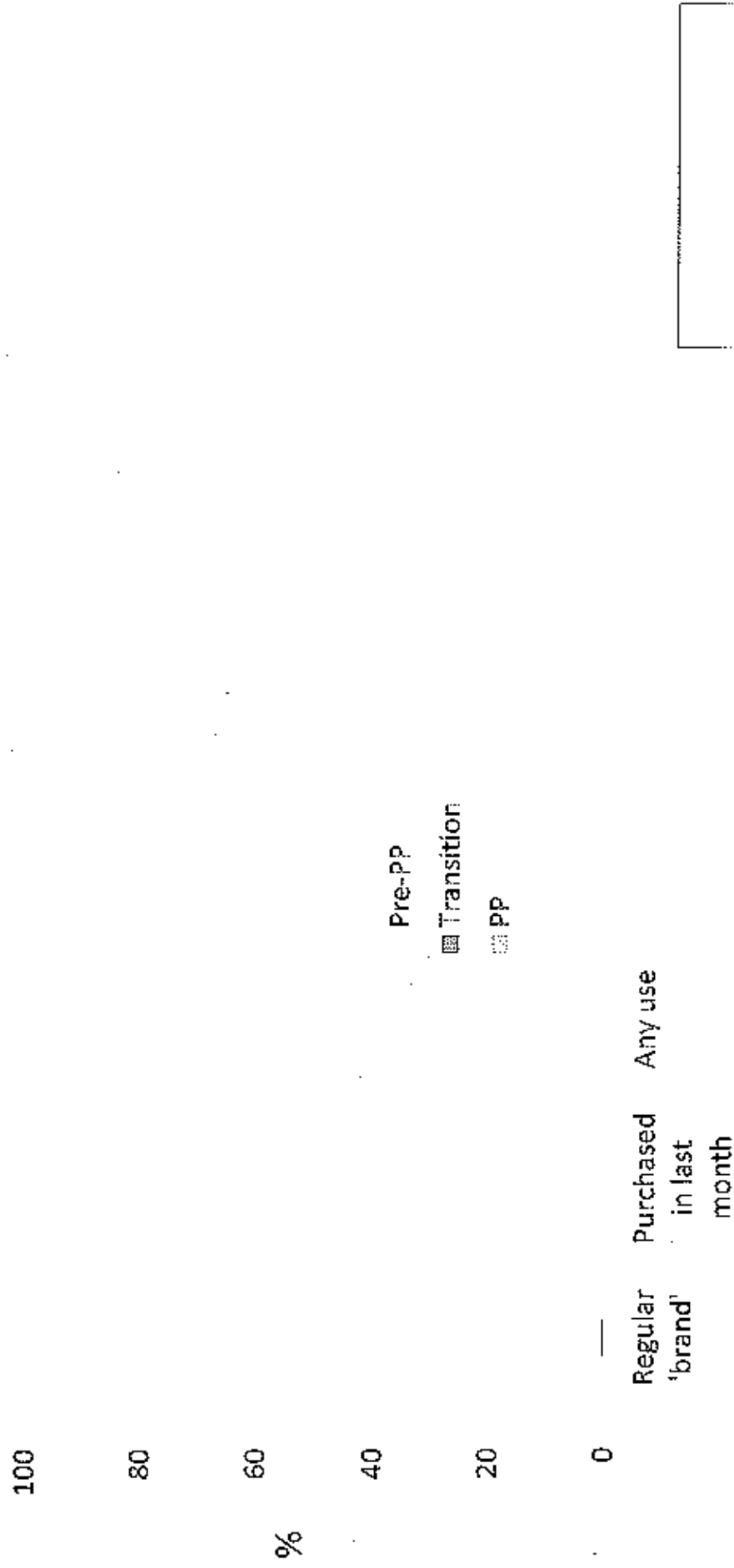
Unbranded 'chop-chop' tobacco



Contraband cigarettes, including counterfeit & 'cheap whites'

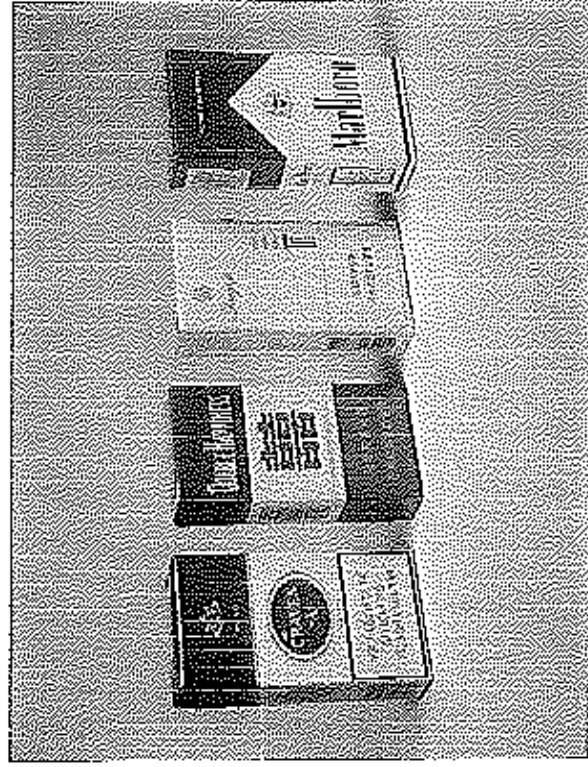
Use of illicit tobacco

Use of unbranded 'chop-chop' tobacco



Scollo et al. Use of illicit tobacco following introduction of standardised packaging in Australia: results from a national cross-sectional survey. Tobacco Control, 2015; 24:i176-i181.

Contraband cigarettes in Australia



Contraband cigarettes including
counterfeit

Contraband cigarettes in Australia

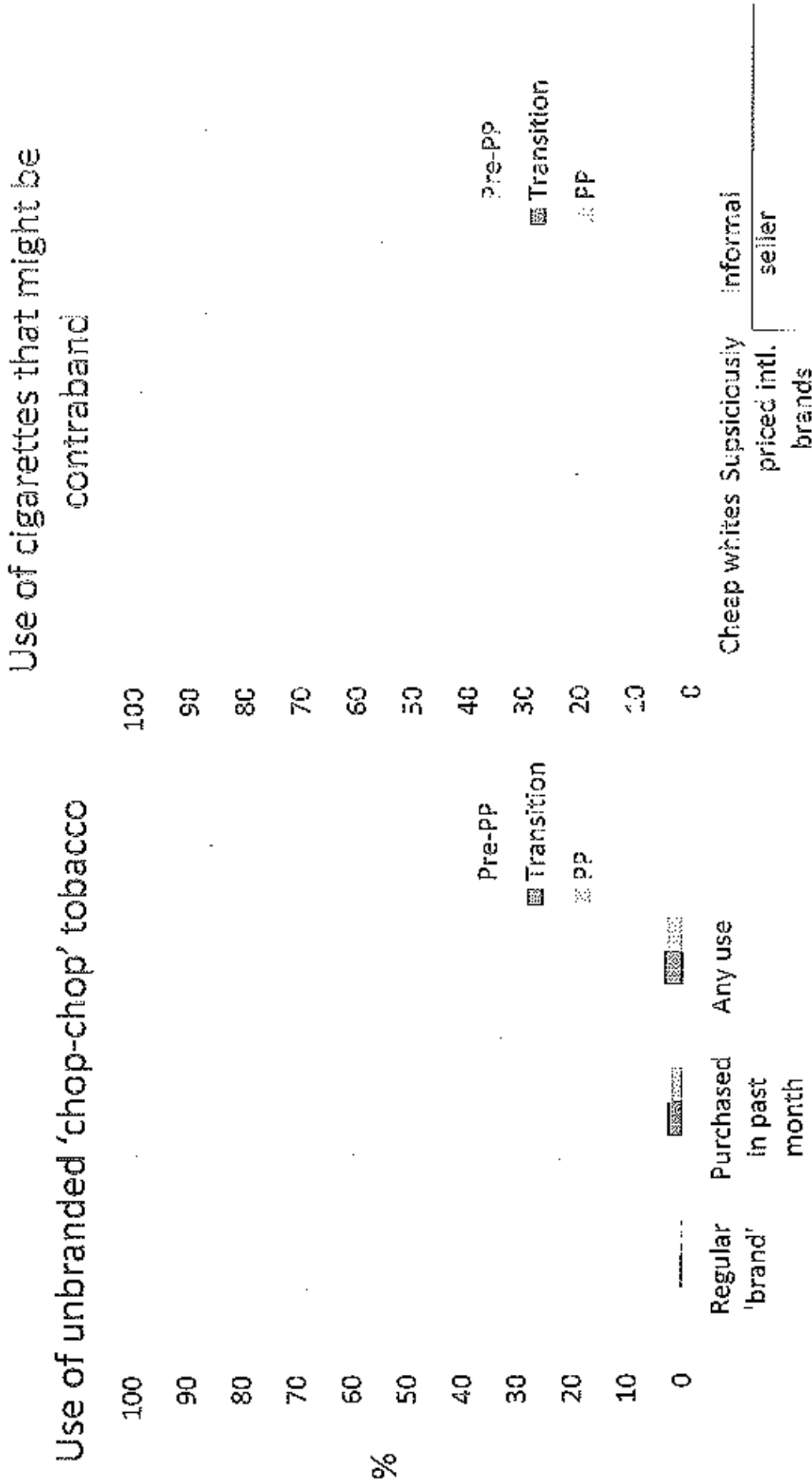


Contraband cigarettes including counterfeit



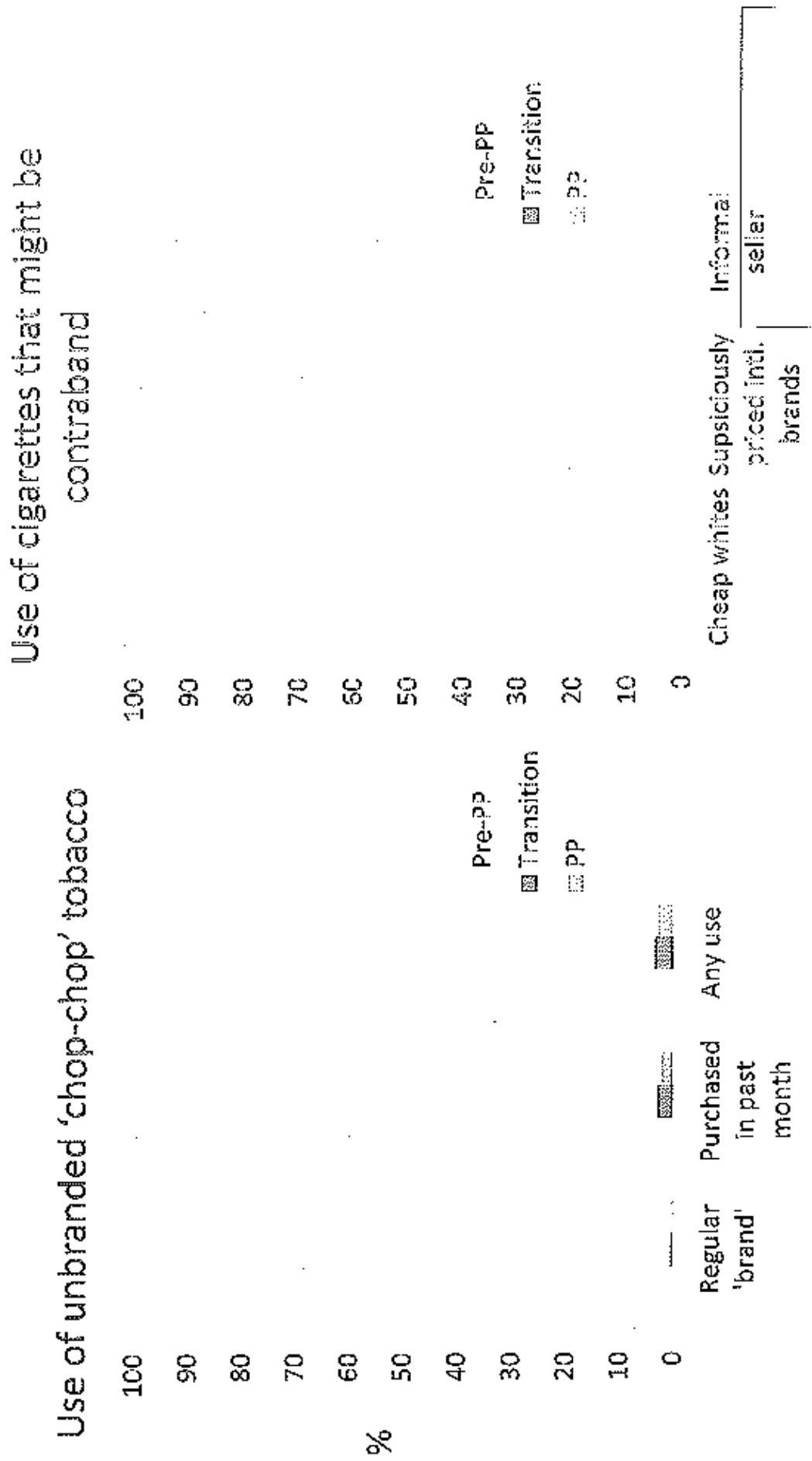
'Cheap whites'

Use of illicit tobacco



Scollo et al. Use of illicit tobacco following introduction of standardised packaging in Australia: results from a national cross-sectional survey. Tobacco Control, 2015; 24:ii76-ii81.

Use of illicit tobacco



Scollo et al. Use of illicit tobacco following introduction of standardised packaging in Australia: results from a national cross-sectional survey. Tobacco Control, 2015; 24:ii76-ii81.

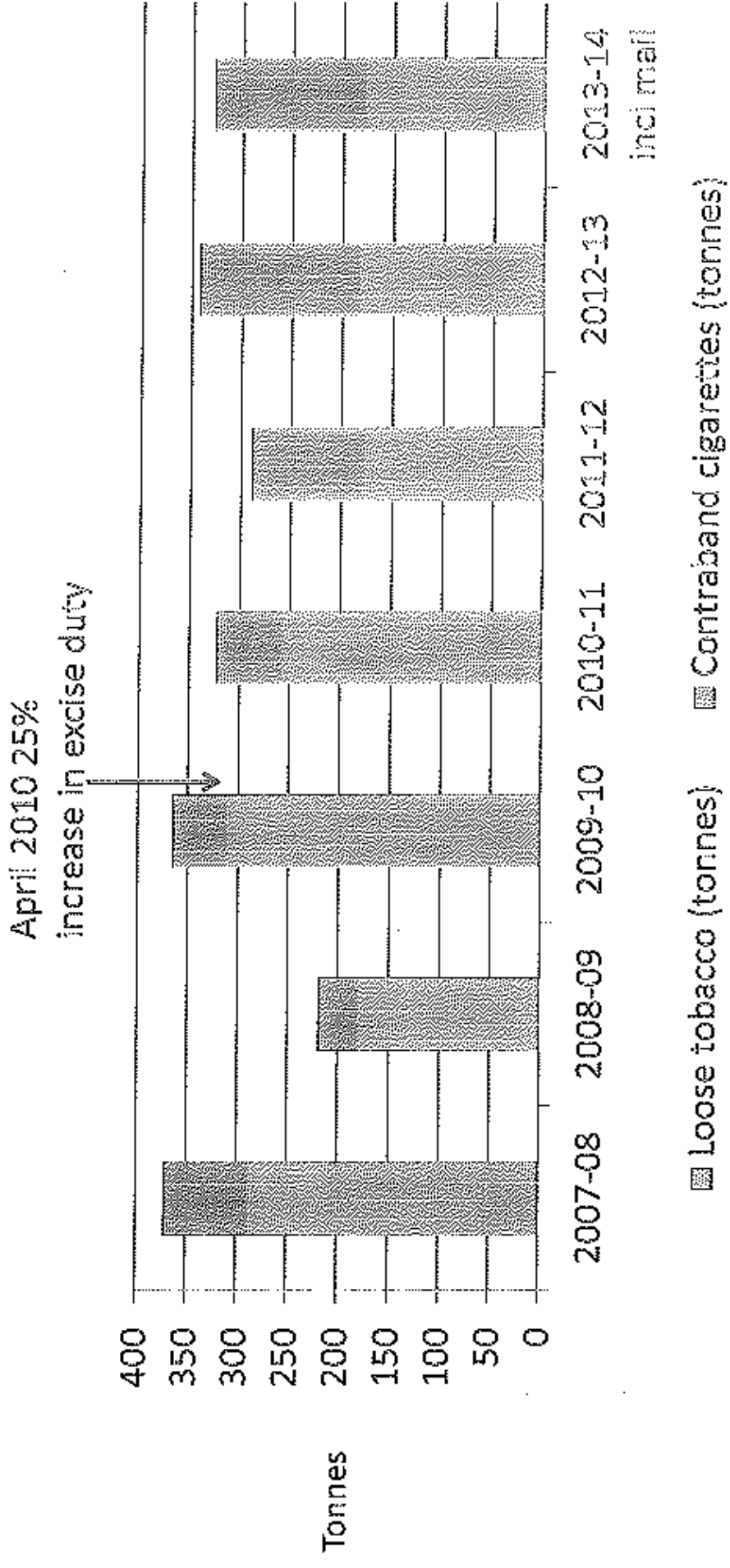
Use of illicit tobacco: industry estimates

The empty pack survey indicated that 4.8% of counterfeit packs carried branding that was available in the Australian market prior to the introduction of Plain Packaging. To date there has been no evidence of counterfeit Plain Packaging cigarettes. This represents a change from 2012 where approximately 45% of counterfeit cigarettes consumed appeared to have been designed for the local market. This shows that since the introduction of plain packaging, Australian counterfeit cigarettes have declined.

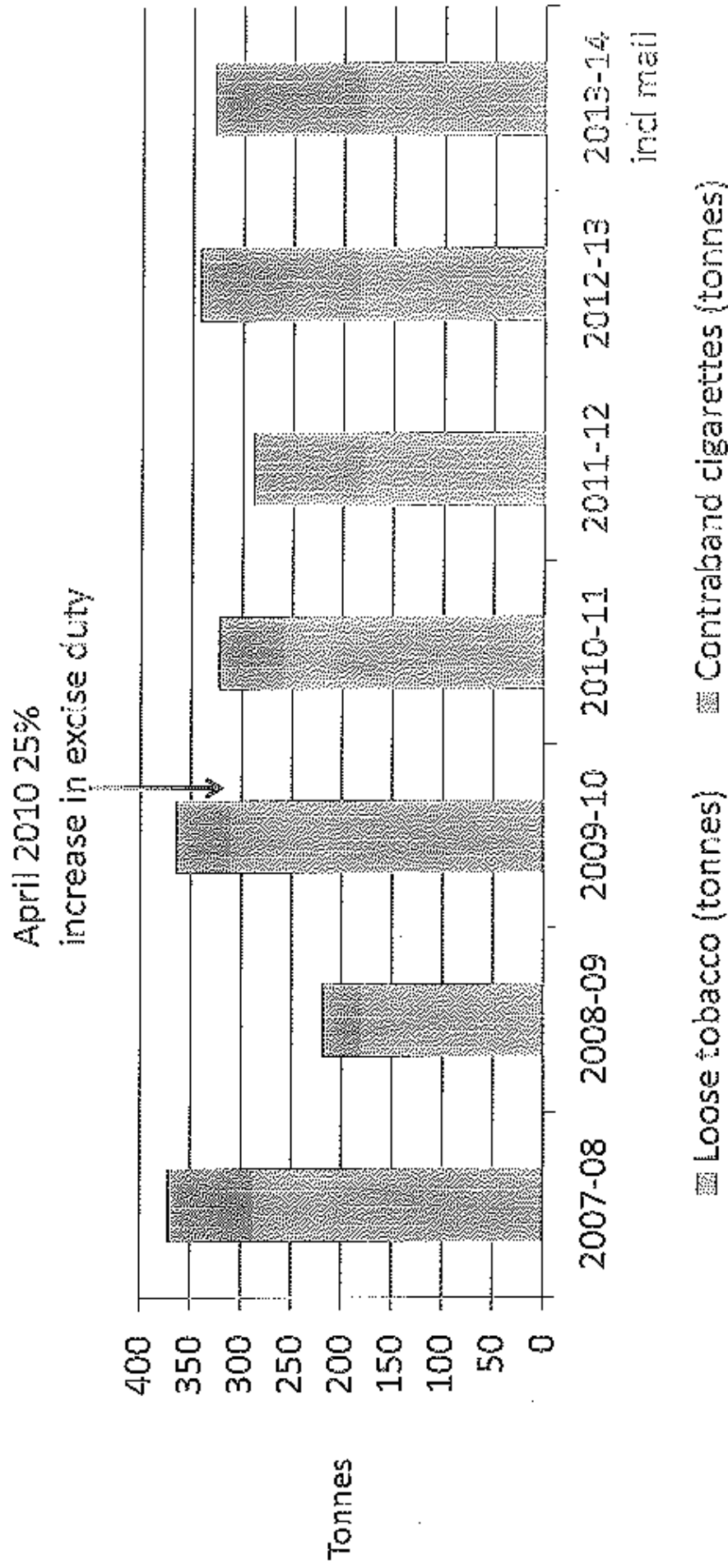
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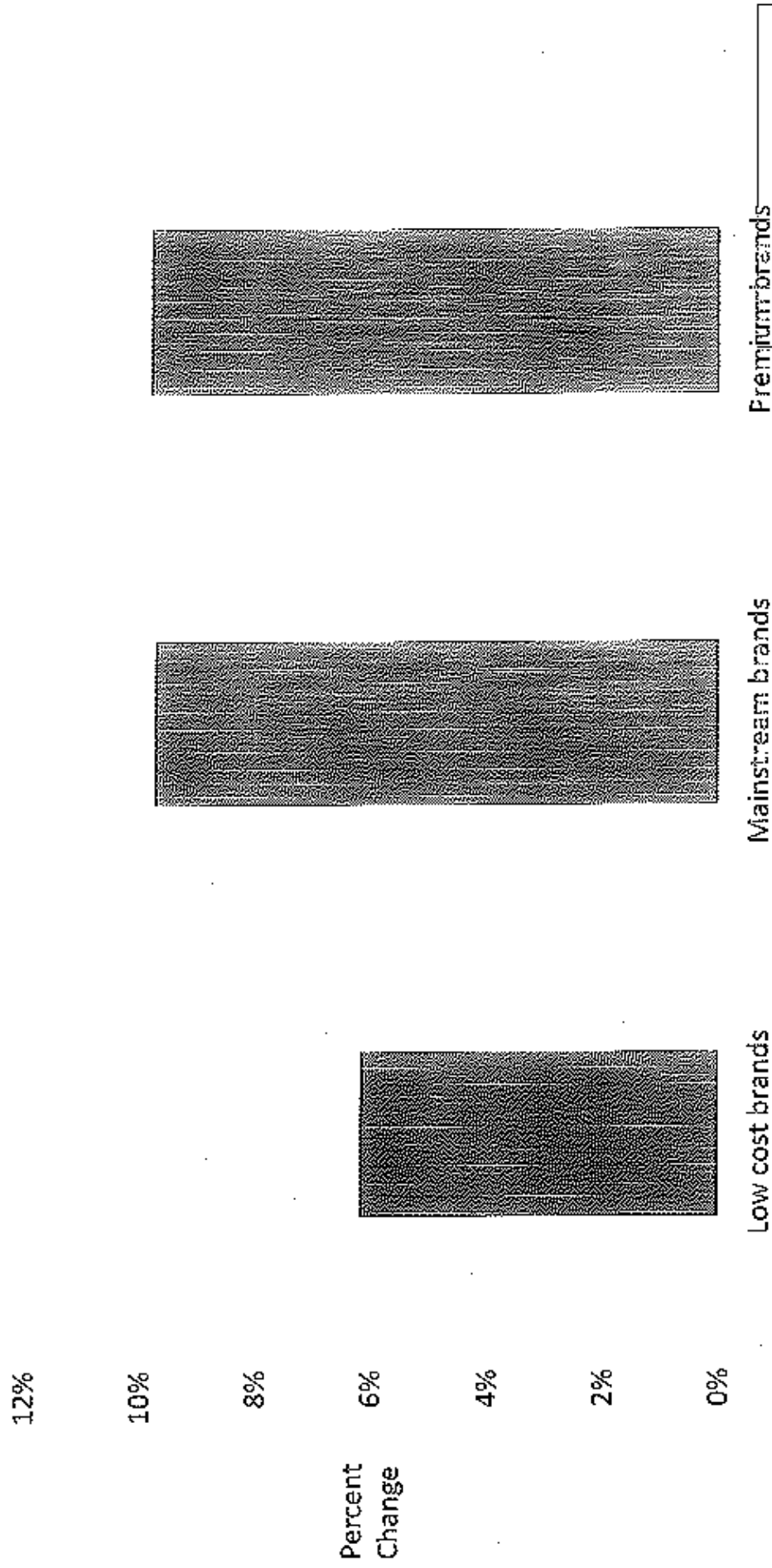
Customs detections of illicit tobacco— loose tobacco and contraband cigarettes



Customs detections of illicit tobacco— loose tobacco and contraband cigarettes

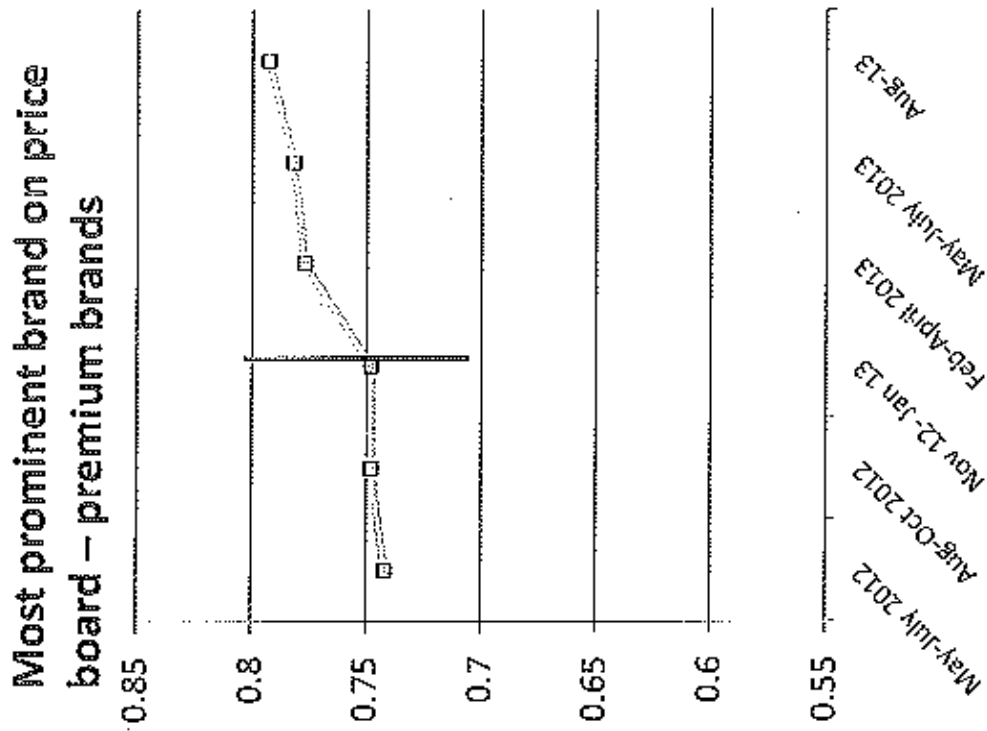


Changes in recommended retail prices, 2011 to 2013—AUD 2013 prices



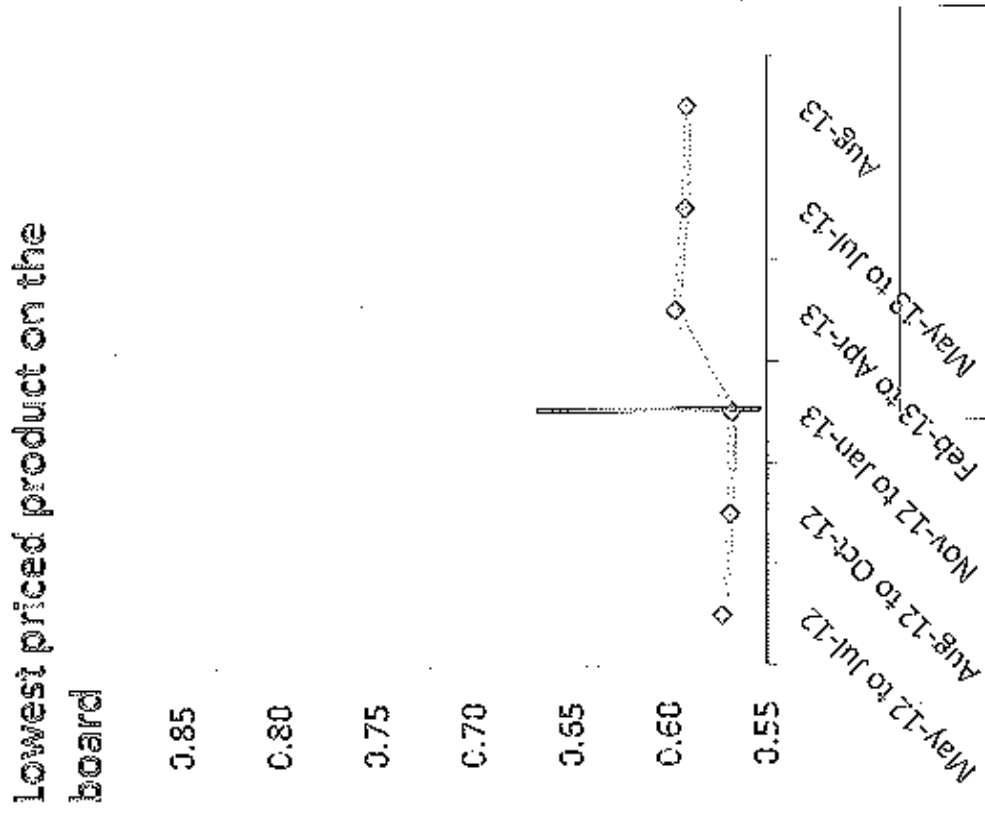
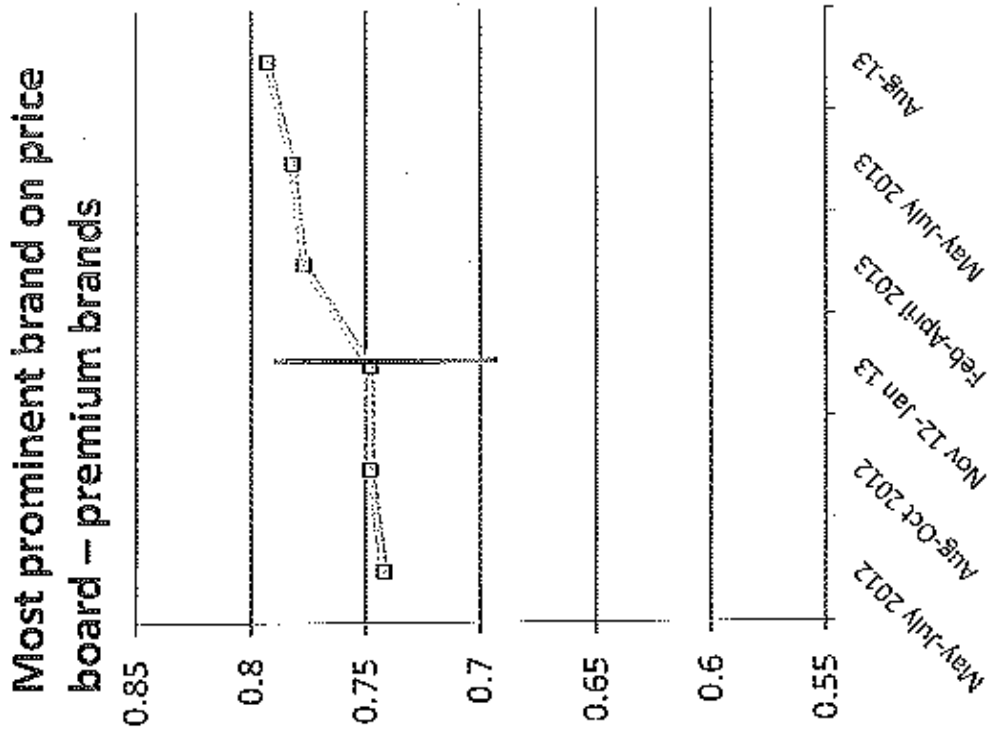
Scollo et al. *Did the recommended retail price of tobacco products fall in Australia following the implementation of plain packaging?* Tobacco Control, 2015; 24:ii90-ii93.

Advertised prices, cents per stick, AUD 2013



Scollo et al. The advertised price of cigarette packs in retail outlets across Australia before and after the implementation of plain packaging: a repeated measures observational study. Tobacco Control, 2015; 24:i182-i189.

Advertised prices, cents per stick, AUD 2013



Scollo et al. The advertised price of cigarette packs in retail outlets across Australia before and after the implementation of plain packaging: a repeated measures observational study. Tobacco Control, 2015; 24:i182-ii89.

New 'super'-value brands

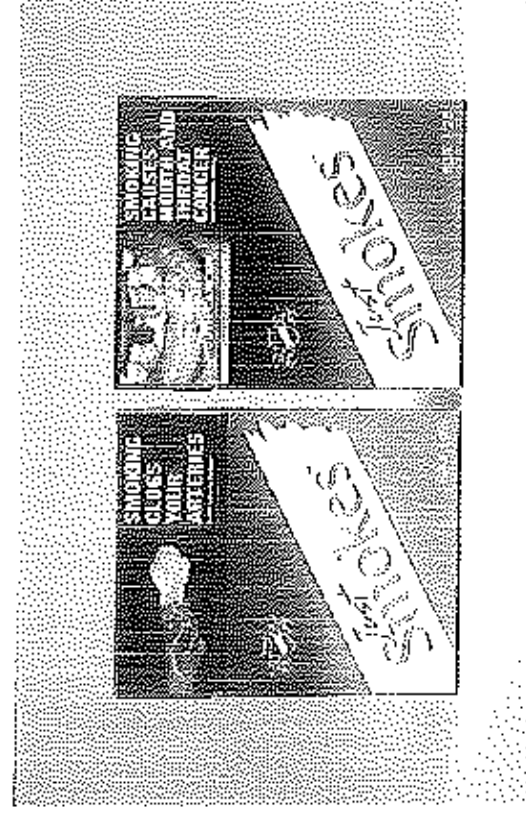
Substantially cheaper up-front cost than existing value products



PM Bond Street

introduced February 2012, 20s and

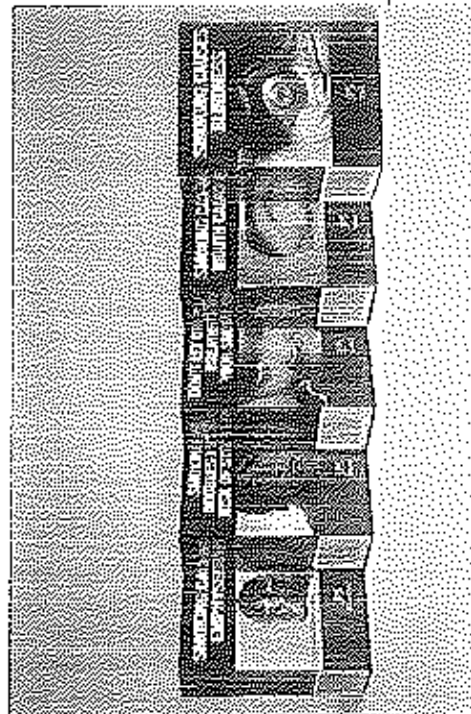
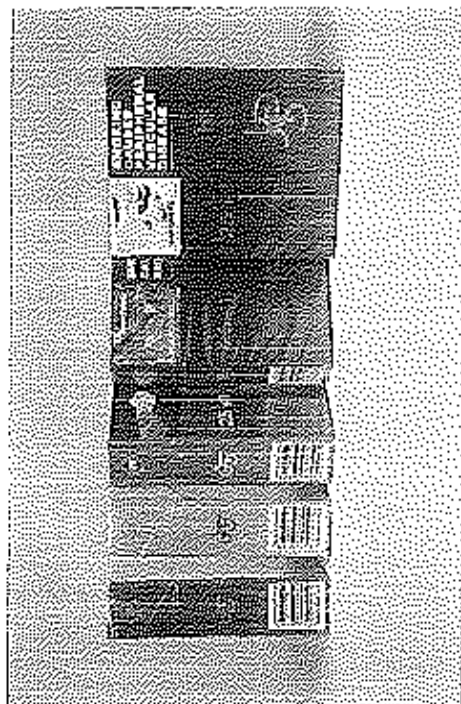
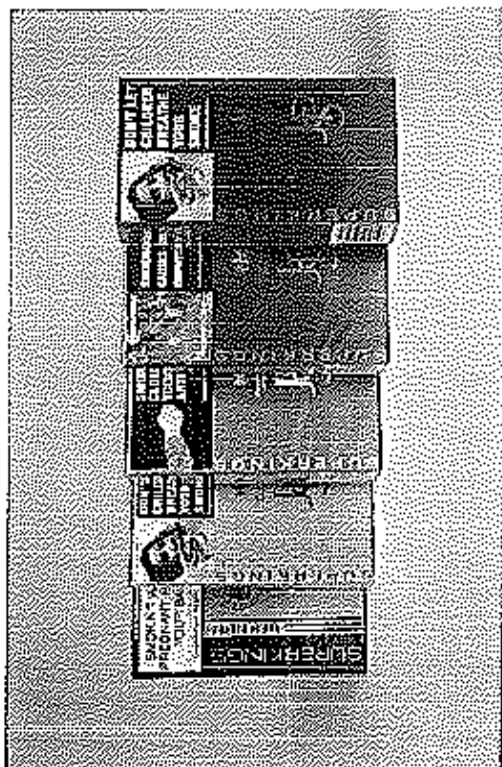
26s pack size



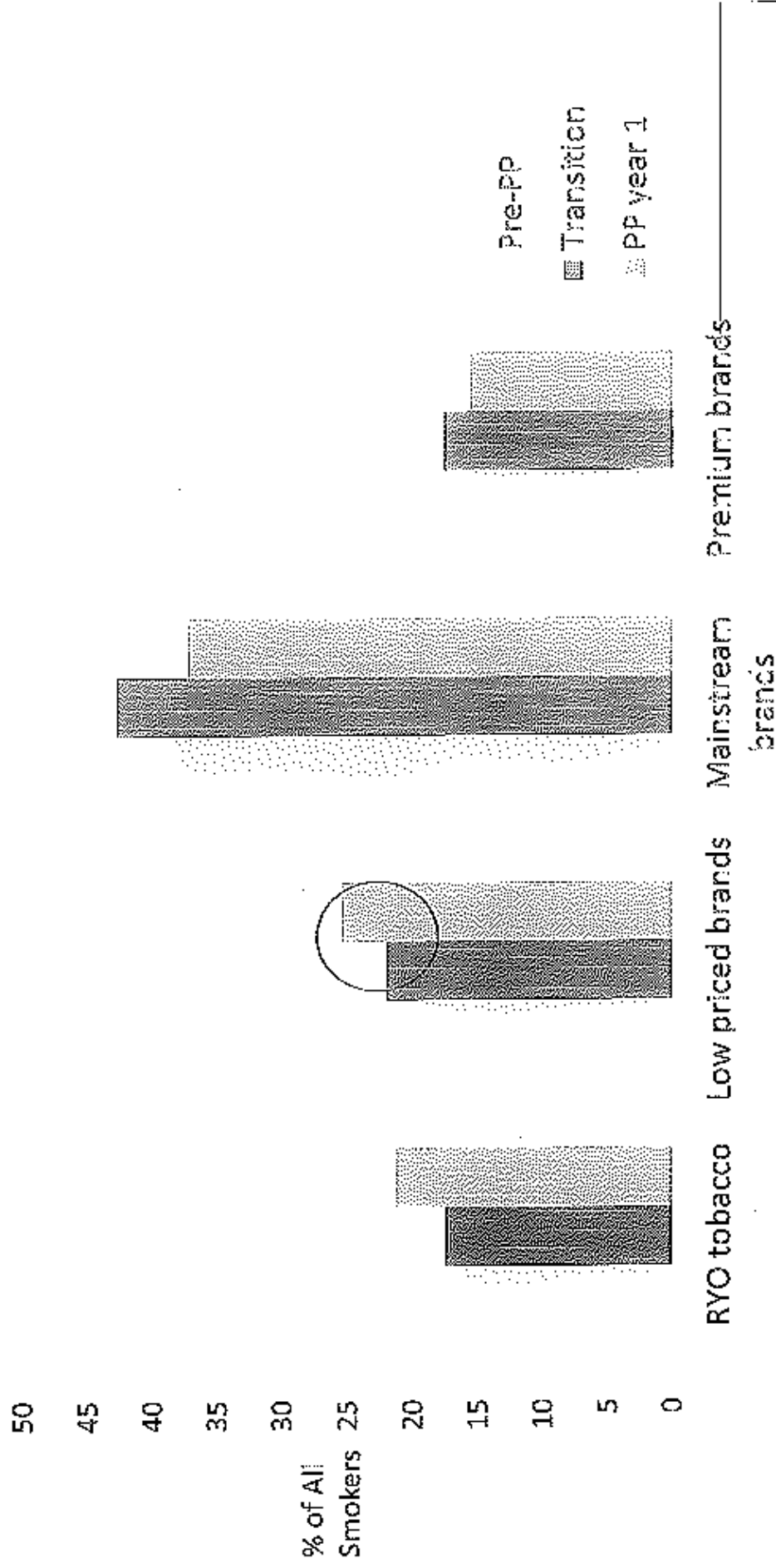
BATA Just Smokes

introduced May 2012

New JPS 'super'-value brand family

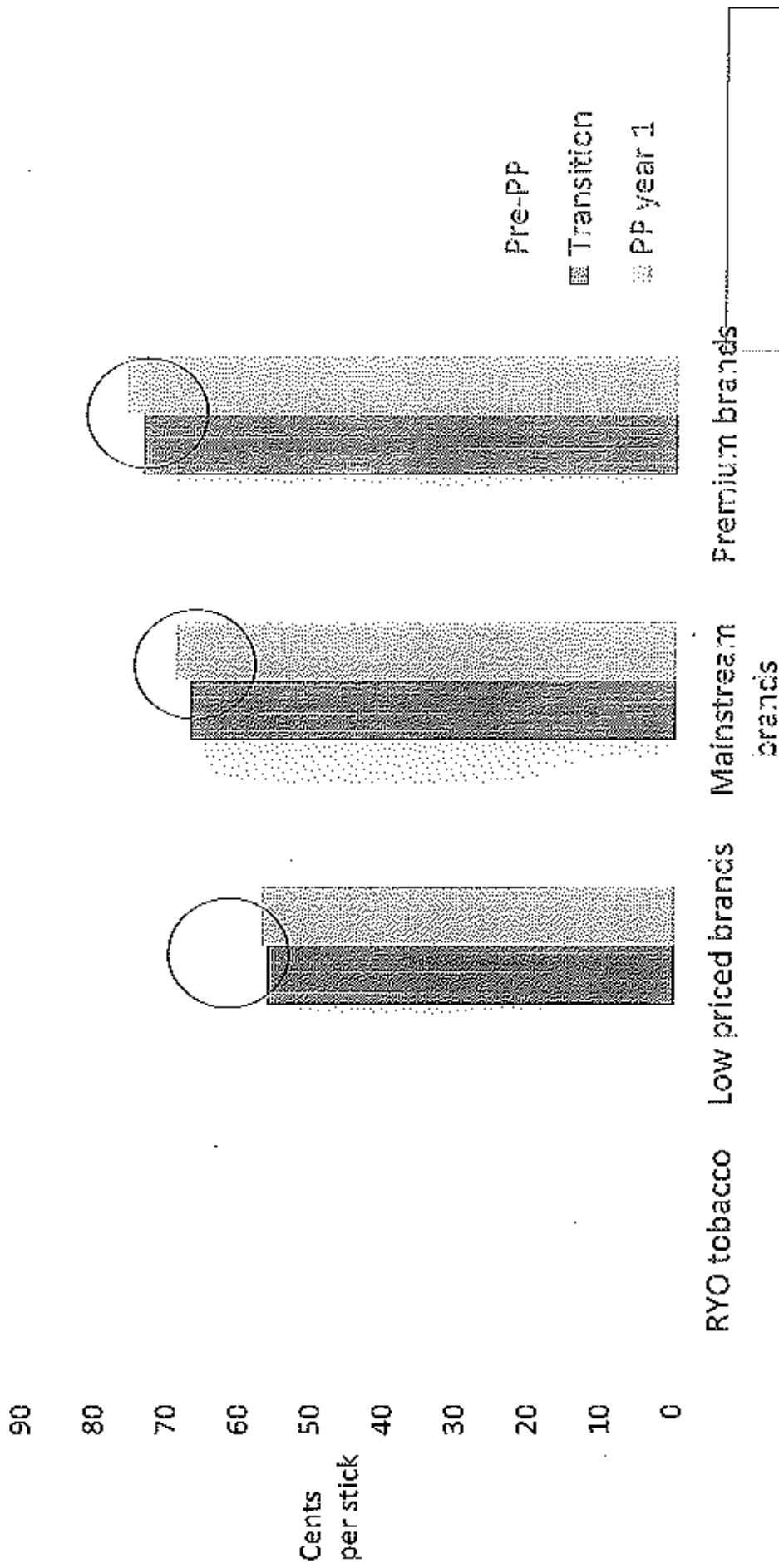


Shift to low-priced brands



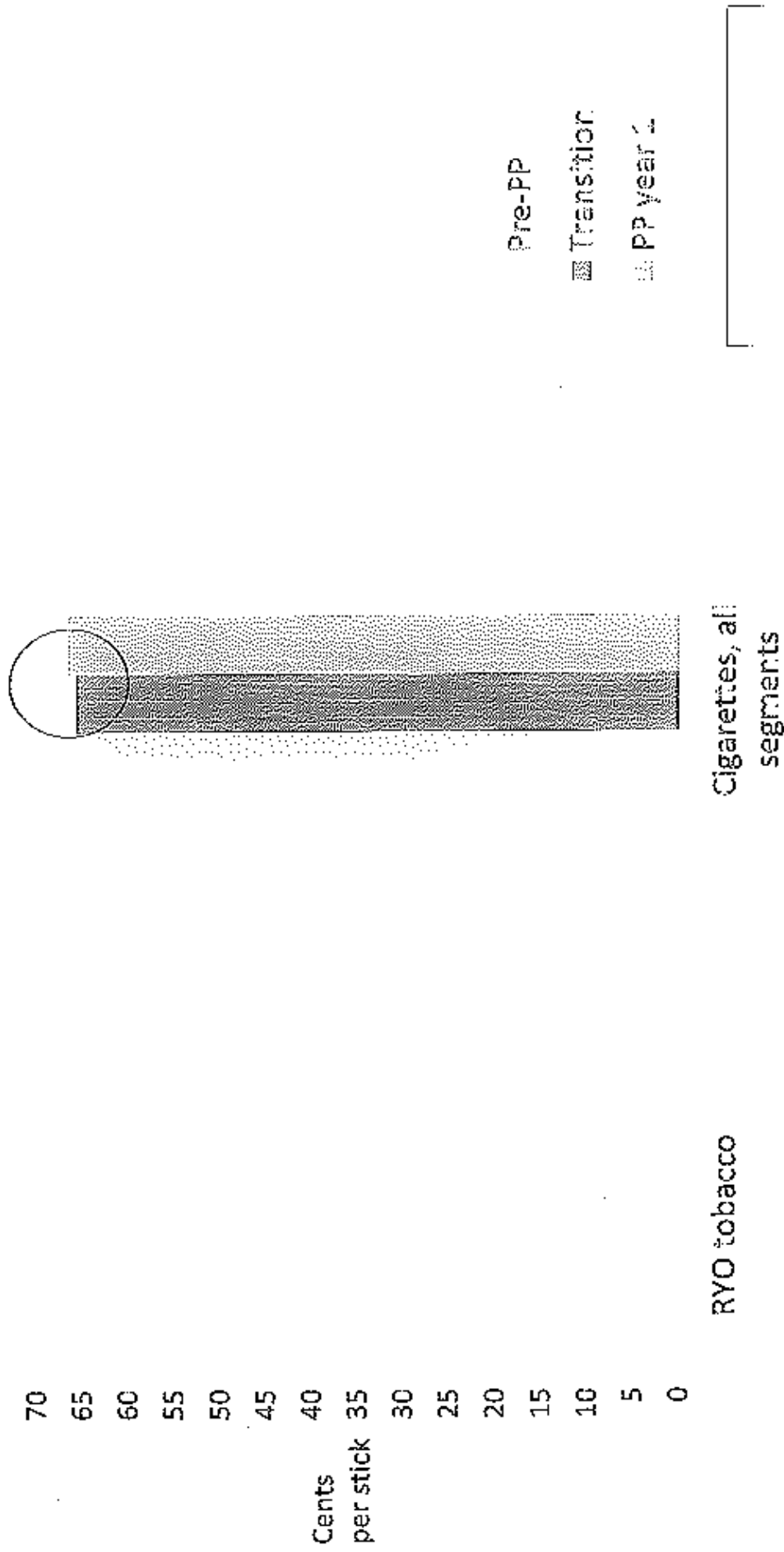
Scollo et al. *Changes in use of tobacco products by pack sizes and price segments, prices paid and consumption following the introduction of plain packaging in Australia*. Tobacco Control, 2015; 24: ii66-ii75.

Prices paid over phases of introduction, \$2014



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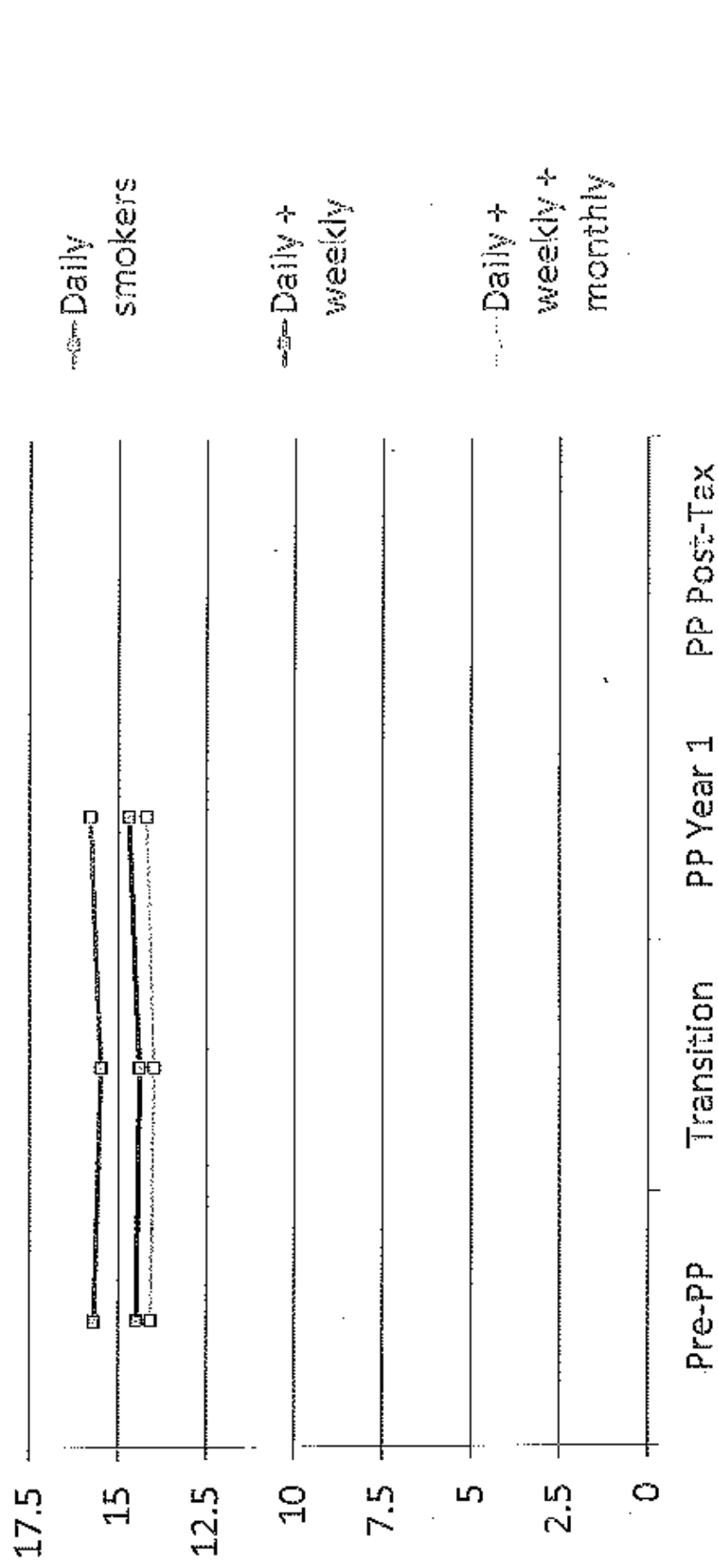
Prices paid over phases of introduction, \$2014



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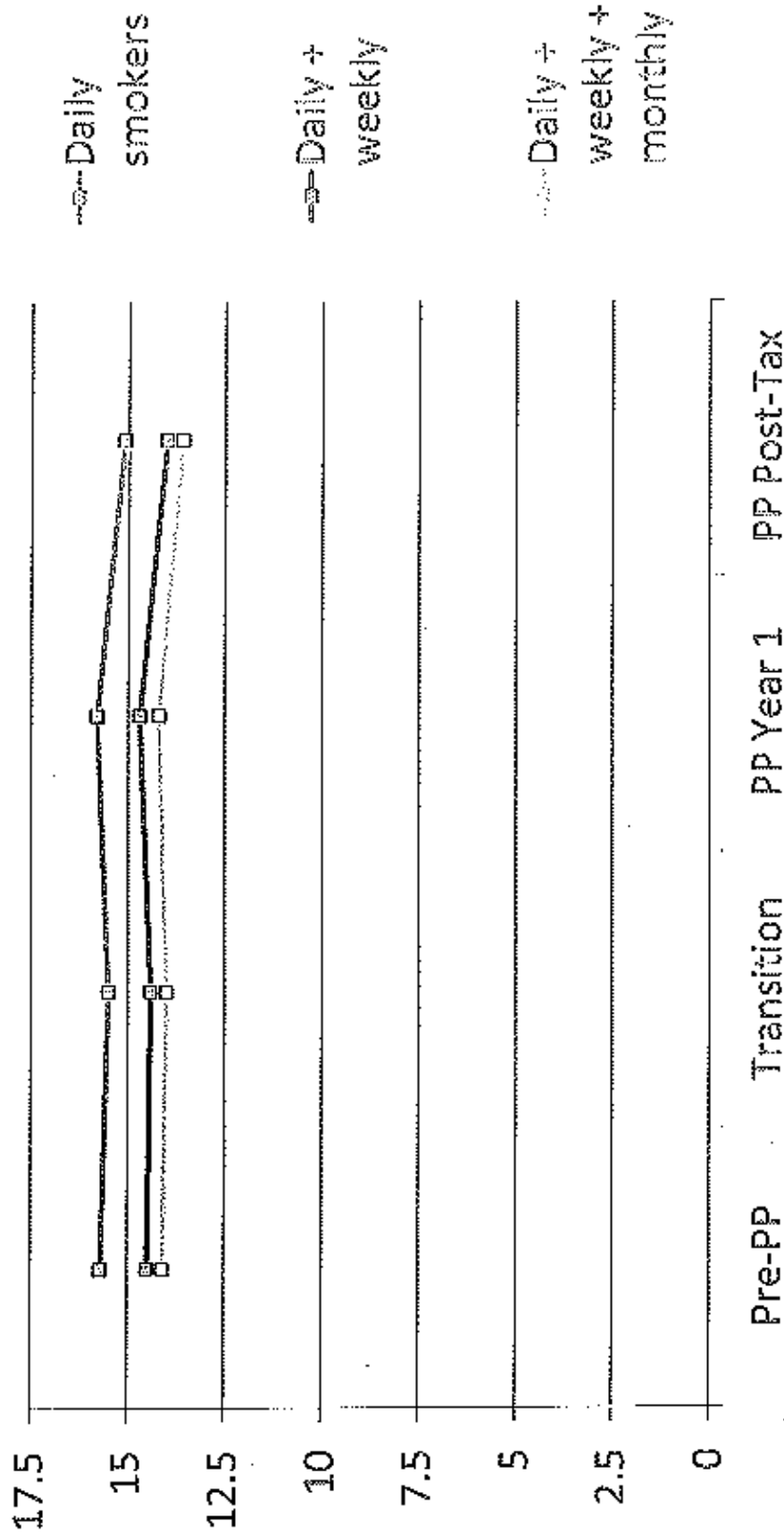
PREDICTION 4:
Increased consumption

Reported consumption – mean no. cigarettes per day



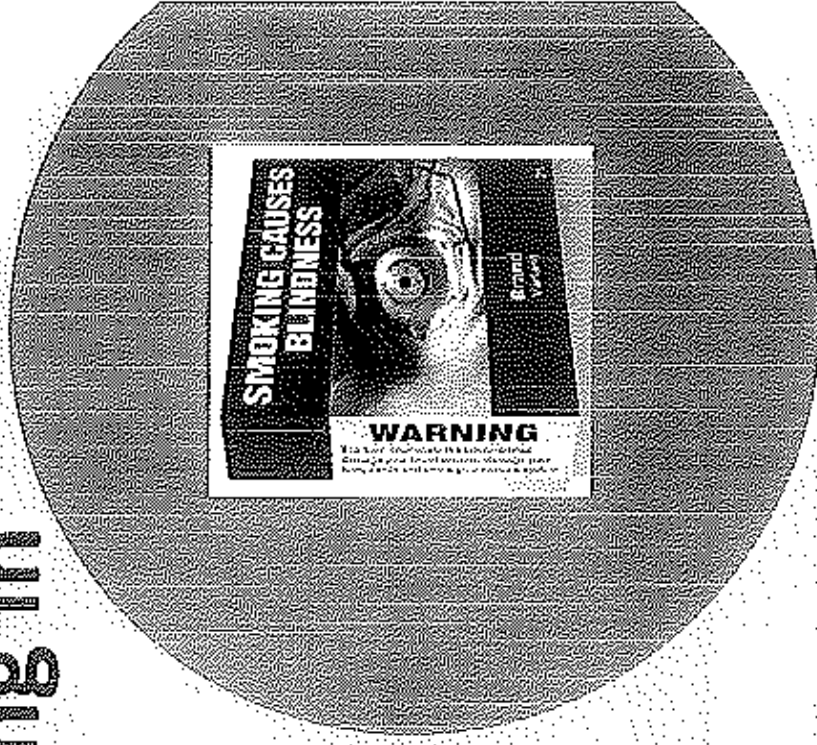
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Scollo et al. Changes in use of tobacco products by pack sizes and price segments, prices paid and consumption following the introduction of plain packaging in Australia. Tobacco Control, 2015; 24: ii66-ii75.

Tobacco Plain Packaging in Australia: 4 dire predictions; 4 sets of reassuring data



National Plain Packaging Tracking Survey funded by Australian Department
of Health

Retail audit funded by Quit Victoria, Cancer Council and ASH UK with
partner organisations