

Tobacco Industry Profile – India

Intended Uses of Report

This document is intended as background information for developing presentations, educational and training materials, and for use in responding on message to media requests. We suggest that you copy directly from this document to materials that you are developing (be sure to maintain citations).

India ratified the World Health Organization’s Framework Convention on Tobacco Control (FCTC) in 2004 and as such is obligated to adopt and implement effective legislation aimed at reducing tobacco use and tobacco smoke exposure.¹ One of the FCTC’s guiding principles is that participation of civil society is essential in achieving the policy objectives contained within the treaty.² The FCTC also recognizes that “there is a fundamental and irreconcilable conflict between the tobacco industry’s interests and public health policy interests.”³ Civil society can play an essential role in raising awareness about the tobacco industry – its goals, its size and operation, its strategies to promote its products, and its strategies to thwart the adoption and implementation of strong tobacco control policies by gaining influence and credibility with policy makers and the public at large. Accordingly, tobacco control advocates should educate policy makers about the tobacco industry and its deadly products in their campaigns to achieve policy initiatives contained within the FCTC.

Evidence from Section 5 (Tobacco Industry Promotion and Sponsorship) of this report can be used to support comprehensive bans on all tobacco advertising, promotion, and sponsorships as specified in FCTC Article 13 and its guidelines. Section 6 (Corporate Social Responsibility) can also be used to support FCTC Article 5.3 guidelines calling for the denormalization and regulation of so called “socially responsible” activities carried out by the tobacco industry. We suggest that you add timely and relevant examples to these sections of the report to ensure that you have a ready resource to access throughout your policy campaigns. When adding examples, be sure to properly document the activity with a citation that includes a link to the reference as well as the date and location of the activity.

Table of Contents

- 1) Introduction
- 2) Bidis in India
- 3) Smokeless Tobacco in India
- 4) Cigarettes in India
- 5) Tobacco Industry Promotion and Sponsorship
- 6) Corporate Social Responsibility
- 7) Appendix A- Company Executives and Contact Information of the Major Tobacco Manufacturers in India

1. Introduction

The tobacco industry is one of the most profitable industries in the world. Tobacco companies use their enormous wealth and influence both locally and globally to market their deadly products. Even as advocacy groups and policy makers work to combat the tobacco industry's influence, new and manipulative tactics are used by tobacco companies and their allies to circumvent tobacco control efforts. It is important for tobacco control advocates to know which companies are present in their country, how and where they operate, the types and quantity of products sold, and marketing tactics used to sell tobacco products. By being informed about all aspects of the tobacco industry within a country, advocates are better equipped to fight for effective tobacco control policies.

It is important to note that the tobacco companies typically report market data annually at least several months after the end of the fiscal year. By its nature, annual market data reported by analysts and tobacco companies are one or two years old. It is also important to note that information about the tobacco industry in India is not always readily available. This is particularly true for the loosely regulated bidi and smokeless sectors. Therefore, general trends, forecast data, and tobacco industry positioning within the market contained here are the most recent we are able to obtain from tobacco analysts, Euromonitor International, and other sources.

In India, the tobacco industry is divided into three distinct and powerful sectors: bidis (smoking products hand-rolled in tendu leaves), smokeless tobacco (mainly chewing tobacco) and cigarettes. Bidis are the most popular tobacco products consumed in India- 48% of the market. Smokeless tobacco makes up 38% and cigarettes only 14% of the market.⁴ Some aspect of the tobacco industry, whether it be tobacco farming, manufacturing, or distribution, is present in every Indian state, making tobacco control a truly national effort. This report, like the tobacco industry in India, has sections on each of the tobacco sectors as well as examples of tobacco promotion, sponsorship and corporate social responsibility efforts designed to increase consumption and industry profits.

2. The Bidi Industry

Bidis are slim hand-rolled, unfiltered cigarettes that are rolled in brown tendu or temburni leaves and held together by a string. The product is often flavoured, and in general bidis are stronger tasting than regular cigarettes. Bidis are cheaper than cigarettes which makes them very popular in rural areas and among the poor.⁵⁻⁶ While bidis are the number one tobacco product used in India, very little is actually known about the organization of the bidi industry. Bidi production is fragmented and because most brands are hand-rolled in individual homes on a small scale, the bidi industry is considered to be a cottage industry.⁵

- In 1995 the Ministry of Statistics and Programme Implementation estimated there were over 6,600 bidi manufacturers in India, compared to 40 cigarette factories and 55 smokeless tobacco factories.⁴ While recent numbers are not available, it is still clear that bidi manufacturers greatly outnumber other types of product manufacturers.
- A woman sitting at home rolling 100 sticks a day qualifies as a bidi factory.⁷

The bidi manufacturing industry is divided into two different sectors: organized and unorganized. The organized sector is factory based and production is increasingly mechanized;

and the unorganized sector is made up of home-based production and small cooperatives.⁵ Most production and hand-rolling is done at home by women and children.⁵

- Tobacco industry analyst, Euromonitor International, estimates that 20% of bidis are produced in the organized sector and 80% in the unorganized sector.⁷
- Even organized factories tend to outsource production to individual homes.⁵

Because the bidi industry is fragmented there are no specific figures on how many bidis are sold or produced. It is estimated that 750 billion to 1.2 trillion sticks are produced annually.⁴

- According to Euromonitor International, the bidi industry in India is worth Rs200 billion (\$4.1 billion USD).⁸
- Bidis are much cheaper than cigarettes and smokeless tobacco products due mainly to unequal levels of taxation on the different products. Bidis cost between Rs2.50-5.00 for 25 sticks (less than one Rs per stick)⁹ whereas the leading brand of gukta costs Rs3-4 per unit.¹⁰ The leading brand of cigarettes costs Rs 80-88 for 20 sticks (Rs4-4.4 per stick).¹¹
- In 2009, Euromonitor reported that bidi volume sales were down 5% from the previous year because of a ban on smoking in public places.⁹

Despite being fragmented, the bidi industry still has a powerful voice in Indian politics which keeps taxes on bidi products low and regulations lax. The major lobbying organization for bidis is the All India Bidi Federation which represents the entire bidi industry.¹² Other organizations that lobby nationally and regionally for the bidi industry include:

- All India Beedi, Cigar & Tobacco Workers Federation (New Delhi)
- Karnataka State Beedi Workers' Federation
- S.K.Beedi Workers Federation
- Karnataka Beedi Industry Association
- Mumbai Beedi Workers Union (Maharashtra)
- All Bengali Beedi Workers' and Employees Federation (Calcutta)

According to Euromonitor International, no single bidi company or brand has more than a 5% market claim.⁸

- Large bidi producers have their own territory (state or district) where they dominate the market with little competition from other bidi companies.⁶
- There are a few regional players that sell their bidi brands in more than one state or district, including Ganesh Beedi Works, Kajah Beedi Co and Bharat Bidi Works.⁹
- There is no national bidi brand and at one time it was estimated that there were over 300 different brands across India.⁴ Some notable brands include:
 - 502 Pataka produced by Pataka Biri Manufacturing
 - 501 Ganesh produced by Magalore Ganesh Beedi Works
 - Top regional brands such as Dinesh in South India, Taj in North India, and Howrah in East and Northeast India.⁸
- While bidi production is concentrated in the west and south of India,⁹ it has also been estimated that each state has around 200 bidi manufactures.¹²

Leading Bidi Companies and Brands				
Company Name	Location	Production and Distribution	Popular Brand (s)	Website
Bharath Beedi Works	Mangalore	<ul style="list-style-type: none"> • Produces 60 million bidis a day¹³ • Popular in North and West India • Part of the Bharath Group 	Thirty Brand Beedies	http://www.30beedi.co.in/
Kerala Dinesh Beedi Workers Cooperative	Kerala	<ul style="list-style-type: none"> • Produces 30 million bidis a day⁶ • Produces 1.8 billion bidis annually¹⁴ • 18 different societies (companies) • Market covers Kerala, Tamil Nadu and Karnataka • Cooperative is sponsored by the Kerala government and includes bidi rolling, food processing, umbrella assembling, clothing and IT 	Kerala Dinesh Beedi	http://www.keraladinesh.com/
Mangalore Ganesh Beedi Works	Tamil Nadu Karnataka	<ul style="list-style-type: none"> • Produces 20 billion bidis annually^{6, 15} • Claims to produce 30% of the bidis in the organized sector¹⁵ • Network of 30 branches 	501	http://www.saiwaiboeki.com/ganeshbeedi/
Pataka Biri Manufacturing Co Ltd	Delhi	<ul style="list-style-type: none"> • Produces 100 million bidis a day • Has 10 factories (2004)⁶ 	502 Pataka Biri	
Rajah Group (Kajah Beedi Group)	Tamil Nadu Kerala Maharashtra	<ul style="list-style-type: none"> • Cooperative of four different companies 	Kajah Beedi Action Beedi	http://www.rg8.biz/beedi.html

3. The Smokeless Industry

Popular among rural and urban consumer, smokeless tobacco is also much more popular among woman than smoking.¹⁶ The smokeless industry in India is highly fragmented - some products are commercially manufactured but many are made in the home and sold locally.¹⁷ Smokeless tobacco products in India include khaini, gutka, mawa, gudhaku, and zarda.

Type of Smokeless Tobacco	Description
Khaini/ Kharra	Mixture of sun-dried tobacco and lime. ¹⁸
Gutka (Gutkha)	A dry mixture of crushed areca nut, tobacco, catechu (spices), lime, aromas and flavourings as well as other additives. ¹⁹
Pan Masala	General term for areca nut product. Does not usually contain tobacco and is often confused with Gutka. ¹⁹
Mawa	Uses shavings of areca nut, tobacco and lime. ¹⁸⁻¹⁹
Gudhaku	A paste made of tobacco and molasses. ¹⁸
Zarda	Raw tobacco that is scented using spices such as saffron. ²⁰

Another product, pan masala, is often confused with gutka because it is packaged the same but it does not contain tobacco.

In a recent Global Adult Tobacco Survey, it was reported that khaini is the most commonly used tobacco product in India, followed by gutka.²¹ However, according to Euromonitor International, Gutka is the most popular form of chewing tobacco sold in India and is estimated to account for approximately 80% of chewing tobacco total volume sales.¹⁰ This discrepancy is mainly a difference between actual prevalence of use and what Euromonitor International is able to measure in terms of volume. More people in India report using khaini, but gutka companies such as Dharwal Industries are larger and more organized and therefore more likely to report product sales.²² In general, smokeless tobacco products are very cheap and are sold in single use packets for Rs1-3 (less than one cent US).¹⁰ Unbranded smokeless products, including unbranded khaini, are common, keeping the products cheap and unregulated.¹⁰

In India, retail volume sales of smokeless tobacco products increased by 82% between 1999 and 2009.¹⁰ After a 2008 smoking ban and tax increase on unfiltered cigarettes, chewing tobacco sales increased by 6.5% as low-income smokers switched to cheaper smokeless products.²³

Historic India Smokeless Tobacco Market Size - Retail Volume ('000- Tonnes)

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
352	380.1	404.8	425.1	454.8	484.4	506.2	539.1	566	600	639

©2010 Euromonitor International

Leading Companies and Popular Brands

The smokeless tobacco industry in India is controlled by a few large national companies and many different regional players.²² The top five companies account for 31% of sales, the rest is controlled by regional players that often only operate in one district in a state. In general, Indian smokeless tobacco users prefer to buy locally.²³

Smokeless Tobacco Company Shares - Retail Volume (%)

Company Name	2001	2002	2003	2004	2005	2006	2007	2008	2009
Dhariwal Industries Ltd (Manikchand Group)	11.5	11.8	11.8	12	12	12.3	12.3	12.5	12.5
Dharampal Satyapal Ltd (DS Group)	7.8	8.2	8.8	9.3	9.5	8.8	7.8	7	7.2
Som Sugandh Industries Ltd	3.7	3.8	4.3	4.2	4	4.7	5	5.5	6
Shree Meenakshi Food Products Pvt Ltd	2.3	2.5	2.5	2.8	2.8	3	3	3.2	3.5
Kothari Products Ltd	4.5	4.5	4.2	4.3	4.3	4	3.5	2.8	2
Others	70.2	69.2	68.4	67.4	67.4	67.2	68.4	69	68.8

©2010 Euromonitor International

Market Share of Top India Smokeless Brands - Retail Volume (%)

Brand	Company name	2009
RMD Gutkha	Dhariwal Industries	12.5
Dilbagh	Som Sugandh Industries	6
Tulsi	Dharampal Satyapal	3.7
Baba	Dharampal Satyapal	3.5
Goa	Shree Meenakshi Food Products	3.5
Pan Parag	Kothari Products	2

©2010 Euromonitor International

Most smokeless tobacco companies in India just produce one brand. Different flavour varieties and packaging sizes are sold under the one brand name. The brand name is also often used to sell a non-tobacco pan masala product. Uniting a tobacco product and non-tobacco product under one name is a clever marketing technique, as India has an advertising ban in place that prevents the direct advertising of tobacco products. Tobacco products that are packaged identically to pan masala benefit from the association made between the two products.



Market leading brand RMD (Right: Pan Masala; Left: Gutkha)²⁴



Hot Pan Masala and Khaini with the same packaging²⁵

Dhariwal Industries- As one of the oldest smokeless tobacco companies in India, it is also currently the market leader.²² The company is part of the Manikchand Group which also has interests in packaging, bottled water, power and real estate among other things.²⁴

- Dhariwal Industries manufactures its products in Vadodara, Pune and Bangalore.
- Dhariwal Industries produces gutka under the brand name *RMD* which is the number one seller in India. The company also uses the *RMD* name for pan masala.²⁴

Dharampal Satyapal- The second largest smokeless tobacco company in India.²² Dharampal Satyapal is part of the DS Group which also has interests in food and beverages, packaging, hospitality and hospitality industries, among others.²⁶

- The DS Group manufactures tobacco products in Agartala, Tripura.
- Produces two smokeless tobacco brands- *Tulsi* (gutka) and *Baba* (zarda). Also produces pan masala under the *Baba* name.²⁶

Som Sugandh Industries- Also known as the Dilbagh group, the company is the third largest smokeless tobacco company in India.²²

- The Dilbagh Group is based in New Delhi.²⁷
- The company produces three smokeless tobacco products- the second most popular *Dilbagh* brand (gutka), *Talab* (gutka) and *Hot* (khaini). All three brands are also used to sell pan masala.
 - *Talab Gutkha* in particular is packaged “in attractive sachets” making it a “hot favourite among youth across all income groups.”²⁸

Kothari Products- Also known as Pan Parag India, and was established in 1973.²⁹

- Most visible product is the *Pan Parag* brand which is used to sell gutka but whose main product is pan masala.²⁹

4. The Cigarette Industry

Cigarette consumption makes up a small portion of the tobacco market in India, only 14% of tobacco products sold are cigarettes.⁴ Retail volume sales have decreased by 9% in the last ten years from 99.6 billion sticks in 1999 to 90.3 billion sticks in 2009.¹¹ Recent declines in cigarette volumes are mainly due to a 2008 increase in the tax on unfiltered cigarettes. The tax increase has also led to many unfiltered brands being removed from the market.³⁰⁻³¹ ITC Ltd stopped unfiltered cigarette production entirely and some companies have launched filter versions of their most popular unfiltered brands to maintain their customers.³²

Historic India Cigarette Market Size- Retail Volume (billion sticks)

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
99.6	98.7	89.3	91.9	94.5	96.5	100	101.1	99.8	91.2	90.3

©2010 Euromonitor International

Despite recent declines in sales, it is expected that cigarette use will increase overtime as disposable incomes increase in India.³³ Euromonitor International predicted in 2008 that if the smokers who currently smoke bidis switched to factory made cigarettes, then India’s cigarette consumption would increase to around 640 billion sticks. This increase would make India the second largest volume cigarette consumer in the world behind China.³⁴

Cigarette Company Shares - Retail Volume (%)

	2001	2002	2003	2004	2005	2006	2007	2008	2009
ITC Group	63.9	65.3	66	66.1	67.5	67.8	67.9	71.8	72.9
Godfrey Phillips India Ltd	9.8	10.7	10.9	11.9	11.1	11.5	11.9	12.9	13.8
VST Industries Ltd	12.2	10	9.4	8.9	8.7	8.4	8.5	8.5	8.7
Golden Tobacco Ltd*	-	-	-	-	-	-	-	3.6	1.5
GTC Industries Ltd	9.9	9.7	9.4	9.4	9.2	9	8.6	-	-
Japan Tobacco Inc	-	-	-	-	-	-	1.3	1.4	1.3
Gallaher Group Plc**	2	2	2	1.5	1.4	1.3	-	-	-
Others	2.3	2.4	2.2	2.2	2.2	1.9	1.8	1.9	1.7
Total	100	100	100	100	100	100	100	100	100

©2010 Euromonitor International

* Golden Tobacco changed its name from GTC Industries in 2008 after de-merging from their retail business.

** Acquired by JTI in 2007

The cigarette market in India is controlled by four locally established companies, but most companies also have close ties to international tobacco companies. The leading transnational tobacco companies (TTC) have recently attempted to increase their shares of the Indian cigarette market but have had little success. The ability of TTCs to increase their presence in India has in part been limited because of restrictions on foreign direct investment (FDI) in cigarette manufacturing.³⁵

ITC Group- *ITC was established in 1910 under the name Imperial Tobacco Company of India. The company changed its name to ITC in 2001 to reflect its diverse interest in products outside of tobacco.*³⁶

- ITC is the leading cigarette manufacturer in India with 73% of the market in 2009. Since 2001, ITC has steadily increased its market share in India and has increased cigarette production by 15% from 57.1 billion sticks in 2001 to 65.8 billion sticks in 2009.¹¹
- Reportedly, the Indian government has a stake in ITC.³⁷⁻³⁹ While ITC claims that the state does not have any direct shares, the company does report that a large number of ITC shares are held by financial institutions which are majority state owned such as the Life Assurance Corporation of India and Unit Trust of India.⁴⁰
- The TTC British American Tobacco (BAT) has also has a 32% share.⁴¹
- ITC generated RS 262.6 billion (\$US 28.9 million) in revenue in 2009 through its interest in cigarettes, hotels, cosmetics and toiletries, packaged food, apparel, paperboards and packaging, and agriculture.⁴⁰
 - ITC's cigarette industry contributed to 66% of the company's total revenue for the fiscal year ending March 2010.⁴⁰
- ITC has five cigarette factories in Bangalore, Kolkata, Munger, Ranjangaon, and Saharanpur.⁴⁰
- In addition to its operations in India, ITC also has cigarette subsidiary Surya Nepal, which is a joint venture with British American Tobacco.⁴²

Website: <http://www.itcportal.com/default.aspx>

Godfrey Phillips India- *Established in India in 1936 as an import company for Godfrey Phillips, UK. The company has since established itself as a major local manufacture of cigarettes in India.*⁴³

- Godfrey Phillips is the second largest cigarette company in India with 14% of the market. Since 2001, the company has seen continuous growth in market share and has increased its cigarette production by 43% from 8.7 billion sticks in 2001 to 12.5 billion sticks in 2009.¹¹
- Godfrey Phillips India has two major stake holders - the KK Modi Group, an industrial conglomerate based in Mumbai, and the international tobacco company Philip Morris International (PMI) which together hold a total of 71% of the company.⁴³ In May 2009, KK Modi acquired an additional 10.8% stake in Godfrey Phillips from PMI, bringing its total share to 47% and PMI's to 25%.⁴⁴
- Godfrey Phillips India has a leaf division that provided tobacco leaf for production in-country and for export. The company also sells tea.³¹
 - The cigarette segment accounted for 92% of Godfrey Phillips India revenue for the financial year ending March 2010.⁴⁵

- Godfrey Phillips is headquartered in New Delhi and has factories in Ghaziabad (near Delhi) and Andheri (near Mumbai). Currently, a new factory is being built in Rabale.³¹
 - The company has a strong presence in North and West India, and in an attempt to increase the company's reach in India, Godfrey Phillips is aggressively expanding distribution into the states of Tamil Nadu and Orissa.³¹

Website: <http://www.godfreyphillips.com/>

VST Industries- *Established in 1930. Before the company changed its name to VST Industries in 1984, it was known as the Vazir Sultan Tobacco Co.*⁴⁶

- VST Industries is the third largest cigarette company in India with 9% of the market. Between 2001 and 2009 the company lost market positioning and saw a 28% decrease in volume sales.¹¹
 - Since 2008, declines in growth have reversed. VST Industries reported a 4.5% increase in volume production for the fiscal year ending in March 2010, as well as record profits.⁴⁷
- VST Industries is an affiliate of BAT, which holds a 32% stake in the company.⁴⁸
- The company sells economy priced cigarettes, and has a strong presence in South India.⁴⁸
 - Besides cigarettes, VST Industries also sells unmanufactured and cut tobacco leaf.⁴⁷
- VST Industries has a manufacturing facility located in Andhar Pradesh.

Website: <http://www.vsthyd.com/>

Golden Tobacco- *Established in India in 1930 as the first wholly-owned Indian tobacco company in the country.*⁴⁹ *Formally known as GTC Industries, renamed Golden Tobacco after demerging from its retail business in 2008.*⁵⁰

- Golden Tobacco is the fourth largest cigarette company in India with 1% of the market. In 2001, the company controlled 10% of the cigarette market but saw a dramatic decline in market share and production in 2008 after the tax increase on unfiltered cigarettes.¹¹
- In 1979, the company was acquired by Dalmia Group which also has interests in telecommunications, chemicals, and textiles. The Dalmia group holds a 36% share of the company.⁴⁹
- The company has two major production facilities in Mumbai and Baroda.⁴⁹

Website: <http://www.goldentobacco.in/index.htm>

Transnational Tobacco Companies (TTC) Presence in India

The expansion of TTC in India has been limited by restrictions on FDI by cigarette companies in the country.³⁵ However, as described previously, three of the top international tobacco companies currently have stakes in local manufactures. Despite restrictions, TTC's continue to focus on India because of the potential growth of the cigarette market.⁵¹

British American Tobacco (BAT) - *BAT is a British company headquartered in London, England. BAT is ranked third in the global tobacco market.*⁵²

- BAT is a stakeholder in ITC and VST Industries and owns approximately 32% of each tobacco company.^{41, 47}
- BAT attempted to increase its stake in ITC from 32% to 51% but the company has been prevented from doing so by the Indian government and restrictions on FDI.³⁵

Philip Morris International (PMI) - *PMI is a U.S. company with headquarters in Lausanne, Switzerland. PMI is ranked second in the global tobacco market behind China National Tobacco Company.*⁵²

- PMI currently owns a 25% stake in Godfrey Phillips India after selling part of its shares to KK Modi in 2009.⁴⁴
- In 2009, after years of trying to get approval to independently manufacture *Marlboro* cigarettes in India, PMI allowed production of its most popular brand to start under the supervision of Godfrey Phillips.⁵³

Japan Tobacco International (JTI) - *The country of Japan is the majority shareholder in JTI and the company is headquartered in Geneva, Switzerland. JTI is ranked fourth in the global tobacco market.*⁵²

- JTI currently holds a 50% stake in JTI India, a joint venture with a Mumbai-based law firm, the Thakkar family.⁵⁴
- JTI has been working since 2008 to increase its stake in its Indian unit from 50% to 74% but was prevented from doing so by the Foreign Investment Promotion board.⁵⁵ In early 2010, JTI invested \$65 million USD in its India unit just days before the Indian government decision to ban FDI in cigarette manufacturing.⁵⁶
- JTI is affiliated with ITC through the manufacturing of *Berkley* cigarettes, which makes up 1.3% of the Indian cigarette market. Although JTI is the global brand owner of *Berkley*, the brand is manufactured in India by ITC.^{11, 57}

Leading Cigarette Brands Promoted in India

Cigarette companies aggressively advertise their brands in order to attract new smokers and to encourage current smokers to switch brands.⁵⁸⁻⁶⁰ From March 2009 to March 2010, cigarette leader ITC spent 5.1 billion Rs (\$114.7 million USD) on advertising and promotion.⁴⁰ According to Euromonitor International, cigarette companies are focusing on targeting young urban consumers and middle-upper income consumers.⁶¹ Companies are also shifting brands away from unfiltered variants to filtered variants.⁶¹ In 2009, local brand *Gold Flake* had the largest cigarette market share in India (31%), followed by *Wills* (18%) and *Scissors* (8%) - all of which are owned by ITC Group.¹¹

Market Share of Top Ten India Cigarette Brands - Retail Volume (%)

Brand	Company name	2009
Gold Flake	ITC Group	31.2
Wills	ITC Group	18.2
Scissors	ITC Group	8.4
Four Square	Godfrey Phillips India Ltd	7.9
Capstan	ITC Group	7.4
Bristol	ITC Group	6.9
Charminar	VST Industries Ltd	4
Red & White	Godfrey Phillips India Ltd	3
Charms	VST Industries Ltd	3
Cavenders	Godfrey Phillips India Ltd	2.5

Ownership of Major Local Brands

Company	Major Brands*
ITC Group	Gold Flake (1), Wills (2), Scissors (3), Capstan (5), Bristol (6), Classic, Silk Cut, Navy Cut, India Kings, Insignia, Flake
Godfrey Philips India	Four Square (4), Red & White (8), Cavenders (10), Tipper, Stellar, I-gen, Jaisalmer, North Pole
VST Industries	Charminar (7), Charms (9),
Golden Tobacco	Panama, Chancellor, Golden, Taj Chap, Style Mini Kings, Steel, June, Just Black, Lips, Diet Blue

*Numbers refer to the brand's market position by retail volume in 2009 (©2010 Euromonitor International)

While global cigarette brands are sold in India, the government severely restricts in country production of these brands. Besides *Marlboro*, other international brands sold in India include BAT's *Benson & Hedges* and JTI's *Winston* brands.⁵³

Slim cigarettes targeting women

Although the female smoking population is currently very small (about 3%),²¹ cigarette companies in India see the potential for growth by attracting women. Since 2007, slim cigarette brands have been launched to appeal to women smokers.³²

- The first slim cigarette to hit the Indian market was the *Stellar Slims* brand by Godfrey Phillips in 2007.⁶² The brand is marketed as having lower levels of nicotine with the satisfaction of a regular cigarette.⁶²
- In 2008, ITC Group launched *Wills Classic Verve* slim cigarettes targeted at women and first time smokers. ITC describes the brand packaged in a shiny red as “India’s trend setting cigarette...[that] defines ubercool urban style.”⁶³
- Golden Tobacco also has a slim cigarette called *June*.⁴⁹



Stellar Slims Cigarette ad “Low nicotine, King sized satisfaction”

Targeting health conscious consumers with misleading claims

As Indian customers become more aware of the health risks associated with tobacco use, cigarette companies have created new products and tactics to counteract consumer knowledge. One such tactic is to use misleading terms (ex “low-tar”) on cigarette packaging or in advertisements that encourage health-concerned smokers to switch to cigarettes brands that they perceive as safer. This also offers consumers that are concerned about health risks from tobacco an alternative to quitting.⁶⁴ As of 2006, India prohibits tobacco product packaging and labeling from containing information that is “false, misleading or deceptive,” or that is likely to create misperceptions about the characteristics or health effects of tobacco products. This includes prohibiting the use of terms such as “light”, “mild” and “low-tar”.⁶⁵ Despite these restrictions, cigarette brands are still misleadingly marketed as being healthier.

- *Loe Tobac* cigarettes launched by Golden Tobacco in 2006 claim to contain 50% less tobacco than regular cigarettes.⁶⁶⁻⁶⁷ Golden Tobacco also claimed that ‘LoeTobac has been found to have “safer delivery levels” of tar, carbon monoxide and tobacco-specific nitrosamines than other brands.’⁶⁸



- Golden Tobacco markets *Diet Blue* cigarettes which use “ECOTINE technology and is low in TSNA [so that it] does less damage to smokers.” On the company website, *Diet Blues* are also described as having almost zero carcinogens making them “the safer option for existing habitual smokers.”⁶⁹
- According to Euromonitor International, ITC plans to peruse creating “less harmful cigarettes” and is expected to promote mid and low tar cigarettes towards consumers in the future.³⁶

Brands that appeal to young tech-savvy smokers.

India has a very large technology industry and a growing information technology culture. Cigarette companies are capitalizing on the technology trend by introducing premium brands that appeal to younger consumers.

- Godfrey Phillips launched *I-gen* in 2006. *I-gen* cigarettes have a black filter and the black, red and silver packaging is “aimed at making the product look trendy and contemporary.”⁷⁰ The brand is described on the company’s website as a cigarette that “holds the promise cigarette quality and immense style.”⁶²
- In 2005, Golden Tobacco launched *Chancellor XP*. XP refers to the Windows operating system and the brand is designed to appeal to India’s information technology workers.⁹



5. Tobacco Industry Promotion and Sponsorship

The tobacco industry engages in a comprehensive marketing strategy to create the impression that tobacco use is widespread and acceptable. These strategies include direct advertising (ads on TV or in magazines and at point of sale) and indirect advertising such as sponsorship of sports and concerts, product placement, and brand stretching. In India, despite an advertising ban having passed in 2003, cigarette companies in particular consistently exploit loopholes in the law and relaxed enforcement to market their products and attract new users. Examples include:

- In 2010, Godfrey Phillips India broke into the Indian chewing industry with the launch of *Pan Vilas*, a premium pan masala brand, and planned to invest Rs 1 billion (\$US 22 million) over three years on marketing the product. Nita Kapoor, vice president of marketing and corporate affairs said in reference to promoting *Pan Vilas* that the company would “push this product aggressively to penetrate deeper in the market.”⁷¹ Considering recent declines in cigarettes sales, the successful marketing of a pan masala brand will allow Godfrey Phillips easier access to the smokeless tobacco market. The company plans to launch a zarda product by the end of 2011.⁷¹
- The ITC group uses two of its popular cigarette brands, *Wills* and *John Player*, as the brand name of lifestyle retailing stores that sell clothing.⁷² The *Wills Lifestyle* brand is a well-established brand and also sponsors India’s annual Fashion Week⁷³, stretching the cigarette brand name so that it is associated with the glamour of fashion and not just the deadly tobacco product.
- In 2009, 700 buses in Mumbai carried pan masala advertisements. While advertising non-tobacco pan masala products is not illegal in India, their presence on buses is considered surrogate advertisement for tobacco products because the same brand name and packaging exists for both pan masala and chewing tobacco products.⁷⁴

- The advertising ban in India is not strictly enforced and tobacco companies take advantage by promoting their products in ways that are illegal. In 2009, *Four Square*, a popular Godfrey Phillips India brand, sponsored a concert series and talent contest in the city of Chennai. The event titled “Four Square- GET FAMOUS- be Tamil Nadu’s Next Singing Sensation” was heavily promoted through limited edition cigarette packs, large billboards, point of sales displays and contest entry locations across the city.⁷⁵

6. Corporate Social Responsibility (CSR)

Tobacco companies maintain CSR programs in an effort to counter negative attention regarding their deadly business. This practice is particularly prevalent in India. By donating funds to noble causes, the perception of cigarette companies by the public and policy makers improves. The true goals of industry-sponsored programs have been revealed through internal tobacco industry memos released to the public by U.S. legal settlements. CSR programs:⁷⁶

- Serve the industry’s political interests by preventing effective tobacco control legislation.
- Marginalize public health advocates.
- Preserve the industry’s access to youth.
- Create allies and preserve influence among policymaking and regulatory bodies.
- Defuse opposition from parents and educators.
- Bolster industry credibility.

In India, cigarette companies integrate themselves into local communities that they operate in through CSR activities. They also work nationally to create goodwill with the public and policy makers in an attempt to protect their profits.

- Since 1990 Godfrey Phillips India has sponsored the Bravery Awards (first under the brand name *Red and White* and now under the company name). The Bravery Awards annually honors citizens that perform physical and social acts of bravery. Indian film actress Preity Zinta acted as an ambassador of the awards from 2006-08. The awards have also launched blood drives and the Amodini-Women's Empowerment initiative.⁷⁷
- In 2000, the ITC launched e-Choupal, an IT training program for Indian farmers. The program claims to reach over 4 million farming families, connecting them to a digital infrastructure that enables them to link to a more formal market. ITC also supports primary education, women empowerment and environmental initiatives.⁷⁸

Smokeless tobacco companies are also known to use CSR tactics in the communities that they operate in.

- The DS Group, which includes Dharampal Satyapal, contributes to a wide range of social issues in Assam and Tripura. Activities include the renovation of Pallimangal H.S. School and contributions to economic development projects of ethnic and tribal groups in North Eastern States.⁷⁹

The tobacco industry in India is complex and powerful. Knowing where and how the industry operates is essential to creating and advocating for strong tobacco control policies. Unless strong tobacco control regulations are put in place and enforced in India, the tobacco industry will continue to expand and profit from addicting consumers to its deadly products.

Appendix A- Company Executives and Contact Information of Major Tobacco Manufacturers in India

Bidi Companies

Bharath Beedi Works

Kadri Road, P.O Box #730,
Mangalore, India
Phone: +91-824-2412830
Fax: +91-824-4252530
Email: info@30beedi.co.in
<http://www.30beedi.co.in/>

B. Ganapathi Pai, Chairman and Managing Director

Mr. Nagendra D. Pai, Executive Director

Mr. Ananth G. Pai, Executive Director

Mr. Subraya M. Pai, Executive Director

Kerala Dinesh Beedi Workers Cooperative

Phone: +91-497-2760414
<http://www.keraladinesh.com/>

Mangalore Ganesh Beedi Works

Saiwai Boeki Shokai Private Limited
89 Short Street
#10-04 Golden Wall Centre
Singapore
188216
Phone: 65-63386177
Fax: 65-63383915
Email: info@saiwaiboeki.com
<http://www.saiwaiboeki.com/ganeshbeedi/>

Pataka Bidi Manufacturing Co Ltd

Manufacturing Plant/Unit/Factory 35 Gagan
Vihar, Delhi, Delhi - 110051
Phone: 011-22523502

Rajah Group (Kajah Beedi Group)

48 South Mount Road
Thirunelveli Town 627006,
Tamilnadu, South India
Phone 0462 – 2336917
Fax 0462 2333488

E-Mail kajahtvl@sancharnet.in
anwara@sancharnet.in
<http://www.rg8.biz/beedi.html>

K. Abdul Gafoor Phone: 0 9443354808

Smokeless Tobacco Companies

Dhariwal Industries Ltd (Manikchand Group)

Manikchand House, 100/101,
D. Kennedy Road
Phone: +91-20-26056099
Fax: +91-20-26051377

Dharampal Satyapal Ltd (DS Group)

A-85, Sector 2,
Noida 201301
Phone: 0120 4032200
Fax: 0120 2522592
Email: ds@dsgroupindia.com

Shree Meenakshi Food Products Pvt Ltd

179\1\5, Kuvapada Ind. Estate, Silli Silvassa
396230, Dadra And Nagar Haveli, India
Phone: 91-260-6531095/98
Kothari Products Ltd

Cigarette Companies in India

ITC Group

Corporate Office

Sardar Patel Marg P.O. Box No 25

Saharanpur: Uttar Pradesh, India

Phone: (132) 2725111 2725115

<http://www.itcportal.com/itc-business/fmcg/cigarettes.aspx>

Yogesh Chander Deveshwar, Chairman of ITC Limited

Godfrey Phillips India Ltd

49, Community Centre,

Friends Colony,

New Delhi - 110025

Tel: + 91 11 268 32155 / 268 36468

Fax: + 91 11 268 40775 / 268 35803

Email: email-gpi@modi.com

<http://www.godfreyphillips.com/>

K. K. Modi, Chairman, K. K. Modi Group of Companies

S. Seru, CEO, Domestic

Nita Kapoor, EVP, Marketing & Corporate Affairs

Pradip Mitra, EVP, Operations

R. N. Agarwal, CFO

VST Industries Ltd

P. O. Box No. 1804

Azamabad, Hyderabad 500020 Andhra Pradesh, India

Phone: 91-40-27610460

Fax: 91-40-27615336

<http://www.vsthyd.com/>

Madhava Reddy, CEO

Golden Tobacco Ltd

S.V. Road, Vile Parle (West),

Mumbai-400056.

Tel: 022-26713951

Fax : 022-26715481

<http://www.goldentobacco.in/>

Mr. Viney Mehra, Director, Technical & International Business

Mr. Sudhee Ranjan, Sr. Vice President, Sales & Marketing

Japan Tobacco Inc

3rd Floor, Raheja Paramount

138, Residency Road

Bangalore 560025

Karnataka, India

Tel: +91 80 4181 8899

Fax: +91 80 4181 8855

<http://www.jti.com>

1. World Health Organization (WHO). WHO Framework Convention on Tobacco Control: Article 5.2b. Geneva: WHO; 2003. Available from: http://www.who.int/fctc/text_download/en/index.html.
2. World Health Organization (WHO). WHO Framework Convention on Tobacco Control: Article 4.7. Geneva: WHO; 2003. Available from: http://www.who.int/fctc/text_download/en/index.html.
3. World Health Organization (WHO). WHO Framework Convention on Tobacco Control: Article 5.3. Geneva: WHO; 2003. Available from: http://www.who.int/fctc/text_download/en/index.html.
4. Sunley EM. India: The tax treatment of bidis. New Delhi: Regional Office of the International Union Against Tuberculosis and Lung Disease; 2008. Available from: http://www.tobaccofreecenter.org/files/pdfs/reports_articles/Sunley-BidiTax%20FINAL-5Feb08.pdf.
5. Gupta PC, Asma S. Bidi smoking and public health. New Delhi: Ministry of Health and Family Welfare, Government of India; 2008.
6. Euromonitor International. Bidis continue to dominated Indian tobacco market. London: Euromonitor International; 2004.
7. Euromonitor International. Bidis highlights (personal communication). 2008.
8. Euromonitor International. Country Profile- Tobacco in India. London: Euromonitor International; 2009.
9. Euromonitor International. Country Profile- Tobacco in India. London: Euromonitor International; 2010.
10. Euromonitor International [database on the Internet]. Smokeless tobacco: India. Euromonitor International. c 2010 [cited 2010 October 20].
11. Euromonitor International [database on the Internet]. Cigarettes: India. Euromonitor International. c 2010 [cited 2010 October 20].
12. Brinson B. Behind Bidis. Tobacco Reporter. 2005.
13. Bharath Beedi Works PVT LTD. Home Page. 2010 [cited 2010 October 20]; Available from: <http://www.30beedi.co.in/>.
14. Kerala Dinesh Beedi Workers Central Co-op Society. Home page. 2010 [cited 2010 October 22]; Available from: <http://www.keraladinesh.com/>.
15. Mangalore Ganesh Beedi Works. About Mangalore Ganesh Beedies. 2007 [cited 2010 October 22]; Available from: <http://www.saiwaiboeki.com/ganeshbeedi/>.
16. International Institute for Population Sciences (IIPS) and Macro International. National Family Health Survey (NFHS-3), 2005-06- Key findings report. Mumbai: IIPS and Macro International; 2007.
17. Euromonitor International. Smokeless tobacco- Is it the future of the industry? London: Euromonitor International; 2010.
18. Reddy S, Gupta PC. Report on tobacco control in India. Ministry of Health and Family Welfare, Government of India; 2004.
19. Healis Sekhsaria Institute for Public Health. Gutka and its deadly cousin, pan masala: Dangerous, unregulated. Mumbai: Healis.
20. Advocacy Forum for Tobacco Control. Smoking tobacco products. 2010 [cited 2010 October 22]; Available from: http://www.aftcindia.org/tob_pro_india.htm.
21. International Institute for Population Sciences (IIPS), Ministry of Health and Family Welfare. Global Adult Tobacco Survey - India report. Mumbai: Ministry of Health and Family Welfare; 2010. Available from: http://mohfw.nic.in/global_adult_tobacco_survey.htm.
22. Euromonitor International. Country Profile- Smokeless tobacco in India. London: Euromonitor International; 2010.
23. Euromonitor International. Country Profile- Smokeless tobacco in India. London: Euromonitor International; 2009.
24. Manikchand Group. RMD. 2008 [cited 2010 October 20]; Available from: <http://www.manikchandgroup.com/rmd/index.html>.
25. Dibagh Group. Hot products. 2010 [cited 2010 October 22]; Available from: <http://dilbaghgroup.com/hot.htm>.
26. DS Group. Tobacco. 2007 [cited 2010 October 22]; Available from: <http://www.dsgruopindia.com/tobacco.html>.
27. Dibagh Group. Our range of products. 2010 [cited 2010 October 22]; Available from: <http://dilbaghgroup.com/products.htm>.
28. Dibagh Group. Talab products. 2010 [cited 2010 October 22]; Available from: <http://dilbaghgroup.com/talab.htm>.

29. Pan Parag India Ltd. Our founders. 2010 [cited 2010 October 22]; Available from: <http://www.panparag.com/productsgallery.html>.
30. Money Control. Increase in tax to impact cigarette volume: ITC. 2009 [cited 2010 October 20]; Available from: <http://www.itcportal.com/about-itc/newsroom/press-reports/PressReport.aspx?id=284&type=C&news=increase-impact-cigarette-volume>.
31. Godfrey Phillips India. Annual report 2008-2009. Godfrey Phillips India; 2009.
32. Euromonitor International. Country Profile- Cigarettes in India. London: Euromonitor International; 2010.
33. Euromonitor International. Tobacco in Asia Pacific: Driver of the global market- Will it remain the tobacco market powerhouse? London: Euromonitor International; 2010.
34. Euromonitor International. India watch: High taxes in India cause smokers to return to bidis. London: Euromonitor International; 2008.
35. The Times of India. Govt bans fresh FDI in cigarette manufacturing. 2010 [cited 2010 October 22]; Available from: <http://timesofindia.indiatimes.com/biz/india-business/Govt-bans-fresh-FDI-in-cigarette-manufacturing/articleshow/5775978.cms>.
36. Euromonitor International [database on the Internet]. Company Report: ITC Euromonitor International. c 2010 [cited 2010 February 27].
37. Euromonitor International. ITC reports profits up and expresses opposition to FDI. Euromonitor International; 2010.
38. Dhanorkar S. ITC lights up a tobacco war. SuchetaDalal.com; 2010 January [cited 2011 January 12]; Available from: <http://www.suchetadalal.com/?id=3092cc00-28c3-8bcd-4b472d692446&base=sections&f>.
39. ITC seeking to block foreign investments. Tobacco Journal International; 2010 [cited 2011 January 12]; Available from: http://www.tobaccojournal.com/ITC_seeking_to_block_foreign_investments.49832.0.html.
40. ITC Group. Reports and accounts 2009-2010. 2010.
41. Chatterjee S. ITC profit rises at fastest pace in three years on higher cigarette sales. Bloomberg; 2010 [cited 2010 October 20]; Available from: <http://www.bloomberg.com/news/2010-05-21/itc-profit-rises-at-fastest-pace-in-three-years-on-higher-cigarette-sales.html>.
42. ITC Group. Surya Nepal Private Limited. 2010 [cited 2010 October 22]; Available from: <http://www.itcportal.com/itc-business/group-companies/surya-nepal.aspx>.
43. Euromonitor International [database on the Internet]. Company Report: Godfrey Phillips India. Euromonitor International. c 2010 [cited 2010 February 27].
44. Reuters. KK Modi Group buys Philip Morris's 10.85% stake in GPI. 2009 [cited 2010 October 22]; Available from: <http://in.reuters.com/article/idINIndia-39894520090526>.
45. Godfrey Phillips India. Audited financial results for the year ended in March 31, 2010. GPI; 2010. Available from: <http://www.godfreyphillips.com/pdfs/Financial-Report-31-03-2010.pdf>.
46. The Economic Times. VST Industries Ltd. 2010 [cited 2010 October 22]; Available from: <http://economictimes.indiatimes.com/infocompanyhistory.cms?companyid=12825>.
47. VST Industries Limited. Annual report 2009-10. 2010. Available from: <http://www.vsthyd.com/>
48. Euromonitor International [database on the Internet]. Company Report: VST Industries. Euromonitor International. c 2010 [cited 2010 February 27].
49. Golden Tobacco Limited. Profile. 2008 [cited 2010 October 22]; Available from: <http://www.goldentobacco.in/Profile.htm>.
50. Euromonitor International [database on the Internet]. Company Report: Golden Tobacco. Euromonitor International. c 2010 [cited 2010 February 27].
51. Joshi H. Cigarette makers' India pipe dream. The Wall Street Journal; 2010 [cited 2010 October 22]; Available from: <http://online.wsj.com/article/SB10001424052702303695604575181220190154074.html>.
52. Euromonitor International. Global tobacco: Where next for the major players. London: Euromonitor International; 2009.
53. Zachariah R, Sinha P. Marlboro man rides into Indian terrain. The Times of India; 2009 [cited 2010 October 20]; Available from: <http://timesofindia.indiatimes.com/business/india-business/Marlboro-man-rides-into-Indian-terrain/articleshow/4988168.cms>.
54. Gupta SD. Japan Tobacco investment in India JV under scanner. Business Standard; 2010 [cited 2010 October 20]; Available from: <http://www.business-standard.com/india/news/japan-tobacco-investment-in-india-jv-under-scanner/401798/>.
55. Businessweek B. Japan Tobacco seeks to expand production in India. Bloomberg; 2010 [cited 2010 October 20]; Available from: <http://www.businessweek.com/news/2010-03-16/japan-tobacco-seeks-india-expansion-as-domestic-demand-wanes.html>.

56. Gupta SD. Japan Tobacco raises investment in India unit. Business Standard; 2010 [cited 2010 October 22]; Available from: <http://www.business-standard.com/india/news/japan-tobacco-raises-investment-in-indian-unit/393420/>.
57. ITC Group. Cigarettes. 2010 [cited 2010 October 22]; Available from: <http://www.itcportal.com/itc-business/fmcg/cigarettes.aspx>.
58. World Health Organization (WHO). WHO Report on the global tobacco epidemic, 2008: The MPOWER package. Geneva: 2008. Available from: http://www.who.int/entity/tobacco/mpower/mpower_report_full_2008.pdf.
59. Andrews RL, Franke GR. The determinants of cigarette consumption: A meta-analysis. Journal of Public Policy and Marketing. 1991;10:81-100.
60. Warner KE. Selling smoke: Cigarette advertising and public health. Washington, D.C.: American Public Health Association; 1986.
61. Euromonitor International. Country Profile- Cigarettes in India. London: Euromonitor International; 2009.
62. Godfrey Phillips India. Brands. 2007 [cited 2010 October 22]; Available from: <http://www.godfreyphillips.com/brands.html>.
63. ITC Group. Product launches 2008-09. 2009 [cited 2010 October 22]; Available from: <http://www.itcportal.com/shareholder/annual-reports/itc-annual-report-2009/page-32.aspx>.
64. U.S. Department of Health and Human Services (HHS). Risks associated with smoking cigarettes with low machine-measured yields of tar and nicotine. Smoking and tobacco control monograph no. 13. Bethesda, MD: National Cancer Institute; 2001. Available from: http://dccps.nci.nih.gov/tcrb/monographs/13/m13_5.pdf.
65. Ministry of Health and Family Welfare. Cigarette and other tobacco products (packaging and labeling) rules. Ministry of Health and Family Welfare Notification GSR 402(E), (2006).
66. Euromonitor International [database on the Internet]. Company Report: Golden Tobacco. Euromonitor International. c 2009 [cited 2010 February 27].
67. Business Line. GTC bets big on low tobacco cigarette. 2006 [cited 2010 October 20]; Available from: <http://www.thehindubusinessline.com/2006/09/28/stories/2006092802410500.htm>.
68. Simpson D. India: "low risk" launch. Tobacco Control. 2006;15:349-50.
69. Golden Tobacco Limited. Diet Blue. 2008 [cited 2010 October 22]; Available from: <http://www.goldentobacco.in/DietBlue.htm>.
70. Hemrajani R. Godfrey test-markets premium cigarette. 2006 [cited 2010 October 20]; Available from: <http://www.rediff.com/money/2006/nov/02cigar.htm>.
71. The Economic Times. Godfrey Phillips forays into Pan Masala category. 2010 [cited 2010 October 22]; Available from: <http://economictimes.indiatimes.com/news/news-by-industry/cons-products/tobacco/Godfrey-Phillips-forays-into-Pan-Masala-category/articleshow/5416878.cms>.
72. ITC Group. Lifestyle retailing. 2010 [cited 2010 October 22]; Available from: <http://www.itcportal.com/itc-business/fmcg/lifestyle-retailing.aspx>.
73. ITC Group. Wills Lifestyle. 2010 [cited 2010 October 22]; Available from: <http://www.itcportal.com/itc-business/fmcg/lifestyle-retailing/wills-lifestyle.aspx>.
74. Iyer M. 700 BEST buses display pan masala ads: RTI. The Times of India; 2010 [cited 2010 October 22]; Available from: <http://timesofindia.indiatimes.com/articleshow/6521394.cms?frm=mailtofriend>.
75. Kannan R. Music talent show stopped. The Hindu; 2010 [cited 2010 October 22]; Available from: <http://hindu.com/2010/01/26/stories/2010012660060400.htm>.
76. Landman A, Ling PM, Glantz SA. Tobacco industry youth smoking prevention programs: Protecting the industry and hurting tobacco control. American Journal of Public Health. 2002 June;92(6):917-30.
77. Godfrey Phillips India. Godfrey Phillips Bravery Awards. 2010 [cited 2010 October 22]; Available from: <http://www.godfreyphillipsbravery.com/Home.html>.
78. ITC Group. ITC CSR booklet. 2009. Available from: <http://www.itcportal.com/images/ITC-CSR-Booklet-PDF.pdf>
79. DS Group. Corporate social responsibility. 2007 [cited 2010 October 22]; Available from: http://www.dsgroupindia.com/corp_responsibility.html.