

# **Tobacco Industry Profile – Latin America**

## **(September 2009)**

### **Intended Uses of Report**

This document is intended as background information for developing presentations, educational and training materials, and for use in media messaging. We suggest that you copy directly from this document to materials that you are developing (be sure to maintain citations). You are encouraged to add any additional relevant information so you have ready facts for these purposes.

We recognize that not all countries in the Latin American region have ratified the World Health Organization’s Framework Convention on Tobacco Control (FCTC). However, the FCTC and its Guidelines provides sound framework for achieving reductions in tobacco use. One of its guiding principles is that participation of civil society is essential in achieving the policy objectives contained within the Convention.<sup>1</sup> The FCTC also recognizes that “there is a fundamental and irreconcilable conflict between the tobacco industry’s interests and public health policy interests.”<sup>2</sup> Civil society plays an essential role in raising awareness about the tobacco industry – its goals, its size and operation, its strategies to promote its products, and to thwart the adoption and implementation of strong policies by gaining influence and credibility with policy makers and the public at large. Accordingly, advocates should educate policy makers about the tobacco industry and its deadly products in their campaigns to achieve priority policy initiatives contained within the FCTC.

Evidence from Section 4 (Misleading Products, Packaging and Labeling) of this report can be used to promote effective packaging and labeling requirements in compliance with FCTC Article 11 and its Guidelines. Section 5 (Tobacco Industry Promotions and Sponsorships) can be used to support comprehensive bans on all tobacco advertising, promotion, and sponsorships, including “socially responsible” promotion and sponsorship by the tobacco industry as specified in Articles 5.3 and 13 of the FCTC and their Guidelines. We suggest that you add examples to these Sections of the report as you find them to ensure a ready resource to use as the need for this type of information arises in your policy campaigns.

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### **1. Introduction**

The tobacco industry is one of the most profitable industries in the world. To market their deadly products, tobacco companies use their enormous wealth and influence locally and globally. 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 tobacco companies are present, how and where they operate, the types and quantity of product sold and the marketing tactics used to sell their products. By being informed about all aspects of the tobacco industry within a country, advocates are better equipped to fight the tobacco industry and its allies on multiple levels.

It is important to note that the tobacco companies typically report market data annually and release information at least several months after the end of the fiscal year. By its nature, market data reported by analysts and tobacco companies are one or two years old. Thus, general trends, forecast data, and tobacco industry positioning within the market contained here is the most recent information we were able to obtain, at the time of the writing of this report, from tobacco analysts.

## **2. Overview of the Tobacco Industry in Latin America**

### **Importance of Latin America to Transnational Tobacco Companies (TTCs)**

Although the Latin American region does not generate as much revenue as emerging markets in Asia, there are many reasons why TTCs focus on building their market shares in the region.

- Tobacco Leaf production.
  - In one trade press article, Latin America is described as the tobacco industry's "primary supplier of their products' most important ingredient."<sup>3</sup>
  - Brazil is the second largest producer of tobacco leaf in the world.<sup>4</sup>
  - Argentina, Colombia, and Venezuela are also important suppliers.<sup>4</sup>
- Opportunities to increase the sale of more expensive, premium brand cigarettes.
  - Over a five year period (2003-08) the volume sales (number of sticks) of cigarettes in Latin America declined by 2% but their value (retail selling price) increased by 74%. This trend of increased pricing is expected to continue according to market analysts Euromonitor International.<sup>5</sup>
  - In general, TTCs can price their premium brand cigarettes at a higher price in Latin American markets than in other emerging markets because of favorable demographics and rising disposable incomes in the region. These two factors offset rising health awareness and regulatory restrictions on the tobacco market.<sup>3</sup>
- Brand Loyalty.
  - As tobacco control regulations increase, tobacco companies with established brands have an advantage of not needing to launch large marketing campaigns in order to break into markets.<sup>3</sup>
  - In countries where a TTC does not already dominate the market, the TTCs can profit by purchasing local brands and companies that already have loyal costumers.
- Friendlier operating environment.
  - Latin American governments are perceived by the tobacco industry as being more willing to work with industry representatives and are more vocal in their support of the industry in general than governments in Northern America and Western Europe.<sup>3</sup>

### 3. Regional Information

British American Tobacco (BAT), based in the UK, has had a strong hold over the Latin American region for many years (around 55% of the market since 2003). However, Philip Morris International (PMI), an American company, knows that they can benefit from selling cigarettes in Latin America.<sup>6</sup> PMI has increased its stake in the region by buying local manufacturers and brands, increasing its market share from 25.7% in 2001 to 34.2% in 2008.<sup>5</sup>

#### Market Leaders in Latin America by Country



Adapted from the 2009 Tobacco Atlas and updated with 2008 Euromonitor Data<sup>5</sup>

**Company shares by cigarette sales volume in Latin America (selected countries)\***

<b>Latin America</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
British American Tobacco Plc	59.6	58	55.8	55.1	54.8	54.7	55.4	55.7
Philip Morris International Inc	25.7	26.4	27.7	28.2	30.7	33.5	33.9	34.2
Productora Tabacalera de Colombia SA (2009)	1.7	1.7	2	2.4	2.5	2.3	2.5	2.4
Cigarros La Tabacalera Mexicana SA de CV (CIGATAM) (2007)	1.3	1.2	1.1	1	0.7	0.7	-	-
León Jimenes Grupo (2006)	0.4	0.4	0.4	0.4	0.4	-	-	-
Cía Colombiana de Tabaco SA (2005)	3.6	3.5	3.5	3.5	-	-	-	-
Japan Tobacco Inc	2.7	2.6	2.8	3.1	3.5	2.8	2.6	2.7
Cía Industrial de Tabacos Monte Paz SA (Uruguay)	1	0.9	0.8	0.8	0.8	0.7	0.7	0.6
Société Industrielle des Tabacs du Cameroun (SITABAC) SA (Brazil)	0.2	0.4	0.6	0.7	0.6	0.5	0.5	0.5
Cía Industrial de Tabacos SA (Bolivia)	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Espert SA (Argentina)	-	-	-	0.3	0.6	0.3	0.2	0.2
Others	3.5	4.7	4.9	4.3	5.3	4.2	4	3.4
<b>Total**</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

\* Source: 2009 © Euromonitor International. Countries included by Euromonitor International are Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Guatemala, Mexico, Peru, Uruguay, and Venezuela

\*\* Due to rounding, figures may not add up to 100 percent.

## **BAT's recent corporate restructuring in Latin America**

<b>Targeted Market</b>	<b>Year</b>	<b>Company</b>	<b>Notes</b>
Costa Rica	2007	BAT opens regional office in Costa Rica	The regional headquarters serves as BAT's operation center for 31 countries in Central America and the Caribbean. <sup>7</sup>
Central America	2001	BAT merges six Central American companies under British American Tobacco Central America SA	Companies included: Cigarrera Morazán (El Salvador), Tabacalera Houndureña (Honduras), Tabacalera Nicaragüenese (Nicaragua), Republic Tobacco Company (Costa Rica) and Tabacalera Istmeña (Panama).  British American Tobacco's Regional Director for Central America, Benjamin Kemball, said: "We welcome the shareholders' decision to support the creation of the new company - an essential step in maintaining British American Tobacco leadership in the area. This is the largest integration of economic interests in Central America to date, and will create the area's third most profitable company." <sup>8</sup>

### **Other BAT subsidiaries in Latin America**

<i>Country</i>	<i>Company Name</i>
Argentina:	Nobleza Piccardo SAIC y F
Brazil:	Souza Cruz SA
Chile:	Cia Chilena de Tobacos SA (Chiletabaco)
Colombia:	BAT Colombia
Dominican Republic:	La Tabacalera CxA
Ecuador:	BAT South America
Guatemala:	BAT Caribbean and Central America
Guyana:	Demerara Tobacco Company Ltd
Jamaica:	Carreras Group Ltd
Mexico:	BAT Mexico SA de CV
Peru:	BAT del Peru SAC
Peru:	Tabacalera Nacional SAA (TANASA)
St Lucia:	CARISMA Marketing Services Ltd.
Trinidad and Tobago:	The West Indian Tobacco Company Ltd
Uruguay:	BAT Uruguay
Venezuela:	Cigarrera Bigott Sucesores SA

Note: list of subsidiaries compiled from Euromonitor International and from corporate website

## PMI's recent corporate restructuring in Latin America

Targeted Market	Year	Company	Notes
Colombia	2009	PMI acquires Protobaco	With the acquisition of the second largest tobacco company in Colombia, PMI now controls over 80% of the market.  Miroslaw Zielinski, president of Philip Morris' Latin America and Canada division, said the deal will allow the company to continue developing Protobaco's brands and provide room to grow in what he called an "important and strategic market." <sup>9</sup>
Colombia	2005	PMI's affiliate GWP C.V. acquires a 96.65% of Coltabaco	Coltabaco is the market leader by volume in Colombia.  "Our investment in Coltabaco is a great opportunity to significantly expand our business in Colombia and in Latin America," said André Calantzopoulos, current Chief Operating Officer of PMI, in 2005. "Our investment reflects the confidence we have in the future of Colombia, its economy and its tobacco industry. It positions us for profitable future growth by partnering with a well managed and successful company that has outstanding people, and an excellent manufacturing and distribution infrastructure." <sup>10</sup>
Dominican Republic	2006	PMI gains 100% stake in Industria de Tabaco León Jimenes	PMI traded its stake in León Jimenes Group's alcohol holdings for full control of the groups tobacco operations. <sup>11</sup>
Mexico	2007	PMI gains majority share in CIGATAM	In 2007 PMI bought an additional 30% stake in the company from Grupo Carso bringing its total stake to 80%. <sup>12</sup> Carlos Slim Helú, owner of Grupo Carso, continues to be involved in PMI and serves on the board of directors.

## Other PMI subsidiaries in Latin America

Country	Company Name
Argentina:	Massalin Particulares SA
Bolivia:	Bis Overseas Bolivia SRL
Brazil:	Philip Morris Brasil
Chile:	Philip Morris Chile Comercializadora Ltda
Costa Rica:	Tabacalera Costarricense SA
Ecuador:	Tabacalera Andina SA
El Salvador:	Tabacalera de El Salvador SA
Guatemala:	Tabacalera Centroamericana SA
Honduras:	Tabacalera Centroamericana SA
Nicaragua:	Philip Morris Nicaragua SA
Panama:	Philip Morris Panama
Paraguay:	Philip Morris Paraguay SA
Peru:	Philip Morris Peru SA
Uruguay:	Abal Hermanos SA
Venezuela:	CA Tabacalera Nacional

Note: list of subsidiaries compiled from Euromonitor International and information from corporate website

**Tobacco company 2008 market share in select countries in Latin America (% of sales volume)\***

Country	BAT	PMI	JTI	Others
Argentina	26.0	69.2	-	4.8
Bolivia	-	73.6	22.5	3.9
Brazil	86.3	11.1	-	2.6
Chile	98.6	1.1	-	0.3
Colombia	51.4	14.3	-	34.3 (33.9 % to Protobaco acquired by PMI in 2009)
Costa Rica	66.3	32.6	-	1.1
Dominican Republic	9.1	73.8	12.1	5.1
Ecuador	9.8	88.1	0.2	1.9
Guatemala	35.6	57.5	-	6.9
Mexico	33.5	65.3	-	1.2
Peru	23.8	17.6	-	4.5
Uruguay	4.2	15.7	-	80 (78.9% owned by Cía Industrial de Tabacos Monte Paz SA)
Venezuela	88.1	9.9	-	2

\* Due to rounding total may not add up to 100 percent

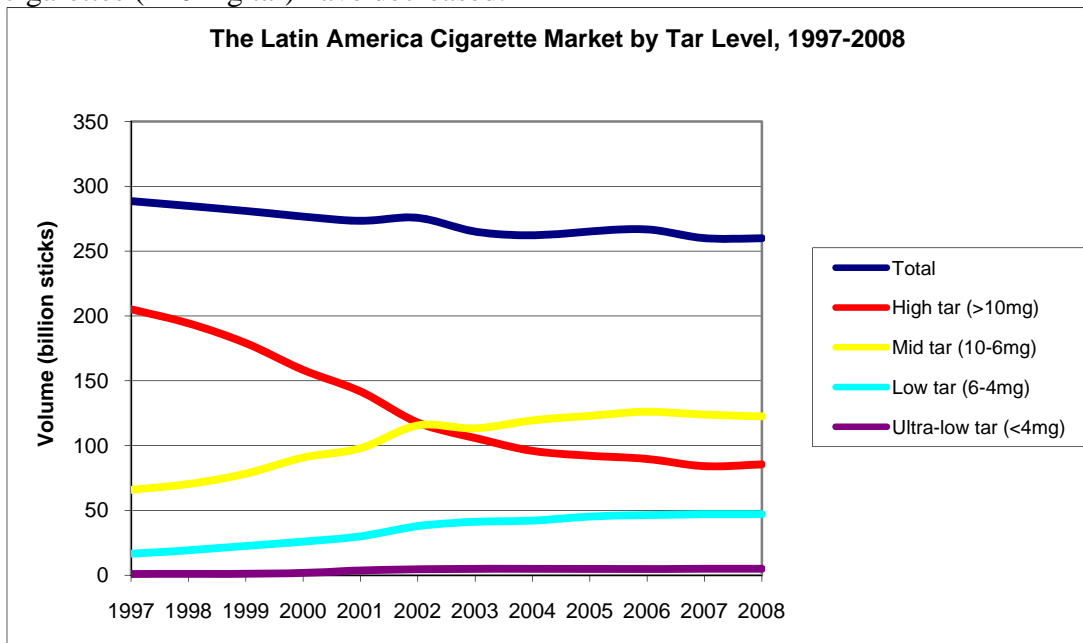
Source: 2009 © Euromonitor International

**4. Misleading Products, Packaging and Labeling**

**“Light” and “Low products”**

As consumers become more aware of the health risks associated with tobacco use, tobacco companies have created new products and tactics to counteract consumer knowledge. One such tactic is the use of misleading terms on tobacco products such as “light” and “low-tar” designed to encourage health concerned smokers to switch cigarette brands rather than quit.<sup>13</sup> The reality, however, is that “light” and “low-tar” cigarettes are no safer than regular cigarettes.<sup>13</sup>

Like other countries around the world, Latin American countries have been the target of the TTCs’ “light” and “low” fraudulent campaigns. During the last 10 years, sales of cigarettes that contain less than 10 mg of tar have grown while sales of high tar cigarettes (>10 mg tar) have decreased.<sup>5</sup>



Sales of “Light” and “Low-Tar” products in Latin America (1997-2008):

- Total cigarette sales by volume declined in Latin America.<sup>5</sup>
- The overall decline in cigarette sales is due to high-tar cigarettes (down 58%).

- Mid-tar (6-10mg) cigarette sales increased by 86% (65.8-122.4 billion sticks).
- Low-tar (4-6mg) cigarette sales increased by 184% (16.6-47.1 billion sticks).
- Ultra low-tar (less than 4mg) cigarette sales increased by 423% (0.9-4.9 billion sticks).

### **Country-specific example: “light” and “low-tar” cigarette sales in Brazil**

In 2001, Brazil enacted legislation prohibiting the use of terms on tobacco packaging implying lower tar such as “light” and “low-tar.” However, colors, numbers and other misleading descriptors implying lower tar content are allowed on tobacco packaging. Despite Brazil’s ban on terms implying lower tar content, cigarette sales of such brands have continued.

- In 2008, more than 60% of the brands sold in Brazil had color-coding, numbers, or other misleading descriptors in their name.<sup>14</sup>
- The sales volume of “**low-tar**” cigarettes has increased by over 400% between 1997 and 2008.<sup>5</sup>
- Since their introduction to the market in 2000, “**ultra low-tar**” cigarettes have increased five times in sales volume from 642 million sticks to 3.3 billion sticks in 2008.<sup>5</sup> Additionally, according to market analysts, ultra low- tar cigarettes produced in Brazil are designed to target the growing female smoking population.<sup>14</sup>

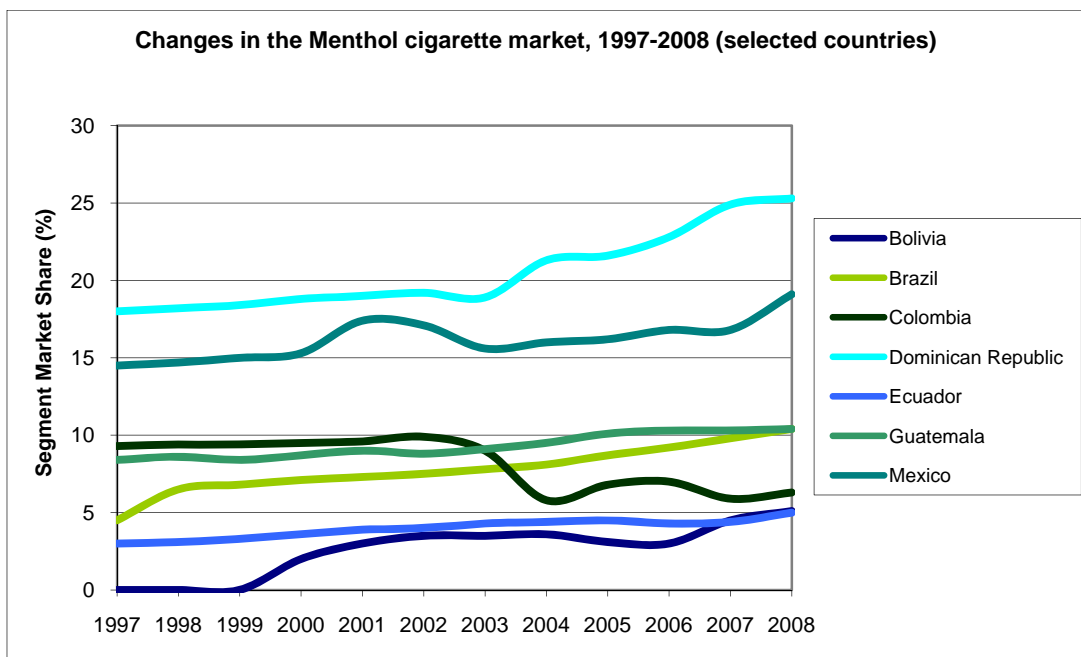
Other country-specific examples of “light” and “low-tar” cigarette sales:<sup>5</sup>

- **Chile:** Since 1997, sale volumes of cigarettes containing 6 mg or less tar have grown by almost 300%. Between 2007 and 2008, the “ultra low-tar” segment has increased by 11%.
- **Guatemala:** “Low” and “ultra low-tar” cigarettes were introduced in 2001 and since then have increases in sales volume by 178% and 199%, respectively. The total volume sold in 2008 was 84.2 million sticks.
- **Mexico:** “Low” and “ultra low-tar” cigarettes were introduced to the market in 2004. Over the last four years, low-tar cigarette sales volume increased by 169%.
- **Peru:** From 2000-2008 “ultra low-tar” cigarettes increased over 300% in sales volume.
- **Venezuela:** The “low” and “ultra low-tar” markets, while less than 1% of the market, have grown in sales volume by 91% and 356% between 2002 and 2008.

### **Menthol Cigarettes**

Flavored cigarettes are particularly attractive to youth.<sup>15</sup> Menthol flavoring, also targeted at all consumers, is aimed at reducing the harsh feeling of smoking regular cigarettes.<sup>16</sup> In Latin America, menthol cigarettes are 8% of the total 2008 market by sales volume.<sup>5</sup>





- Between 2007 and 2008 most menthol markets experienced growth in sales volume.<sup>5</sup>
  - Market growth in volume: Bolivia (14 %), Brazil (5%), Chile (4%), Colombia (1%), Costa Rica (0.2%), Dominican Republic (18.5%), Ecuador (4%), Guatemala (4%), Mexico (18%), Peru (20%), and Uruguay (138%).
  - Market declines in volume: Argentina (-0.5%) and Venezuela (-7%).

### **Slim and Super-Slim Cigarettes**

The tobacco industry uses slim and super-slim cigarettes to target female consumers.<sup>17</sup> In Latin America, the total market for slim and super-slim cigarettes is small (4%), but it is growing.<sup>5</sup>

- Countries where slim cigarettes are 1% or more of the total cigarette market:
  - Brazil (8.5%)
  - Costa Rica (5%)
  - Ecuador (2%)
  - Colombia (1%)
- Countries that experienced slim cigarette volume growth between 2006 and 2008:
  - Argentina (30% increase)
  - Colombia (15% increase)
  - Costa Rica (8% increase)
  - Guatemala (28% increase)
  - Mexico (1.5% increase)
  - Peru (164.5% increase)

## **5. Tobacco Industry Promotions and Sponsorships**

Tobacco companies sponsor parties, concerts, sports teams, and sporting events that deceptively associate tobacco with desirable places, situations or physical qualities. This tactic weakens tobacco control efforts because tobacco companies can continue publicizing their products in the presence of existing bans on direct advertising.<sup>18</sup> The industry is also able to advertise their products with no requirement for accompanying health warnings.<sup>19</sup> Examples of strategic promotions and sponsorships include music

and concert events, sports sponsorships, arts and cultural events, and those which promote the tobacco companies as “socially responsible.”

### **Recent Examples of Music and Concert and Sports Sponsorships:**

- Mexico 2009: Marlboro MX Beat is an annual concert series that promotes local and international independent groups.
  - 2009’s series was held Feb-March in Guadalajara, Puebla, Monterrey, and Mexico City and included performances by N.E.R.D, NORTEC presenta Bostich + Fussible, Vampire Weekend and Mystery Jets.<sup>20</sup>
- Colombia soccer leagues: the top two primer leagues in Columbia are sponsored by tobacco brands.
  - Copa Mustang (the primer A league) and Copa Primer (the primer B league) are sponsored by the Protobaco cigarette brands Mustang and Primer.<sup>21</sup> In 2008 Mustang cigarettes were the second most popular brand in Colombia with a 17.4% market share.<sup>5</sup>
    - Protobaco was acquired by PMI in July 2009.

### **Corporate Social Responsibility (CSR)**

Tobacco companies maintain CSR programs in an effort to counter negative attention regarding their deadly business. By donating funds to noble causes, the perception of tobacco 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:<sup>22</sup>

- 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 for the industry among policymaking and regulatory bodies.
- Defuse opposition from parents and educators.
- Bolster industry credibility.

Also, as so-called “responsible” corporations, both PMI and BAT try to create the perception that they support the FCTC (when they do not) in order to gain credibility as stakeholders in the regulatory environment (see Appendix A).

### **Recent Examples of CSR:**

- BAT’s subsidiary in Brazil, Suza Cruz, donated than \$9.5 million USD to charities and social programs.<sup>23</sup>
  - Programs included cultural events, youth education and entrepreneurship programs.
  - Suza Cruz also has also established many environmental programs.
- In 2008 PMI donated close to \$400 thousand USD to charity groups in Mexico.<sup>24</sup>
  - Groups included The Resource Foundation, Merced Foundation, Desarrollo Rural de Nayarit, and the Fundacion Mexicana de Apoyo Infantil

## **Appendix A: Transnational Tobacco Companies' Views on Tobacco Regulation and the Framework Convention on Tobacco Control (FCTC)**

During the development of the FCTC, top tobacco industry executives tried to undermine the development of the international treaty by creating an alternative to the FCTC through an internal strategy called "Project Cerberus."<sup>25</sup> Currently, even though PMI and BAT do not support the FCTC, they try to create the perception that they do, in order to be seen as legitimate and credible stakeholders in the regulatory environment.

PMI claims to support regulation of tobacco products because it "provides stability and predictability for business and establishes a level playing field;"<sup>26</sup> however, their first goal is to protect their profits and not the health of a population. On its website, PMI claims that it supports comprehensive regulations under the FCTC and that the company "actively look[s] for opportunities to help improve the way [the] industry is regulated" by "work[ing] with governments and the public health community to define effective tobacco regulation."<sup>26</sup> However, in the company's 2008 annual report, it is clear that PMI does not support the life saving measures embodied in the best practices for FCTC implementation:

"Several of the recommendations in the [FCTC] Guidelines, such as limiting the tobacco industry involvement in the development of tobacco policy and regulations, generic packaging, point of sales display bans, a ban on the use of colors in packaging, and a ban on all forms of communication to adult smokers, reflect extreme applications of the provisions of the Treaty, many of which are punitive measures against the tobacco industry and are untethered to public health objectives...[that] may adversely affect our business, volume, results of operations, cash flows and financial position."<sup>6</sup>

BAT's website publicly acknowledges that tobacco poses a real health risk and therefore it supports regulation of tobacco products: "[W]e support, and want to help deliver, balanced tobacco regulation and we want to participate on the compliance with effective future laws." Ultimately, though they are trying to protect their ability to sell products in a competitive market to the "significant percentage of adults who *choose* to be tobacco consumers."<sup>27</sup> Despite being excluded from negotiations surrounding the development of the FCTC, BAT said in 2003 that it would continue to offer legislative proposals to governments for tobacco regulation.

"To have sensible regulation that can really contribute to reducing the health impact of tobacco, we need to move away from the adversarial approach of the WHO, to one of co-operation and inclusion. On public smoking, for example, it would be helpful if the WHO could base its views on sound scientific evidence, rather than continuing to promote the belied that smokers pose a significant threat to non-smokers' health."- Martin Broughton, BAT Chairman of the Board, 2003.<sup>28</sup>

BAT's public statements directly conflict with their internal strategic planning to fight FCTC development. Internal BAT documents disclose that the company launched its so-called "corporate social responsibility" campaign with the aim of moving the tobacco industry "ahead- fast enough and far enough- of the WHO agenda to negate the need for the convention [FCTC]."<sup>29</sup> After the World Health Assembly had approved FCTC drafting in May 1999, an industry-wide meeting took place to develop a strategy against the FCTC for the upcoming year.<sup>30</sup> In an attempt to target key countries, a member of BAT's WHO Steering Committee, Simon Millson, called for "more sniper, less scatter gun"<sup>30</sup> and reminded his colleagues that there remained only a year to "influence the drafting process" which was "crucial...to limit the damage such a convention could do to our business."<sup>31</sup>

**FCTC  
Regulation**

**PMI Position<sup>6, 26</sup>**

**BAT Position<sup>27</sup>**

<p>Tobacco Advertising, Promotion and Sponsorship (APS) bans</p>	<p>Does not agree with total APS bans but does support advertising bans on television, radio and billboards.</p> <p>Supports marketing limitations as long as it doesn't hinder their ability to "communicate directly with adult smokers."</p> <p>Does not believe that point of sale displays have an adverse effect on public health and therefore does not support point of sale bans.</p>	<p>"We believe that tobacco companies should be able to communicate responsibly with adult consumers," and therefore BAT does not support comprehensive APS bans.</p> <p>BAT claims that it does not market its products to promote smoking but only to gain market shares with adults who have already made the "informed decision" to smoke.</p>
<p>Taxes</p>	<p>Does not support banning duty free cigarettes sales and believes that excessive taxation can lead to increases in illicit trade</p>	<p>Agrees that higher taxes might discourage some people from smoking, but that sharp increases encourage illicit trade more than quitting.</p>
<p>Smoke-free Environments</p>	<p>Does not support 100% smoke-free legislations (except on public transportation, in schools and childcare facilities)- implies that separate smoking sections and rooms and ventilation systems are viable options for regulating public smoking and protecting public health.</p> <p>Supports indoor restrictions as long as "comfortable" places in hotels, restaurants, nightclubs and bars are provided for smokers.</p> <p>Believes that business owners should have the flexibility in deciding how best to address the concerns of smokers and non-smokers.</p>	<p>Supports regulations in indoor public places that "accommodate" both nonsmokers and smokers. "We support practical initiatives, such as the creation of smoke free areas, combined with adequate provision for smokers."</p> <p>Believes that banning smoking in all indoor work and public places "go[es] too far," and advocates for separate smoking and non-smoking areas and ventilations systems.</p> <p>Questions the validity of science that declares secondhand smoke causes serious illness.</p>
<p>Packaging and Labelling</p>	<p>Supports bans on tar and nicotine levels reported on packages when other descriptors ("light" "mild") are banned.</p> <p>Fights bans on using colors to denote product variation and plain packaging initiatives.</p> <p>Supports warning labels as long as they don't vilify tobacco companies or inaccurately depict health effects. Believe that text warnings are "sufficient."</p> <p>Believes that textual warnings are sufficient but are not opposed to using graphics.</p>	<p>Accepts 30% front and back warnings that depict health risks so that adult consumers can make informed choices.</p> <p>Says that if descriptors like "light" and "mild" are banned that there should still be ways to differentiated between brand variations.</p> <p>Ensures "that all advertising, cigarette packs and primary packaging carry a clearly visible health warning," even in countries that do not require health warnings.</p>

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