

GTNF 2018

Global Tobacco & Nicotine Forum
Dynamic dialogue, expanding perspectives.

GTNF 2018 - London

One step forward, two steps back: is regulation advancing or obstructing THR?

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ECigIntelligence

www.ECigIntelligence.com



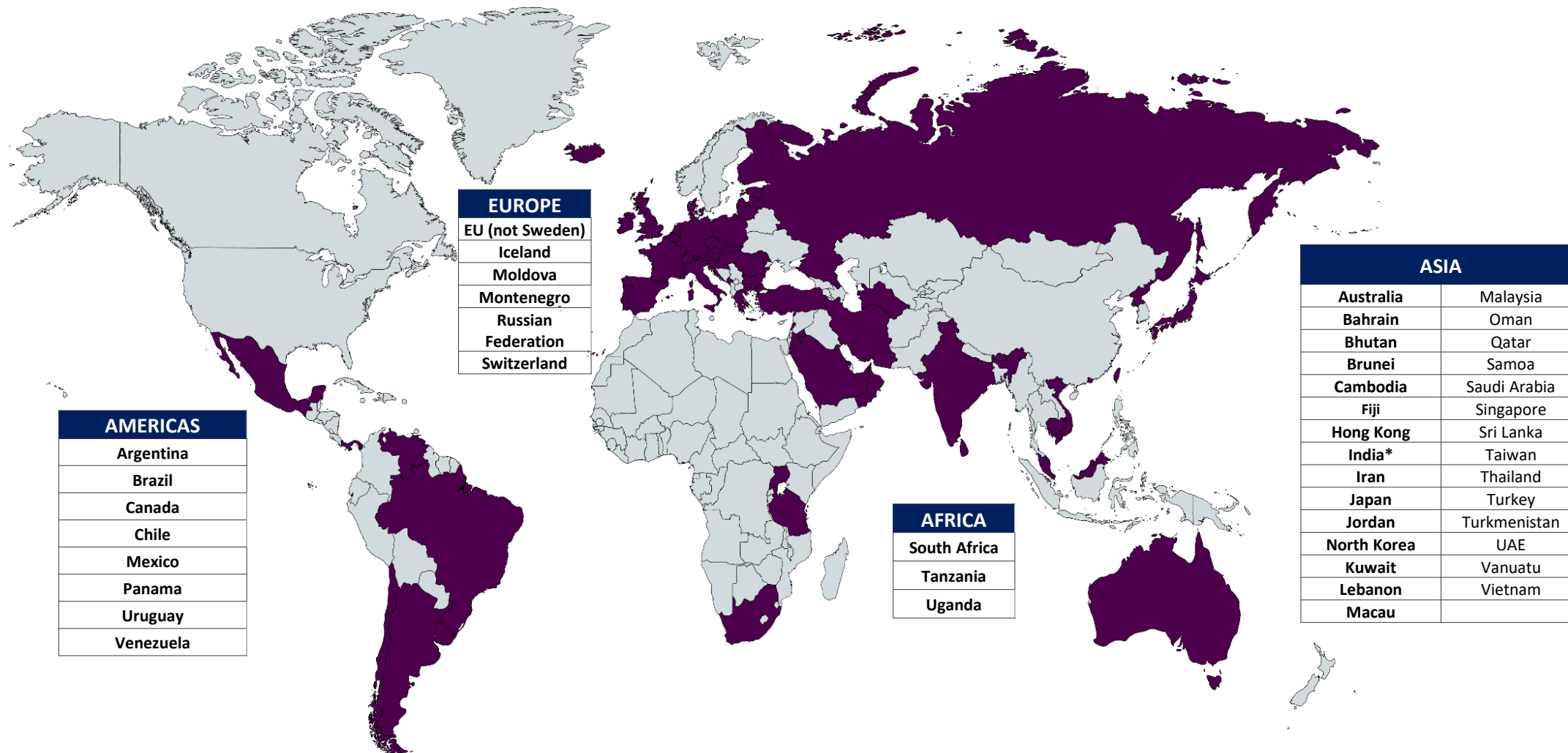
- 1 Review of THR prohibitions around the world:
 - E-cigarettes
 - Heated tobacco
 - Snus/chewing tobacco

- 2 Future change in THR regulation: Forwards or Backwards?

- 3 Impact of THR on consumption and smoking behaviour:
 - E-cigarettes
 - Heated tobacco
 - Snus/chewing tobacco

Review of Current Global Prohibition of THR products

Total proportion of World Population living under one or more THR ban: **34%**



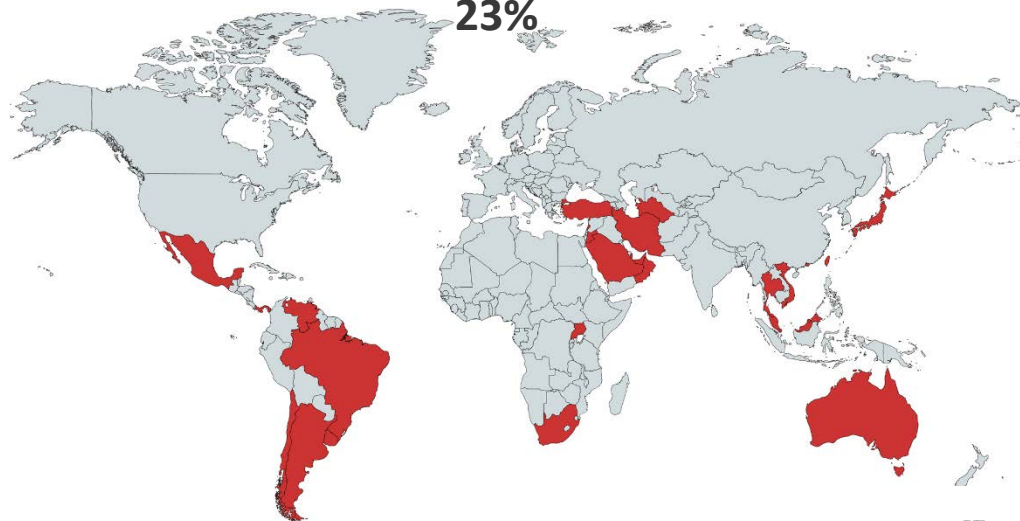
Source: ECigIntelligence legal review, August 2018; prohibition status includes specific ban or effective ban on THR products, effective ban such as where THR products deemed to be medical products and no medical licences issued; THR products studied: e-cigarettes; heated tobacco and snus/chewing tobacco.

Population source: United Nations - Population Division - World Population Prospects: The 2017 Revision: total population; India population subject to ban considered on a state level, with c.41% of country subject to bans.

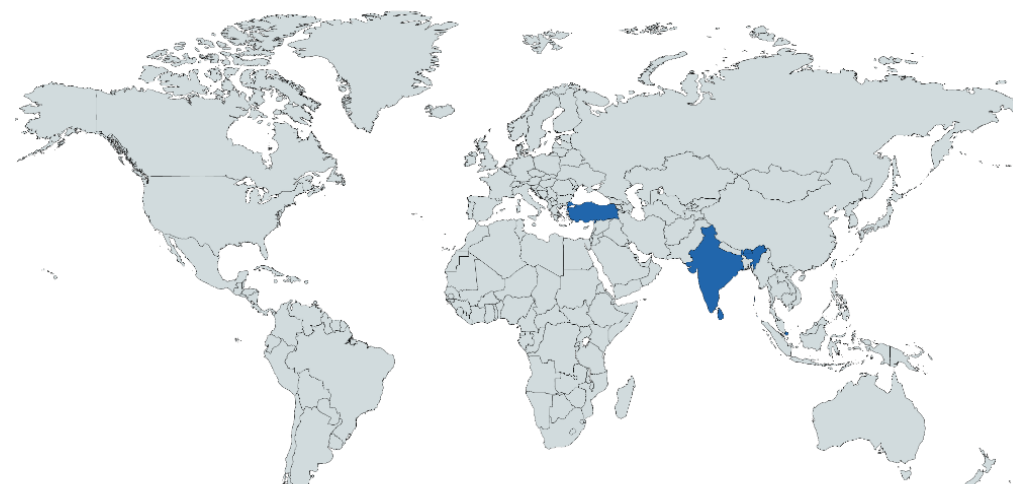
Global prohibitions on E-cigarettes, Heated Tobacco and Snus / chewing tobacco

Total proportion of World
Population living under E-cig bans:

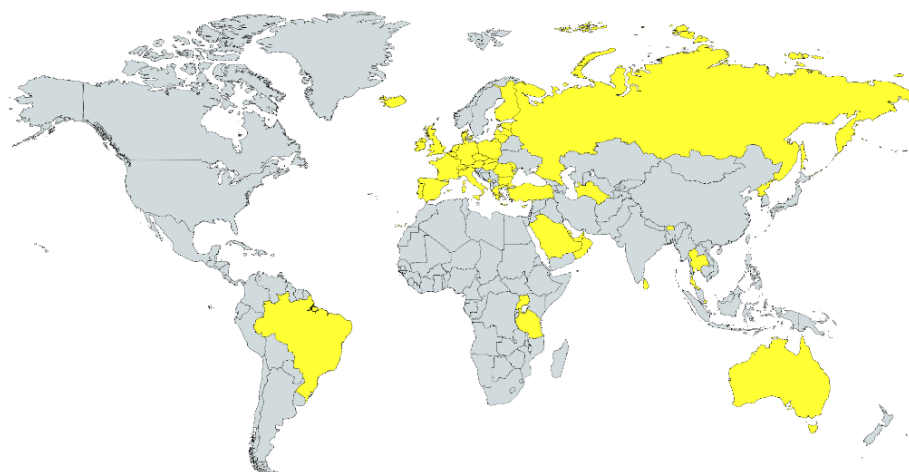
23%



Total proportion of World
Population living under HT bans: **9%**



Total proportion of
World Population living
under Snus bans: **24%**



Source: ECigIntelligence legal review, August 2018; prohibition status includes specific ban or effective ban, such as where THR is deemed a medical product and no medical licences issued. Population source: United Nations - Population Division - World Population Prospects: The 2017 Revision: total population; India population subject to ban considered on a state level, with c.41% of country subject to bans.

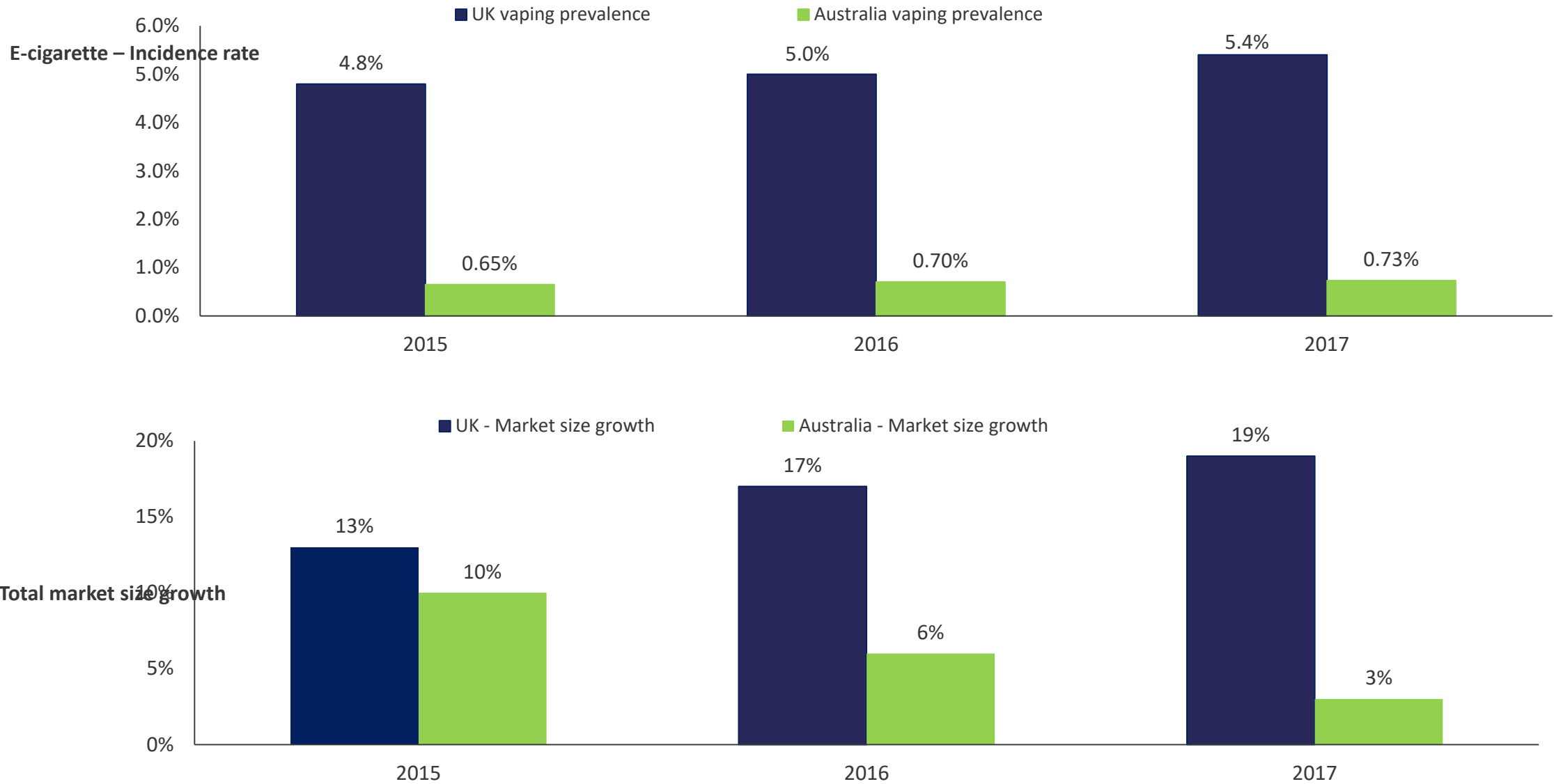


Future change in THR regulation: forwards or backwards?

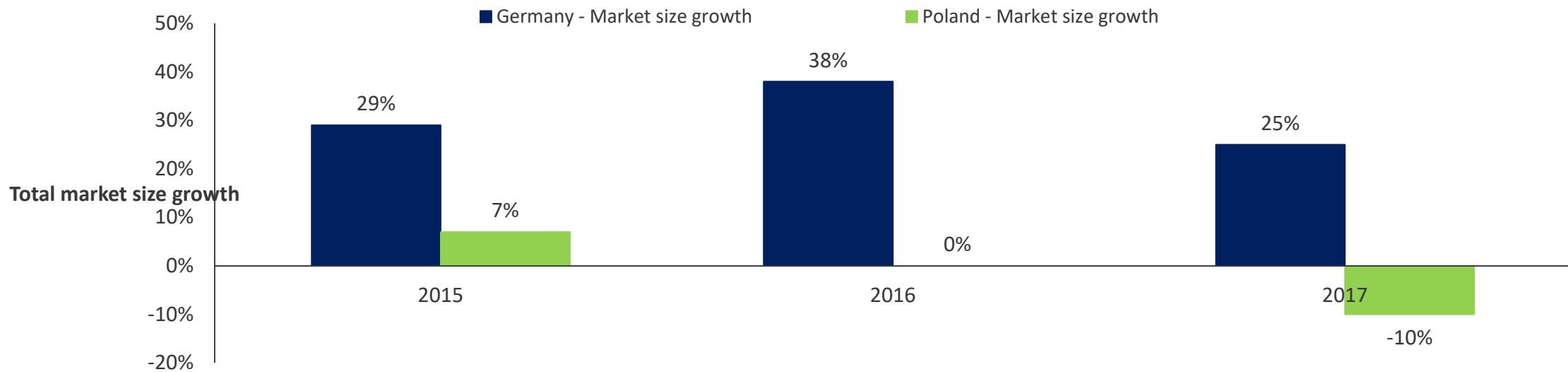
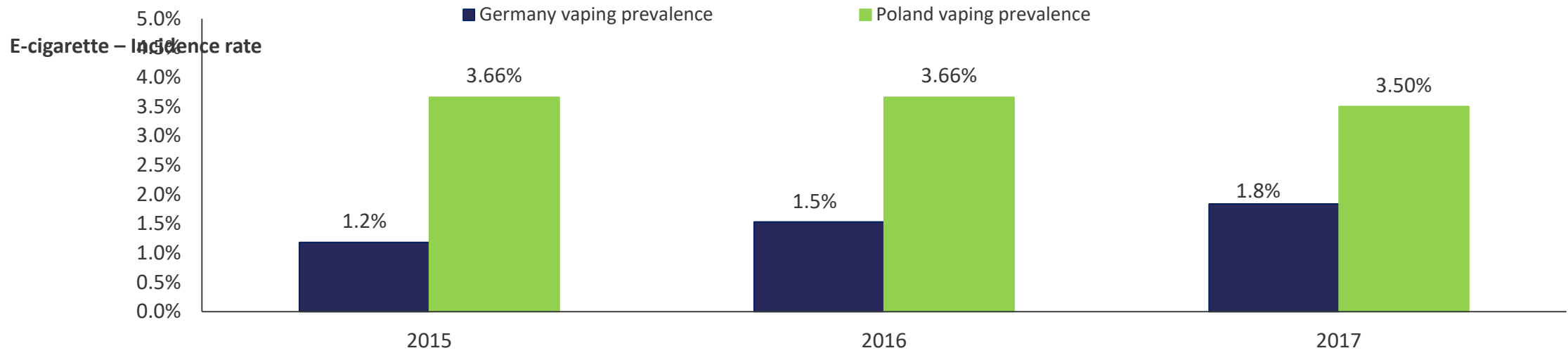


Future more lenient regulation of THR	Future more restrictive regulation of THR
Italy: freeze on e-cig tax until end-2018; remove tax entirely?	India: new government guidance ban nic. e-cigs; continuing bans at state level
New Zealand: ruling against prohibition on import of heated tobacco products; THR products supported by Min. of Health	Israel: new nic. concentration limits; new tax and marketing restrictions on THR
Philippines: e-cig friendly bill introduced March 2018, with support from House of Rep.	Poland: new tax on e-cigs from Jan 2019; draft bill to increase e-cig inspection and notification processes
Switzerland: lifting of ban on nic. e-cigs; revised proposal less stringent than previous	South Korea: increasing tax/warnings on e-cigs/heated tobacco; equate with cigarettes
UK: supportive parliamentary report Aug 2018, UK treasury confirmed no planned tax on vape products	Sweden: tax on e-cig products from Jul 2018; new restrictions on nic. e-liquid >17mg/ml

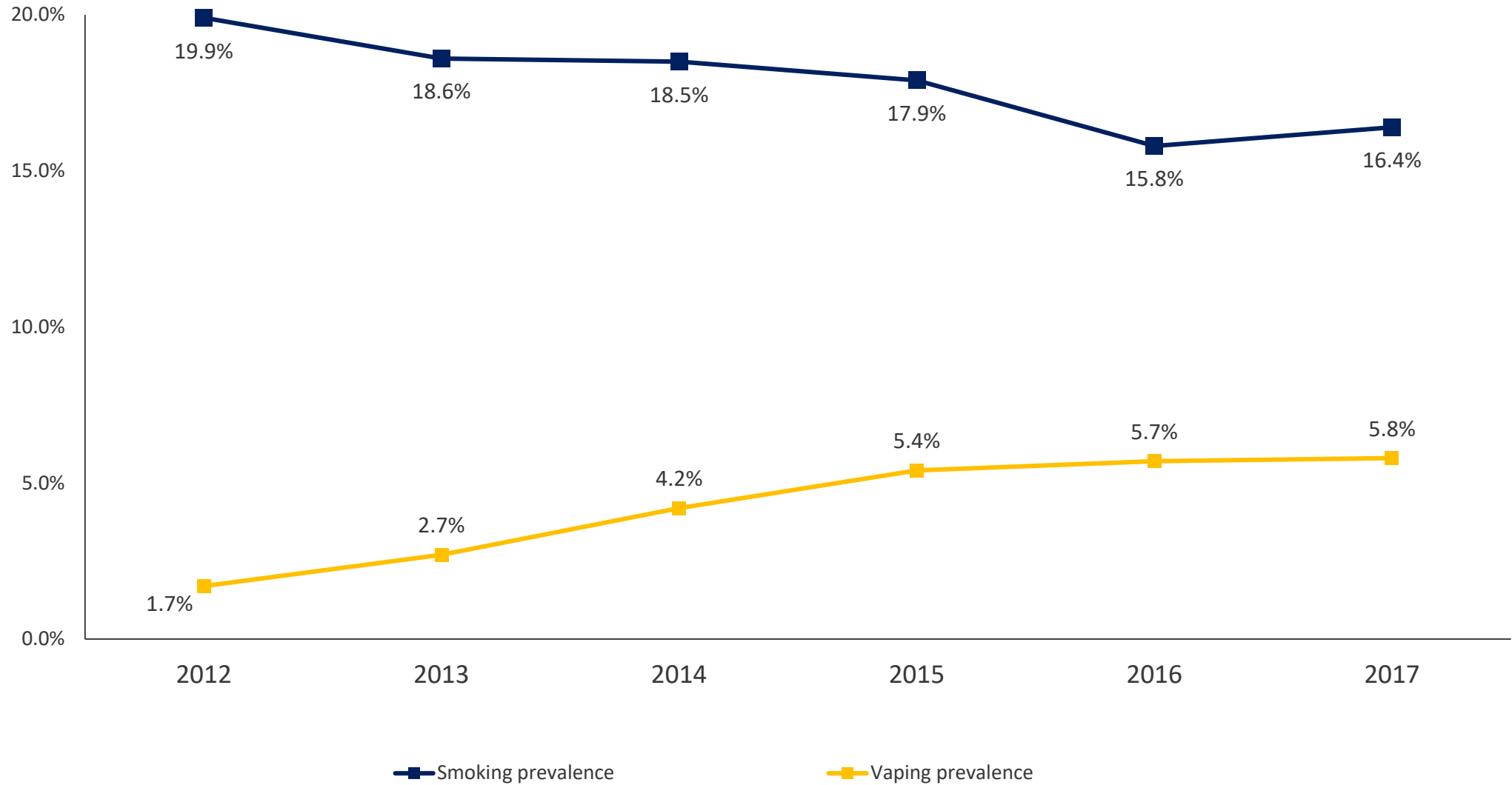
E-cigarettes: United Kingdom (open) vs. Australia (ban)



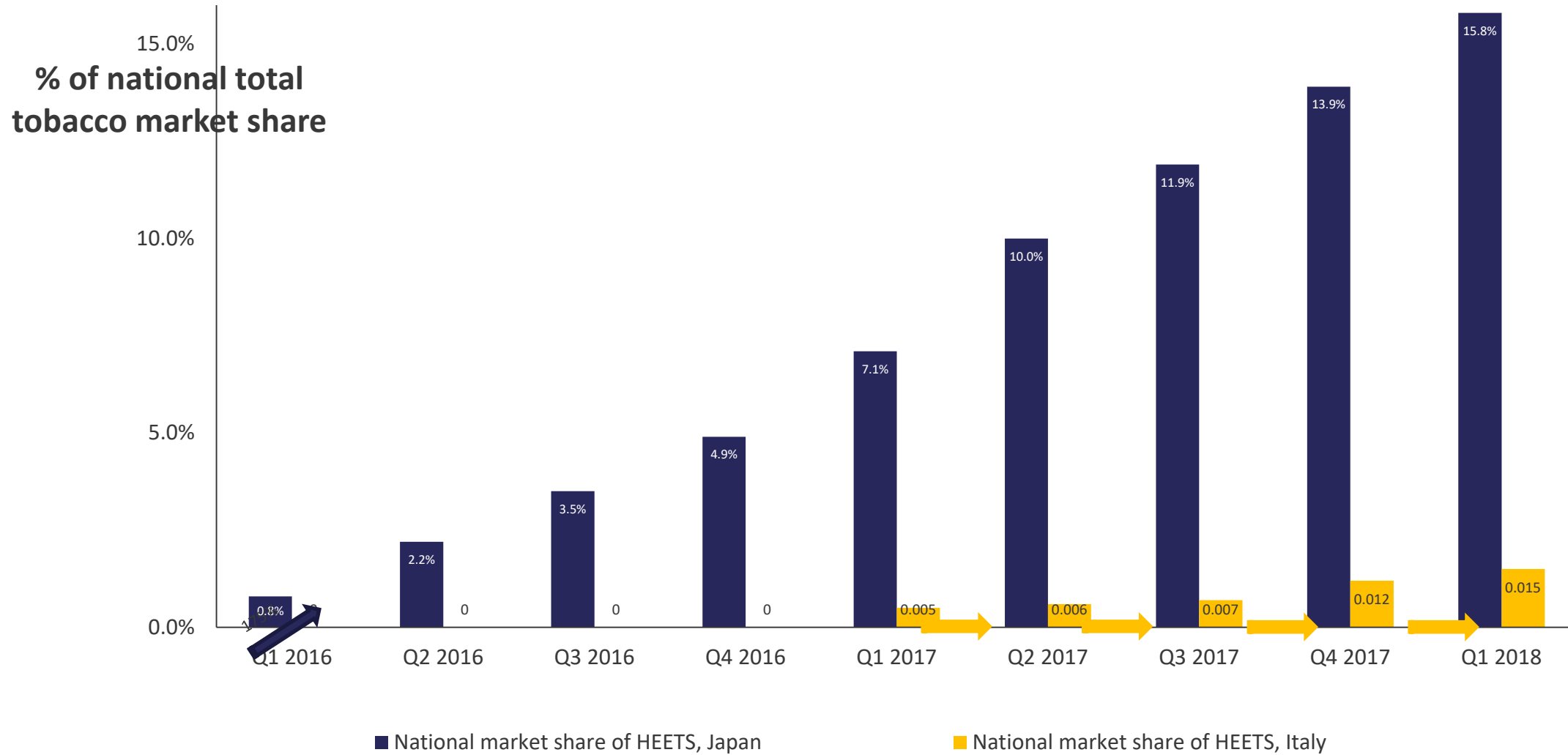
E-cigarettes: Germany (open) vs. Poland (recent restrictions)



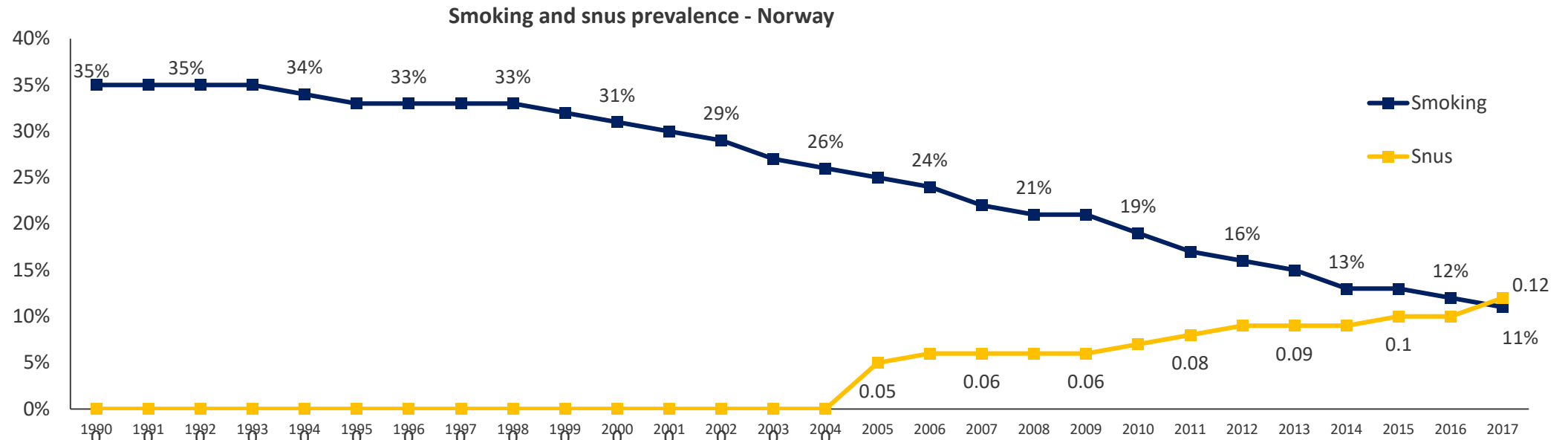
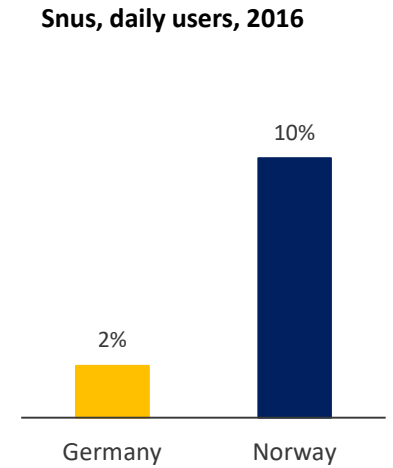
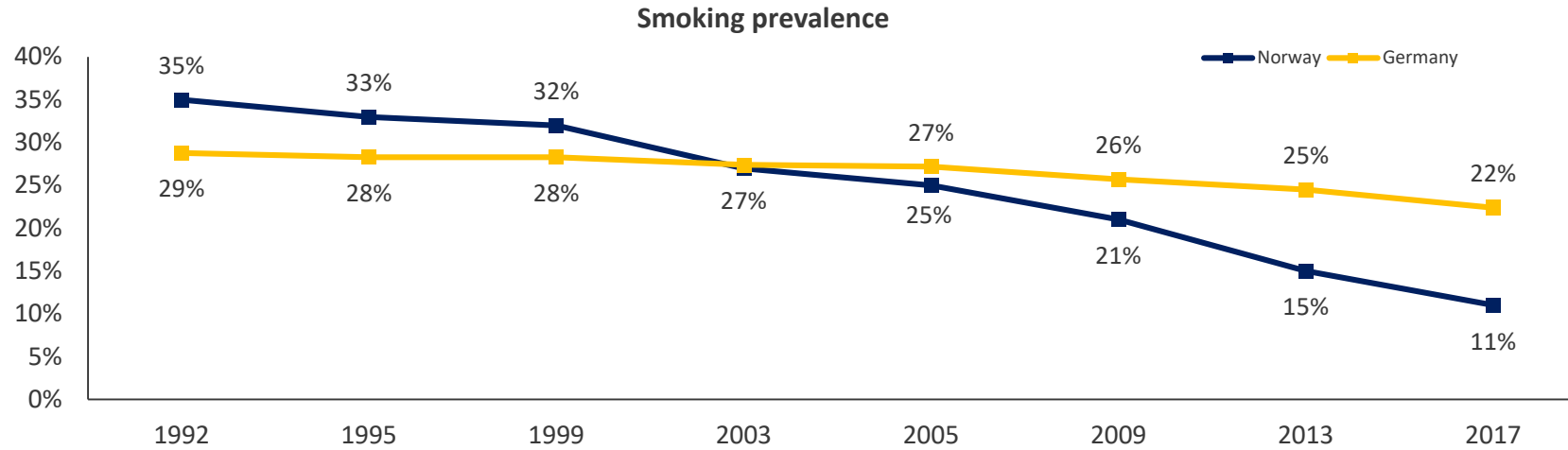
E-cigarettes: UK smoking vs. vaping (correlation not causation?)



Heated tobacco: Japan (open) vs Italy (more restrictive)



Snus: Norway and Germany: smoking vs snus



QUESTIONS?

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