Flavor Capsule Cigarettes in Six Countries: Availability by Brand, Variant, and Flavor

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Flavor capsule cigarettes

• Introduced in Japan in 2007

• Market share is growing rapidly; increasing menthol market share

• Associated with misperceptions of harm and appeal to youth
Gaps in knowledge

- How are they being marketed?
- Consumer perceptions?
- Trends by brand, variants, and flavor
Tobacco Pack Surveillance System (TPackSS)

3 cities

36 neighborhoods

1-4 retailers/neighborhood
### Flavor capsule variants in six countries

<table>
<thead>
<tr>
<th>Flavor capsule cigarette</th>
<th>Cigarette pack indicates that the user is able to change the stick flavor AND/OR the cigarette stick indicates it can be crushed or “turned on”</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Flavor capsule variant (FCV)</strong></td>
<td>Cigarette packs that are identical in brand name and sub-brand name and graphic design elements (irrespective of type of pack and cellophane wrapping)</td>
</tr>
</tbody>
</table>

2013
n=1,085

2015/2016
n=1,216
Growth in number of flavor capsule variants on the market

- **Brazil**: 8 (2013) to 9 (2015/2016)
- **Indonesia**: 2 (2013) to 3 (2015/2016)
- **Philippines**: 3 (2013) to 3 (2015/2016)
- **Thailand**: 0 (2013) to 2 (2015/2016)
- **Vietnam**: 1 (2013) to 3 (2015/2016)
- **ALL**: 18 (2013) to 34 (2015/2016)
Brands & owners

2013

Dunhill
Free
Lucky Strike
Kent
Marlboro
L&M
Harmony
Mild Seven
Winston
West

Brands & owners 2015/2016

Dunhill
Free
Lucky Strike
Kent
Craven A
Hollywood
Pall Mall
Marlboro
L&M
Harmony
Chesterfield
Fortune Tribal
Mild Seven
Winston
Camel
Mevius
West
Esse
Bohem Café

British American Tobacco
Philip Morris International, Inc.
Japan Tobacco International
Imperial Tobacco Company

British American Tobacco
Philip Morris International, Inc.
Japan Tobacco International
Imperial Tobacco Company
KT&G
2015/2016 FCVs by flavor

- Menthol or mint (n=11)
- “Fresh” (n=4)
- Mint and “purple” (n=5)
- “Ibiza sunset” (n=1)
- Ice coffee and lime (n=1)
- Orange coffee (n=1)
Flavor unknown (n=11)
How TPackSS can be used for ongoing surveillance

globaltobaccocontrol.org/tpackss
Strengths and limitations

• Follows rigorous, systematic protocol; provides global perspective

• Sample may not be representative of nations as a whole

Findings and implications

• # of FCVs available on the market is growing and potentially fueling menthol cigarette growth

• Many FCVs contain menthol or mint capsules, however many are labeled with non-characterizing flavors

• Can inform advocacy efforts that call for stronger regulation of flavored cigarettes and plain packaging

• Can inform future research on flavor capsule cigarettes
Thank you!

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