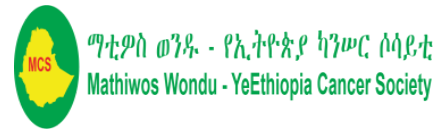


***Mapping Report on Tobacco Industry Tactics, their entities, allies
and products in Ethiopia with ATCA Technical support***

*October 2020
Addis Ababa, Ethiopia*



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Acronyms

- ATCA : African Tobacco Control Alliance
- CC : Customs Comission
- CSOs : Civil Society Organizations
- EFDA : Ethiopian Food and Drug Authority
- FAG : Federal Attorney General
- JTI : Japan Tobacco International
- MOF : Ministry of Finance
- MOU : Memorendum Of Understanding
- MWECS : Mathiwos Wondu-YeEthiopia Cancer Society
- NTCCC : National Tobacco Control Coordination Committe
- NTE : National Tobacco Enterprise
- PHW : Pictorial Health Warning
- SFE : Smoke Free Environment
- TAPs : Tobacco Advertising and Promotions
- TC : Tobacco Control
- TI : Tobacco Industry
- TIMR : Tobacco Industry Monitoring and Response
- WHO : World Health Organization

A. Context

Ethiopia posed with significant Tobacco Industry (TI) challenges, following the domination and 70% share acquisition of the National Tobacco Enterprise (NTE) S.C of Ethiopia by the Japan Tobacco International (JTI). Despite, the effort being made by the government to reduce consumption of tobacco products especially cigarette smoking through introduction of stringent tobacco control legislations, NTE is in the process of modernizing, expanding and rehabilitating the existing cigarette company to boost production to nearly 20 billion cigarettes per year in 15 years with investment cost of about 50 million USD on 96,000 m² of land leased by the government (Source: Tobacco and its Health Hazards Including A Proven Method on How to Stop Smoking, a draft book by Mr. Tekaligne Legesse, JUNE, 2020). NTE is working with a mission to be the number one tobacco company in East Africa (Source: <https://www.ethiojobs.net/company/238615/National-Tobacco-Enterprise-%28Ethiopia%29-Sh.-co./>). Therefore, it is unquestionable that the smoking prevalence in Ethiopia (4.7%) which is the lowest in the world can be boosted in the foreseeable future unless the aggressive expansion and modernization project and activities of JTI is controlled and the existing tobacco control legislations are strictly enacted. Ethiopian Food and Drug Administration (EFDA), which is the mandated government authority to monitor and regulate NTE, have been taking measures to undermine the various interferences from the tobacco industry. Since controlling the vigorous and multiple interference tactics from the industry could not be executed by a single government entity, EFDA established a vibrant National Tobacco Industry Monitoring and Response (TIMR) team comprised of 24 members from diverse multisectoral organizations. End of March 2020, EFDA organized a capacity building refresher training for the team members and introduced basic monitoring and mapping tools in collaboration with MWECS and technical support from ATCA. By the time TIMR team was making preparations to conduct the baseline data collection on TI entities, allies, products, tactics and interferences, Ethiopia reported confirmed corona virus cases and state of emergency was declared

which restricted and delayed execution of most activities. Despite the existing challenges, nine members of the TIMR team were recommended and collected the baseline data from July 14-31, 2020 taking the necessary precautionary measures against COVID-19.

B. Objectives

i. General Objective

- *To generate evidences from tobacco industry monitoring in July 2020 to support country policy objective.*

ii. Specific Objectives

- *To collect baseline data on tobacco industry entities, allies and their products.*
- *To gather evidences on identified tobacco industry interference and tactics.*

C. Methodology

a. Survey coverage area(s)

The baseline data was primarily collected to identify existing TI interference and tactics categorized into seven possible strategies: i) Re-inventing the image, ii) Influencing politicians, iii) Tobacco advertising, promotion and sponsorship, iv) Keeping tobacco products affordable, v) Forging alliances, vi) Intimidation and harassment and vii) Undermining science. Besides, this assessment addressed the TI allies, entities and their products. The data were collected from the industry itself and other concerned government offices like Ministry of Revenue, Customs Commission, Ethiopian Food and Drug Authority, market assessment and other places as intended.

b. Data collection techniques

A total of 9 (nine) potential members from the TIMR team were purposively selected in closer consultation with EFDA. Each of the data collectors were shared the two baseline data collection/ mapping tools, topics to be explored/ investigated, possible means of data sources, scheduled time for the data collection and organizations to be visited along with the contact person. Besides, EFDA wrote support letters to each of the data collectors assist them in facilitating their work. The baseline data were collected through

observation, interview, documents review, browsing the internet and desktop review taking the necessary precautionary measures against COVID-19. The baseline data were collected from July 14-30, 2020.

c. Data processing and analysis

The data were processed and analyzed through narrative analysis where the data obtained from interviews, market inspections, newspapers and other documents were reviewed, personalized, filtered out to be evidence based and narrated to address survey questions/objectives.

D. Findings

1. Tobacco production chain

The National Tobacco Enterprise (Ethiopia) Share Company (NTE) was established in 1942. NTE owned and managed five tobacco farms: in Amhara Regional State (Shewarobit, Ataye, Jawa), Southern Regional State (Bilate, Hawassa, Bodit) and Oromia Regional State (East shoa around Wonji)(1). There were also two processed commercial farms at South Omo and Dilla with the prime aim of decreasing more than 60% reliance of imported tobacco leaf from abroad. However, NTE is not the only legal tobacco cultivator in the country. Rather, there were also more than 10,000 Small holders/out growers. In the year interval from 2007 to 2016, domestic tobacco leaf production increased by 229%. The enterprise also imports tobacco leaf from abroad to complement its requirement. Using its factory situated in Addis Ababa, NTE /JTI is the only legal manufacturer of tobacco products in the country owned by 71% of its share by Japan Tobacco International which is the largest multinational tobacco company in the world and the remaining 29% by Sheba Investment group, a private foreign shareholder (2). There are around 104 wholesalers throughout the country, duty free importers/ distributors (Alfaraj Country Trading, Ethiopian Tourist Trading and Nourhussien) and individuals from abroad involved in distributing of tobacco products. Duty free retailers, Street vendors and different outlets like small shops, hotels, bars, supermarkets, minimarkets etc were entities involved in selling of tobacco products. There were also brokers who promoted NTE and its products in different ways (), individuals like Tewodros Ashenafi who is the local partner of JTI and played a key role in helping bring the company to Ethiopia (3,4)and organizations like the Chamber of Commerce (Yearly contribution for partnership as commercial organization which protects the organizational right) and Ministry of Finance (Slow the ratification of tobacco taxation and try to lower the tax imposed) that represented the commercial and other vested interests of the TI. Ethiopian Custom Commission and the Federal Police Commission signed a MoU with NTE to fight illicit trade. Using this opportunity, NTE tried to undermine excise tax by

referring that increased tax might fuel illicit tobacco trade; Legal advisories like Mihreteab Legal office give legal consultancy support to the TI either weaken draft laws or use loopholes of approved laws to challenge enforcement, Researchers (AAU, ETHIOPIAN economic association) conducted researches supported by the TI (5).

2. Available cigarettes brands

The company locally manufactured five brands of Cigarettes for sale on the local market: Nyala, Nyala Premium, Elleni, Gissila, Delight and Winston. Almost 95% of the product sold locally was Nyala brand while the remaining 5% comprised the rest of the brands (6, 7). Even if it was only NTE/JTI who can legally operate on the tobacco business in the country, there were also illegal cigarette brands imported for sale on local market like: Gandham and Business Royals being the major ones and also others like Marlboro, Green Apple, Oiris, Rothmans and Strawberry. Eastern region of the country particularly Wajjallee, Jigjiga, Harar and Somali were considered as the major routes of entry for smuggled tobacco products in the country (NTE survey 2012). Sometimes certain duty free tobacco products purposively imported to the country for the diplomatic community were found being sold in the market. Unlike to the 40-44% illicit trade prevalence studied by the TI itself, research conducted by a neutral research consultancy agency to help quantify the illicit cigarette market in Ethiopia in 2018, revealed that, the total market of the TI was 81% and the remaining 19% was illicit (6). So far, there was no tobacco product produced for export purpose. However, recently NTE/JTI was undertaking preliminary arrangements to sign agreement with the South Sudanese Tobacco Company and export 500,000 packs of Nyala brand cigarettes per annum. However, the export was not yet started due to security issues (7,8).

3. Subversive activities of tobacco companies

Industry strategy 3.1: Re-inventing the image

A couple of weeks after JTI became the principal shareholder of NTE, the company assigned a new CEO who has long term working experience with JTI to spearhead its operation in Ethiopia. JTI continued to replace most Ethiopian national top management positions with foreigners having extensive work experience with JTI (9). Besides to JTI's intention to easily implement its strategies and expand its business rapidly, this approach will have direct influence particularly on young job seekers as most of them perceive working with foreigners will result in being highly paid with foreign currency.

The recruitment posts from the TI enhance its image as a place for talented individuals. Reviewed posts expressed NTE/JTI as one of the top enterprises in terms of annual turnover, profitability, and its contribution to the economy and with the biggest number of

employers in the country. In addition to the good working conditions, NTE provides with various additional attractive employee benefits like canteen, medical treatment, internal promotions and careers within the Company, opportunities to attend in many technical and managerial trainings and learning programs in Ethiopia and abroad (10).

The media is the most powerful tool the TI uses to reach to the wide public and promote its views, products and image. The TI used various media houses particularly the print media and published articles at different times to promote its views regarding illicit trade prevalence and methods of curbing it based on the recommendations kept in the market survey commissioned by the industry itself, its products, and its image raising the recognition NTE/JTI received from the Ministry of Revenue for being one of loyal high tax payer organization in 2019. July 27, 2019, on an event organized by the Ministry of Revenue, the Prime Minister handed over the platinum, gold and silver awards to 160 loyal taxpayers in a ceremony held at the Presidential Palace. This event was organized for the first time and awardees were selected based on their annual tax contribution and tax compliance history. NTE/JTI received a platinum award as the 5th reputable company out of 160 businesses (11, 12,21).

Engaging in Corporate Social Responsibility (CSR) activities was the other strategy the TI used to re-invent its image, improve its reputation and attract new customers. In July 29, 2019, NTE/JTI participated on the green legacy environmental scheme national campaign officially launched by the Ethiopian Prime Minister and planted 2,000 trees to show their support to the National Green Development Program. This activity was part of the industry's effort to convince the government build in trust, get acceptance and strengthen its partnership with the industry (13). The TI also requested for re-innovation of the Cancer treatment Center at one of the hospitals in Addis though the request was declined by the officials. Recently, in response to the COVID 19 pandemic, NTE/JTI produced hand sanitizers despite getting production license from EFDA and distributed free of charge to economically disadvantaged group of the community (14).

Industry Strategy 3.2: Influencing politicians

During the two rounds of share purchase agreements with JTI, the government assured to work with the TI and promised to offer the necessary support believing the sector's contribution to the overall economy of the country (15). Following, in a contact of sale agreement signed between the former Ministry of Public Enterprises and JTI, the government allowed insertion of Article (Art 9) which, assumes illegal trade of tobacco product as significant problem in Ethiopia, and further directs the relevant government body to sign MOU with the company, the government's illegal trade control task force to collaborate with the enterprise and develop joint

action plan to combat illicit trade, the worst of which includes any law making government organization in relation to tobacco shall consider NTE/JTI as a stakeholder and involve them in reviewing of existing and newly emerging TC legislations as necessary (16). The TI used this opportunity to directly or indirectly put pressure on policy makers and influence law making processes. For example, a letter was addressed to the Ministry of Finance signed by the Cabinet Affairs Minister at the Office of the Prime Minister ordered discontinuation of the amendment process of the excise tax proclamation and serve concerns of the TI (17). Similarly, a letter from same office was addressed to EFDA to hold discussions on the draft proclamation with the TI. Hence, EFDA shared the draft of proclamation 1112/2019 to NTE/JTI; the TI reviewed the draft article by article and provided comments and recommendations to each of the key provisions in favour of itself with the help of well experienced legal consultancy office called Mihreteab Law Office. Further, the TI requested EFDA for a meeting to discuss on the comments they submitted and a high level delegation team of the TI including the CEO and internal and external legal expertise of the TI brought sensible arguments and comments intended to delay and weaken the stronger TC provisions enshrined under the draft (observation by MWECS who was part of this meeting too). The TI argued that, there was no evidence that larger PHW will proportionately increase smokers' awareness rather would benefit illicit trade. They also questioned the effectiveness of the proclamation through referring certain restrictions could bring unwanted effect of facilitating illicit trade when the timing is ill-considered, or when measures are excessive and too sudden. Hence, they threatened the government to first succeed in bringing the illegal market to acceptable levels otherwise the legislation would not be effective (18).

Similarly, despite the existence of concrete evidences, there were proxy indicators that led to the conclusion that the TI exerted pressure on MoF to put lower excise tax base during drafting of the excise tax proclamation proven to be the most effective strategy to reduce tobacco consumption. World Bank in collaboration with WHO made assessment on modeling the impact of tobacco tax policy reforms on tobacco use in Ethiopia and put recommendations. However, MoF by passed those recommendations and put a lower tax rate. The whole MoF legal team attended different capacity building and international experience sharing visits organized by WHO, however, they resisted heavier taxes exacerbate illicit trade which is the foremost argument of the TI. Pertinent stakeholders particularly Ministry of Health and EFDA were not adequately consulted on the draft and the amount of excise tax levied was not disclosed until this draft was approved by the Council of Ministers. The enterprise used various workshop opportunities to warn policy makers that tobacco control and fiscal measures should be proportionate otherwise customers switch to use illicit products at cheaper rates via porous boundaries of the country, illicit trade will prevail and the government will lose revenue (key informants from MoR).

NTE/JTI also extensively engaged in media campaign during the final stages of ratification process of the excise tax proclamation to influence policy makers. For example, during the parliamentary public hearing called to receive feedback and ratify the excise tax proclamation, very strong and evidence based convincing health perspective arguments were raised by public health advocates. However, neither of the media houses gave coverage to these arguments rather reported the views of the industry as if higher tax rate will exacerbate the existing high illicit trade prevalence and poses economic threats since the industry is high tax payer enterprise in the country. A press statement sent on behalf of the CC to different media houses following few days after the public hearing also explained tobacco as the leading product smuggled illegally to the country referencing prevalence figure finding resulted from a survey report conducted by the TI (19).

NTE/JTI signed MOU with Customs Commission on April 25, 2019 to fight illicit trade. Per the term of agreement, NTE/JTI is expected to provide legal and technical assistance to the Commission, Conduct research and provide information to CC and assign focal person. Without prior knowledge of the concerned department within the commission, NTE/JTI developed and dropped their own meeting agendas to be presented in the name of the Commission in meetings. NTE/JTI sent meeting invitations to the officials attend international meeting on illicit trade (20, 21).

Besides, they used multiple strategies to influence the regulatory body of government delay implementation of the PHW directive. Starting from commenting to dilute the draft to requesting for extended time (additional 1 year) for implementation to be given to them to finish products at stock and import machinery for the new pack.

Industry Strategy 3.3: Tobacco advertising, promotion, sponsorship and sales strategies

Tobacco advertising, promotion and sponsorship in any form either directly or indirectly are totally banned. However, advertising using print materials like umbrella with company's name, T-shirts, Plastic bags, Match box, and Tobacco products selling display shelves/boxes in public places were widely observed both in Addis Ababa and the regions. The TI was also engaged in various promotional activities like free distribution of key chains with the company's name, tobacco products selling display shelves/boxes, T-shirts, Plastic bags, Wall clock with brand names of Tobacco products to various retailers, bar and chat chewing houses. Tobacco products are highly displayed to the public at point of sale in most retail shops including among street vendors around schools and Universities purposively targeting to attract potential new youth smokers. This was accompanied with sell of cigarettes in single sticks where most youth can afford it at lower prices. Besides, the TI used other promotional strategies like price discount, promotional allowance and retail value added (payments to retailers that sell tobacco products in reduced prices, The TI offers multi-pack price

discount) (*Observation*). Despite lack of evidences to NTE's involvement, in violations to the restrictions kept on Proclamation 1112/2019, tobacco products continued to be promoted through films, drama and theatre. NTE/JTI also used the name of one of indigenous animal to Ethiopia called Nyala Ibex to its most commonly sold cigarette brand called Nyala and Nyala Premium and name of ancient princess of Ethiopia to the other brand called Elleni (*observation of cigarette packs*).

NTE used innovative packaging designs to encourage purchase and re-purchase. Upon submission of sample packs by NTE for approval, EFDA identified there was a misleading labeling of the factory's new brand cigarette as Winston Blue and Winston Red. Such kind of labeling in the form of differentiating a similar brand using different kinds of colors is totally prohibited under Proclamation 1112/2019 and PHW directive 44/2019 as it may give wrong interpretation for the users as the red one is stronger and the blue is light. The industry on its behalf strongly claimed EFDA to give them approval as if there is no such kind of standard interpretation.

Besides, NTE/JTI minimized the pack size of the commonly sold brand Nyala when they print the current pack with the new PHW image and text. Even though there is no legislation to regulate the pack size, this will have direct effect to reduce the image proportion to the 70% display area of the pack size.

Industry Strategy 3.4: Forging alliances

The enterprise provides technical support, seedlings and plant protection chemicals to tobacco growing farmers free of charge. Fertilizers are supplied to the farmers on credit basis which is reimbursable during tobacco sales. The tobacco farmers are not organized and don't have the capacity to negotiate price. The farmers are always in disadvantage when they sell their tobacco at a price fixed by the enterprise (2). However, during parliamentary public hearing called to ratify Proc.1112/2019, certain farmer representatives strongly debated the parliament as if passage of sturdy TC legislation will affect their livelihood (*Observation by TC advocates during parliamentary public hearing*). There are around 104 wholesalers throughout the country, three duty free importers/ distributors (Alfaraj, Country Trading, Ethiopian Tourist Trading and Nourhussien) and many other retailers like street vendors who based their livelihood on tobacco and other products distribution and sell. Ethiopian Tourist Trading Enterprise, which is granted import license by NTE/JTI, is another alliance that works closely with the enterprise to import tobacco products. For marketing purpose NTE/JTI works in alliance with Prlogue/Cactus Marketing Consultancy PLC, concerning legal issues the enterprise

works in alliance with Emilue Consultancy/ Mihreteab Legal Service. NTE/JTI promoted consumer right and investment right in alliance with Addis Ababa Chamber of Commerce.

EFDA hosted repeated complaint from various hotels and their associations with regard to implementation of Article 8 of Proc.1112/2011. The hotels argued implementation of 100% SFE would affect the hospitality industry through repealing of customers and hence EFDA should re-consider its decision. There were no evidences whether the TI is behind this association or not however, most of the arguments raised by the hotels were that of the TI.

NTE requested EFDA, Customs Commission and the Federal Police Commission to work jointly in fighting illicit tobacco trade using monopoly rights. However, EFDA declined this request whereas the two organizations are working jointly with the TI on the basis of signed MOU. Besides, NTE/JTI hired Consultant for Customs commission to consult the commission on the strategies to curb illicit trade of tobacco products.

Industry Strategy 3.5: Intimidation and harassment

Legal treats were directed towards EFDA during issuing of tobacco control directive No. 28/2014 and drafting EFDA proc1112/2019. The TI intimidates higher officials of the Authority by threatening to institute litigation against the Authority. They went to the Former Ministry of Justice claiming that the Directive issued by EFDA is of no legal base. Similarly, complained to the Federal Attorney General, the Office of the Prime Minister and Women, Children and Social Affairs standing committee of the Parliament claiming that the Tobacco Control Provisions enshrined under EFDA Proclamation 1112/2019 would contribute to increment of Illicit trade/smuggling of tobacco products and loss of revenue to the government and tobacco farmers ([Key informants from EFDA and FAG](#)).

Regarding the TAPs ban violation by NTE/JTI in the name of fighting illicit trade with CC, the company refuted the allegation, saying NTE/JTI is abiding by the country's law. The industry argued plastic bags with "Stop Contraband" message and the company's name could not be a tobacco promotion and placing the company's name is not restricted by the tobacco control legislation or any other law in Ethiopia. The enterprise questioned company name is not a brand and by no means could it be interpreted as promotion or advertising material for a tobacco product (22).

NTE through a paid legal consultant tried to discourage/embarrass the successful advocacy work done by MWECS (One of the leading advocacy partner in NCDs and TC to MoH, EFDA and other pertinent government organizations (23). An informant from reporter newspaper said that following publications of articles, unknown individual from NTE/JTI called and verbally harassed/warned him to

refrain from publications of tobacco related topics as it is none of his business. The TI intimidated the parliament during the public hearing called to ratify the proclamation that strong and too sudden TC measures would affect economy of the country ([Observation by TC actors during parliamentary public hearing](#)).

Industry Strategy 3.6: Undermining science

NTE/JTI in collaboration with the Ethiopian Economic Association where three economists from Addis Ababa University conducted a survey entitled as “Nature and Consequences of Illicit Trade in Ethiopia: The Case of Textile & Garment, Tobacco and Pharmaceutical Products”. The survey report indicated that the most serious form of illicit trade activities was smuggling and one of the major products posing a challenge under this illicit trading was cigarettes next to electronics and garments. The report declared that, Illegal cigarettes constitute 44% of the market; up from 38% in 2012 (5). This survey finding was used as a principal statistics among policy makers to put a lower excise tax base. Informant from CC said that:” Overall 45% of cigarette in Ethiopia market is illicit. The commission didn’t conduct research, but used research conducted by economist with support of the NTE.” NTE/JTI repeatedly used this finding to influence the ratification of the excise tax proclamation.

4. Advocacy efforts by CSOs to counter industry tactics

The very basic for so far obtained successes in tobacco control is the existence of strong CSOs coalition that works closely with the government. These CSOs served as leading advocacy partner to the government and acted as watch dog for the proclamation maintain basic FCTC provisions. Some of the specific activities by CSOs include: organized awareness creation, sensitization and capacity building workshops on the basic concepts of TIMR to different target groups, advocacy workshop through dinner to relevant/influential individuals and celebrities, mass awareness creation among the community using different platforms, shared other countries experience to different sectors proactively prevent industry tactics, facilitated capacity building training opportunities abroad for pertinent stakeholders from different organizations on TIM. Published countering articles on newspapers, organized press release and engaged with the media to expose and counter identified industry tactics; with the help of international partners’ survey was conducted by an independent research consultancy agency to depict the actual illicit tobacco prevalence. Provided financial and technical supports to EFDA tackle tactics of TI, conducted repeated courtesy visits and submitted complaint letters regarding

interference of the TI to different policy makers, supported and contributed to strengthening of National and Regional tobacco control coordination committees establishment of the TIMR team which is functioning as a sub-committee of the NTCCC. All these concerted efforts lead to timely counter interferences from the TI with gradually strengthened capacity and basement of strong TC legal frameworks particularly Proclamation 1112/2019 and the excise tax proclamation.

5. Position of tobacco companies in the country's economy

JTI acquired the majority (71%) shares of NTE from the Government of Ethiopia in 2016/2017 for USD 1 billion. This was the largest private sector investment by a Japanese company in Ethiopia to date. The company provided direct employment to over 1,200 Ethiopians and indirect employment to over 10,300 tobacco out-growers/independent farmers (1). NTE estimated the area under tobacco cultivation in the country in a range from 1,800 to 2,200 hectares in any one season taking into account that tobacco is a rotational crop and not always planted each season by framers. The number of people, who might be employed in tobacco farms and directly or indirectly rely their welfare from Tobacco farming across the entire country was estimated between 22,000 and 31,000 people in any one season. The Percentage of tax collected from the tobacco sector increased in recent times. However data on percentage of the Gross Domestic Products (GDP) coming from the tobacco sector could not be avail during this data collection time (24). As stated above, in 2019, NTE/JTI was among the top reputable high tax payer enterprises out of 160 organizations which received their awards from the Prime Minister.

Table 1: Percentage of tax collected from the tobacco sector in the past five years (2007-2011 E.C)

S.no	Tax period (E.C)	Tax Type (in ETB)		
		Schedule C-Normal	Excise Tax	Value Added Tax (VAT)
1.	2011	114,802,234.00	1,025,779,154.48	245,464,641.58
2.	2010	178,304,897.00	857,538,085.91	257,213,261.66
3.	2009	145,147,782.30	615,576,564.71	245,400,011.17
4.	2008	115,296,171.60	541,771,766.05	177,908,163.84
5.	2007	101,826,851.10	513,912,861.01	184,456,951.20

N.B: For additional years back to 2002 E.C, please refer to the annex section.

6. Strengths in Tobacco Control at the National Level

In the past four or five years, TC measures were strengthened and drew government attention. TC is embedded in the National NCDs prevention and control action plan which is a growing health and development concern. Despite the meticulous strategies and huge financial capacity of the TI to undermine TC efforts, existence of strong civil society coalition that works on advocacy was the basis for almost all of the achievements in tobacco control in Ethiopia. There is a close collaboration among TC CSOs, the government particularly EFDA and certain earned media which could be shared as best practice to sectors other than TC. This collaborated effort along with increased commitment among policy makers capacitated the country to endorse stringent FCTC compliant TC proclamation and modified excise tax proclamation sidestepping the vigorous interference from the TI. The existence of strong legal grounds is one of the very basic specialties that the country had. A well-structured and vigilant TIMR team existed; information exchanged on timely basis and countering measures were being taken where certain victories over the TI were obtained so far. Overall, in recent times, TIMR activities in the country were strengthened. A tobacco control focal unit exists under EFDA; a NTCCC comprised of members from different sectors of government organizations, CSOs and the media existed. Recently, EFDA managed to stream this tobacco control coordination committee across each of the regions of the country. In the aim of drawing the TC implementation to the grassroots level and identifying the existing shortage of legal expertise in the regions, EFDA is providing technical support to the regions endorse their own implementing regulations and directives for the TC proclamation. The authority organization drafted model implementing guidelines and circulated to let similar implementation existed across each region.

7. Barriers to tobacco control at the national level

Ethiopia didn't have a legal framework problem; however, there is weak implementation/enforcement of the TC proclamation. TC is not well financed by the government rather it is mostly dependent on donor based CSOs. EFDA and regional regulators have financial and manpower limitations to enforce the new bill in full capacity. Besides, the Federalism structure of the country and lack of similar commitment is another big challenge for lack of uniform enforcement of the TC proclamation across each region. The law making process is quite long as observed during ratification of the TC proclamation and currently the adoption process for the implementing regulation and directive is delayed beyond the expected period. Despite the existence of strong CSOs, their advocacy work is not supported by adequate evidences. Interference from the TI to hamper enforcement of TC proclamation continued to be the other

major challenge. The illicit trade protocol is not yet approved. Due to absence of track and tracing system, new technology duty free and other illicit tobacco products are widely sold on the market.

G. Conclusion and Recommendations

In conclusion, despite, the effort being made by the government to reduce consumption of tobacco products through introduction of stringent tobacco control legislations, NTE/JTI is in the process of modernizing, expanding and rehabilitating the existing tobacco company to boost production. There were a wide array of evidences which indicated the various strategies and tactics the industry used to undermine, weaken and interfere with the tobacco control measures being taken. Among others, the tobacco industry tried to dilute and delay the different tobacco control legislations through bringing recommendations that will favour its own interests with the help of hired legal consultants, used front groups to argue on behalf of the industry, conducted survey through consultant and came up with exaggerated figures of illicit trade prevalence to undermine tax measures, economic threat to the government, signed MOU with concerned government bodies, engaged in different CSR activities to reinvent its image and manipulated the media at various times to promote its image and views.

Hence, it is strongly recommended that, Ethiopia is at peak time to take strict measures to halt the aggressive and growing strategic interferences from the tobacco industry. The Ethiopian Food and Drug Authority in collaboration with concerned stakeholders should firmly implement and follow the existing tobacco control legislations. Each region should adopt the model law to its own context and enforce as soon as possible. The NTCCC members and specifically the TIMR team sub-committee should work jointly and very closely to monitor, expose, take/recommend appropriate, timely and proactive countering measures. Promotion of the provisions of Proc 1112/2019, WHO article 5.3 and the industry tactics to different government organizations and the general public, has to be strengthened. Close follow up and action has to be taken regarding the MOU and the contract sale agreement provisions with the Ministry of Revenue, Ministry of Finance and Economy and Public Enterprises Holding and Administration Agency (the former Ministry of Public Enterprise). Attention should be given to the rapid ratification of illicit trade protocol and adoption of track and tracing system.

H. Lessons Learned

In recent times, there is a strengthened and activated effort to monitor and counter tobacco industry efforts in interfering with tobacco control measure. However, the TIMR efforts are always over passed by the speed and strategies the industry is using to interfere with tobacco control measures. The TI always comes up with new strategies and tactics to use the loopholes in tobacco control to undermine the measures being taken. Tobacco control actors in contrary are going to counter once interference was observed from the TI. Hence, capacity building should continue for them to act proactively.

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17. <https://www.thereporterethiopia.com/article/where-there-smoke-there-fire>
18. Document review (the TI's comment on the draft of Proc 1112/2019)
19. <https://www.youtube.com/watch?v=BwsC3OWgEwA&feature=youtu.be>
20. Draft Memorandum of Understanding signed between the Ethiopian Customs Comission and the National Tobacco Enterprise Ethiopian (S.C), April 25, 2019.
21. <https://www.capitalethiopia.com/capital/illegal-tobacco-trade-affects-monopoly/>
22. <https://www.thereporterethiopia.com/article/accusation-hits-nte-breaching-ban-tobacco-advertising>
23. <https://www.thereporterethiopia.com/article/much-fuss-over-obsequious-recognition-lip-service>
24. A letter by National Tobacco Enterprise (Ethiopia) Share Company wrote to Ethiopian Food and Drug Administration, August 28, 2020, Reference: 2/A/10-3/21.1.

Appendices

Table 1: BASELINE DATA COLLECTION ON TOBACCO INDUSTRY INTERFERENCE AND TACTICS

Country	<i>Ethiopia</i>
Lead organization	<i>Mathiwos Wondu-YeEthiopia Cancer Society (MWECS)</i>
Office address	<i>Bole Sub-City, Kebele 05, House No 156/ሊ, Megenagna 200 meters from the car weight scale of the road authority or behind SIDRA International Hotel. P.O. Box 80571, Addis Ababa, Ethiopia.</i>
Email	<i>wondub@mathiwos.org</i>
Telephone - fixed and mobile	<i>Tel: +251-118-122838/0116395760/0116394760 Mobile: +251911227273</i>
Data collection period (from yyyy to date)	<i>July 14-31,2020</i>
Lead data collector (Name, Email, Telephone)	<i>Tizita Wondwossen, tizitaw@mathiwos.org,+251912038132</i>

Date of submission		15/August/2020	
Industry Strategy 1: Re-inventing the image (The TI aims to enhance its image as respectable)			
TI Tactic	Source of Information	TI activities(Please separate past & present activities)	Civil society response(Please separate past & present activities)
“Youth smoking prevention” (Use of the “Youth smoking prevention” program to depict smoking as an adult choice and appear to be protecting children from tobacco)	Past: NA	Past: NA	Past: Share other countries experience to different sectors proactively prevent this industry tactic Awareness creation through workshops
	Present: NA	Present: NA	Present: Share other countries experience to different sectors proactively prevent this industry tactic Awareness creation through workshops
Recruitment (The TI enhances its image as place for talented individuals)	Past: Website of Job vacancy posting organization https://www.ethiojobs.net/company/238615/National-Tobacco-Enterprise-%28Ethiopia%29-Sh.-co./	Past: A job vacancy posted on Ethiojobs (one of the leading online job searching and most frequently visited website by most job seekers) stated that NTE is one of the largest enterprises and taxpayers in the country and	

		<p><i>also one of the biggest employers in the country, providing direct and indirect employment to more than 5,000 Ethiopians. Besides, it stated that diversity and inclusion are at the heart of the Company. In addition to the good working conditions, NTE provides with various additional attractive employee benefits like canteen, medical treatment, opportunities to attend in many technical and managerial trainings and learning programs in Ethiopia and abroad. Internal promotions and careers within the Company.</i></p>	
	<p><i>Press release</i></p>	<p><i>Past: In 2017 when JTI acquired the remaining 30% share from the government, Eddy Pirard, President and CEO of JTI stated that by combining talented international and newly acquired local qualified expertise, JTI is confident to take NTE to a new level of</i></p>	

		<i>growth on the press release circulated to media houses.</i>	
	https://www.thereporterethiopia.com/article/japan-tobacco-assigns-new-ceo	<i>Past: A couple of weeks after JTI became the principal shareholder of NTE, the company assigned a new CEO who has long term working experience with JTI to spearhead its operation in Ethiopia. JTI continued to replace most Ethiopian national high positioned employees with foreigners having extensive work experience with JTI. Besides to JTI's intention to easily implement its strategies and expand its business rapidly, this approach will have direct influence particularly on young job seekers as most of them perceive working with foreigners will result in being highly paid with foreign currency.</i>	
	Present: NA	Present: NA	Present:
Funding research including universities	Past: NA	Past: NA	Past:

<p><i>(The TI funds research/universities to enhance its image of respectability and create doubt over health evidence)</i></p>	<p>Present: NA</p>	<p>Present: NA</p>	<p>Present:</p>
<p>Manipulation of the media (The TI uses the media to promote its views, image and products and shape public opinion)</p>	<p>Past: Newspapers (https://www.capitalethiopia.com/capital/about-40-of-ethiopian-tobacco-market-is-illegal/) https://www.capitalethiopia.com/capital/illegal-tobacco-trade-affects-monopoly/</p>	<p>Past: Published articles in different times to promote its views regarding illicit trade prevalence, its products, the recognition NTE/JTI received from Ministry of Revenue for being one of loyal high tax payer organization and methods of curbing illicit trade based on the recommendations from market survey commissioned by the industry itself.</p>	<p>Past: Published countering articles, Organized awareness raising workshops, With the help of international partners survey to depicts the actual illicit tobacco prevalence was conducted by an independent research consultancy agency</p>
	<p>Present: National TV(https://www.youtube.com/watch?v=BwsC3OWgEwA&feature=youtu.be), radio, newspapers(https://www.thereporterethiopia.com/article/much-fuss-over-obsequious-recognition-lip-service), https://www.thereporterethiopia.com/article/customs-commission-partners-spotlight-communication</p>	<p>Present: media campaign NTE/JTI started media campaign during the end stages of ratification process of the excise tax proclamation to influence policy makers and the public lower tax to be laid to tobacco</p>	<p>Present: Press release, Complaint letter along with evidences and other countries experiences on taxation submitted to the media houses.</p>

		<p><i>products. Tobacco products are reported the leading products smuggled illegally to the country with prevalence of 40% all over the country and the prevalence higher up to 90% in the eastern region of the country. This report finding originated from the assessment conducted by the tobacco industry and the press statement was sent on behalf of Customs Commission. During the parliamentary public hearing, rejecting the very strong health perspective arguments raised by public health advocates, the national medias reported the views of the Corporate Social Affairs and</i></p>	
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		<p><i>Communication Director of NTE reflecting higher tax rate will exacerbating the existing high illicit trade prevalence and economic threats as the industry is high tax payer enterprise in the country.</i></p>	
<p>Corporate Social Responsibility (CSR) <i>(Use of CSR to reinvent its image, improve its reputation and buy new friends)</i></p>	<p><i>Newspaper (https://moencoethiopia.com/blog/go-green-ethiopia/) Interview</i></p>	<p><i>Past: July 29, 2019, NTE participated on the go green/the green legacy environmental scheme national campaign officially launched by the Ethiopian Prime Minister and planted 2,000 trees to show their support to the National Green Development Program. This activity is part of the industry's effort to convince the government build in trust, get acceptance and strengthen its</i></p>	<p><i>Exposed the act on different sensitization and capacity building workshops organized to different target groups including policy makers</i></p>

		<p>partnership with the industry. NTE/JTI requested the Hospitals for re-innovation of the Cancer treatment Center The request was denied by professionals</p> <p><i>Check on Supporting Anti HIV/AIDs clubs in School around Shewarobit area, and library book support etc (NTE previous website)</i></p>	
	<p><i>Lideta Sub city Office of Food Medicine and Health Care Administration and Control</i></p>	<p><i>Present: In response to the COVID 19 pandemic, NTE produced hand sanitizers despite getting production license from EFDA and distributed free of charge to economically disadvantaged group of the community living in Lideta Sub-city. Lideta Sub City is one of the 10 sub-cities of Addis Ababa where NTE is located and high number of confirmed</i></p>	<p><i>Exposed this effort of TI as being one form of CSR the industry uses to regain its acceptability among the public and the government on an article published in one of the widely circulated newspaper called "the reporter". (https://www.thereporterethiopia.com/ar)</i></p>

		positive cases for COVID 19 identified.	ticle/upping-ante-against-silent-killer .
Promotion of new tobacco products (The TI is engaged in marketing innovative products like e-cigarettes and heat-not-burn tobacco)	https://www.jti.com/about-us/our-business/how-we-work	NA (So far the TI is not engaged with such kind of activities in Ethiopia. However, on JTI's website, there is an indication to produce tobacco products they called reduced risk products including vaping in the foreseen future.)	

Industry Strategy 2: Influencing politicians (The TI aims to increase political influence to block, delay, weaken and undermine TC measures)			
TI Tactic	Source of Information	TI activities (Please separate past & present activities)	Civil society response (Please separate past & present activities)
Political support and funding (Offer donations to gain favours from politicians)	<p>Press release by JTI (https://www.jt.com/media/news/2016/pdf/20160715_12.pdf)</p> <p>https://www.jt.com/media/news/2017/pdf/20171221_E01.pdf</p>	<p>Past: In 2016 JTI acquired NTE's 40% share purchase agreement of USD510 million from the government. During the transaction, Mrs. Demitu Hambisa, Ethiopia's former Minister of Public Enterprises stated her expectations from JTI to bring their technical, business and management ability to develop NTE into a world class tobacco company, which will contribute to the overall Ethiopian economy. She assured the government look forward to working with JTI and offer full support in making this a success for all stakeholders. The deal was completed with funds by the Group's existing cash and loan facilities while the country was facing foreign currency shortage. In less than 6 months' time JTI signed</p>	

		<i>additional share purchase agreement of USD 434 million with the government for approximately 30% of the total shares in NTE, bringing the JT Group's share ownership to over 70%.</i>	
<i>Lobbying (The TI makes deals and influences the political process)</i>	<i>Interview</i>	<i>Past: As per informants from the Customs commission, NTE/JTI sent meeting invitations to the officials attend international meeting on illicit trade. In addition, they personally communicated and offered foreign training opportunity to one of the informants in the Commission in an attempt to influence him against the tobacco control measures he is undertaking representing the Commission. Without prior knowledge of the concerned department within the commission, NTE/JTI developed and dropped their own meeting agendas to be presented in the name of the Commission in meetings.</i>	
<i>Voluntary agreements (The TI promotes weaker agreements instead of legislation)</i>	<i>Draft of the MOU Interview Newspaper (https://www.capitalethiopia.com/capital/illegal-tobacco-trade-affects-monopoly/)</i>	<i>Past: NTE/JTI signed MOU with Customs Commission on April 25, 2019. Among others some of the terms of agreement include: NTE to share information regarding illicit trade to CC, provide legal and technical assistance to the Commission, Coordinate potential trainings to law enforcement personnel, Conduct research and provide information to CC and both organizations to assign focal person. This agreement is expected to be effective for 1 year and terms to be automatically enforceable for additional period of 1 year. NTE/JTI has been providing information to the Commission regarding smuggled tobacco products and the commission has significantly reduced smuggled tobacco products on the basis of their whistle blower. Therefore, the Commission signed MOU with NTE to combat contraband; so far NTE is the only private company the commission signed MOU with.</i>	<i>Advocacy for ratification of the illicit trade protocol</i>

<p>'Sensible' legislative drafts (The TI provides drafts of so-called 'sensible' but ineffective legislation)</p>	<p><i>Contract agreement from Former Ministry of Public Enterprises</i></p> <p>Newspaper https://www.thereporterethiopia.com/article/where-there-smoke-there-fire</p> <p>Documents (the TI's comment on the draft of Proc 1112/2019)</p>	<p><i>Past:</i></p> <p><i>On the contract sale agreement signed between the former Ministry of Public Enterprises and JTI, it is stated that any law making government organization in relation to tobacco shall consider NTE/JTI as a stakeholder and consult them during the law making process. As a result, a letter was addressed to the MoFEC signed by Mr. Alemayehu Tegenu, Cabinet Affairs Minister at the Office of the Prime Minister ordered discontinuation of the amendment process of the excise tax proclamation and serve concerns of the TI. Similarly, a letter from same office was addressed to EFDA to hold discussions on the draft proclamation with the TI. NTE/JTI reviewed the draft of proclamation 1112/2019 article by article and provided to EFDA comments and recommendations to each of the key provisions in favour of the industry. The industry consulted one of the best law offices in Ethiopia (Mihreteab Law Office)-which brought the comments on behalf of the industry. The TI requested for a meeting to discuss on the comments they brought against the draft of Proclamation 1112 and a high level delegation team of the TI including the CEO, JTI's legal expertise together with Mihreteab Law Office brought sensible arguments and comments intended to delay and weaken the stronger TC provisions enshrined under the draft.</i></p>	<p><i>Provided Technical and financial support to EFDA reject recommendations from the TI and the draft proclamation maintained the stronger FCTC based provisions.</i></p>
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<p>False claims of “failure” of TC policy overseas (The TI deters TC reforms by portraying them as unworkable, damaging, ineffective)</p>	<p>Documents (the TI’s comment on the draft of Proc 1112/2019)</p>	<p>Past: NTE/JTI argued the currently approved 70% GHW to be deleted and the existing 30% HW maintained. They argued that, there is no evidence that larger GHW will proportionately increase smokers’ awareness rather will benefit illicit trade.They also questioned the effectiveness of the proclamation through raising timing issue. Certain tobacco restrictions can have unwanted effect of facilitating illicit trade when the timing is ill-considered, or when measures are excessive and too sudden.Hence, the government should first succeed in bringing the illegal market to acceptable levels otherwise the legislation will not be effective. Present: Similarly the above reason was the forefront argument point of MoFEC to put lower excise tax to tobacco products during ratification process of the excise tax proclamation.</p>	<p>Provided Technical and financial support to EFDA reject recommendations from the TI and the draft proclamation maintained the stronger FCTC based provisions. Curtsey visit to MoFEC officials, submission of letters and evidences , press release</p>
<p>Proposing and promoting tools and systems that favour TI (The TI pushes for instruments that benefit its interest. For example, Codentify, an inefficient tracking and tracing system)</p>	<p>NA</p>	<p>NA</p>	<p>CSOs Advocate tracking and tracing system to be applied and require sharing Kenyan experiences</p>
<p>Industry Strategy 3: Tobacco advertising, promotion and sponsorship (The TI aims to attract new smokers, maintain current use and create a positive image of its own)</p>			
<p>TI Tactic</p>	<p>Source of Information</p>	<p>TI activities(Please separate past & present activities)</p>	<p>Civil society response(Please separate past & present activities)</p>
<p>Advertising using print materials.</p>	<p>Past: Newspaper (http://addisstandard.com/beh)</p>	<p>Past: Sturdy plastic posters, presumably designed to withstand the downpours of the rainy season, have</p>	

(The TI uses posters, billboards, umbrellas, etc. in public places to advertise its products.)	<u>ind-the-smokescreen-of-ethiopia-surg-ing-tobacco-producti on/</u>	<i>littered many parts of Addis Ababa, including residential areas, promoting the British American Tobacco's Rothmans cigarettes. Their slogans read: "DISCOVER OUR LEGACY: TRUE TOBACCO TASTE."</i>	
	Present: <i>Observation of Users Inspection Evidence from EFDA and Regional Regulatory</i> <u>https://www.thereporterethiopia.com/article/accusation-hits-nte-breaching-ban-tobacco-advertising</u>	Present: <i>Umbrella with company's name (NTE) T-shirts Plastic bags Tobacco products selling display shelves/boxes</i>	<i>Financial and Technical support to EFDA tackle tactics of TI Notify EFDA when such act is observed Exposed the observed tactics and argued violation of the country's law by the industry through articles published on newspapers, press release, panel discussions... Awareness creation for multi-sectoral organizations</i>
Media advertising (The TI uses the media like the TV, radio, magazines, newspapers to advertise its products)	NA	NA	
Promotion of tobacco products (Conduct free distribution of cigarettes, gift vouchers, gadgets with brand names)	Past and present: <i>Observation of product users Interviewing Retailers</i>	Past and Present: <i>Retail value-added promotions and specialty items such as Distribution of key chains with the company's name (NTE)free of charge Tobacco products selling display shelves/boxes</i>	Past and present: <i>Financial and Technical support to regulating body of government.</i>

<i>and other promotional activities)</i>	<i>EFDA and Regional regulators' inspection result</i>	<i>T-shirts Plastic bags Wall clock with brand names of Tobacco products Tobacco products highly visible in public places (Display at point of sale including the street vendors) Tobacco companies pay retailers for shelf space</i>	<i>Notify EFDA when such act is observed. Awareness creation for community using different platforms.</i>
<i>Promotion of new tobacco products (The TI is engaged in marketing innovative products like e-cigarettes and heat-not-burn tobacco)</i>	<i>NA</i>	<i>NA</i>	
Point of Sale promotion <i>(Aggressive in-store promotion to attract potential "new smokers", mostly children.)</i>	<i>Past and present: Product users Retailers Retail shop customers Government institution reports (EFDA and Regional regulators)</i>	<i>Past and present: Tobacco products highly visible in public places (Display at point of sale including the street vendors around schools and Universities purposively targeting to attract potential new youth smokers) Price discount Promotional allowance Retail value added (Payments to retailers that reduce the price, multi-pack discount) Signs</i>	<i>Past and present: Financial and Technical support to regulating body of government. Awareness creation for community using different platforms.</i>
Internet promotion <i>(Use of internet promotion to avoid advertising restrictions and continue to promote, especially to youth)</i>	<i>The internet</i>	<i>NA</i>	

<p>Innovative packaging (Use of innovative packaging designs to encourage purchase and re-purchase.)</p>	<p><i>Past: Tobacco and its Health Hazards Including A Proven Method on How to Stop Smoking. A book by Tekaligne Legesse, JUNE, 2020)</i></p> <p><i>Present: Observation of the sample packs submitted to EFDA for approval</i></p>	<p><i>Past: According to the market research conducted by the Industrial Project Service (IPS) in year 2003 contraband cigarettes were preferred as compared to domestic brands because of the relatively cheaper price, aesthetically attractive crash proof packaging etc. IPS recommended that NTE shall produce new brands of cigarettes with crash proof hinge lid packaging at competitive cost so as to combat contraband brands and raise market share of domestic brands. As the result NTE bought crash proof box packer and developed a brand known as Delight in year 2005 to replace contraband cigarettes mainly Sportsman. In the same manner Nyala premium was developed with the intention of replacing Rothmans brand.</i></p> <p><i>Present: Upon submission of sample packs by NTE for approval, EFDA identified there was a misleading labeling of the factory's new brand cigarette as Winston Blue and Winston Red. Such kind of labeling in the form of differentiating a similar brand using different kinds of colors is totally prohibited under Proclamation 1112/2019 and PHW directive 44/2019 as it may give wrong interpretation for the users as the red one is stronger and the blue is light. The industry on its behalf is strongly claiming EFDA to give them approval as if there is no such kind of standard interpretation.</i></p> <p><i>Present: NTE/JTI minimized the pack size of the commonly sold brand nyala when they print the current pack with the new GHW image and text. Even though there is no legislation to regulate the pack size, this will have direct effect to reduce the image proportion to the 70% display area of the pack size.</i></p>	
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<p>Sport, entertainment and fashion promotion <i>(The TI associates tobacco with youth, celebrity, glamour, Success.)</i></p>	<p>NA</p>	<p>NA <i>To be Checked on Previously supporting Nyala sport Club</i></p>	
<p>Films, DVD, computer games <i>(Use of films, DVDs and computer games to avoid advertising restrictions and continue to promote - especially to youth)</i></p>	<p><i>Past and present: Various media outlets (TV, Social media, You tube, Cinema, Theatre...)</i></p>	<p><i>Past and present: The tobacco industry violates the advertising restrictions and continued to promote cigarette smoking through films, drama and theatre.</i></p>	<p><i>Past and present: Financial and Technical support to regulating body of government. Notify EFDA when such act is observed. Supported NTCCC meeting recently where delegate of the Broadcast Authority is informed to take action. Orientation workshop to Artists, Ethiopian Film Makers Association and to media</i></p>
<p>Brand stretching and brand sharing <i>(Tobacco brand names, logos etc are connected with non-tobacco products and vice-versa to increase appeal and use.)</i></p>	<p><i>Past and present: Observation NTE/JTI website</i></p>	<p><i>Past and present: NTE/JTI uses the name of one of indigenous animal to Ethiopia called Nyala Ibex to its most commonly sold cigarette brand called Nyala and Nyala Premium and name of ancient princess of Ethiopia to the other brand called Elleni.</i></p>	

Industry Strategy 4: Keeping tobacco products affordable (The TI aims to facilitate smoking among regular users and encourage experimenting among youth non-users)			
TI Tactic	Source of Information	TI activities(Please separate past & present activities)	Civil society response(Please separate past & present activities)
Campaigns opposing tax increases. <i>(The TI strongly opposes tobacco tax as it is a proven strategy to reduce consumption)</i>	Interview News paper Past https://www.capitalethiopia.com/capital/about-40-of-ethiopian-tobacco-market-is-illegal/ Present https://www.thereporterethiopia.com/article/customs-commission-partners-spotlight-communication	<i>Media campaign as stated under manipulation of the media JTI's official explained at the Economist's Illicit Trade Summit held in July 2019, at Hyatt Regency Hotel that 40% of the tobacco sold in Ethiopia is illegal therefore; tobacco control and fiscal measures should be proportionate so they do not undermine the fight against illegal tobacco.</i> <i>During excise tax proclamation public consultation held at Ghion Hotel, NTE repeatedly raised that if tax raised illicit trade will prevail and the government will lose revenue. Strongly argued for low tax that enable them to compete with illicit cigarette available at cheap price</i> <i>During the drafting process of the excise tax proclamation, NTE have submitted a letter to the commissioner of the Customs Commission that demands reduction of excise tax rate. They claimed that high tax results in high price. This may force customers switch to use illicit products at cheaper rates.</i>	<i>Curtsey visit to MoFEC officials, submitted complaint letter and evidences of the actual illicit trade prevalence conducted by neutral consultancy agency, press release to expose the act</i>
Sale of single cigarettes <i>(The TI encourages the sale of single cigarettes to facilitate purchase and initiation among youth)</i>	<i>Past and present: Observation, Newspaper</i> (http://addisstandard.com/behind-the-smokescreen-of-ethiopias-surging-tobacco-production/)	<i>Past and present: Most retail shops including street vendors throughout the country sell cigarettes in single despite Proc.1112/2019 bans sale of single stick cigarettes. This act is also widely observed around the Universities where most youth can afford it at lower prices.</i>	<i>Technical and financial support to EFDA develop implementing regulation and directive for the proclamation</i>
Industry Strategy 5: Forging alliances			

(The TI aims to create the illusion of broad support)

TI Tactic	Source of Information	TI activities (Please separate past activities from present activities)	Civil Society Response (Please separate past responses from those present)
<p>Front groups and alliances (fully/partly funded) (The TI mobilizes partners by donating funds to influence and delay legislation/regulation)</p>	<p><i>Observation by TC advocates during parliamentary public hearing Tobacco and its Health Hazards Including A Proven Method on How to Stop Smoking. A book by Tekaligne Legesse, JUNE, 2020) Newspaper</i></p>	<p><i>The enterprise provides technical support, seedlings and plant protection chemicals to the farmers free of charge. Fertilizers are supplied to the farmers on credit basis which is reimbursable during tobacco sales. The tobacco farmers are not organized and don't have the capacity to negotiate price. The farmers are always in disadvantage when they sell their tobacco at a price fixed by the enterprise. However, certain representatives strongly debated the parliament as if passage of strong TC legislation will affect their livelihood during parliamentary public hearing called to ratify Proc.1112/2019. Complaint from Hotel Association with regard to implementation of Article 8 following ratification of Proc.1112/2011.</i></p>	<p><i>Technical and financial support to organize orientation workshop to the hotels and periodic inspection to look for their adherence to implementation.</i></p>
	<p><i>Ethiopian Food and Medicine Authority (EFDA)</i></p>	<p><i>National Tobacco Enterprise requested EFDA alliances to prevent and control illicit tobacco products</i></p>	<p><i>EFDA refused the alliance</i></p>
	<p><i>EFDA</i></p>	<p><i>NTE requested EFDA to manufacture food supplement for nutrition purpose from tobacco leafs in the form of gum, patch and sublingual</i></p>	<p><i>EFDA refused the request</i></p>
	<p><i>EFDA</i></p>	<p><i>NTE requested EFDA to give an information or rumors (ጥቆማ) on illicit trade</i></p>	<p><i>EFDA did not respond to their request because of the issue of Conflict of interest</i></p>
	<p><i>Ethiopian Customs Commission</i></p>	<p><i>NTE requested the Customs Commission alliances to curb illicit tobacco products including counterfeit and contraband cigarettes</i></p>	<p><i>The request was accepted by Customs commission and MoU</i></p>

			<i>was developed and Signed by both parties on the action taken to curb illicit trade</i>
	<i>Federal Police Commission</i>	<i>NTE requested the Federal Police Commission alliances to control and prevent illicit tobacco products by using monopoly rights.</i>	<i>The request was accepted by Federal police commission and take the action on illicit trade of tobacco products</i>
	<i>Ethiopian Tourist Trading Enterprise (ETTE)</i>	<i>NTE gave import license to ETTE to import tobacco products which does not fulfill the Graphical Health Warning recently implemented and Consult/inform ETTE to get special release permission from EFDA which seems as NTE works in alliance with EFDA.</i>	<i>The decision or action was not taken. It is in the process.</i>
<i>Consultancies, think tanks (The TI funds consultancies and think tanks to support its views)</i>	<i>Individual</i>	<i>NTE works collaboratively and funds on the marketing of Tobacco products with Prlogue/Cactus Marketing Consultancy PLC.</i>	<i>Currently working in alliance</i>
	<i>Individual</i>	<i>NTE funds and works in alliance with Emilue Consultancy Company/ Mihreteab Legal Service on the legal issues of tobacco products</i>	<i>Currently working in alliance</i>
	<i>Ethiopian Customs Commission</i>	<i>NTE hired Consultant for Customs commission to consult the commission on the strategies to curb illicit trade of tobacco products.</i>	
	<i>Individual/rumors</i>	<i>NTE funds for 100 think thanks (99 local and 1 foreigner) to promote tobacco products marketing</i>	<i>Counter act in legislation development process and implementation of it indirectly.</i>
	<i>Ethiopian Economic Association</i>	<i>The illicit trade prevalence study</i>	<i>To counter their high and exaggerate estimation,</i>

			<i>independent study on illicit market has been conducted and used to inform public</i>
Rights groups (The TI promotes rights groups to create image of grassroots support: smokers' rights groups, business rights groups, citizens' rights groups, etc...)	Addis Ababa Chamber of Commerce	NTE promoted the Consumer right and investment right in alliance with Addis Ababa Chamber of Commerce	Civil Society responded against their argument to the law maker
	Individual	NTE promoted the Tobacco growers right in alliance with different Farmers associations.	Civil Society responded against their argument to the law maker
Industry Strategy 6: Intimidation and harassment (The TI aims to create fear of negative consequences and deter health measures)			
TI Tactic	Source of Information	TI activities (Please separate past activities from present activities)	Civil Society Response (Please separate past responses from those present)

<p>Litigation and legal threats (The TI challenges laws and intimidates opponents)</p>	<p>Documents Interview</p> <p>https://www.thereporterethiopia.com/article/accusation-hits-nt-e-breaching-ban-tobacco-advertising</p>	<p><i>Past: Legal treats were directed towards EFDA during issuing of tobacco control directive No. 28/2014 and drafting EFDA proc1112/2019. The TI intimidates higher officials of the Authority by threatening to institute litigation against the Authority. They went to the Former Ministry of Justice claiming that the Directive issued by EFDA is of no legal base. Similarly complained to the former Prime Ministers Office and women, Children and Social Affair standing committee of the Parliament claiming that the Tobacco Control Provisions Enshrined under EFDA Proclamation 1112/2019 would contribute to increment of Illicit trade and loss of revenue by the government and the tobacco farmers.</i></p> <p><i>Present: the industry is threatening to litigate the authority against the determination of the authority to fully enforce Provisions of Proclamation 1112/2019 and Graphic Health Warning Directive 45/2020 pertaining to enforcement date of the provisions and the details on size, shape and content of GHW. Besides, they used multiple strategies to delay implementation of the GHW directive. Starting from commenting the draft, raised delayed introduction of the graphic and text content of the pack to EFDA, additional 1 year to be given to then to finish products at store and import the machinery for the new pack. Besides, they requested EFDA to settle copyright issue as the images are copied from other countries.</i></p> <p><i>Present: Regarding the TAPs ban violation by NTE/JTI in the name of fighting illicit trade with CC, the company refuted the allegation, saying NTE/JTI is abiding by the country's law. The plastic bags with "Stop Contraband" message and NTE's name is not a tobacco promotion. Placing the company's name is not restricted by the tobacco control legislation or any other law in</i></p>	
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	<p>https://www.thereporterethiopia.com/article/much-fuss-over-obsequious-recognition-lip-service</p>	<p><i>Ethiopia. Company name is not a brand and by no means can it be interpreted as promotion or advertising material for a tobacco product, the industry questions.</i></p> <p><i>Present: NTE through a paid legal consultant tried to discourage/embarrass the successful advocacy work done by MWECS (One of the leading advocacy partner in NCDs and TC to MoH, EFDA and other pertinent government organizations.</i></p> <p><i>An informant from reporter newspaper said that following publications of articles, unknown individual from NTE/JTI called and verbally harassed/warned him to refrain from publications of tobacco related topics as it is none of his business.</i></p>	
<p>Economic threats (The TI creates economic fears to gain concessions)</p>	<p>Contract agreement Letter from Ministry of Revenue Media (TV), Newspaper https://www.ethiopianreporter.com/article/16574</p>	<p><i>Past and present: In terms of getting concessions, in a contact of sale conducted between the former Ministry of Public Enterprises and JTI, the government allowed insertion of an Article(Art 9) which, assumes illegal trade of tobacco product as significant problem in Ethiopia, and further provides for the relevant government body to conclude an MOU with the company, the government’s illegal trade control task force to collaborate with the enterprise and develop joint action plan to combat illicit trade, the worst of which includes to involve the industry in reviewing of existing and newly emerging TC legislations as necessary. July 27, 2019, on an event organized by the Ministry of Revenue, the Prime Minister handed over the platinum, gold and silver awards to 160 loyal taxpayers in a ceremony held at the Presidential Palace. This event was organized for the first time and awardees were selected based on their annual tax contribution and tax compliance history. NTE/JTI received a platinum award as the 5th reputable company out of 160 businesses. The PM assured the taxpayers of government’s commitment to use properly and efficiently tax revenue collected from them and extends the required support to them. Informant</i></p>	<p><i>Countered the recognition through an article publish on newspaper</i></p>

		<p>from Ministry of Revenue said that “The 2019 award given on bases of criteria set by the ministry and we consider NTE as a business entity. For example, No compliant or suspicion observed in relation to NTE to undermine tax payment or things that mitigate its responsibility plus no issue raised in relation to price mitigation as the division has no authority in this regard. We understand that EFDA and other stakeholders have health concern in relation to tobacco. However, we evaluated the enterprise for the recognition based on criteria set for business entities. But we will consider for the future the impact on public health we may be considered as one criterion to select.”</p> <p>Past: A statement on job searching website states that: “Currently, the Company is among the top public enterprises in terms of annual turnover, profitability, and its contribution to the economy as a whole. Annual turnover has continually increased, on average by Birr 190 million, during the previous five years period. Similarly, its contribution to the economy in terms of taxes paid, dividend to the shareholders and job creation to the citizen as a whole is persistently increasing.”</p> <p>https://www.ethiojobs.net/company/238615/National-Tobacco-Enterprise-%28Ethiopia%29-Sh.-co./</p>	
<p>Predictions of catastrophic effects or increased smuggling (Making use of dire predictions of catastrophic effects or increased smuggling if tobacco control measures are implemented.)</p>	<p>Interview A book http://addisstandard.com/behind-the-smokescreen-of-ethiopias-surg-ing-tobacco-production/</p>	<p>Present: According to informants from Ministry of Revenue, Higher tax payers control branch, during the stakeholders’ consultative meeting organized jointly by EMoR and MoFEC the draft excise tax proclamation, the industry strongly argued if strong tax measures are to be implemented, and smuggling of tobacco products with cheaper prices will increase via porous boundaries of the country. Customers will switch to use illicit products.</p> <p>Past: Informant from the Federal Attorney general also reported that NTE/JTI repeatedly brought claims of illicit</p>	

		<i>trade/increased smuggling trying to defy the draft Proclamation 1112/2019 drafted and tabled by the EFDA.</i>	
Selective interpretation of international treaties. <i>(The TI makes selective interpretation of international treaties to argue measures cannot be implemented.)</i>	NA	NA	
Industry Strategy 7: Undermining science (The TI aims to influence/oppose policy-making)			
TI Tactic	Source of Information	TI activities (Please separate past activities from present activities)	Civil Society Response (Please separate past responses from those present)
Commissioning supposedly 'independent' research and evidence	<i>Survey report Interview Media (Newspapers, broadcast media)</i>	<i>"Overall 45% of cigarette in Ethiopia market is illicit. The commission didn't conduct research, but used research conducted by the economist with support of the NTE"informant from the CC said. This research was conducted by the Ethiopian Economic Association entitled as "Nature and Consequences of Illicit Trade in Ethiopia: The Case of Textile & Garment, Tobacco and Pharmaceutical Products" where three economists from Addis Ababa University conducted this survey. NTE repeatedly used this finding to influence the ratification of the excise tax</i>	Used the Empty pack survey conducted by neutral consultancy agency and revealed illicit trade is only 18 % in the country

		<p><i>document and this figure was used as principal figure to lay lower tax to tobacco products by MoFEC.</i></p> <p><i>The 2012 market study by Industrial Project Services (IPS) the most serious form of illicit trade activities is smuggling and one of the major products posing a challenge under this illicit trading is cigarettes next to electronics and garments. In 2017, NTE also declared that, Illegal cigarettes constitute 44% of the market, up from 38% in 2012</i></p>	
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Adapted from:

- ***FCTC Article 5.3 Toolkit-Guidance for Governments on Preventing Tobacco Industry Interference - The Union***
- ***Countering Tobacco Tactics-A guide to identifying, monitoring and preventing tobacco industry interference in public health – ASH, Australia***

N.B: Present TI activities refer to those tactics from the industry observed since January 1, 2020 to the end date of this baseline data collection.

Table 2: MONITORING OF TOBACCO INDUSTRY ENTITIES, ALLIES AND THEIR PRODUCTS

Country	<i>Ethiopia</i>
Reporting Organization	<i>Mathiwos Wondu-YeEthiopia Cancer Society (MWECS)</i>
Office Address	<i>Bole Sub-City, Kebele 05, House No 156/Λ, Megenagna 200 meters from the car weight scale of the road authority or behind SIDRA International Hotel. P.O. Box 80571, Addis Ababa, Ethiopia.</i>
Email	<i>wondub@mathiwos.org</i>
Telephone – fixed and mobile	<i>Tel: +251-118-122838/0116395760/0116394760</i>

	<i>Mobile: +251911227273</i>
Data collection Period	<i>July 14-31,2020</i>
Lead data collector (<i>Name, Email, Telephone</i>)	<i>Tizita Wondwossen, tizitaw@mathiwos.org,+251912038132</i>
Date of submission	<i>15/August/2020</i>

(1) TI entities and allies representing the commercial and other vested interest of the TI in your country

Types of entity	Names of entity	How does it weaken TC policy development?	How does it support TI?	Comments if any
TI entities involved in growing tobacco <i>e.g. Leaf buying and processing companies</i>	<i>NTE plantation</i> <ul style="list-style-type: none"> ● <i>Amhara region (Shewarobit, Ataye, Jawa)</i> ● <i>SNNP(Bilate,Hawassa,Bodit)</i> ● <i>Oromia region (East shoa around Wonji)</i> 	<i>Lobbying higher officials as if they support job creation, investment expansion, hard currency and economic implication</i>	<i>Production of more raw materials for the production of more tobacco products</i>	
	<i>Small holders/out growers (more than 10,326 farmers)</i>	<i>Livelihood affected. NTE initiates out growers/farmers to oppose tobacco-control policies implementation</i>	<i>Supply raw materials</i>	
	<i>Two processed commercial Farm(South Omo and Dilla)</i>	<i>Investment expansion, hard currency and economic implication</i>	<i>Supply of processed raw materials</i>	<i>To decrease more than 60% reliance of imported tobacco leaf from abroad.</i>

TI entities involved in manufacturing tobacco e.g State-owned national, multinational tobacco companies	NTE/JTI	Influence higher officials, as if they are higher tax payers, job creations and investment expansion Hard currency and economic implication Complex interferences (tax influence illicit trade control)	Production of different tobacco products, attraction of people to smoke so that they create more revenue for TI Lead the market	
TI entities involved in distributing tobacco e.g. Importers, exporters, duty free distributors	NTE/ 104 wholesalers found through the country	Job creation and economic implication	Product distribution easily, availability of products throughout the country	<ul style="list-style-type: none"> ● 19 Addis Ababa ● 11 Around A.A ● 16 Eastern part ● 20 Northern part ● 22 Southern part ● 16 Western part
	Duty free importers/ distributors (Alfaraj, Country Trading, Ethiopian Tourist Trading and Nourhussien)	New technology tobacco products which challenges TC Policies. Job creation, economic implication	Availability of different brand of tobacco products, attraction of people to smoke cigarette and also pay royalty for NTE	Duty free products are allowed in order to satisfy the interest of diplomatic community.
	Individual from Abroad	Availability of illicit tobacco products(new technology tobacco products), no tax is imposed on it	Varieties of tobacco products that attracts people to smoke	
TI entities and allies involved in selling tobacco e.g retailers' associations, duty free retailers	Different outlets for selling(small shops, hotels, bars, supermarket, minimarket etc)	Easily access tobacco products/makes difficulty in creating free smoke areas. Display tobacco products in front desk.	Increasing availability and also increase people demand to smoke tobacco products which intern increase the NTE Income.	
	Duty free retailers	Easily access to different brand of tobacco	Increasing availability and also increase people demand	

		<i>products(new technology tobacco products), that makes challenges to TC</i>	<i>to smoke tobacco products which intern increase the NTE Income.</i>	
	<i>Street vendors</i>	<i>Avail tobacco products here and there that attract people to smoke cigarette</i>	<i>Avail tobacco products, attract people to smoke</i>	
Other TI allies, front groups	<i>Brokers/front groups</i>	<i>Working against TC Policies because they got resource from the company</i>	<i>Promote NTE in different manner</i>	
	<i>Tewodros Ashenafi¹²</i>	<i>He joined as board director, and Japan Tobacco.</i>	<i>Tewodros is the local partner and did the largest privatization and private transaction in Ethiopian history, the \$1.4 billion enterprise value privatization of National Tobacco Enterprise (NTE),</i>	
	<i>Chamber of commerce</i>	<i>Yearly contribution for partnership which indirectly affects TC Policies</i>	<i>Yearly contribution for partnership as commercial organization which protect the organizational right</i>	
	<i>Ministry of Finance and Economic cooperation</i>	<i>Slow the ratification of tobacco taxation and try to lower the tax imposed</i>	<i>Obtain sufficient time and low excise tax imposed as per other countries/delay ratification of excise tax</i>	
	<i>Custom commission and federal police commission signed a MoU with NTE</i>	<i>As if they control illicit tobacco trade but NTE indirectly inducing illicit tobacco product trade into the markets</i>	<i>NTE tries to reduce excise tax by mentioning that increasing the tax may induce more illicit tobacco products.</i>	<i>Actual illicit tobacco products were 11-18% throughout the country as per EFDA report, but the study</i>

¹ <https://www.eastwest.ngo/profile/tewodros-ashenafi>

² <https://www.thereporterethiopia.com/content/japan-tobacco-pays-usd-510-mln-acquire-stake-national-tobacco>

				<i>conducted by NTE was 45%.</i>
	<i>Legal advisories</i>	<i>Influence development of graphic health warning, development Tobacco control directive and proclamation through different means</i>	<i>Promote and protect NTE</i>	
	<i>Researchers</i>	<i>Produce false information related with tobacco products which affects TC</i>	<i>Generate evidences related to tobacco products.</i>	
	<i>Film promoters and celebrates</i>	<i>Produce confusion about the tobacco products. Attract people to smoke cigarettes especially the youth</i>	<i>Promotes tobacco products/NTE</i>	
	<i>Media</i>	<i>Promotion and advertising tobacco products which affects TC</i>	<i>Promotes tobacco products/NTE</i>	

Data source(s): NTE, Investment agreement, tax declarations, letter of communication, MoA reports/Import permit, EFDA document/Special license, trade registration from ministry of trade, Observations, media monitoring/social media/mainstream media, Tobacco and its Health Hazards Including. A Proven Method on How to Stop Smoking, a book by Tekaligne Legesse, JUNE, 2020

(2) TI market share in your country

Type of TI entity	Name of TI entity	Market share	Comments if any
Multinational/transnational tobacco manufacturing companies	<i>Japan Tobacco International (JTI)</i>	81%	<ul style="list-style-type: none"> <i>JTI is the majority (71%) shareholder of the National Tobacco Enterprise SC of Ethiopia while Sheba Investment Plc of Yemen holds 29 % of the industry.</i>
	<i>Sheba Investment Plc</i>		

			<ul style="list-style-type: none"> • <i>JTI argues that 40-44% of tobacco products sold in Ethiopia is illegal reducing that the company's market share to around 60%.</i> • <i>95% of the JTI product sold locally is Nyala brand while the remaining 5% comprises of Winston, Delight, Nyala Premium and Gissila.</i>
State-owned or privately owned national/local tobacco manufacturing companies	<i>NA</i>	<i>NA</i>	
Privately-owned national/local tobacco manufacturing companies	<i>NA</i>	<i>NA</i>	

Data source(s):The research conducted by CoRDe Consulting in 2018, the Campaign for Tobacco Free Kids which engaged Hana Ross to help quantify the illicit cigarette market in Ethiopia, <http://www.reep.uct.ac.za/>, JTI website, Capital Newspaper, <https://www.capitalethiopia.com/>

(3) Tobacco products sold in your country

Type of tobacco product	Tobacco company manufacturing/importing tobacco product	Brand name	Price of pack of 20 cigarettes	Price of pack of 10 cigarettes	Price of single cigarette	Price of cigar (unit)	Price of cigarillo (unit)	Price of smokeless tobacco *
Cigarettes manufactured locally for sale on local market	<i>NTE</i>	<i>Nyala with GHW</i>	<i>35</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>NTE</i>	<i>Nyala without GHW (This brand is promoted/ being sold as a product</i>	<i>65</i>	<i>NA</i>	<i>4</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>

		<i>intentionally produced to prevent COVID -19)-market inspection result. This might be the industry's strategy to finish this product from the market as the deadline to declare this product as illegal by EFDA is approaching.</i>						
	<i>NTE</i>	<i>Delight</i>	<i>30</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>NTE</i>	<i>Eleni</i>	<i>30</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>NTE</i>	<i>Gisila</i>	<i>30</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>NTE</i>	<i>Nyala Premium</i>	<i>30</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>NTE</i>	<i>Winston</i>	<i>100</i>	<i>NA</i>	<i>5</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
Cigarettes imported for sale on local market	-	<i>Marlboro</i>	<i>120</i>	<i>NA</i>	<i>6</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>Independent Tobacco Inc</i>	<i>Green Apple</i>	<i>60</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>Oriental General Trading Inc</i>	<i>Oiris</i>	<i>60</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	-	<i>Rothmans</i>	<i>130</i>	<i>NA</i>	<i>7</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>Independent Tobacco Inc</i>	<i>Business Royals</i>	<i>60</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
	<i>Independent Tobacco Inc</i>	<i>Strawberry</i>	<i>60</i>	<i>NA</i>	<i>3</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
Smoke-tobacco products (e.g. cigar, cigarillo) manufactured locally for sale on local market	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
Smoke-tobacco products imported for sale on local market	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>

Smokeless tobacco products manufactured locally for sale on local market	NA	NA	NA	NA	NA	NA	NA	NA
Smokeless tobacco products imported for sale on local market	NA	NA	NA	NA	NA	NA	NA	NA

Data source(s): Market surveillance and NTE

- Price of smokeless tobacco: mention the price and quantity (e.g. 200 CFA – 50 gms)

(4) Tobacco products manufactured in your country for export

Type of tobacco product	Tobacco company manufacturing tobacco product	Brand name	Quantity exported
Cigarettes	NTE	Nyala (NTE is signing an agreement with South Sudanese Tobacco Company to export products to oversee market).	500,000 packs per year (However, the export is not yet started due to security concerns)
Smoke-tobacco products (e.g. cigar, cigarillo)	NA	NA	NA
Smokeless tobacco products	NA	NA	NA

Data source(s): Market surveillance and NTE.

(5) Impact of the tobacco sector on the economy of your country

Data required	Data	Data source
Area under tobacco cultivation in your country	<i>5 farms (Shewa Robi, Billate, Hawassa, Wolayta/Bodite and East Shoa)+ Small holders) (in a range from 1,800 to 2,200 hectares)</i>	https://www.jti.com/africa/ethiopia <i>Letter from NTE/JTI</i>
Number of tobacco farmers in your country	<i>10,326 tobacco out-growers</i>	https://www.jti.com/africa/ethiopia
Number of people employed in the tobacco farms	<i>Estimated between 22,000 and 31,000 people</i>	<i>Letter from NTE/JTI</i>
Number of people employed in the tobacco sector	<i>direct employment to 1,260 Ethiopians</i>	https://www.jti.com/africa/ethiopia
Percentage of tax coming from the tobacco sector	<i>114,802,234 ETB in 2019</i>	<i>Evidence from Ministry of Revenue</i>
Percentage of the GDP coming from the tobacco sector	<i>TBD</i>	

Adapted from: Tobacco Industry Monitoring (TIM) Tool, Centre for Tobacco Control in Africa (CTCA)

D. Principal Investigator and data collectors

Principal Investigator- Tizita Wondwossen (MWECS)

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