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RESEARCH REPORT

Comprehensive Study of the Tobacco Market in Egypt



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EXECUTIVE SUMMARY

Tobacco use in Egypt poses major public health and economic concerns, with approximately one in every four adults consuming tobacco. Male smoking rates are among the highest globally, driven by deep-rooted social norms, cultural acceptance, and economic factors. The market is dominated by local brands, but there are also imported and illicit—likely smuggled—brands in the tobacco market. This report presents an analysis of a littered-pack collection survey across several major areas of Egypt.

The key findings of the survey are the following:

- ▶ Local brands dominate the market, with only 17.2 percent of the total number of brands controlling 82.3 percent of total packs, reflecting considerable consumer loyalty and affordability.
- ▶ The market is highly concentrated, with just two brands (Cleopatra and LM) holding more than 73 percent of the market share.
- ▶ Illicit brands account for a large proportion of the total brands in the market (74.2 percent), but a far smaller proportion of total packs (15.6 percent).
- ▶ Many brands have a market share of less than one percent, thus top-performing brands differ greatly from those with lesser market share.
- ▶ Illicit brands fail to comply with local tax and health regulations, highlighting inefficiencies in regulatory oversight.
- ▶ Illicit brands are widespread but operate at low volumes, suggesting small-scale operations that complicate regulatory efforts.
- ▶ The majority of tobacco packs sold are medium-priced brands, emphasizing a consumer preference for affordable, but not economy options.
- ▶ The low-priced segment consists solely of one illicit brand.
- ▶ Local and legally imported brands fully comply with health and tax regulations.



1. INTRODUCTION

Globally, tobacco consumption remains a critical public health and fiscal challenge, and Egypt is no exception. Tobacco consumption in Egypt is a pressing issue, with approximately 24.4 percent of adults engaging in tobacco use (World Health Organization, 2025).² Driven by strongly ingrained social conventions, cultural acceptance, and economic considerations, male smoking rates (35.6% aged 15 and above – CAPMAS 2021³) in Egypt rank among the highest worldwide. Egypt's tobacco market is somewhat complicated by a mix of local, imported, and illicit brands; diverse pricing policies; and government initiatives meant to lower consumption (Economics for Health, 2022).⁴

The adverse health effects of tobacco use, coupled with its economic burden, necessitate comprehensive research and evidence-based policy interventions. Egypt has taken significant steps to address these challenges, including reforming its tobacco tax system among other major actions taken to handle these issues. In July 2010, the country shifted from an eight-tier specific excise tax to a mixed system which includes a uniform specific tax of 1.25 EGP per pack and an ad valorem tax of 40 percent on retail prices. Over time, the tiered specific tax rates have increased, with amendments in October 2023 introducing a 12-percent annual rise in price ranges for five years and increasing specific taxes by 50 piasters per tier. Ad valorem taxes remain at 50 percent of retail prices (see Table 1).

Table 1: Rates of specific excise tax on cigarettes over time

EXCISE TAX ON CIGARETTES			
	Ad valorem tax	Specific tax (per pack of 20 sticks for retail price)	
		Tax rate	Retail price
2014	50%	<ul style="list-style-type: none">• 1.75 EGP• 2.25 EGP• 3.25 EGP	<ul style="list-style-type: none">• < 9 EGP• ≥ 9 EGP and < 15 EGP• ≥ 25 EGP
2015	50%	<ul style="list-style-type: none">• 2.25 EGP• 3.25 EGP	<ul style="list-style-type: none">• < 10 EGP• ≥ 10 EGP and < 16 EGP

² World Health Organization. (2025). *Smoking rates by country*. Retrieved January 3, 2025, from <https://www.emro.who.int/egy/programmes/tobacco-free-initiative.html>

³ Central Agency for Public Mobilization and Statistics (2021). Press release. Retrieved May 23, 2025, from https://www.capmas.gov.eg/Admin/News/PressRelease/2021530131839_666%20e.pdf

⁴ Economics for Health. (2022). *Egypt tobacco market report*. Retrieved January 3, 2025, from <https://www.economicsforhealth.org/files/research/896/egypt-rr-2022-final-sep-14.pdf>

		<ul style="list-style-type: none"> • 4.25 EGP 	
2016	50%	<ul style="list-style-type: none"> • 2.75 EGP • 4.25 EGP • 5.25 EGP 	<ul style="list-style-type: none"> • < 13 EGP • ≥ 13 EGP and < 23 EGP • ≥ 23 EGP
2017	50%	<ul style="list-style-type: none"> • 3.5 EGP • 5.5 EGP • 6.5 EGP 	<ul style="list-style-type: none"> • ≤ 18 EGP • > 18 EGP and ≤ 20 EGP • > 30 EGP
2020	50%	<ul style="list-style-type: none"> • 4 EGP • 6.5 EGP • 7 EGP 	<ul style="list-style-type: none"> • ≤ 24 EGP • > 24 EGP and ≤ 35 EGP • > 35 EGP
2023	50%	<ul style="list-style-type: none"> • 4.5 EGP • 7 EGP • 7.5 EGP 	<ul style="list-style-type: none"> • ≤ 31 EGP • > 31 EGP and ≤ 45 EGP • > 45 EGP

Source: Authors' calculations based on data from WHO (2020)⁵ and Economics for Health (2023)⁶

The purpose of this study is to document the market shares of tobacco companies and brands, distinguish between imported and domestic cigarettes, assess compliance levels, and evaluate printed pack prices. The analysis mostly depends on a survey of littered packs collected across diverse regions of Egypt. By disseminating the study's findings, this research seeks to improve the capacity of the nation to evaluate how taxation policies affect public health outcomes and revenue generation. The study will offer practical insights to improve tobacco tax policies, guarantee regulatory compliance, and facilitate informed discussions with key stakeholders to strengthen policy frameworks.

⁵ World Health Organization. (2022). Egypt: Tobacco Agriculture and Trade Country Profile. Geneva <https://cdn.who.int/media/docs/default-source/country-profiles/tobacco/tobacco-agriculture-trade-country-profiles/tobacco-agriculture-trade-egy-2022-country-profile.pdf>

⁶ Hanafy, K., Elgazzar, S., ElWakkad, D. S., & Ashraf, N. (2023). The Economics of Tobacco and Tobacco Taxation in Egypt. Arab Academy for Science, Technology & Maritime Transport. Retrieved from <https://www.economicsforhealth.org/files/research/896/egypt-rr-2022-final-sep-14.pdf>

2. METHODOLOGY

The approach of this study was intended to guarantee strong, reliable, and representative results on the Egyptian tobacco market. Given the complexity of the tobacco sector and how it interacts with public health, the economy, and laws, this study used evidence-based approaches to address various difficulties inherent to tobacco market analysis. These difficulties include the dearth of accurate official sales statistics resulting from rampant illegal selling of some brands and difficulty to distinguish between legal from illegal brands, particularly in cases of similar packaging. The study used litter-pack collecting to gather actual consumption and a compliance checklist to fairly evaluate regulatory adherence among brands in order to solve these problems. The design of the study aimed to capture a wide spectrum of market data and sought to offer actionable insights through quantitative analysis based on littered-pack collection as well as supporting the conclusions via interviews (Grilo et al., 2024)⁷. The study is notable for its completeness in data collection since it captures the price, brand, and compliance of every pack.

Apart from the quantitative research, the study combined qualitative interviews with important market players such as retailers, importers, and enforcement authorities to offer interpretive understandings of regulatory enforcement. Based on unambiguous regulatory indicators—namely, presence and validity of the tax stamp, QR code functionality, price verification, health warning labels’ (image and text) coverage percentage, language consistency, and the presence of a regulatory authority’s mark—(WHO, 2022) the study developed a rigorous compliance checklist (see Appendix 1). Differentiating legal (local/imported) from illegal tobacco goods was made possible in great part by these indicators. Interviews also helped explain whether local tax evasion, smuggling from a lower-tax jurisdiction, or enforcement shortcomings caused any lack of compliance.

Through this robust methodology, the study aims to bridge gaps in tobacco market research, inform policy development, and contribute to the broader discourse on tobacco control and public health interventions in Egypt (Hanafy et al., 2023).

2.1. Study Design

The study utilized a littered-pack collection survey conducted across seven regions of Egypt, encompassing 14 governorates. Data were collected from urban and rural districts within

⁷ Grilo, Grazielle & Kaplan, Bekir & Bhattacharya, Paramita & Mukherjee, Nirmalya & Welding, Kevin & Kennedy, Ryan. (2024). Tobacco product litter as a form of post consumption marketing: an observational study in India. *Tobacco Control*. 34. tc-2023. 10.1136/tc-2023-058407

each governorate. A Python-based algorithm ensured a representative selection based on population, socioeconomic characteristics, and geographic diversity.

2.1.1. Governorates selection

From Egypt's seven regions, two governorates were selected per region, yielding 14 governorates. Selection criteria included:

- ▶ population size and gender distribution,
- ▶ urban-rural classification, and
- ▶ socioeconomic indicators, such as educational attainment and gross domestic product (GDP) per capita.

The selection ensured balanced representation of regional differences, reflecting diverse economic and demographic factors.

2.1.2. Subdistrict selection

Within each governorate, four districts were selected (two urban and two rural). A weighted algorithm as explained in the following section incorporating factors such as population density and educational levels ensured fair representation. If a governorate lacked diversity (for example, all districts are urban), the selection was adapted accordingly.

2.2. Algorithm Coding

Governorates and districts were chosen using a Python-based algorithm that involved:

- ▶ **Normalization:** Min-max scaling of standardized demographic and socioeconomic variables.
- ▶ **Weight Assignment:** Variables were weighted for importance (for example, population density had a higher weight).
- ▶ **Selection:** Governorates and districts were scored and ranked, ensuring regional representation.

2.3. Survey Protocol

The survey purpose was to collect discarded cigarette packs from defined areas within selected districts.

2.3.1. Littered-pack collection protocol

To capture tobacco consumption patterns, a structured collection protocol was implemented:

- ▶ **Survey areas:** The survey was conducted within a one-square-kilometre area centred on the police station in each subdistrict. Police stations were chosen as central points because of their accessibility and importance as hubs for public contact. In cases of geographical obstacles, the survey area was adjusted while maintaining the minimum area requirement.

- ▶ **Timing:** Data collection occurred during late afternoons when street cleaning activities were minimal and foot traffic was reduced, improving availability of and access to littered packs.
- ▶ **Collection teams:** Trained personnel equipped with gloves and labelled collection bags conducted the surveys. District tags on bags guaranteed traceability of gathered packs back to their specific subdistricts.
- ▶ **Ethical considerations:** The methodology avoided direct interaction with individuals, focusing solely on discarded litter. The study received approval from the Ethics Review Committee at the Arab Academy for Science and Technology and Maritime Transport.

2.4. Data Collection Parameters

Each discarded cigarette pack was analysed to extract the following information:

- ▶ **brand classification:** local vs. imported vs. illicit;
- ▶ **price information:** printed price and observed compliance with official price lists; and
- ▶ **regulatory compliance:** presence of health warnings, tax/customs stamps, and QR codes for traceability.

2.5. Pilot Study

To ensure the robustness and feasibility of the research methodology, a pilot study was conducted in Alexandria Governorate in October 2024. On a smaller scale, the pilot phase examined statistical analysis criteria, data validation techniques, and littered-pack collection policies. Involving the gathering of 253 cigarette packs, the pilot study was conducted in two subdistricts in Alexandria covering both urban and suburban areas.

Conducting a pilot study prior to full-scale data collection is crucial for several reasons:

- ▶ **Feasibility assessment:** The pilot assessed the practical aspects of data collection, including survey protocols and team training.
- ▶ **Refinement of methodology:** Insights gained from the pilot led to adjustments in data collection techniques, guaranteeing the dependability of the final data.
- ▶ **Statistical power:** A well-designed pilot study informed the necessary sample size for the full study, enhancing the statistical power and validity of the results.
- ▶ **Consistency and accuracy:** Conducting a pilot study allows for improvement of data cleaning and validation procedures to guarantee consistency over data sets and correct pack labelling variances.

During the pilot study, it was found that the chosen time and methodology were effective, and the data collection process was accurate. Furthermore, the pilot provided valuable insights into the presence of various brands, highlighting the importance of incorporating brand analysis into the main study for a more detailed and comprehensive understanding of market dynamics.



3. MAIN STUDY ANALYSIS AND FINDINGS

3.1. Data Descriptive Statistical Analysis

The data set represents a comprehensive examination of the tobacco market in Egypt, derived from the analysis of 12,614 discarded cigarette packs collected from the selected subdistricts. This data collection method offers an unfiltered view of actual consumption patterns, providing insights that conventional sales data or self-reported surveys may not capture. The use of discarded packs ensures that the data represent products that have successfully reached end consumers, reflecting real-world purchasing behaviours, preferences, and consumption trends.

The data set includes 166 brands. However, to ensure accuracy and relevance of the analysis, the consolidation process (detailed in Appendix 2) examines the particular criteria for brand categorisation—including variations in price, brand type, and flavour variants. This ensures the robustness of the data set and avoids needless fragmentation, thereby guaranteeing the accuracy and relevance of the analysis. Two main criteria dominated the merging decisions:

1. ***Differences in price:*** For some brands, price variations reflected differences in product lines targeting distinct consumer segments. For instance, Cleopatra and Target were classified into multiple categories due to price discrepancies, representing different tiers within the same brand. This was illustrated by adding the letter “P” after the name of the brand.
2. ***Differences in brand type and flavours:*** Several brands were found in imported, local, or smuggled forms, which could significantly affect consumer perception and market behaviour. For example, Davidoff and Oscar were categorized separately based on the origin (imported vs. smuggled). Marlboro and Time were further segmented due to the presence of illicit packs alongside legal ones. Flavour variations also influenced classification: LM, Manchester, and Mond were divided based on flavoured versus non-flavoured products, as these distinctions often target different consumer preferences. This was illustrated by adding the letters “T” and “F” after the brand name for type and flavours, respectively.

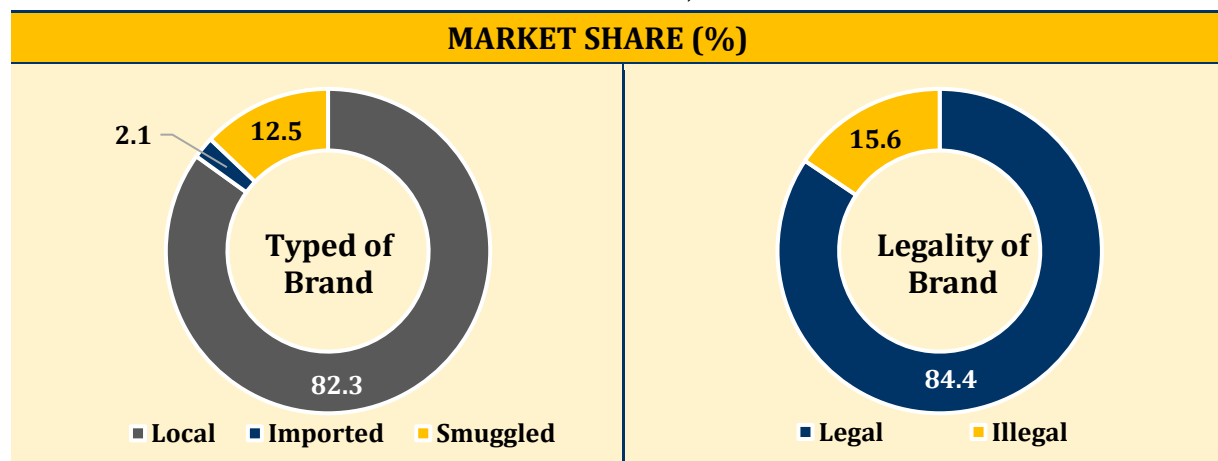
This dual-layered classification provides a nuanced understanding of market preferences and supply chain dynamics, ensuring that the analysis remains robust while avoiding unnecessary fragmentation. Consolidating 166 to 93 brands was essential to streamline the data set, making the analysis more coherent and focused on meaningful market trends.

The classification allows for an in-depth exploration of market segmentation, revealing key differences in consumer behaviour, distribution networks, and the impacts of regulatory frameworks. The data set was classified based on two critical dimensions: type (local, imported, and smuggled) and legality (legal and illegal).

Table 2 shows the aggregated brand distribution and pack counts across these divisions. With 93 different cigarette brands within the 12,614 packs gathered from littered-pack collections conducted across selected urban and rural districts in Egypt markets, the study of the country's tobacco market exposes a highly concentrated structure.

Table 2: Distribution of cigarette brands and packs by type and legality

		Number of brands	Number of packs	Distribution of brands (%)	Market share (%)
Total		93	12,614	100.0	100.0
Type	Local	16	10,385	17.2	82.3
	Imported	8	264	8.6	2.1
	Illicit	69	1,965	74.2	15.6
Legality	Legal	24	10,649	25.8	84.4
	Illicit	69	1,965	74.2	15.6



Key characteristics of Egypt's cigarette market structure include:

- ▶ **Local brands' dominance:** Despite making up only 17.2 percent of the total brand variety, the results show a strong dominance of local brands, which account for 82.3 percent of all packs. Price and brand familiarity are balanced to reflect consumer preferences for accessibility and loyalty.
- ▶ **High variety of illicit brands:** The economic appeal of untaxed goods and regulatory enforcement gaps is highlighted by smuggled goods, which pose a serious challenge. Although they only make up 15.6 percent of the market, these brands have the greatest variety (74.2 percent). This points to a fragmented market with low sales volumes per brand among illegal distributors.

- ▶ **Low share of imported brands:** Higher-income consumers who associate imported goods with perceived superior quality and social standing are drawn to imported brands, which occupy a niche market. These brands constitute a small market segment (8.6 percent of brands and 2.1 percent of packs), highlighting potential barriers to market expansion such as high tariffs, distribution challenges, or local consumer preferences that favor local brands due to price or familiarity.
- ▶ **Market leadership by legal brands:** Despite representing only 25.8 percent of brand variety, legal brands constitute the largest share of the market at 84.2 percent of packs. This suggests that legal brands benefit from factors such as economies of scale, widespread distribution, and established consumer trust.
- ▶ **Prevalence of illegal brands in variety:** Due to their limited market presence, illegal brands account for only 15.6 percent of total packs, despite making up the majority of the brand variety (74.2 percent).

3.1.1. Market share breakdown by brand

Table 3 provides a detailed analysis of market share data across a wide spectrum of tobacco brands, each listed with its corresponding market share percentage, indicating its relative presence in the overall market. The cigarette industry is generally quite concentrated, with the top 10 brands controlling 88.7 percent of the market and only two brands, Cleopatra and LM, controlling 73.3 percent.

Cleopatra is the most-sold brand, holding a significant 52.9 percent of the market, which suggests a strong preference among customers or widely appealing pricing strategies. Next—with a 20.4-percent market share—LM is ahead of other well-known brands like Merit, Captain Black, and Marlboro, which each have 2.4 to 3.4 percent. Five brands—including HP, Winston, Time (T), Kentucky Selects, and Shamlan—have a market share between one and two percent each.

The list continues with brands like Time, Dusk Red Premium, and series such as Target (T-P) and Mond, each nearing less than one percent. This market segment is highly competitive, with numerous brands competing for consumer loyalty across various price points and quality perceptions.

Further down, the enumeration continues to detail brands that hold less than one percent of the market share, starting with Time at 0.94 percent, and continuing with brands such as Karelia and Dusk Red Premium. It includes Target (T-P) and Target, both just under three-quarters of a percent. The sequence progresses to RGD and Pine with diminishing percentages, followed by Gold Coast and Carnival, each close to half a percent, and Mond sharing a similar market share. The list extends to Landus, Marlboro Crafted, and Time (T-P), which appear with even smaller percentages. The listing concludes with a range of 30

brands, each holding shares below 0.10 percent, illustrating their minimal individual impact on the market (also detailed in Appendix 4).

Table 3: Brands' market share percentage

Brand	Share	Brand	Share	Brand	Share
Cleopatra	52.9	252	0.1	Oscar (T)	0.03
LM	20.4	Mond (P)	0.1	Solidere	0.03
Captain Black	3.4	Nashville	0.1	A+B	0.02
Marlboro	2.6	Oris	0.1	Bison	0.02
Merit	2.4	Camel	0.1	D&J	0.02
HP	1.8	Manchester	0.1	Edge Black	0.02
Winston	1.6	Millionaire	0.1	Grand Class A	0.02
Time (T)	1.3	Bro	0.1	Indigo	0.02
Kentucky Selects	1.3	Regina	0.09	Karelia (T)	0.02
Shamlan	1.1	Boston	0.08	Kent hd	0.02
Time	0.9	Napoli	0.08	Manchester (F)	0.02
Karelia	0.8	Nine Blue	0.07	Master Red	0.02
Dusk Red Premium	0.8	Platinum	0.07	Super Grand Silver	0.02
Target (T-P)	0.7	Business Royal	0.06	Davidoff	0.02
Target	0.7	LM (F)	0.06	Dunhill	0.02
RGD	0.6	Modern cigarettes red	0.06	Futura	0.02
Pine	0.6	Portman Red	0.06	Limited Blue	0.02
Gold Coast	0.5	Anderson Red	0.06	Marbid	0.02
Carnival	0.4	Centro	0.06	Mondeo	0.02
Mond	0.4	Cleopatra (P)	0.06	Mondial Lite	0.02
Landus	0.4	Wing Red	0.06	Patron Blue	0.02
Marlboro Crafted	0.3	Manchester (T)	0.05	Aresnall Red	0.01
Time (T-P)	0.3	Mondial	0.05	Armani	0.01
Monus	0.2	Belmont	0.04	Winston (T)	0.01
Miles	0.3	King	0.04	Cavallo black	0.01
رياضي مصفي	0.2	Marlboro (T)	0.04	Excellence	0.01
Caraven A red	0.2	Empire Blue	0.03	Galaxy	0.01
Landus (F)	0.1	Euro	0.03	King doom	0.01
Davidoff (T-P)	0.1	Marlboro (T-P)	0.03	Oscar	0.01
Time Select	0.1	Max 7	0.03	Red -itl	0.01
Rothmans	0.1	Miami	0.03	Williams Light	0.01

3.2. Price Variation Analysis

The analysis of pricing data reveals distinct patterns among the 93 tobacco brands studied—categorized into high-priced “premium,” medium-priced, and low-priced segments. With a standard deviation of 16.11 and an overall mean price of 41.91 EGP for all brands, the Egyptian tobacco market exhibits a moderate degree of price dispersion. High-priced “premium” brands are defined as those that are priced more than one standard deviation

from the mean, or more than 58.02 EGP. Brands like Merit (90 EGP) and Davidoff (95 EGP) are part of this category.

To gain a preliminary understanding of the market landscape, a scanning exercise was conducted across all 56 districts. This initial phase involved non-intrusive observation to capture a broad snapshot of brand pricing, serving as a foundational step toward developing a robust survey with a solid methodology to reach accuracy for future phases. This approach ensures that initial data gathering does not influence market dynamics or inadvertently disclose the purpose of the study to participants.⁸ Additionally, legally recognized brands have made their official prices available online via QR codes. Digital tools improve pricing information's accessibility and transparency, setting the stage for a more thorough and methodical market analysis later.

The medium-priced category, encompassing brands priced between 25.8 EGP and 58.02 EGP, represents the largest portion of the market. Notable brands in this segment include Cleopatra Gold (34.72 EGP) and Captain Black Red (45 EGP). This category's dominance demonstrates a varied pricing approach that strikes a balance between affordability and brand value to satisfy a wide range of consumer preferences.

3.2.1. High-priced brands

In the high-price category, prices range from 60 to 95 EGP (see Table 4). Brands like Davidoff appear at the higher end, typically priced at 95 EGP, indicating a premium market positioning often associated with imported or luxury items. The lower boundary of this category is defined by brands such as LM and Winston at 64 and 60 EGP, which are still significantly higher than the median price found in other categories.

Table 4: High-priced brands categorization

Brand	Type	Price (EGP)	Legality	Packs count	Brand	Type	Price (EGP)	Legality	Packs count
Davidoff	S	95	Illegal	2	Marlboro Crafted	L	74	Legal	40
Merit	L	90	Legal	301	Marlboro (T-P)	S	74	Illegal	4
Davidoff (T-P)	I	85	Legal	16	Camel	L	65	Legal	13
Kent HD	S	85	Illegal	3	LM	L	64	Legal	2573
Dunhill	S	85	Illegal	2	LM (F)	L	64	Legal	8
Marlboro	L	84	Legal	323	Winston	L	60	Legal	202
Marlboro (T)	S	84	Illegal	5	Winston (T)	S	60	Illegal	1

⁸ Inquiries during the initial scanning phase were conducted indirectly without making cigarette purchases, rather purchasing something that is normally needed from the kiosk (for example, a bottle of water) and asking for the price of the packs while paying.

3.3.2. Medium-priced brands

The medium-price category (see Table 5) has a narrower price range, from 25.8 to 58.02 EGP. This category is dominated by local and imported brands that cater to a mid-tier consumer base looking for a balance between cost and perceived quality. The price observed for the most popular brand, Cleopatra, is 27 EGP. The other major brands in this category are Captain Black and HP, priced at 45 EGP and 33 EGP, respectively.

Table 5: Medium-priced brands categorization

Brand	Type	Price (EGP)	Legality	Packs count	Brand	Type	Price (EGP)	Legality	Packs count
Karelia	S	50	Illegal	106	Millionaire	S	34	Illegal	13
Rothmans	S	50	Illegal	15	Anderson red	S	34	Illegal	7
Karelia (T)	I	50	Legal	3	Edge Black	S	34	Illegal	3
Time (T)	I	47	Legal	163	Super grand silver	S	33.75	Illegal	3
Time	L	47	Legal	118	Wing Red	S	33.5	Illegal	7
Time Select	L	47	Legal	16	D&J	S	33.5	Illegal	3
Captain Black	S	45	Illegal	430	Futura	S	33.5	Illegal	2
Mond	S	45	Illegal	50	HP	S	33	Illegal	227
Landus	S	45	Illegal	49	Oris	S	33	Illegal	14
Landus (F)	S	45	Illegal	18	Miami	S	33	Illegal	4
Time (T-P)	S	43	Illegal	33	Armani	S	33	Illegal	1
Carnival	S	40.75	Illegal	51	King doom	S	33	Illegal	1
Caraven A red	S	40.75	Illegal	20	Red - itl	S	33	Illegal	1
Cavallo black	S	40.75	Illegal	1	Centro	S	32.5	Illegal	7
Pine	S	40	Illegal	70	Oscar (T)	I	32.5	Legal	4
Manchester	S	40	Illegal	13	Oscar	S	32.5	Illegal	1
Manchester (T)	I	40	Legal	6	Portman red	I	32	Legal	8
Manchester (F)	S	40	Illegal	3	Max 7	S	32	Illegal	4
Cleopatra	L	38.75	Legal	6672	A+B	S	32	Illegal	3
Target	L	38.75	Legal	89	Excellence	I	32	Legal	1
Boston	L	38.75	Legal	10	Solidere	S	31.5	Illegal	4
Mondial	L	38.75	Legal	6	Aresnall red	S	31.5	Illegal	1
Belmont	L	38.75	Legal	5	RGD	S	31	Illegal	81
Mondial Lite	L	38.75	Legal	2	Bro	S	31	Illegal	12
Dusk red premium	S	38	Illegal	103	Patron blue	S	30.75	Illegal	2
Gold Coast	I	38	Legal	63	Mond (P-F)	S	30.5	Illegal	14
Platinum	S	38	Illegal	9	Modern cigarettes red	S	30.5	Illegal	8
Business Royal	S	37	Illegal	8	Master red	S	30.5	Illegal	3
Euro	S	37	Illegal	4	Limited blue	S	30.5	Illegal	2
Napoli	S	36.5	Illegal	10	Marbid	S	30.5	Illegal	2
Regina	S	35.5	Illegal	11	Mondeo	S	30.5	Illegal	2
King	S	35.5	Illegal	5	رياضي مصفى	S	30	Illegal	22
Empire blue	S	35.5	Illegal	4	252	S	30	Illegal	14
Shamlan	S	35	Illegal	132	Nine Blue	S	30	Illegal	9
Monus	S	35	Illegal	25	Grand class A	S	30	Illegal	3
Miles	S	35	Illegal	24	indigo	S	30	Illegal	3
Target (T-P)	S	34.73	Illegal	92	Galaxy	S	30	Illegal	1
Bison	S	34.5	Illegal	3	Williams light	S	30	Illegal	1
Nashville	S	34	Illegal	14	Cleopatra (P)	L	27	Legal	7

3.3.3. Low-priced brands

The low-price category (see Table 6) is very narrowly defined in this analysis, with only one brand, Kentucky Selects, priced at 25 EGP. This price point represents the lower end of the market, typically associated with high accessibility and targeting the most price-sensitive consumers. The legality status is illegal, and a prevalence of these smuggled goods in the lowest price bracket could appeal to consumers with limited spending power. The pack count is relatively low; however, suggesting limited distribution or niche market appeal.

Table 6: Low-priced brands categorization

Brand	Type	Price (EGP)	Legality	Packs count
Kentucky Selects	Smuggled	25	Illegal	160

3.2.4. Market distribution analysis (pack distribution by price category)

The market distribution analysis reveals significant insights into consumer preferences across different price categories. The market is dominated by the medium-priced segment, which accounts for 71.04 percent of all packs, as shown in Table 7. This suggests that consumers strongly prefer what they perceive as balanced value offerings. The demand for premium brands, despite their higher cost, is demonstrated by the 27.69-percent share of the high-priced category. The tiny market share of low-cost brands (1.27 percent) indicates that there is little demand in this market.

Table 7: Pack distribution by price category

Price category	Mean price (EGP)	Total packs	Market share (%)
High-priced	76.36	3,493	27.69
Medium-priced	35.94	8,961	71.04
Low-priced	25.00	160	1.27

3.2.5. Legality and compliance (compliance by price category)

Legality and compliance assessments across price categories reveal critical market dynamics and regulatory challenges (Table 8). 99.5 percent of the high-priced segment consists of legal brands. The presence of legal brands in medium-priced and low-priced segments is 80 percent. In contrast, the low-priced category consists entirely of illegal brands. However, the overall pack count in both low-priced and high-priced categories is small, suggesting that illegal packs mainly belong to the medium-priced category. Overall, 15.6 percent of packs were found to be illegal.

Table 8: Compliance by price category

Price category	Number of packs		Share (as % of total packs)	
	Legal	Illegal	Legal	Illegal
High-priced	3,476	17	99.51	0.49
Medium-priced	7,173	1,788	80.05	19.95
Low-priced	0	160	0	100
Total	10,649	1965	84.44	15.58

3.3. Compliance Analysis

The compliance analysis highlights critical trends across the 93 tobacco brands evaluated, focusing specifically on adherence to health warning requirements and tax stamp regulations. Based on brand origin, market share, and price category, local brands show complete adherence to health warning regulations, while imported and illicit brands show notable compliance gaps, as shown in Appendix 3. Comprehensive compliance is observed among local brands, which demonstrate their adherence to public health guidelines and regulatory standards. However, illicit brands (illegal brands in table 5) show significant gaps in compliance, especially those with smaller market shares. These variations highlight the need for better oversight in some market segments as well as the effectiveness of regulatory enforcement in others.

3.3.1. Health warning compliance

The presence of health warnings and graphic imagery on tobacco packaging plays a pivotal role in public health messaging, aiming to influence consumer awareness and potentially deter tobacco consumption. In terms of compliance, the analysis reveals a sharp difference between illicit and local/imported licit brands.

Local brands demonstrated full compliance, with 100 percent meeting all regulatory requirements, including displaying graphic images covering 50 percent of the packaging (Table 9). Prominent local brands such as Cleopatra Gold, Cleopatra Queen, LM Red, LM Blue, Merit Filter, Marlboro Red, and Time Red adhered completely to these regulations.

In contrast, illicit brands demonstrated partial compliance, most with only text warnings present. Brands like HP Red, Captain Black Red, Captain Black Blue, and Kentucky Selects failed to include the necessary graphic health warnings, undermining efforts to align with regulatory standards.

Table 9: Graphic and text warnings by Market Type

Market Type	Graphic & Text warnings
Local	All brands have graphic warnings and text warnings in Arabic
Imported	All brands have graphic warnings and text warnings in Arabic
Smuggled	44 brands have no health warning
	20 brands have text warnings in Arabic or English
	6 brands have graphic warnings and text warnings in Arabic or English

3.3.2. Tax compliance

Tax compliance analysis reveals a similar pattern of disparities. Tax stamps ensure that products meet regulatory standards and contribute to government revenues. A thorough analysis of tax compliance for a few chosen brands is given in Appendix 4, which shows that illicit brands routinely fell short of tax regulations, whereas domestic and foreign brands were 100-percent compliant.

3.4. Interview Findings

The qualitative interviews with stakeholders from the Customs Authority, the Ministry of Finance, and the tobacco industry provided comprehensive insights into the challenges affecting Egypt's tobacco market. Tax evasion, including smuggling, and illicit manufacturing practices are just a few of the complex issues that were discussed. The main conclusions drawn from these interviews are listed below:

- ▶ The brands categorized as illicit are illicit tobacco products that consistently undermine the market by evading taxes and customs duties, which decreases legal market shares, thus significantly reducing government revenue.
- ▶ Smuggling happens via a number of routes, such as land and sea. Furthermore, regulatory gaps that allow illegal tobacco products to enter the local market are a result of corruption within the customs authority.
- ▶ A large number of cigarette packs that are smuggled have unclear origins and manufacturing locations. These frequently consist of “sweepings” cigarettes, which are made from leftover tobacco.
- ▶ Governmental organizations frequently function as separate, autonomous silos. This lack of coordination makes the problem of smuggled tobacco worse because it is more difficult to form a cohesive front to effectively address and regulate the tobacco market.

4. CONCLUSION, RESEARCH GAPS, AND RECOMMENDATIONS

Egypt's cigarette market is characterized by a complex and concentrated landscape, with local brands leading sales due to their affordability and strong consumer loyalty. The market is concentrated, with only two brands accounting for around 73 percent of the market. On the other hand, illicit brands add to market diversity, particularly in the low- and high-end segments, highlighting regulatory vulnerabilities, such as inadequate border control and tax evasion. Altogether, 16.6 percent of packs were found to be illegal, while locally manufactured and legally imported brands fully comply with regulations.

4.1. Research gaps

- ▶ There is a need to further explore the impact of illegal brands on the market and the effectiveness of enforcement strategies, especially considering the fragmented distribution networks.
- ▶ Deeper insights are required into why consumers prefer certain brands, especially smuggled ones, which could inform more targeted regulatory and marketing strategies.
- ▶ Longitudinal studies could help track changes in consumer habits and market dynamics over time, particularly in response to regulatory changes and market entries or exits.
- ▶ Illicit cigarettes are more attractive, and thus, harmful, if they are more affordable because lower prices increase demand, especially for young people.

4.2. Recommendations

The recommendations provided are derived from identifying key findings and research gaps in the study of Egypt's tobacco market. Significant issues with smuggling, other types of tax evasion, regulatory gaps, and consumer behaviour are revealed by the analysis. Significantly, the presence of illicit goods—likely mostly smuggled—highlights the need for focused interventions. A comprehensive strategy that incorporates public awareness campaigns, improved regulatory frameworks, and policy reforms is required to effectively address these problems. These recommendations aim to secure the supply chain and regulate the tobacco market, which is essential to raise government revenues and safeguard public health in Egypt.

4.2.1. *Enhance regulatory monitoring and enforcement to secure the cigarette supply chain*

- ▶ Conduct periodic, but systematic surveys to monitor illegal products.
- ▶ Enhance border enforcement in high-risk areas.

- ▶ Conduct regular audits and inspections of tobacco manufacturing and distribution channels to ensure compliance with tax and health regulations.

4.2.2. Optimize tobacco taxation policy

- ▶ Develop predictive models to evaluate how tax changes affect consumption, revenue, and public health, while allocating a portion of tobacco tax revenues to support anti-illicit-trade efforts and public health programs.
- ▶ Ensure some tobacco tax revenues are reinvested in healthcare—thus aligning fiscal measures with broader public health goals for long-term impact on economic and social development.

4.2.3. Close regulatory loopholes

- ▶ Implement stricter penalties for smuggling, other tax evasion, and counterfeit production, and standardize procedures for verifying the authenticity of customs tags to prevent exploitation of free zones.

4.2.4. Combat smuggling and illicit trade

- ▶ Launch coordinated anti-illicit operations targeting small-scale distributors dominating the illicit market.
- ▶ Disrupt distribution networks of smuggled premium brands that appeal to price-sensitive consumers seeking luxury products at lower costs.

4.2.5. Enhance market transparency & diversification

- ▶ Establish public databases allowing consumers to verify the legality of tobacco products.

4.2.6. Foster interagency collaboration

- ▶ Establish a centralized task force and unified regulatory framework that brings together the Customs Authority, Ministry of Finance, and law enforcement agencies to streamline enforcement, enhance intelligence sharing on illicit activities, and implement joint training programs to build capacity in combating tobacco-related crimes.



APPENDICES

Appendix 1: Egypt Rules and Regulations

Tax stamp

Regulatory body	Customs Authority or Tax Authority
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Price availability

Functioning QR code	The QR code must direct the customer to the price of the pack
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Health warnings

Text warnings describe health impacts	Number of published warnings at any given time
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Warnings include a picture or graphic	Warnings required to rotate
---------------------------------------	-----------------------------

% of principal display areas covered (front and back)	Warnings are written in the principal language(s)
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Front	Ban on misleading packaging and labelling
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Back	Health warnings on smokeless tobacco products
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Appendix 2: Brands and Reasons for Categorization

Brand	Reasons for categorization
Cleopatra	Classified into two categories based on the number of cigarettes per pack with the average price per pack being different across both categories.
Davidoff	Classified into two categories due to the difference in price and brand type (some of the packs are smuggled)
Karelia	Classified into two categories due to the difference in brand type (some of the packs are smuggled)
Landus	Classified into two categories due to the difference in flavours (there is a type of Landus cigarettes with flavours)
LM	Classified into two categories due to the difference in flavours (there is a type of LM cigarettes with flavours)
Manchester	Classified into three categories due to the difference in type and flavours (there is a type of Manchester cigarettes with flavours)
Marlboro	Classified into three categories due to the difference in price and brand type (some of the packs are smuggled)
Mond	Classified into two categories due to the difference in price and flavours (there is a type of Mond cigarette with flavours)
Oscar	Classified into two categories due to the difference in brand type (some of the packs are imported)
Target	Classified into two categories due to the difference in price and brand type (some of the packs are smuggled)
Time	Classified into three categories due to the difference in price and brand type (some of the packs are smuggled or imported)
Winston	Classified into two categories due to the difference in brand type (some of the packs are smuggled)

Appendix 3: Breakdown of Health Warnings by Brand, Language, Location, & Tax Compliance

Brand name	Type	Price category	Market share	Health warnings		Tax/ customs compliance
				Language	Location	
Brands using written warnings only						
Bison	Smuggled	Medium-priced	Low	English	At the side of the pack (Small font)	No
Super Grand Silver	Smuggled	Medium-priced	Low	English	Positioned below (Small font)	No
Rothmans	Smuggled	Medium-priced	Low	English or Arabic	Centrally positioned below	No
Kent HD	Smuggled	High-priced	Low	Arabic	Lower half of packaging	No
King	Smuggled	Medium-priced	Low	English	Lower half of packaging	No
Grand Class A	Smuggled	Medium-priced	Low	English	At the side of the pack (Small font)	No
Futura	Smuggled	Medium-priced	Low	Arabic or English	Lower half of packaging	No
Patron	Smuggled	Medium-priced	Low	English	Centrally positioned below	No
Davidoff (T-P)	Smuggled	High-priced	Low	English	Lower half of packaging	No
Regina	Smuggled	Medium-priced	Low	English	Lower half of packaging	No
King Doom	Smuggled	Medium-priced	Low	English	Positioned in half of pack	No
Target (T-P)	Smuggled	Medium-priced	Low	Arabic	Lower half of packaging	No
Shamlan 99%*	Smuggled	Medium-priced	Low	Arabic	Lower half of packaging	No
Pine	Smuggled	Medium-priced	Low	Arabic	Centrally positioned below	No
Time (T-P)	Smuggled	Medium-priced	Low	Arabic	Lower half of packaging	No
رياضي مصفى	Smuggled	Medium-priced	Low	Arabic	Lower half of packaging	No
Caraven A Red	Smuggled	Medium-priced	Low	Arabic	Lower half of packaging	No
Marlboro (T)	Smuggled	High-priced	Low	Not found	Centrally positioned below	No
Marlboro (T-P)	Smuggled	High-priced	Low	English	Lower half of packaging	No
Captain Black	Smuggled	Medium-priced	Low	English	Lower half of packaging	No
Brands using graphic photo-based warnings						
Merit	Local	High-priced	Low	Arabic	Lower half of packaging	Yes
Time	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Edge Black	Smuggled	Medium-priced	Low	English	Lower half of packaging	No
Mondial	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Karelia (T)	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Winston Red	Local	High-priced	Low	Arabic	Lower half of packaging	Yes
Dunhill	Smuggled	High-priced	Low	Arabic or English	Lower half of packaging	No
Mondial Lite	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Winston (T)	Smuggled	High-priced	Low	Arabic or English	Lower half of packaging	No
Excellence	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Aresnall Red	Smuggled	Medium-priced	Low	Arabic or English	Lower half of packaging	No
Marlboro	Local	High-priced	Low	Arabic	Lower half of packaging	Yes

Brand name	Type	Price category	Market share	Health warnings		Tax/ customs compliance
				Language	Location	
Brands using graphic photo-based warnings (...Contd.)						
Cleopatra	Local	Medium-priced	High	Arabic	Lower half of packaging	Yes
Shamlan 1%*	Smuggled	Medium-priced	Low	Arabic	Positioned in half of pack	No
LM	Local	High-priced	High	Arabic	Lower half of packaging	Yes
Gold Coast	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Target	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Carnival	Smuggled	Medium-priced	Low	Arabic or English	Lower half of packaging	No
Marlboro Crafted	Local	High-priced	Low	Arabic	Lower half of packaging	Yes
Manchester (T)	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Time (T)	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Time Select	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Davidoff	Smuggled	High-priced	Low	Arabic	Lower half of packaging	No
Boston	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
LM (F)	Local	High-priced	High	Arabic	Lower half of packaging	Yes
Portman Red	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Cleopatra (P)	Local	Medium-priced	High	Arabic	Lower half of packaging	Yes
Camel	Local	High-priced	Low	Arabic	Lower half of packaging	Yes
Belmont	Local	Medium-priced	Low	Arabic	Lower half of packaging	Yes
Oscar (T)	Imported	Medium-priced	Low	Arabic	Lower half of packaging	Yes
No health warning						
Miles	Smuggled	Medium-priced	Low	None	None	No
Indigo	Smuggled	Medium-priced	Low	None	None	No
Platinum	Smuggled	Medium-priced	Low	None	None	No
Euro	Smuggled	Medium-priced	Low	None	None	No
Limited blue	Smuggled	Medium-priced	Low	None	None	No
Williams Light	Smuggled	Medium-priced	Low	None	None	No
Manchester	Smuggled	Medium-priced	Low	None	None	No
Marbid	Smuggled	Medium-priced	Low	None	None	No
Galaxy	Smuggled	Medium-priced	low	None	None	No
Oscar	Smuggled	Medium-priced	Low	None	None	No
Cavallo black	Smuggled	Medium-priced	Low	None	None	No
HP	Smuggled	Medium-priced	High	None	None	No
Mond (P-F)	Smuggled	Medium-priced	Low	None	None	No
Nashville	Smuggled	Medium-priced	Low	None	None	No
Master Red	Smuggled	Medium-priced	Low	None	None	No
A+B	Smuggled	Medium-priced	Low	None	None	No
D & j	Smuggled	Medium-priced	Low	None	None	No
Oris	Smuggled	Medium-priced	Low	None	None	No

Brand name	Type	Price category	Market share	Health warnings		Tax/ customs compliance
				Language	Location	
No health warnings (...Contd.)						
Mondeo	Smuggled	Medium-priced	Low	None	None	No
Mond	Smuggled	Medium-priced	Low	None	None	No
Mouns	Smuggled	Medium-priced	Low	None	None	No
Armmani	Smuggled	Medium-priced	Low	None	None	No
Red - iltl	Smuggled	Medium-priced	Low	None	None	No
Kentucky Select	Smuggled	Low-priced	Low	None	None	No
Karelia	Smuggled	Medium-priced	Low	None	None	No
Landus	Smuggled	Medium-priced	Low	None	None	No
RGD	Smuggled	Medium-priced	Low	None	None	No
252	Smuggled	Medium-priced	Low	None	None	No
Landus (F)	Smuggled	Medium-priced	Low	None	None	No
Nine Blue	Smuggled	Medium-priced	Low	None	None	No
Napoli	Smuggled	Medium-priced	Low	None	None	No
Business Royal	Smuggled	Medium-priced	Low	None	None	No
Modern cigarettes Red	Smuggled	Medium-priced	Low	None	None	No
Dusk red premium	Smuggled	Medium-priced	Low	None	None	No
Wing Red	Smuggled	Medium-priced	Low	None	None	No
Manchester (F)	Smuggled	Medium-priced	Low	None	None	No
Anderson	Smuggled	Medium-priced	Low	None	None	No
Millionaire	Smuggled	Medium-priced	Low	None	None	No
Bro	Smuggled	Medium-priced	Low	None	None	No
Max 7	Smuggled	Medium-priced	Low	None	None	No
Empire Blue	Smuggled	Medium-priced	Low	None	None	No
Miami	Smuggled	Medium-priced	Low	None	None	No
Centro	Smuggled	Medium-priced	Low	None	None	No
Solidere	Smuggled	Medium-priced	Low	None	None	No
Note: *means percentage of the packs						

Appendix 4: Summary of Tax Compliance across Selected Brands

Brand name	Brand type Local/ imported/ smuggled	Total brand	% of the collected littered pack sample	Health warning presence percentage	Health compliance	Tax compliance	Tax/ customs authority stamp
Cleopatra	Local	6672	52.90%	100%	Compliant	100%	Yes
LM	Local	2573	20.40%	100%	Compliant	100%	Yes
Merit	Local	301	2.39%	100%	Compliant	100%	Yes
HP	Smuggled	227	1.80%	0%	Not Compliant	0%	No
Captain Black	Smuggled	430	3.41%	0%	Not Compliant	0%	No
Time	Local	118	0.92%	100%	Compliant	100%	Yes
Kentucky Selects	Smuggled	160	1.27%	0%	Not Compliant	0%	No
Dusk Red Premium	Smuggled	103	0.82%	0%	Not Compliant	0%	No
Karelia	Smuggled	106	0.84%	0%	Not Compliant	0%	No
Target (T-P)	Smuggled	92	0.73%	100%	Not Compliant	0%	No
Winston	Local	202	1.60%	100%	Compliant	100%	Yes
Shamlan	Smuggled	132	1.05%	100%	Not Compliant	0%	No
Marlboro	Local	323	2.56%	100%	Compliant	100%	Yes
Time Select	Local	16	0.13%	100%	Compliant	100%	Yes
Pine	Smuggled	70	0.56%	100%	Not Compliant	0%	No
Gold Coast	Imported	63	0.50%	100%	Compliant	100%	Yes
RGD	Smuggled	81	0.64%	0%	Not Compliant	0%	No
Target	Local	89	0.71%	100%	Compliant	100%	Yes
Mond	Smuggled	50	0.40%	0%	Not Compliant	0%	No
Landus	Smuggled	49	0.39%	0%	Not Compliant	0%	No
Carnival	Smuggled	51	0.40%	0%	Not Compliant	0%	No
Monus	Smuggled	25	0.20%	0%	Not Compliant	0%	No
رياضي مصفي	Smuggled	22	0.17%	0%	Not Compliant	0%	No
Marlboro Crafted	Local	40	0.32%	100%	Compliant	100%	Yes
Caraven A Red	Smuggled	20	0.16%	0%	Not Compliant	0%	No
Miles	Smuggled	24	0.19%	0%	Not Compliant	0%	No
252	Smuggled	14	0.11%	0%	Not Compliant	0%	No
Landus (F)	Smuggled	18	0.14%	0%	Not Compliant	0%	No
Nashville	Smuggled	14	0.11%	0%	Not Compliant	0%	No
Regina	Smuggled	11	0.09%	0%	Not Compliant	0%	No
Davidoff	Smuggled	2	0.02%	100%	Not Compliant	0%	No
Boston	Local	10	0.08%	100%	Compliant	100%	Yes

Brand name	Brand type Local/ imported/ smuggled	Total brand	% of the collected littered pack sample	Health warning presence percentage	Health compliance	Tax compliance	Tax/ customs authority stamp
Rothmans	Smuggled	15	0.12%	0%	Not Compliant	0%	No
Nine Blues	Smuggled	9	0.07%	0%	Not Compliant	0%	No
Napoli	Smuggled	10	0.08%	0%	Not Compliant	0%	No
Business Royal	Smuggled	8	0.06%	0%	Not Compliant	0%	No
Lm (F)	Local	8	0.06%	100%	Compliant	100%	Yes
Portman Red	Imported	8	0.06%	100%	Compliant	100%	Yes
Modern Cigarettes Red	Smuggled	8	0.06%	0%	Not Compliant	0%	No
Wing Red	Smuggled	7	0.06%	0%	Not Compliant	0%	No
Cleopatra (P)	Local	7	0.06%	100%	Compliant	100%	Yes
Manchester	Smuggled	13	0.10%	0%	Not Compliant	0%	No
Platinum	Smuggled	9	0.07%	0%	Not Compliant	0%	No
Anderson Red	Smuggled	7	0.06%	0%	Not Compliant	0%	No
Bro	Smuggled	12	0.10%	0%	Not Compliant	0%	No
Camel	Local	13	0.10%	100%	Compliant	100%	Yes
Millionaire	Smuggled	13	0.10%	0%	Not Compliant	0%	No
Time (T-P)	Smuggled	33	0.26%	0%	Not Compliant	0%	No
Marlboro (T)	Smuggled	5	0.04%	0%	Not Compliant	0%	No
Belmont	Local	5	0.04%	100%	Compliant	100%	Yes
Mond (P-F)	Smuggled	14	0.11%	0%	Not Compliant	0%	No
Oris	Smuggled	14	0.11%	0%	Not Compliant	0%	No
Max 7	Smuggled	4	0.03%	0%	Not Compliant	0%	No
Marlboro (T-P)	Smuggled	4	0.03%	0%	Not Compliant	0%	No
Oscar	Smuggled	1	0.01%	0%	Not Compliant	0%	No
Empire Blue	Smuggled	4	0.03%	0%	Not Compliant	0%	No
Miami	Smuggled	4	0.03%	0%	Not Compliant	0%	No
Centro	Smuggled	7	0.06%	0%	Not Compliant	0%	No
Solidere	Smuggled	4	0.03%	0%	Not Compliant	0%	No
Bison	Smuggled	3	0.02%	0%	Not Compliant	0%	No
Super Grand Silver	Smuggled	3	0.02%	0%	Not Compliant	0%	No
Indigo	Smuggled	3	0.02%	0%	Not Compliant	0%	No
Master Red	Smuggled	3	0.02%	0%	Not Compliant	0%	No
Edge Black	Smuggled	3	0.02%	100%	Not Compliant	0%	No
Kent Hd	Smuggled	3	0.02%	100%	Not Compliant	0%	No
Mondial	Local	6	0.05%	100%	Compliant	100%	Yes
King	Smuggled	5	0.04%	100%	Not Compliant	0%	No

Brand name	Brand type Local/ imported/ smuggled	Total brand	% of the collected littered pack sample	Health warning presence percentage	Health compliance	Tax compliance	Tax/ customs authority stamp
Grand Class A	Smuggled	3	0.02%	100%	Not Compliant	0%	No
Manchester (F)	Smuggled	3	0.02%	0%	Not Compliant	0%	No
Karelia (T)	Imported	3	0.02%	100%	Compliant	100%	Yes
A+B	Smuggled	3	0.02%	0%	Not Compliant	0%	No
D&J	Smuggled	3	0.02%	0%	Not Compliant	0%	No
Futura	Smuggled	2	0.02%	100%	Not Compliant	0%	No
Euro	Smuggled	4	0.03%	0%	Not Compliant	0%	No
Manchester (T)	Imported	6	0.05%	0%	Compliant	100%	No
Dunhill	Smuggled	2	0.02%	100%	Not Compliant	0%	No
Lite Mondial	Local	2	0.02%	100%	Compliant	100%	Yes
Limited Blue	Smuggled	2	0.02%	0%	Not Compliant	0%	No
Davidoff (T-P)	Imported	16	0.13%	100%	Compliant	100%	Yes
Marbid	Smuggled	2	0.02%	0%	Not Compliant	0%	No
Mondeo	Smuggled	2	0.02%	100%	Not Compliant	0%	No
Winston (T)	Smuggled	1	0.01%	100%	Not Compliant	0%	No
Excellence	Imported	1	0.01%	100%	Compliant	100%	Yes
Aresnall Red	Smuggled	1	0.01%	100%	Not Compliant	0%	No
Armmani	Smuggled	1	0.01%	0%	Not Compliant	0%	No
Williams Light	Smuggled	1	0.01%	0%	Not Compliant	0%	No
Red - Intl	Smuggled	1	0.01%	0%	Not Compliant	0%	No
Galaxy	Smuggled	1	0.01%	0%	Not Compliant	0%	No
King Doom	Smuggled	1	0.01%	0%	Not Compliant	0%	No
Oscar (T)	Imported	4	0.03%	100%	Compliant	100%	Yes
Cavallo Black	Smuggled	1	0.01%	0%	Not Compliant	0%	No
Parton Blue	Smuggled	2	0.02	0%	Not Compliant	0%	No
Time (T)	Imported	163	1.29%	100%	Compliant	100%	Yes