

ANALYSIS OF TOBACCO MARKET IN SRI LANKA - 2019

Executive Summary

The main aim of this baseline study was to conduct an analysis of the tobacco market in Sri Lanka focusing on sales patterns and purchasing habits. This analysis will provide information on the current situation as well as provide a baseline for evaluation of the proposed laws, once in place.

The analysis was conducted in seven districts – Colombo, Monaragala, Hambanthota, Kurunegala, Nuwara Eliya, Mannar and Jaffna, from 20/04/2019 to 01/07/2019. In each district, the main town and one or two sub-towns were investigated. Data was obtained from cigarette and other tobacco selling outlets, outlets that sold and stopped selling cigarettes, officers authorized to enforce the National Authority on Tobacco and Alcohol (NATA) Act and Medical Officer of Health (MOH) officials. Observations were conducted on tobacco sales activity surrounding educational institutions and a desk study was conducted on internet sales of tobacco products including Electronic Nicotine Delivery Devices (ENDS).

The sample for the survey contained 208 outlets selling cigarettes and 37 outlets that sold and voluntarily stopped cigarette sale across the 7 districts. A total of 68 NATA authorized officers were interviewed via focus group discussions in the 7 districts. A three minute walking distance of 34 educational institutions across the 7 districts were observed for tobacco sales activity.

The results contain several notable findings. In terms of daily cigarette sales patterns, it was found that 337 cigarettes are sold on average, per day in the surveyed outlets. The largest selling brand of cigarettes was “John Player Gold Leaf” (JPGL) with an average of 201 sticks of JPGL sold per day, per outlet. The most common method of purchase of cigarettes is as single sticks in all 7 districts surveyed, indicating laws banning single stick cigarette sale will significantly affect cigarette purchase and consumption in the country.

In terms of beedi sales patterns, it was found 194 beedi sticks are sold on average, per day, per outlet in the surveyed districts. Customers buy beedi commonly as 2 or 5 sticks. It should be noted that numbers for beedi and cigarettes in this study should not be compared due to the significant differences in prices and size of the product. Previous studies have found beedi consumption to be declining from 5.4% in 2016 to 5.2% in 2017 (2016, 2017 ADIC SPOT Survey).

Results relating to consumer behavior shows a clear preference to the JPGL cigarette brand across all consumers. However, it was found that other brands except JPGL have different consumer profiles. Dunhill is preferred by youth and white collar workers while Navy Cut is preferred by older smokers and blue collar workers.

In terms of retailer cigarette purchasing patterns the most common method is through delivery by the tobacco industry. Most retailers only purchase cigarettes to last for a single day and pay by cash. However, credit methods where retailers can purchase cigarettes on loan and pay the tobacco company later is available and used by some retailers.

According to retailers, the profit for a JPGL cigarette stick is Rs. 1.28 and for a Dunhill cigarette stick profit is Rs. 1.12. All other cigarette brands and beedi have less than Rs. 1 in profit per stick. Retailers also report incentives are awarded by the tobacco company only for selling JPGL and Dunhill cigarette brands.

Majority of the retailers held the opinion that cigarette sale is not profitable and state they do not plan on continuing in the long-term. All surveyed retailers also hold negative opinions on cigarette smoking despite selling the product.

In terms of the behavior of the tobacco company, the majority of the outlets that sell cigarettes displayed promotions by the tobacco company, most commonly the poster specifying the legal age for buying cigarettes. The most common intervention conducted by the tobacco company as reported by retailers,

is meeting and providing information on tobacco products. However, less than half the surveyed retailers reported interventions by the tobacco company.

Retailer adherence to laws on not allowing smoking within the outlet premises and prohibition of cigarettes sale to individuals below 21 years of age were reported as high and tallied with observations of the data collectors. However, retailers commonly used appearance to identify age than requesting identification. More awareness for retailers can resolve this problem as currently 57% of the retailers report they have not received awareness on tobacco, by anyone other than the tobacco company.

According to the retailers the recent price increase was more effective in driving down cigarette sales comparative to the impact of Pictorial Health Warnings (PHW). It is possible this is due to most consumers buying cigarettes as single sticks. Hence, PHW on cigarette packs would have a lesser impact as it would go unnoticed by most consumers.

Out of the 37 retailers surveyed who voluntarily stopped cigarette sale, 52% report it was due to their personal dislike of selling cigarettes. This is further established as 79% of these retailers stopped selling cigarettes without any direct encouragement from external parties. The current environment within the country is conducive to discontinuing cigarette sale. This could have made the transition to stop selling cigarettes easier for retailers. 72% of the retailers claim they were contacted by the tobacco company to re-start cigarette sales when they stopped.

The focus group discussions with NATA Authorized Officers revealed that interferences from the tobacco company when enforcing the NATA Act was prevalent across districts. The common method cited was the attempts to contact officers to influence law enforcement. For example, officers in Jaffna were contacted by the tobacco company when they mobilized to remove Abhisheka sign boards (Abhisheka is the tobacco company loyalty scheme for retailers). The surveyed officers refused to be contacted or disregarded these influences and continued enforcing the tobacco control laws as mandated.

Observation of a 3 minute walking distance from educational institutions revealed that almost all the observed schools/institutes had at least 1 shop with cigarettes and/or other tobacco products within walking this distance. This raises the concern of easy accessibility of tobacco products by under-age youth and children, which can influence initiation to tobacco smoking.

The study also revealed that while it is against the law, both internet sales and home delivery of tobacco products occur within the country. There is a necessity to analyze the extent of this breach of law and identify and implement an effective mechanism to stop such breaches of law through the internet.

In conclusion, the present study provides data for the current situation of the tobacco market and purchasing patterns across 7 districts in Sri Lanka and can be used as a baseline in the future to evaluate the efficacy of policy measures which are to be implemented. The study recommends further research on several specific areas – 1) the relationship between policy measures and cigarette purchasing patterns, 2) Influence of the easy availability of tobacco products in proximity to educational institutions on initiation of under-age youth and children to tobacco smoking and 3) Extent of the breach of tobacco control laws through the internet and developing mitigating mechanisms – in order to further strengthen tobacco control policy within the country.

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1. Introduction

Several types of tobacco are consumed in both smoked and smokeless forms in Sri Lanka. Although the most widespread smoked form of tobacco is cigarettes, the use of beedi, traditional betel quid, commercial and non-commercial preparations of different types of smokeless tobacco is also prevalent. To comply with the provisions of the World Health Organization's Framework Convention on Tobacco Control (WHO FCTC), The National Authority on Tobacco and Alcohol (NATA) is working on amending the tobacco control laws and regulations. Pictorial Health Warnings covering 80% of the principal surface areas of the tobacco packaging and prohibition of the sale of tobacco products to those under the age of 21 is already incorporated in the law.

Some of the measures for which Cabinet Approval was obtained in 2018 were implementing plain packaging and prohibition of the sale of tobacco products within 100 meters of schools and other premises mainly frequented by children, or employing those below the age of 18 years to sell tobacco. The amendments related to these provisions are being drafted at present and it is expected that these laws will come into effect in the latter part of 2019. NATA is also awaiting the Cabinet Approval for its proposal prohibiting loose sales of tobacco products.

The main aim of this baseline study was to conduct an analysis of the tobacco market in Sri Lanka focusing on sales patterns and purchasing habits. This analysis will provide information on the current situation as well as a baseline for evaluation of the proposed laws, once in place. The analysis was conducted in seven districts – Colombo, Monaragala, Hambanthota, Kurunegala, Nuwara Eliya, Mannar and Jaffna. In each district, the main town and one or two sub-towns were analyzed. Data was obtained from cigarette and other tobacco selling outlets, outlets that sold and stopped selling cigarettes, officers authorized to enforce the National Authority on Tobacco and Alcohol (NATA) Act and Medical Officer of Health (MOH) officials. Observations were conducted on tobacco sales activity surrounding educational institutions and a desk study was conducted on internet sales of tobacco products including Electronic Nicotine Delivery Devices (ENDS).

The findings of this study will support evidence based policy development for tobacco control. The study covered different aspects related to retail sale structure and variations, adherence to current laws and regulations, status related to proposed amendments and the attitudes and knowledge of retailers and customers. This data enables NATA in monitoring of the amendments which will come into force, by providing a baseline for comparison with future analyses.

1.1. Objectives

Main objective

Analyze the tobacco market in Sri Lanka focusing on sales patterns and purchasing habits.

This objective covers the following Terms of Reference:

A. Retail sale structure and variations

- a) Retail sale patterns of different types of tobacco products (smoked and smokeless) e.g. comparison of quantities of different product
- b) How different types of products are distributed in different parts of the country
- c) Geographical and seasonal variations
- d) Variations in retail sales patterns urban, rural and plantation areas
- e) Availability of credit for retailers
- f) Inducements given by tobacco industry for retail of different types of tobacco products
- g) Availability of internet sales of tobacco products including Electronic Nicotine Delivery Devices (ENDS)
- h) Local websites providing home delivery of tobacco products

B. Adherence to current laws and regulations

1. Adherence to age restrictions when selling
2. The display of health warnings
3. Advertising in retail outlets
4. Disallowing smoking in retail premises
5. Availability of smokeless tobacco products
6. Monitoring of retail sales by enforcement authorities

C. Status related to proposed amendments

1. Availability in proximity to schools
2. Purchase patterns and quantities (single sticks, loose sales etc.)

D. Attitudes and knowledge of retailers and customers

1. Attitudes of retailers on different tobacco products
2. Profiles of customers of different tobacco products
3. Exposures of retailers to prevention interventions
4. Attitudes of retailers that have stopped retailing voluntarily

2. Methodology

2.1. Design

The study design incorporated both quantitative and qualitative techniques. Surveys were used to obtain data from outlets selling cigarettes and other tobacco products and outlets which voluntarily stopped selling cigarettes. A structured interview was used to obtain information from NATA Authorized officers and MOH officers through focus group discussions. Observations were used to obtain information on shops selling tobacco within a 3 minute walking distance of educational institutions. A desk study was conducted to obtain data on internet sales and home delivery of tobacco products.

2.2. Sample

The sample was gathered from 20/04/2019 to 01/07/2019 across 7 districts in Sri Lanka which were selected purposively. These were Colombo, Monaragala, Hambanthota, Kurunegala, Nuwara Eliya, Mannar and Jaffna.

2.2.1. Outlets selling cigarettes

A total of 208 outlets covering the 7 districts were selected. In Colombo, Monaragala, Hambanthota and Kurunegala the main town and 1 sub-town was selected for data collection. In the Jaffna, Mannar and Nuwara Eliya districts more than 1 sub town was selected due to reduced population density leading to a reduced number of outlets.

2.2.2. Outlets which stopped selling cigarettes

In total 37 outlets which used to sell cigarettes and voluntarily stopped selling from the 7 districts were selected.

2.2.3. NATA authorized officers and MOH officers

Approximately 10 officers per district were selected. In total 68 officers covering the 7 districts were interviewed.

2.2.4. Educational institutions

Approximately 5 educational institutes with students below the legal smoking age of smoking (21 years), mainly schools, were selected in each district. 3 minute walking distance of a total of 34 educational institutions, covering the 7 districts, were observed.

2.2.5. Desk study

A desk study was carried out on the availability of internet sales of tobacco products including Electronic Nicotine Delivery Devices (ENDS) and local websites providing home delivery of tobacco products. The key words (Electronic Nicotine Delivery Devices (ENDS), e - cigarette, e - cigarette home delivery, e - cigarette products in Sri Lanka, e - cigarette sales) were searched on Google search engine and Facebook and all relevant search results were reported with a link and screenshot.

2.3. Procedure

To maintain the integrity of data, the sample selection followed two procedures. Data collection procedure a) was used for selecting outlets which were selling cigarettes and outlets which used to sell cigarettes and stopped voluntarily. Data collection procedure b) was used for observations surrounding educational institutions.

2.3.1. Selection of data collectors

5 data collectors were selected from staff members of ADIC for the data collection process. Staff members were selected specifically due to their experience in field work in the selected districts. The data collectors were given a training on the terms of reference of this study, measures and the data collection procedures to be followed. One pair of data collectors obtained data from one district.

2.3.2. Data collection procedure

a) Selection of outlets for data collection from sellers

For selection of outlets in each town and sub-town, the main intersection was chosen as the central point. The data collectors started at this point of the town and walked down each road leading from the centre, covering both sides of the road, for an approximate 1km radius. Every third outlet, on both sides of the road in main towns and every outlet on both sides of the road in sub-towns were selected to obtain data. Every outlet was selected in sub-towns due to the small number of outlets in sub-towns.

b) Observation of outlets in proximity to educational institutions

For observation of availability of tobacco products in proximity to educational institutions, the data collectors walked down all roads directly leading to the educational institution for 3 minutes and observed the outlets which sold tobacco products.



Image 1. Data collection



Image 2. Data collection

2.4. Instruments

The project tool kit including four measures were developed by ADIC research and evaluation programme to cover the objectives of the analysis.

2.4.1. Questionnaire for outlets selling cigarettes

This questionnaire contained 28 items and was in the national languages – Sinhala and Tamil. The questions were posed to the retailers/sellers and answers were collected. The questions obtained data on retail sale structure and variations; adherence to current laws and regulations; attitudes and knowledge of retailers and customers and purchase patterns and quantities (single sticks, loose sales etc.).

2.4.2. Questionnaire for outlets which voluntarily stopped selling cigarettes

This questionnaire contained 8 items and was in the national languages of Sinhala and Tamil. The questions were posed to the retailers/sellers and answers were collected. The questions obtained data on attitudes of retailers that have stopped cigarette sale voluntarily.

2.4.3. Structured interview format for NATA authorized officers and MOH officers

The interview format contained 6 items focusing on obtaining data on adherence to current laws and regulations, specifically about monitoring of retail sales by enforcement authorities. This was through focus

group discussions in each district.

2.4.4. Observation guideline for availability of tobacco products in proximity to educational institutions

The availability of tobacco products in proximity to schools were observed in different types of outlets (food outlet, retail store, kiosk, other).

2.5. Data Analysis

Data analysis was conducted using the Statistical Package for Social Sciences (SPSS).

3. Results

3.1. Results from retailers selling cigarettes and other tobacco products

Approximately 30 outlets were selected in each district (Table 1). The total number of outlets selected were 208 across 7 districts. The slight differences in the amount of outlets selected were due to practicalities such as the actual number of outlets available.

District	Number	Percentage
1. Colombo	30	14.4
2. Kurunegala	30	14.4
3. Hambanthota	31	14.9
4. Nuwara Eliya	28	13.5
5. Jaffna	27	13.0
6. Mannar	32	15.4
7. Monaragala	30	14.4
Total	208	100.0

Table 1. Total number of outlets selling cigarettes selected

56% of the outlets studied were from main towns and 44% were from the sub towns (Figure 1). Main towns are the towns with the highest population for that district and sub-towns are towns which have less population than the main town. Different types of outlets were selected to obtain data (Figure 2). These included food outlets (37%), retail shops (54%), kiosks (4%) and other shops (5%). Food outlets defined in this study are establishments where food is served and people can sit and eat. Kiosks defined in this study are small temporary sales outlets. The other shops category include various sales outlets which do not belong to any of the mentioned categories.

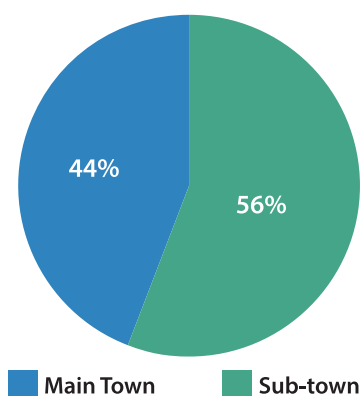


Figure 1. Selected locations

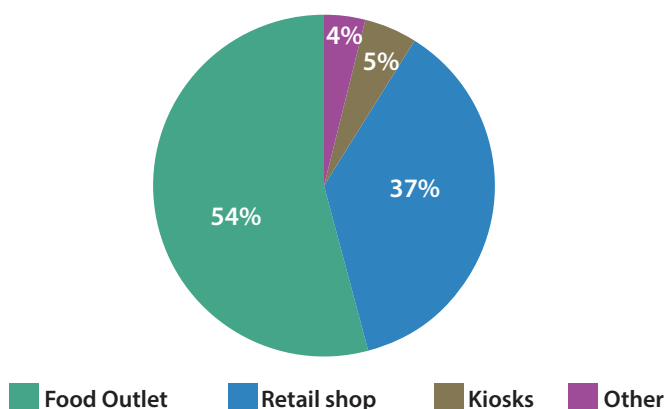


Figure 2. Selected outlet types

a) Daily tobacco sales pattern

i) Cigarettes

Overall, in the 7 districts 337 cigarettes are sold on average per day in the surveyed outlets. The highest reported total cigarette sales are in Colombo at 662 cigarettes (Table 2).

District	Cigarettes*
Colombo	662
Kurunegala	299
Hambanthota	396
Nuwara Eliya	384
Jaffna	155
Mannar	104
Monaragala	355
Total	337

* in average number of sticks sold in the surveyed outlets

Table 2. Average cigarette sale in districts

**Most Sold
Cigarette
Brand: JPGL
201 sticks
per day, per
outlet**

In terms of the number of cigarette brands, in all 7 districts the “John Player Gold Leaf” (JPGL) brand is the most sold. The average daily cigarettes sold from the JPGL brand is 201 sticks, per outlet (Figure 3). In Colombo JPGL brand sells significantly more than the 7 district average at 337 sticks, per day, per outlet (Table 3). Overall second most sold cigarette brand is “Navy Cut” with an average 64 cigarettes sold per day, per outlet (Table 3). In Nuwara Eliya and Mannar districts Dunhill emerged as the second most sold brand. However, the difference is under 20 sticks (Table 3). The least sold brand of cigarettes in all 7 districts is 3 roses and B&H with about 1 stick sold per day, per outlet (Figure 3).

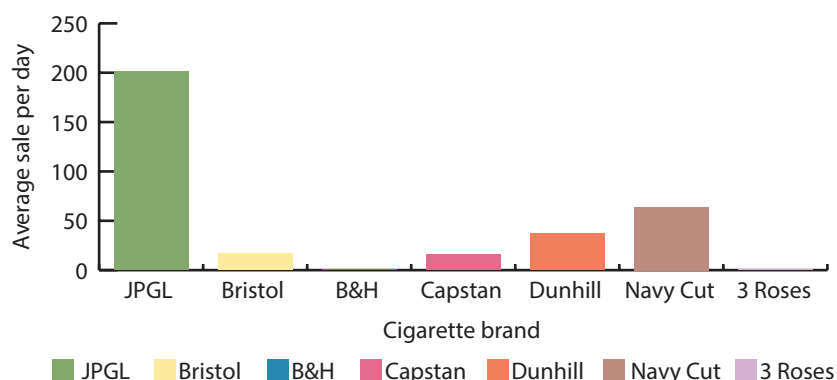


Figure 3. Average cigarette sale per day: Brand

District	Cigarette brand							Average Number
	JPLG	Bristol	B&H	Capstan	Dunhill	Navy Cut	3 Roses	
Colombo	377	21	2	18	112	132	0	662
Kurunegala	164	19	1	29	28	58	1	299
Hambanthota	244	20	0	34	9	90	0	396
Nuwara Eliya	217	31	0	15	69	51	0	384
Jaffna	100	5	2	3	20	25	0	155
Mannar	77	6	0	1	11	9	1	104
Monaragala	227	14	0	16	12	83	2	355
Average Number	201	17	1	16	37	64	1	337

Table 3. Average number of cigarettes sold per day, per outlet by brand

The most common method of purchase by customers in all 7 districts is as single sticks, with 76% customers buying cigarettes in this form (Figure 4). The least common form customers buy cigarettes is as 5 cigarette packs (2%) and 20 cigarette packs (9%).

A majority (76%) of customers buy cigarettes as single sticks

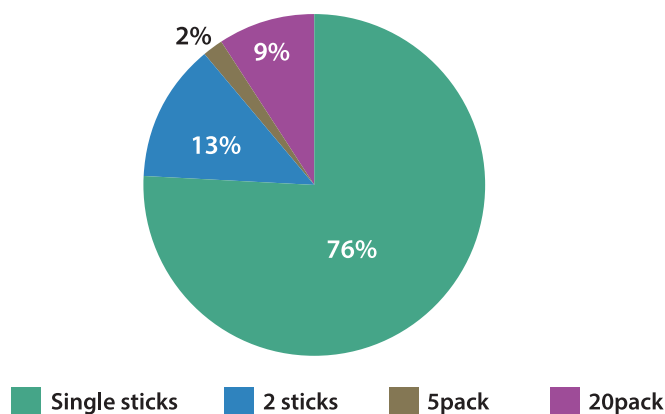


Figure 4. Cigarette buying pattern

ii) Beedi

Overall 194 beedi sticks are sold on average per day, per outlet in the 7 districts (Table 4). The highest number of sticks are sold in Moneragala and the lowest number of sticks are sold in Colombo (Table 4).

District	Beedi*
Colombo	83
Kurunegala	84
Hambanthota	133
Nuwara Eliya	246
Jaffna	291
Mannar	179
Monaragala	359
Total	194

* Average number of sticks per day, per outlet

Table 4. Average beedi sales per day, per outlet in districts

Most commonly customers buy beedi as 2 to 5 sticks (42%), suggesting one customer generally buys 2 or more beedi sticks in a single instance (figure 5).

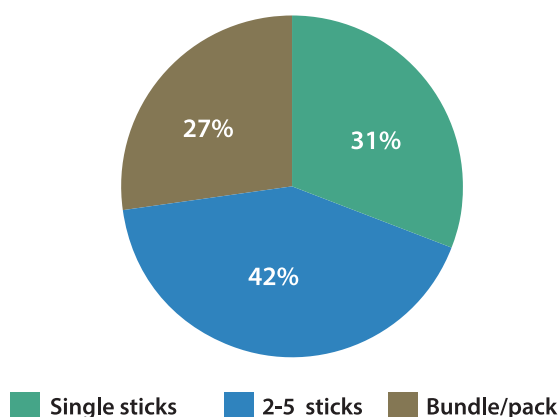


Figure 5. Beedi buying pattern

It should be noted that the numbers of beedi and cigarettes should not be compared due to the significant differences in prices and size of the product. Previous studies show that the prevalence of beedi consumption among Sri Lankan males to be 5.4% in 2016 and 5.2% in 2017 (2016, 2017 ADIC SPOT Survey)¹.

b) Individual differences observed in customers of different cigarette brands

As reported by the retailers, JPGL is the most popular cigarette brand among both young and older people. Young and elder people are described in this study according to how the retailers identified the age of customers by their appearance. Dunhill is more popular among youth than older people. Navy Cut, Capstan and Bristol brands are all more popular with older people than youth (Figure 6).

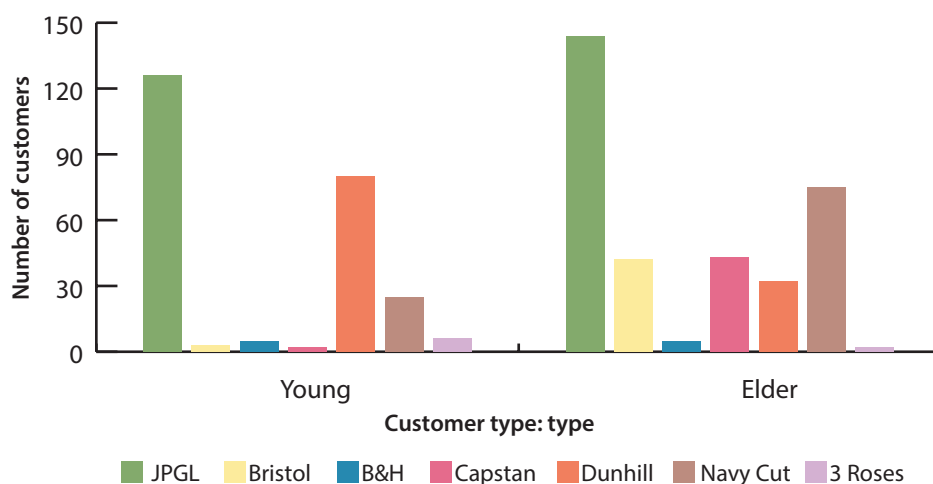


Figure 6. Types of customers for cigarette brands: Age

¹ The Alcohol and Drug Information Centre (2016, 2017) Spot Survey. Available from <http://adicsrilanka.org/trend-surveys/>

In terms of popularity of brands with customers of different professions, again JPGL is the most popular brand among both white collar and blue collar workers, as reported by retailers. In this study blue collar and white collar workers are described according to how retailers identified customers by appearance. The lower priced cigarette brand Navy Cut is significantly popular especially among blue collar workers. Dunhill is more popular with white collar workers. White collar workers seems to prefer JPGL, Navy Cut and Dunhill brands, while blue collar workers prefer JPGL, Navy Cut, Capstan and Bristol brands (Figure 7).

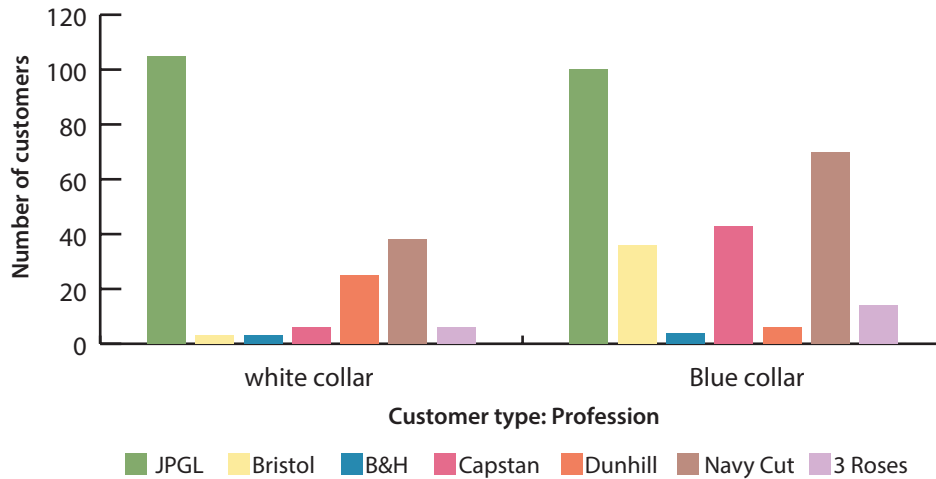


Figure 7. Types of customers for cigarette brands: Profession

c) Retailer cigarettes purchasing patterns

i) Method

The most common method retailers’ purchase cigarettes is through delivery done by the tobacco company (64%). The second most common method of purchase is through wholesale shops (23%) (Figure 8).

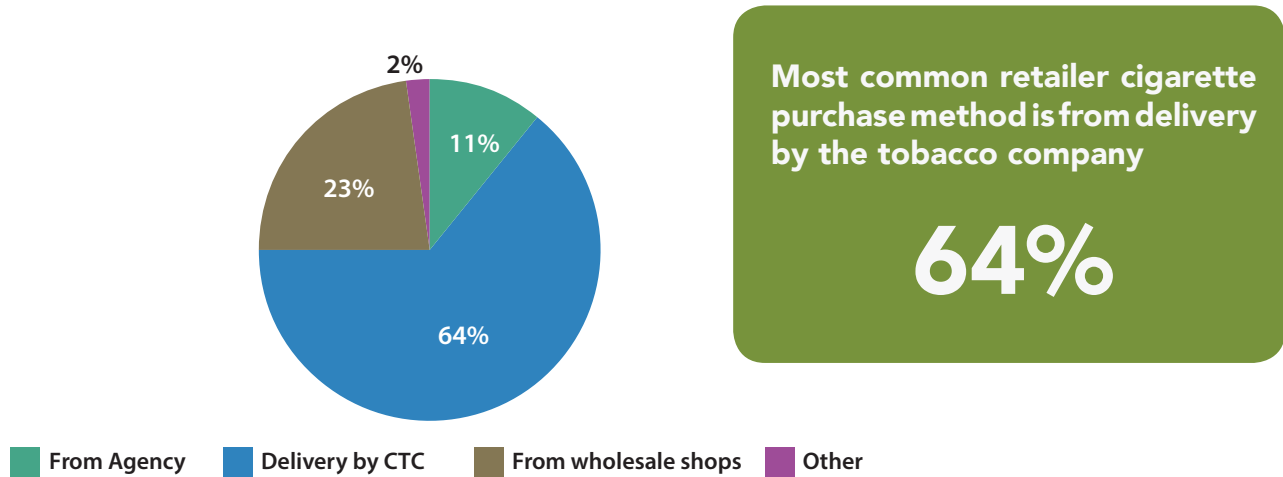


Figure 8. Method retailers purchase cigarettes

ii) Volume of cigarettes purchased in one instance

A majority (57%) of the retailers reported they purchase cigarettes for one day. 37% of the retailers reported purchasing cigarettes for 2 or 3 days. Very few retailers report purchasing cigarettes for a whole week (6%) (Figure 9).

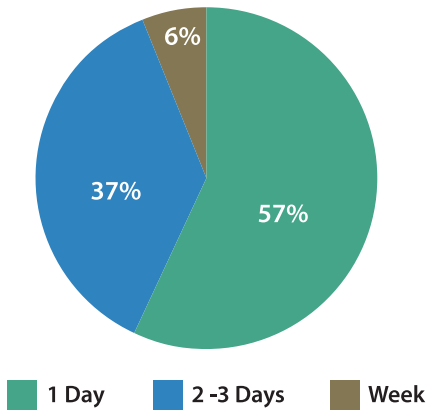


Figure 9. Retailer cigarette purchase volume in one instance

iii) Method of payment for purchasing cigarettes

The most common method of payment for cigarettes purchased by retailers is through cash (74%). However, 15% of the retailers reported purchasing cigarettes on credit and a further 11% retailers reported using both cash and credit methods to purchase cigarettes (Figure 10). The credit method of purchasing is when the tobacco company gives cigarettes on loan and collects payment later.

57% | The majority of retailers purchased cigarettes only for one day

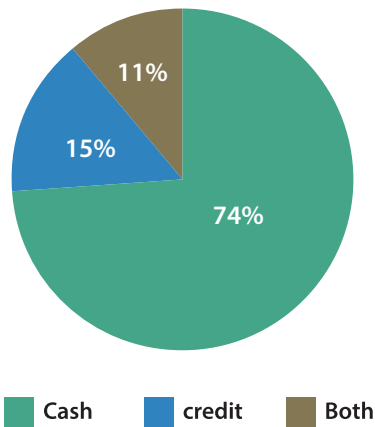


Figure 10. Method of payment for retailer cigarette purchase

d) Discounts and incentives awarded by the tobacco company to retailers for cigarette sale

The retailers reported incentives being awarded for selling JPGL and Dunhill brands only. Most of the incentives were awarded for selling the JPGL brand cigarettes. The incentives reported were receiving cashier machines, showcases, clocks, t-shirts, light-up boards and calculators. Multiple items were at times received in combination. Some sellers did not report an item but reported being given gifts, annual gifts or money. Several sellers reported receiving incentives depending on the number of cigarettes sold i.e. 2500 sticks. Specifically, it was reported if 40 JPGL bundles (a bundle is 20 packs of cigarettes) are purchased an incentive of Rs. 3500 was awarded.



Image 3. Abhisheka (CTC loyalty program) light-up board



Image 4. Abhisheka water filter

Incentives for retailers awarded only for JPGL and Dunhill brand sales
 Incentive for purchasing 40 JPGL bundles: Rs. 3500
 Incentive for selling 15 Dunhill bundles: Rs. 3500

For the Dunhill brand, several retailers reported receiving an incentive of Rs. 3500 for selling 15 bundles of cigarettes. Several retailers also reported receiving gifts.

e) Retailer profit of tobacco sales

Retailers reported profit for JPGL was Rs. 1.28 per stick and profit for Dunhill was Rs. 1.15 per stick. All other brands and beedi and cigars (Figure 11) turned out only a few cents in profit per stick.

81.9%
of retailers
stated that
cigarette sale is
not profitable

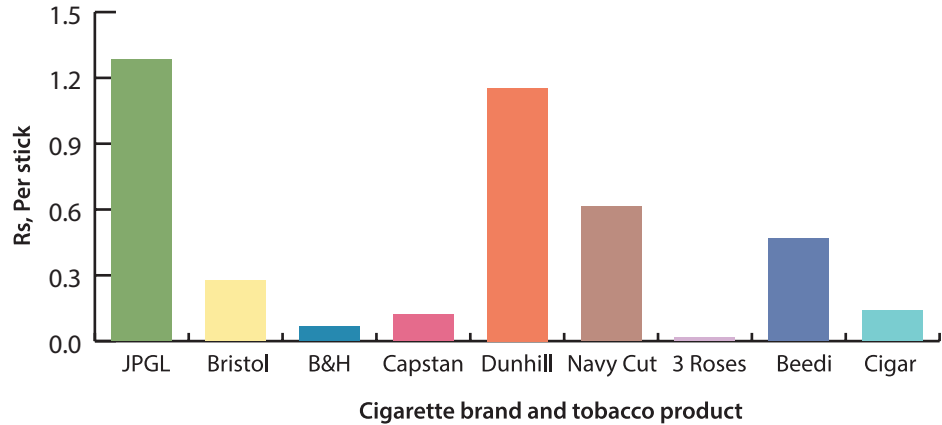


Figure 11. Retailer profit per stick of tobacco product

JPGL has the highest profit of Rs. 1.28 per stick among all cigarette brands

When questioned on retailers' opinion on whether cigarette sale is profitable or not, the majority of the retailers (81.9%) stated that cigarette sale is not profitable. Most of the retailers (57.9%) also stated they do not plan to continue cigarette sale.

f) Cigarette pack visibility inside shops

Overall, 61 outlets in the 7 districts had cigarette packs visibly displayed inside the outlets. 128 shops did not have cigarette packs visibly displayed. From 55 of the outlets with visibly displayed cigarette packs, 47 had pictorial Health Warning (PHW) facing front and 8 did not have the PHW visible.



Image 5. Cigarette pack display

g) Tobacco company promotions within the outlet

72% of the outlets selling cigarettes displayed promotions by the tobacco company within the outlet (Figure 12). The most common tobacco company promotion observed within outlets of all 7 districts was the signboard demarcating the legal age of smoking (21 years) (58%). Cigarette prices were also advertised by the tobacco company within 21% of the outlets.

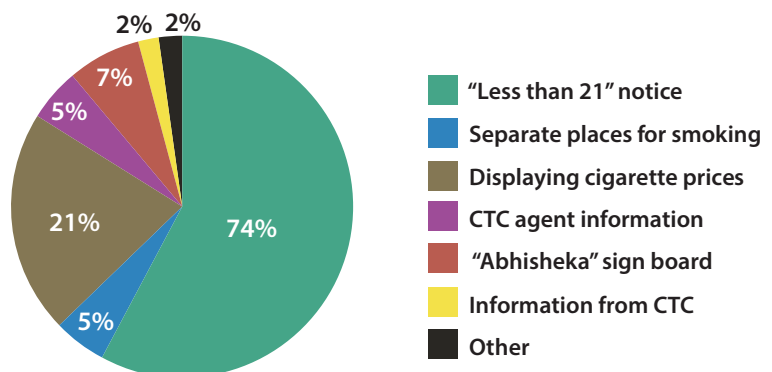


Figure 12. Tobacco company promotions within outlets

72% | outlets selling cigarettes have promotions by the tobacco company within the outlet



Image 5. Less than 21 years sticker



Image 6. Abhisheka signboard

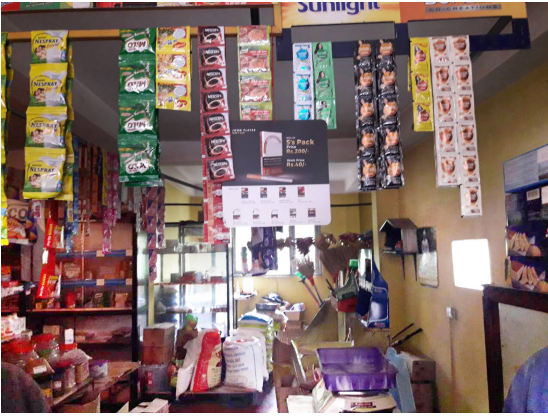


Image 7. Cigarette price display



Image 8. Abhisheka signboard

h) Tobacco company interventions

93 of the 208 retailers reported tobacco company interventions. These interventions included, meeting the owner and providing information, participating in functions, receiving gifts from the company and intervening in legal issues (Figure 13). The most frequent type of intervention by the tobacco company is meeting with the shop owner/retailer and providing information on company products (86 out of 93 retailers). The tobacco company did not conduct interventions for a majority of the shop owners (115 out of 208 retailers).

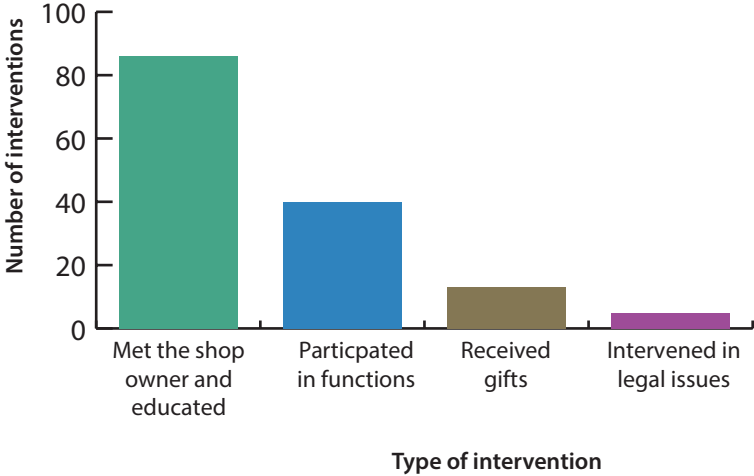


Figure 13. Tobacco company interventions

i) Retailers allowing smoking within their outlet premises

Retailers self-reported whether they allow smoking within their outlet, and data collectors noted if people were smoking inside the outlet. 86.8% of the retailers reported they do not allow smoking inside their outlet and 13.2% retailers reported they do allow smoking inside the outlet. The report tallied with data collector’s observations (Figure 14).

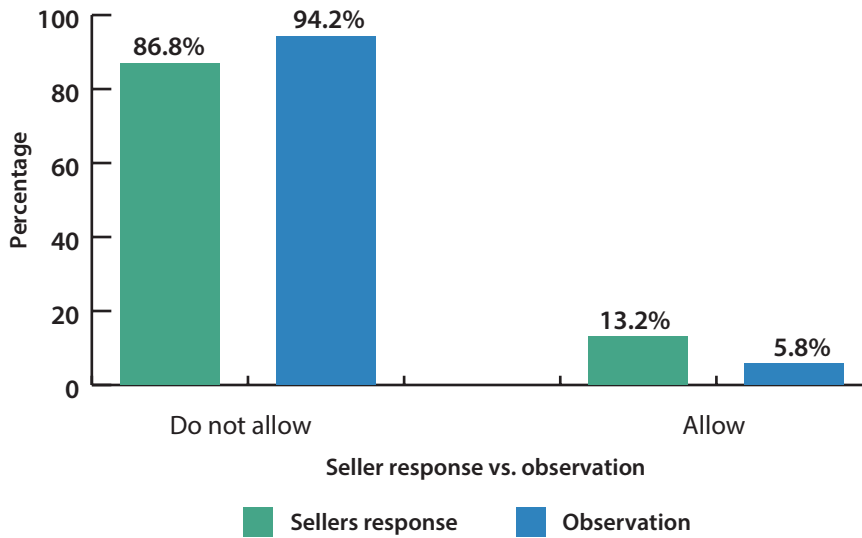


Figure 14. Allowing smoking within outlets

j) Awareness received by parties other than the tobacco company

57% of the retailers reported they have not received awareness by anyone other than from the tobacco company.

Out of the retailers who reported receiving awareness from others than the tobacco company, most awareness was conducted by Public Health Inspectors (PHI) (86%) (Figure 15).

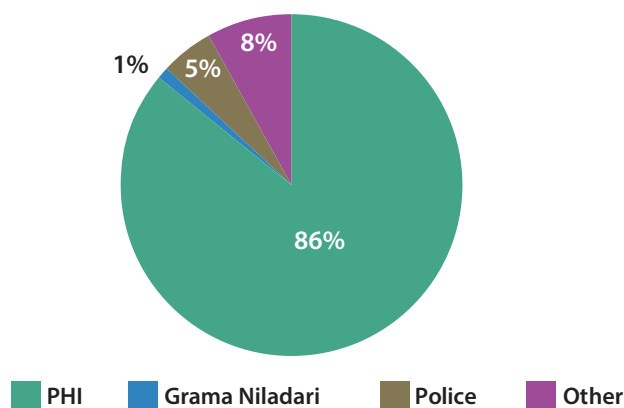


Figure 15. Awareness conducted by government officers

57% | retailers have not received awareness by anyone other than from the tobacco company.

k) Perceived non-monetary differences between cigarette brands

The majority (75.2%) of retailers reported there was no other difference than price between cigarette brands. The retailers who reported differences stated taste, smell, quality, flavour, length and other differences between cigarette brands (figure 16).

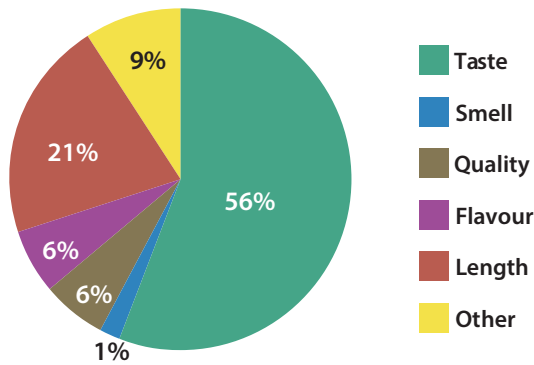


Figure 16. Non-monetary perceived differences between cigarette brands

Only 12% of the retailers cited health issues of cigarette smoking

l) Retailers' opinions, attitudes and beliefs

48% of the retailers view smoking as "not good". However, only 12% of the retailers cited health issues of cigarette smoking (Figure 17). The "other" reasons cited here are reasons which do not fit into the categories, such as "this should be stopped", "I don't like people smoking", "It [smoking] is bad for children". None of the retailers viewed cigarette smoking as positive even though they were selling the product.

None of the retailers viewed cigarette smoking as positive even though they were selling the product.

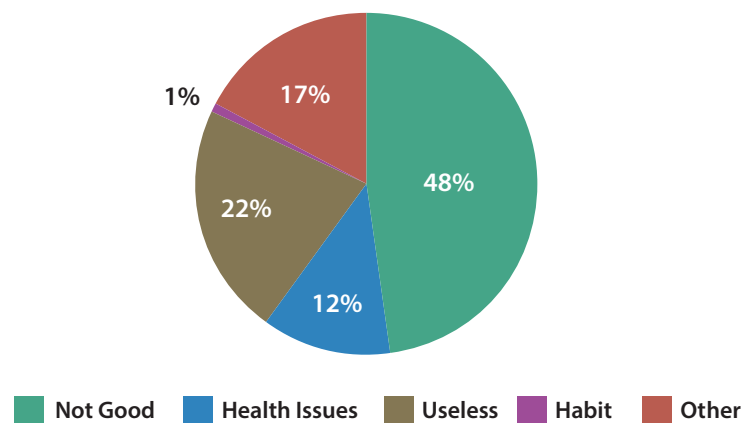


Figure 17. Retailers' view on smoking

56.7% of the retailers report reduction of the sale of cigarettes following the recent price increase

Results

In terms of the perceived impact policy changes such as pictorial health warning (PHW) and the most recent price increase of cigarettes have had on cigarette sale, the majority of the retailers (56.7%) reported that they saw a reduction of cigarette sales with the price increase (Figure 18). Comparatively PHW impact was reported as reducing cigarette sale by 24.6% retailers (Figure 18).

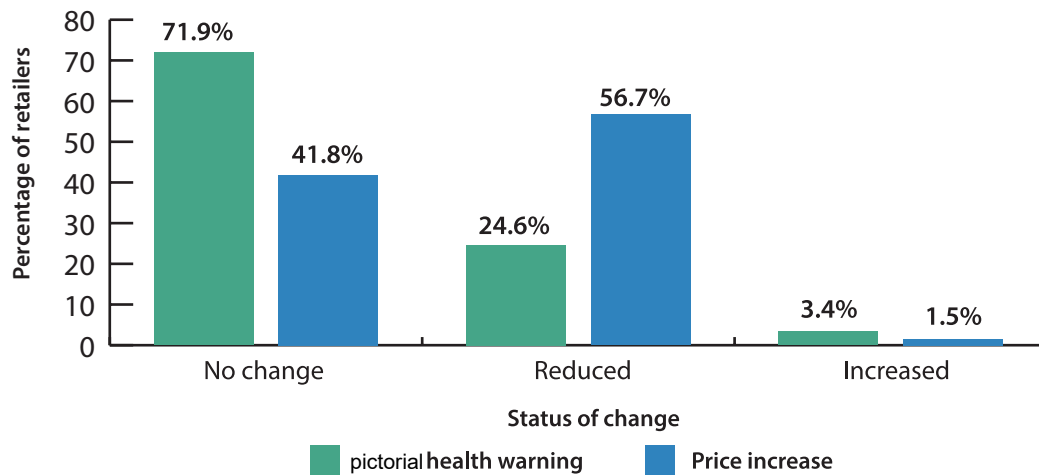


Figure 18. Retailers' perception on impact of national policy changes on cigarette sale

Majority of the retailers (70.8%) reported that there was a customer tendency to substitute to lower priced cigarettes. The most common brand that was used as a substitute reported by retailers was Navy Cut (76%) (Figure 19).

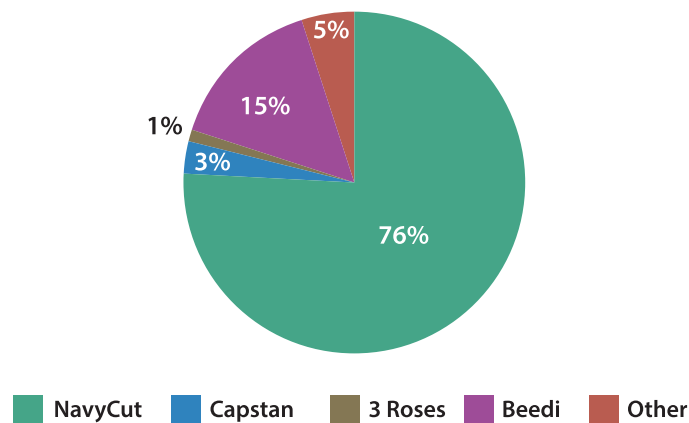


Figure 19. Customer tendency to substitute to lower priced cigarettes

Most of the retailers (82.8%) selling cigarettes do not take part in prevention activities.

Only 22.7% of the retailers asked for ID to confirm age before selling

The majority of the retailers (77.1%) were aware of the national drug prevention programme and a majority (69.5%) reported the programme had reduced cigarette sales. However, most of the retailers (82.8%) reported they did not take part in prevention activities.

Most retailers (57.8%) reported that they were aware of other retailers voluntarily discontinuing cigarette sales. 42.2% said they were not aware of this.

Retailer adherence to legal age limits of smoking (21 years) as reported by retailers themselves were very high with 91.6% retailers denying cigarette sale to individuals below 21 years. However, the most commonly used method by the retailers to clarify age was through appearance (Figure 20). Only 22.7% retailers asked for ID to confirm age.

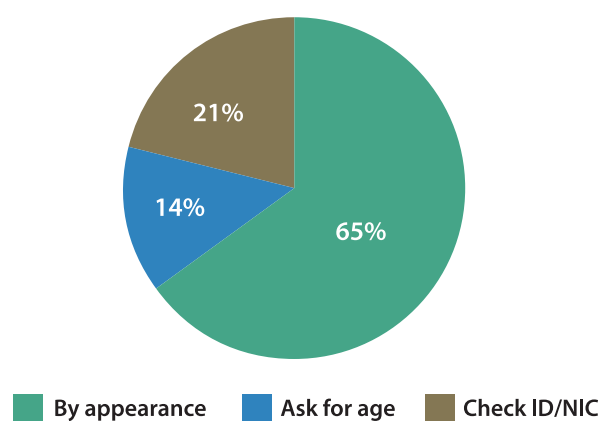


Figure 20. Age identification method used by retailers before selling cigarettes

3.2. Results from retailers who stopped selling cigarettes

Either 5 or 6 outlets which had voluntarily stopped cigarette sale were selected from each district. In total 37 outlets were selected across the 7 districts (Table 5).

Table 5. Total number of outlets which voluntarily stopped selling cigarettes selected from each district

District	Number	Percentage
Colombo	6	16.2%
Kurunegala	5	13.5%
Hambanthota	5	13.5%
Nuwara Eliya	6	16.2%
Jaffna	5	13.5%
Mannar	5	13.5%
Monaragala	5	13.5%
Total	37	100.0%

Results

57% of the outlets were selected from main towns while 43% were selected from sub towns (Figure 21). Out of the selected outlets majority were under the food outlet category (69%) (Figure 22). Other outlet types were retail (25%), kiosk (3%) and other (3%).

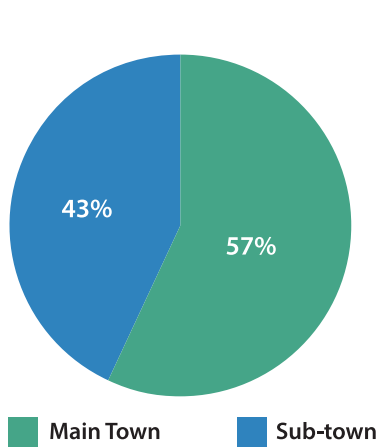


Figure 21. Selected location type for outlets which stopped cigarette sales

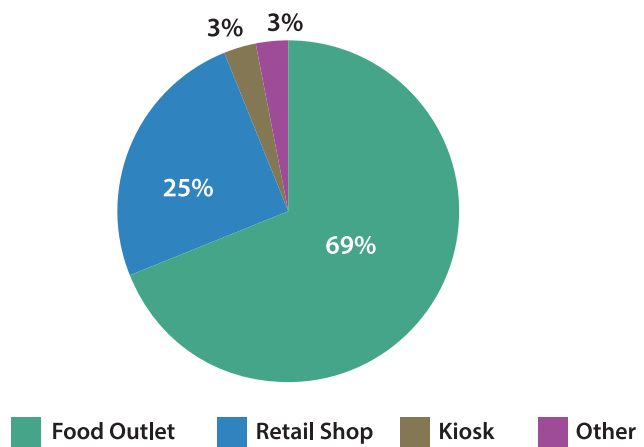


Figure 22. Selected outlet type for outlets which stopped cigarette sales

The minimum duration an outlet had stopped selling cigarettes in the sample was 3 months and the maximum duration was 21 years.

52% of the retailers cited their personal dislike for selling cigarettes as the reason for stopping cigarette sales in their outlets (Figure 23). Further, a majority (79%) stopped cigarette sale with no external encouragement. Most of the retailers (67%) said their decision to stop had not affected business (Figure 24). However about 1/3rd of the retailers claimed the decision had reduced business.

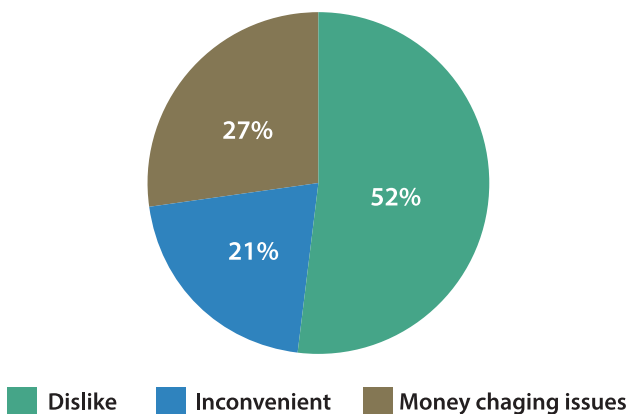


Figure 23. Reasons for stopping cigarette sales

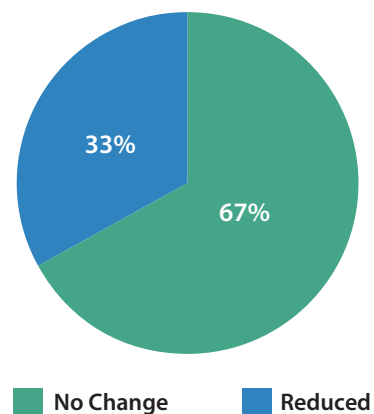


Figure 24. Effect stopping cigarette sales had on business

67%

Most of the retailers said their decision to stop selling cigarettes had not affected business

72% of the retailers claimed the tobacco company contacted them after they stopped selling cigarettes. Most of these interventions (14 out of 16 reported) were in the form of requesting retailers to start selling cigarettes again. 96% retailers did not agree with the interventions by the tobacco industry.

Only 4 out of the selected 36 shops which do not sell cigarettes sell other tobacco products.

72% of the retailers were contacted by the tobacco company after they stopped selling cigarettes

3.3. Focus group discussions with NATA Authorized officers and MOH officers

The Authorized officers of the NATA Act are Police officers, Excise officers, Public Health Inspectors (PHI) and Food and Drug Control officers. Medical Officers of Health (MOH) were included in focus groups as the NATA amendment currently awaiting approval includes giving MOHs the powers to enforce the NATA Act.

The focus groups included officers from each of the mentioned categories and approximately 10 officers were interviewed through 2 to 3 focus group discussions, in each district. In total 68 officers were interviewed.

They reported on instances the law was enforced according to the NATA Act, on selling cigarettes to individuals below 21 years, smoking inside shops and other provisions. All districts except Monaragala reported enforcing the law on breaching the NATA Act. However 11 warnings were issued in Monaragala district against smoking inside shops.

Law enforcement against selling cigarettes to individuals below 21 years was reported only in several occasions in Colombo and Kurunegala districts and in 3 cases in the Jaffna district.

Law enforcement against smoking inside shops was reported only in several occasions in Kurunegala and Nuwara Eliya districts and in 7 cases in the Jaffna district with 11 warnings being issued in Monaragala district.

In Colombo and Kurunegala most instances of law enforcement was reported against illegal cigarettes. Law against smoking in public was enforced in Kurunegala and Hambathota districts. In Hambathota and Monaragala districts law was enforced against not paying VAT for cigarettes.

One specific incident was noted by a PHI in Nuwara Eliya district where he enforced the law to take down a cigarette display board at a supermarket. It was also reported that he was contacted by the tobacco industry on this matter.

Kurunegala and Jaffna emerges as districts which are stronger in law enforcement through these focus group discussions.

In terms of whether there were designated smoking areas in shops, officers from Colombo reported that there were many while officers from Monaragala reported these existed in shops around the town. Officers from Nuwara Eliya said there were 2 shops with designated smoking areas. Officers from both Kurunegala and Hambathota reported limited shops existed with designated smoking areas. However, it was observed that officers of these 2 districts seemed to be less aware of shops having designated smoking areas. Officers in the Jaffna district reported that there were no shops with designated smoking areas. However, shops which sell cigarettes are also limited in the Jaffna district.

Almost all officers from all 7 districts in the focus group discussions reported conducting awareness activities for shop keepers in the areas under their purview.

Interferences from the tobacco company when enforcing the NATA Act was prevalent across districts

In terms of tobacco free zones, officers from Hambanthota, Monaragala, Mannar and Jaffna reported there were such areas within their districts.

In terms of tobacco industry influence, officers of Colombo, Kurunegala, Mannar, Monaragala, Jaffna and Nuwara Eliya districts reported having such an influence. There were instances of tobacco industry contacting the officers in Kurunegala, Monaragala and Mannar. In Nuwara Eliya officers reported being contacted by tobacco industry lawyers when a case against breaching the NATA Act was to be filed. Officers in Jaffna reported being contacted by industry lawyers when they mobilized to remove "Abhisheka" signboards.

In Kurunegala district, it was reported that the tobacco industry conducted several sessions at the Katana Police Training School.

While many officers said there was no influence by the industry in Hambanthota district, there was one exception, where there was an attempt to influence an officer strongly enforcing the law in the district.

Officers in focus groups from all districts reported tactics by the tobacco industry to promote the product in areas under their purview. However not all officers possessed adequate knowledge or awareness of the activities. In Colombo district, awareness of tactics was poor. In Kurunegala district there were some officers with thorough knowledge. In Monaragala district around half the officers had a thorough knowledge of tobacco industry tactics including promotions. In Hambanthota district there were several officers with adequate knowledge of tobacco industry tactics. In Jaffna district over half the officers had knowledge on the general promotions done by the tobacco industry. In both Nuwara Eliya and Mannar districts about a quarter of the officers in each district had knowledge of general promotions by the tobacco industry (Refer to Annex A for full focus group discussion report).

3.4. Observations: Tobacco sales activity in proximity to educational institutions

Overall, tobacco products being sold within a 3 minute walking distance of educational institutions was a common occurrence in the observed areas. A 3 minute walking distance of 34 educational institutions in the 7 districts were observed starting at the main gate of the institutions. Out of the observed educational institutions 26 were formal schools and 8 were institutes with students under 21 years of legal age for smoking. The most common tobacco product for sale observed was cigarettes.

The highest number of outlets selling tobacco products in proximity to educational institutions was found in Monaragala with 17 tobacco selling outlets surrounding the 5 schools observed, this was followed by Hambanthota with 16 tobacco selling outlets in the observed area. In Jaffna, there were 8 outlets selling tobacco products in the observed area surrounding 3 out of the 4 schools. The least number of outlets selling tobacco products in proximity to educational institutions was found in Nuwara Eliya with 5 outlets in the area surrounding 3 out of 5 educational institutions.

Two of the outlets observed were under the "Abhisheka" title. This title is awarded by the tobacco company to outlets which sell the most cigarettes in the area. One of the outlets was found within walking distance of Hambantota Vocational Training Institute and Zonal education Office, RDHS office and the other outlet was found within walking distance of St. Annes College Kurunegala. (Refer to Annex B for full observation report)

3.5. Internet sales of tobacco products, ENDS and home delivery of tobacco products

The desk study on internet sales and home delivery was conducted from 3rd June to 5th July 2019. The internet search turned out 19 results for internet sales of tobacco products including ENDS, most commonly e-cigarettes. Out of these 14 were online shopping websites and 5 were blogs/articles/comments related to e-cigarettes. Out of the 14 websites 1 was Alibaba which is an international online marketplace delivering to Sri Lanka. 3 were online shops operating out of Facebook specifically to sell tobacco products and 2 more were ads posted via online sale pages on Facebook.

Home delivery of tobacco products is relatively rare in Sri Lanka. The search turned up 7 results which included 4 online shopping websites and 3 Facebook posts offering delivery of tobacco products.

4. Discussion

As observed in this study and consistent with existing market research, JPGL is the most sold cigarette brand in the surveyed districts. JPGL is followed by Navy Cut and then Dunhill as second and third most sold brands respectively.

The tobacco company delivers their products to a majority of the retailers and most retailers opt to buy cigarettes only for a single day. This suggests stopping purchasing of cigarettes for a single day can have a significant impact on sale and consumption of cigarettes. This is further illustrated by the significant amount of incentives the tobacco industry gives the retailers. The Company attempts to maintain relationships with the retailers by meeting them, giving gifts, aiding them in legal matters etc. because the business mostly runs on a day to day purchase and sale system. Therefore, a retailer not purchasing on even a single day can have a significant impact.

Tobacco Industry promotions exist in a majority of the cigarette selling outlets. Most of these promotions are in the form of “not selling cigarettes to anyone below 21 years” sticker. There are other promotions carried out by the tobacco company such as through the ‘Abhisheka’ scheme where retailers are awarded various incentives for selling cigarettes including light-up name boards.

For retailers, purchasing cigarettes day to day is costly, and yet it was observed they mostly purchase cigarettes for cash. However, the tobacco company does have a credit system in place as well. Through this system retailers can purchase cigarettes on loan and settle the payment later, either in the same day or the following day when the next batch of cigarettes are delivered.

JPGL is the most profitable and most sold cigarette brand as reported by retailers and yet retailers obtain only Rs. 1.28 maximum profit per single JPGL cigarette stick. But they spend a large sum of money on purchasing cigarettes every day. The average number of JPGL cigarettes sold per day, in the surveyed outlets is 201. This justifies why a majority of retailers report that selling cigarettes as not profitable. It is interesting to note that retailers continue sales when they themselves report and calculations also show that selling cigarettes is not a profitable business. Perhaps it is to do more with habit and beliefs retailers have as some of them reported they are willing to stop cigarette sales if other retailers in the area stop sale, which means they have the belief “other retailers will profit more than me if I stop selling cigarettes”. More education in this area may perhaps aid retailers to understand the reality. This is important considering majority of the retailers who stopped cigarette sale voluntarily noted that it did not have any difference on their business.

The majority of the customers as reported by surveyed retailers buy cigarettes in the form of single sticks. This finding suggests prohibiting loose sale of cigarettes (single stick sale) which was proposed by NATA and is currently awaiting Cabinet Approval can prove to be a successful policy measure in reducing cigarette sale and the resulting harm within the country. Beedi, on the other hand is bought by customers mostly as 2 or 5 sticks.

As reported by retailers, the most popular brand of cigarettes among customers regardless of age or profession was JPGL. The second most popular brand changes with age, where youth prefer Dunhill and older customers prefer Navy Cut. When it comes to profession Navy Cut appears as the second most popular brand across blue collar and white collar workers. Dunhill emerges as the third popular brand among the white collar workers but not among the blue collar workers.

When assessing retailers’ opinions on smoking almost all retailers view it negatively. However only 12% knew and reported health problems of smoking. In terms of effectiveness of policy changes in impacting cigarette sales reported by retailers, they report that the recent price increase to have reduced cigarette sales more than pictorial health warnings (PHWs) on cigarette packs. Considering most cigarettes are currently are bought as single sticks, this finding is not surprising, as PHWs will have more impact when

entire cigarette packs are bought. The finding further strengthens the need to prohibit loose sales of cigarettes to reduce sale, consumption and harm from cigarette smoking in the country.

The majority of the retailers reported that customers had a tendency to substitute to lower priced cigarettes. Navy Cut is the brand that retailers report as customers substituting to most often. However, retailers also stated, when being interviewed that customers generally tend to go back to the brand they always bought after a certain time period.

The majority of retailers tend to adhere to tobacco control policies within the country. Most do not allow smoking within their shops and do not sell to individuals below 21 years. However, most retailers do not use the effective method of asking for ID before selling cigarettes and instead relies on their subjective judgment of the customer's age by appearance. This method is not effective and more education should be provided to the retailers to request ID to confirm age before selling cigarettes.

Through the focus group discussions it was evident all the officers enforcing the NATA act had faced significant interference from the tobacco company. The company tried contacting and intervening with enforcement of the law in many situations as reported by officers. However, the officers have either refused contact or disregarded these influences and continued to enforce the law.

One specific interference by the tobacco company is noted by officers of Kurunegala where the company conducted sessions at the Katana Police Training School.

In terms of knowledge about tobacco industry tactics and promotions the Colombo district officers lacked knowledge compared to other districts. In terms of interventions Hambanthota district officers mobilized less, compared to officers of other districts. Jaffna district officers mobilized specifically in targeting and removing of Abhisheka signboards.

All officers showed a positive trait where they did not supply any information without thorough verification that the data collectors were not from the tobacco company.

In terms of tobacco sales activity around educational institutions, the majority of the observed institutions had at least 1 tobacco selling outlet within a 3 minute walking distance. Cigarettes were the most commonly available tobacco product in these outlets. Observed educational institutions in Monaragala had the highest number of 17 tobacco selling outlets within walking distance, this was closely followed by Hambanthota which had 16 tobacco selling outlets within a walking distance of the observed educational institutions.

While internet sales of tobacco products and home delivery of tobacco products is against the law in Sri Lanka, the desk study revealed both of these occur within the country. However internet sales of tobacco products was more common while home delivery was relatively a rare occurrence.

4.1. Limitations

The study while containing certain important findings which can be used as a baseline for future analyses, has several limitations. Firstly, the sample was purposive and as such is not representative of the entire country.

Secondly, using self-reported measures can lead to social desirability bias, especially when collecting data on attitudes and behaviours. However, the data collectors were trained to be objective in asking the questions to obtain the most accurate answers from the retailers.

4.2. Recommendations for future research

Several issues which emerged can be noted as worthwhile to conduct further analyses to understand the tobacco market and sales and purchasing patterns within Sri Lanka.

The retailers' reported price increases had a more significant impact in reducing cigarette sales than Pictorial health warnings (PHWs). Further analyses can focus on this finding and which policy measures have the best effects in reducing cigarette sale in the population and the relationships between the policy measures

to identify which measures interact to produce the best results in reducing cigarette sales, consumption and harm in the country. For example, the relationship between loose sale of cigarettes and cigarette price increase or the effect of PHWs on purchasing of cigarettes as packs.

This study found existence of tobacco and mainly cigarette selling outlets within a 3 minute walking distance from educational institutions was fairly high. In the view of the law to ban cigarette sales within 100 meters of schools/educational institutions which is awaiting implementation, further analyses can focus on the impact high availability of cigarettes have in influencing youth and children below legal age of smoking (21 years) to start smoking cigarettes.

This study also found that despite being illegal, internet sales and home delivery of tobacco products do occur in Sri Lanka. It would be important to further analyze the extent of these internet sales and identify how it happens and who is responsible in order to develop mechanisms to control such breaches of the law through the internet.

In Conclusion, while having several limitations, the study provides an overall view of the tobacco market, sales and purchasing patterns of 7 districts within Sri Lanka. The analysis can be used as a baseline in future to evaluate the efficacy of policy measures to be implemented. The analysis also discovered several specific areas which can benefit from further research in the future.

5. Appendices

Annex A: Focus group discussion report

Colombo District

Law enforcement has mostly been conducted by police and excise officers. Public Health Inspectors (PHI) lack interest in enforcing the law and was reluctant to provide information.

Majority of the instances of enforcing the law reported by the officers were on illegal cigarettes. There were only several instances reported on smoking below the legal age of 21 years.

Many of the officers reported there were separate, designated smoking areas.

All officers reported mobilizing to create awareness among shop owners. Their field reports confirm the awareness activities they have conducted.

There were no reported villages or towns in the districts which were cigarette-free.

There were several interventions by the tobacco industry reported within the district.

Many officers lack awareness about strategies used by the tobacco industry. However there were small groups of officers who actively mobilize for tobacco prevention providing some information on the tobacco industry strategies.

Kurunegala District

There were instances on enforcing the law on smoking cigarettes reported. Majority of these cases were against illegal cigarettes, but there were some cases against selling cigarettes to people under 21 years, several cases against smoking in public and some cases against smoking inside shops.

Limited number of shops which have designated smoking areas reported. Officers' knowledge on the existence of such areas were low.

Majority of the officers conducted awareness activities for retailers in their fields as observed from their statements.

There were no reported villages or town which were cigarette-free.

It was observed that the tobacco company seems to be targeting the officers. There were instances reported by the officers of being contacted through the industry via phone or through various people. It was reported different sessions were conducted by the tobacco industry in the Katana Police Training School's Programme.

There were several officers with a thorough understanding and several more with an adequate understanding of tobacco industry tactics.

Hambanthota District

Majority of the officers do not report enforcing the laws related to cigarettes. The few instances reported were mostly cases of cigarettes without VAT and a few more on public smoking.

There were very few reported shops with designated smoking areas, and some officers had was unaware of such shops.

Many officers were conducting awareness activities for shop keepers in the area.

It was reported that there were areas which were cigarette free. Areas were not reported.

Majority of the officers reported that the tobacco industry does not intervene with them. However it was observed that the industry had tried to intervene with one of the officers who conducted many enforcements.

There was some knowledge in the officers on indirect tobacco industry promotions.

Monaragala District

There were some instances of law enforcement reported. There were no instances of cigarette sale to people below 21 years reported among these cases. There were several cases of enforcing law against smoking inside shops and warning in such cases reported and several cases against cigarettes without VAT payments.

In shops near the town there were designated areas for smoking reported.

All officers had conducted awareness for shop owners in several instances.

A few villages which had stopped cigarette sale was reported.

Many of the officers were targeted by the tobacco industry and intervened in various methods.

About 50% of the officers selected had a thorough understanding of tobacco industry tactics. They were also aware of promotional activities by the industry.

Nuwara Eliya District

The law was reportedly enforced in 5 instances by PHI officers and in 35 instances by excise officers.

8 instances of smoking inside the shop was reported, the law was enforced but no case was filed. The excise department reported 161 cases.

One PHI specifically reported enforcing the law against putting up a cigarette display board in Keels Supermarket. The tobacco industry had contacted this PHI to discuss the issue.

2 shops were reported as having designated smoking areas.

9 awareness activities for retailers were reportedly conducted by the officers in the group.

There are no smoke free town in the area.

The officers report tobacco industry lawyers contact them if there is any instance they want to file a case against breach of law.

3 out of the 10 officers knew about general promotions by the tobacco industry.

Mannar District

There were no law enforcement instances reported by the officers, regarding selling to people below 21 years or smoking inside shops or any other law of the NATA act. However 11 warnings were issued against smoking inside shops.

There were no shops reported with designated smoking areas in the district.

11 awareness programmes were reportedly conducted by the officers for shop owners.

2 towns Thirukketheeswaram, Thottavali were reported to be smoke-free towns by the officers.

Officers reported no influence by the tobacco industry.

3 officers had an understanding of general promotions conducted by the tobacco industry.

Jaffna District

In law enforcement, 3 cases were reported on cigarette sale for below 21 year olds and 7 cases were reported against smoking inside shops.

There were no shops with designated smoking areas reported in this district.

The officers have a process of conducting awareness programmes for shop keepers every Saturday. Nallur is currently a smoke-free town.

As officers mobilize to remove abhisheka boards by CTC, lawyers representing the company have tried to contact PHI.

6 out of 10 officers knew general promotions done by the industry.

Jaffna districts shows a trend of shops stopping cigarette sale altogether. In the town, cigarette selling shops are rare.

Shop owners are motivated by PHI to discontinue cigarette sale and the PHI have develop the process to continue follow up discussions with shop owners.

Excise officers have very poor knowledge on tobacco act and new company strategies. As well less involvement to tobacco control activities.

Annex B: Observation Report: Tobacco sales surrounding Educational Institutions

Colombo District

6 main schools in the district was chosen to observe the surrounding area. Data collectors observed tobacco products with mainly cigarettes being sold in 9 shops or establishments within 200 meter or a 3 minute walking distance from all of the schools.

Asoka Vidyalaya – Maradana: 1 shop selling cigarettes located between 100 meters from the main gate.
Ananda College – Colombo: 1 shop located 80 meters from the main gate, on the opposite side of the road. The shop sells both cigarettes and tobacco with betel.

Lumbini Vidyalaya: 2 shops besides the High level road were located near the main gate of the school selling cigarettes and tobacco with betel.

Thrsutan and Royal College: 1 major hotel "Raheema" selling cigarettes was located right in front of the main gate of Thurstan college and within 50 meters from the main gate of Royal college primary section.
Isipathana College: 1 shop located 60 meters from the left side of the main gate, selling cigarettes and tobacco with betel. 2 more temporary selling points (kiosks) were located just between 150 meters from the main gate. Another shop selling cigarettes were located 200 meters from the main gate on the high level road.

Monaragala District

2 schools and 3 educational institutions were selected to observe the surrounding area. As observed there were 17 tobacco selling shops or establishments within 200 meters or 3 minute walking distance of these 5 educational institutions. Both cigarettes and chewing betel were sold the most in these shops.

Mahanama Central College, National School- Monaragala: 1 shop located right in front of the gate to the school sells chewing betel. 1 hotel located 100 meters from the right side of the main gate, which is selling cigarettes and chewing betel. 2 more shops selling tobacco products are located just over 150 meters from left of the main gate.

Nawa Maga Education Institute, Wadikumbura Rd, Monaragala: 1 shop located in front of the institute is selling cigarettes. Another shop (Juice Bar) located 150 meters from the entrance sells both cigarettes and chewing betel.

Royal National College, Monaragala: 1 hotel which is located 200 meters from the main gate sells both cigarettes and betel.

Threemana Higher education Institute, Monaragala: 1 shop located 100 meters from the entrance of Institute is selling cigarettes. 3 more shops within 3 minute walking distance of the institute sells both cigarettes and tobacco products.

APEX institute - Sanasa Mandiraya: 2 small scale shops located on the left of the institute sells betel, one sells cigarettes as well. Located 20 meters from the right side of the main entrance of the institute there are 2 shops which sells cigarettes. There were 2 more small scale sellers, selling betel.

Hambanthota District

Surrounding area of 3 schools and 2 educational institutions were observed. There were about 16 shops or establishments within 200 meters from the main entrances of all 5 of the educational institutions, selling mostly cigarettes but also other tobacco products including beetle.

Hambanthota Maha Vidyalaya (Hospital Road): 1 shop located 100 meters from the right side of the main gate selling cigarettes and beetle. There are over 4 shops located 100 meters from the left of the main gate selling cigarettes and chewing beetle.

Hambanthota Wididaya Tution Institute: 1 shop located 40 meters from the left of the entrance selling cigarettes. 1 shop located 10 meters from the right of the entrance selling both cigarettes and beetle.

Hambantota, Vocational Training Institute and Zonal education Office, RDHS office: 1 shop located in front of the main gate sells cigarettes. 1 shop located 100 meters from the left of the main gate on the opposite side of the road, selling cigarettes and beetle. This shop is identified as an Abhisheka shop. 1 shop located 20 meters from the right of the main gate selling both beetle and cigarettes.

St. Mary's College , Hambanthota: Two shops located on either side of the main gate within 150 meters selling both cigarettes and beetle.

Sri Rahula Vidyalaya, Tangalle: As the school is located in the centre of the town many shops selling cigarettes and other tobacco products were observed. Within 150 meters from the gate on both left and right sides there are at least 4 shops selling cigarettes as well as other tobacco products.

Kurunegala District

Surrounding are of 3 schools and 2 educational institutions were selected for observations. There were 6 shops selling mostly cigarettes in 4 out of the 5 educational institutions.

Wayamba Royal College and Technical College, Kurunegala: 1 shop selling cigarettes and beetle located 150 meters from the main gate of the Wayamba Roya college and 100 meters from the entrance of Technical College, Kurunegala.

Silver line Institute: 2 shops located within 200 meters from the right of the main entrance, selling cigarettes and beetle.

Maliyadewa College, Kurunegala: No shops were located selling tobacco products within 200 meters of the main entrance.

St. Annes College: 3 shops located 100 meters from the school main gate, selling cigarettes. One shop has the Abhisheka title.

Nuwara Eliya District

5 schools were selected to observe the surrounding area. 3 out of 5 of the schools had tobacco products being sold in 5 shops within 200 meters.

Good Shepherd Collage: There were no shops selling tobacco within 200 meters from the main gate.

Holy Trinity Science College: 2 shops located within 200 meters on either side of the entrance, selling tobacco products.

Sussex College: 2 shops located within 200 meters from the right of the main entrance selling tobacco

products.

Gamini Central College: 1 shop located within 200 meters from the right of the main entrance selling tobacco products.

St. Xavier's College: There were no shops selling tobacco within 200 meters from the main gate.

Mannar District

The surrounding area of 3 schools and 1 educational institute was selected for observation. 3 out of 4 of the educational institutions had 10 tobacco selling shops located within 200 meters from the main entrance.

Siththi Vinayagar National School: 3 shops located within 200 meters from the right of the main entrance selling tobacco products.

Al Asar Muslim Vidyalaya: 2 shops located within 200 meters from the right of the main entrance selling tobacco products.

St Savior Boys Collage: There were no shops selling tobacco within 200 meters from the main gate.
IDL Academic Institute: 5 shops located within 200 meters of the main entrance with 3 from the right side and 2 from the left side, selling tobacco products.

Jaffna District

4 schools were selected to observe the surrounding area. There were 8 shops within 200 meters from all the observed schools selling tobacco products.

St Johns collage: 4 shops located selling tobacco products within 200 meters of the main gate, with 1 shop on the right and 3 shops on the left.

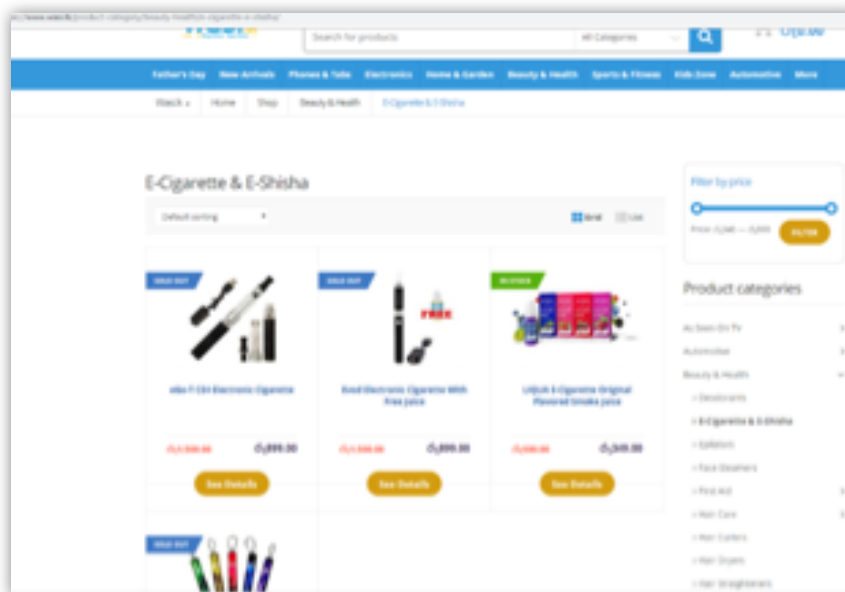
St Patricks' collage: 1 shop located selling tobacco products within 200 meters from the left of the main gate.

Jaffna Hindu collage: 1 shop located selling tobacco products within 200 meters from the left of the main gate.

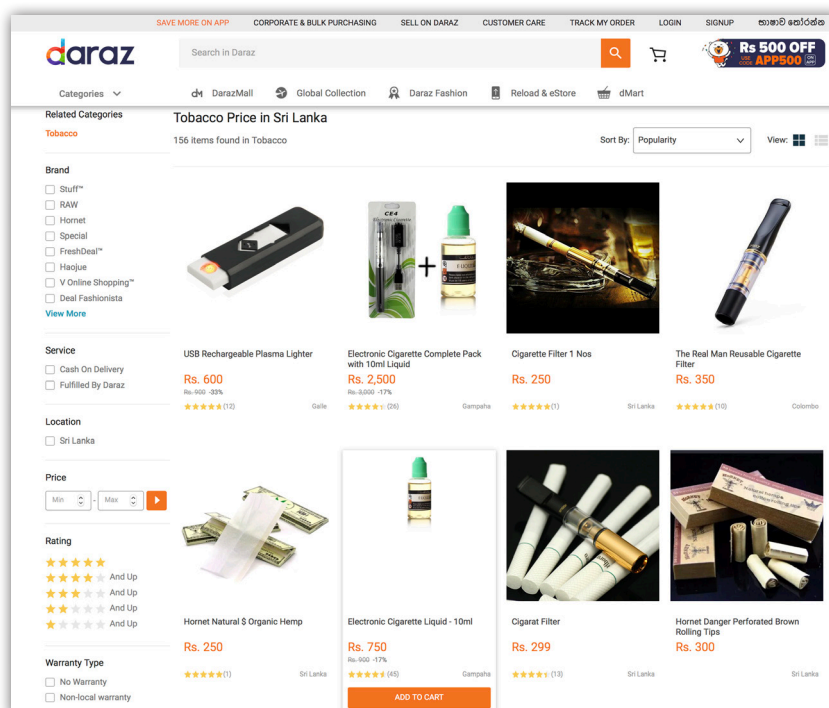
Kokkuvil Hindu collage: 2 shops located within 200 meters of the main gate selling tobacco products with 1 shop on either side from the gate.

Annex C: Online sale of tobacco products including ENDS and home delivery of tobacco products (Search conducted from 30/04/2019 to 24/05/2019)

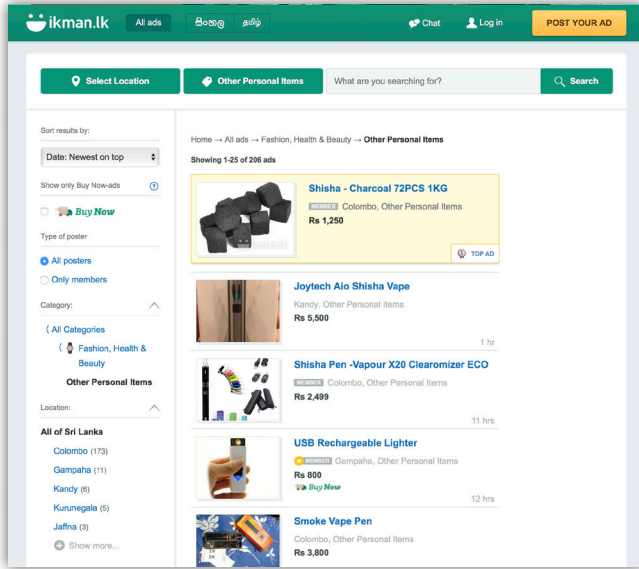
1. <https://www.wasi.lk/product-category/beauty-health/e-cigarette-e-shisha/>



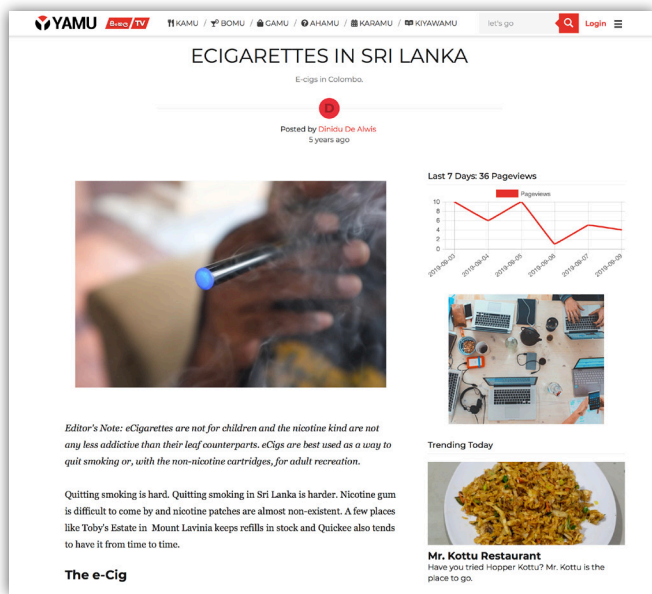
2. <https://www.daraz.lk/tobacco/>



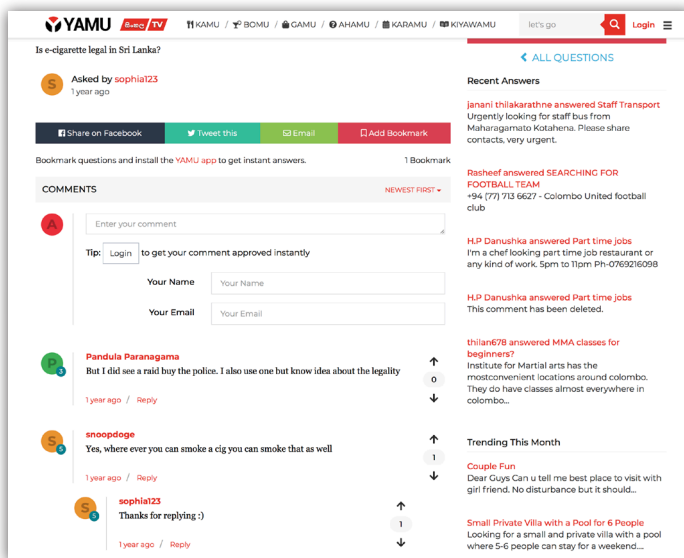
3. <https://ikman.lk/en/ads/sri-lanka/other-personal-items>



4. <https://www.yamu.lk/blog/ecigarettes-in-sri-lanka/>



5. <https://www.yamu.lk/questions/is-e-cigarette-legal-in-sri-lanka>



6. <https://www.mydeal.lk/deals/view/1647>

mydeal.lk I'm looking for...

DEPARTMENTS **Daily Deals** Immediate Pick Up Browse Latest Special Offers Travel & Leisure

LOGIC Disposable Electronic Cigarette
ID: 1647 Availability: Out of Stock

Rs. 1,200 **40% Off** (Original Price: Rs. 1,600)

Special Card Offer: **Rs. 1,082**

Warranty: Warranty not applicable

Out of Stock

Overview

LOGIC is the leader in Premium Electronic Cigarettes, offering a smart alternative to smoking tobacco products such as cigarettes, cigars and pipes. With multiple industry leading patents, LOGIC sets itself apart by featuring revolutionary technology that delivers the most realistic smoking experience. Simulating the feeling and taste of a real cigarette, LOGIC provides a sensory experience that satisfies a smoker's addictive cravings for nicotine, tobacco flavor, hand to mouth motion and vapor release, while avoiding. With LOGIC you can receive instant gratification without any hassles.

Random Products

Preethi Xpro Duo 1300 W Mixer Grinder
Rs. 31,500 **Rs. 23,990** **25% Off**
Special Cards Offer: **Rs. 21,621**

Vivie Fast Charging Lightning Cable
Rs. 3,000 **Rs. 1,490** **50% Off**

7. <https://www.mydeal.lk/deal/978>

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DEPARTMENTS **Daily Deals** Immediate Pick Up Browse Latest Special Offers Travel & Leisure

QUIT SMOKING START VAPORING
No Smoke, No Ash, No Tar

Buy a Rechargeable Kit of LOGIC Premium Electronic Cigarettes
ID: 978 Availability: Out of Stock

Rs. 2,340 **40% Off** (Original Price: Rs. 3,900)

Special Card Offer: **Rs. 2,109**

Warranty: Warranty not applicable

Out of Stock

Overview

LOGIC is the leader in Premium Electronic Cigarettes, offering a smart alternative to smoking tobacco products such as cigarettes, cigars and pipes. With multiple industry leading patents, LOGIC sets itself apart by featuring revolutionary technology that delivers the most realistic smoking experience. Simulating the feeling and taste of a real cigarette, LOGIC provides a sensory experience that satisfies a smoker's addictive cravings for nicotine, tobacco flavor, hand to mouth motion and vapor release, while avoiding. With LOGIC you can receive instant gratification without any hassles.

Random Products

HP Notebook 15.6 Intel Core i3 8th Gen (Windows 10)
Rs. 89,990
Special Cards Offer: **Rs. 81,103**

Samsung 65" Series 8 MU8000 Premium UHD 4K Flat Smart TV with
Rs. 499,990 **Rs. 349,990** **30% Off**

8. <https://www.youtube.com/watch?v=MMSOzGxu2VQ>

LIQUA

Electronic cigarette Sri Lanka
3,762 views

Adarata News
Published on Dec 14, 2017

Category: **Howto & Style**

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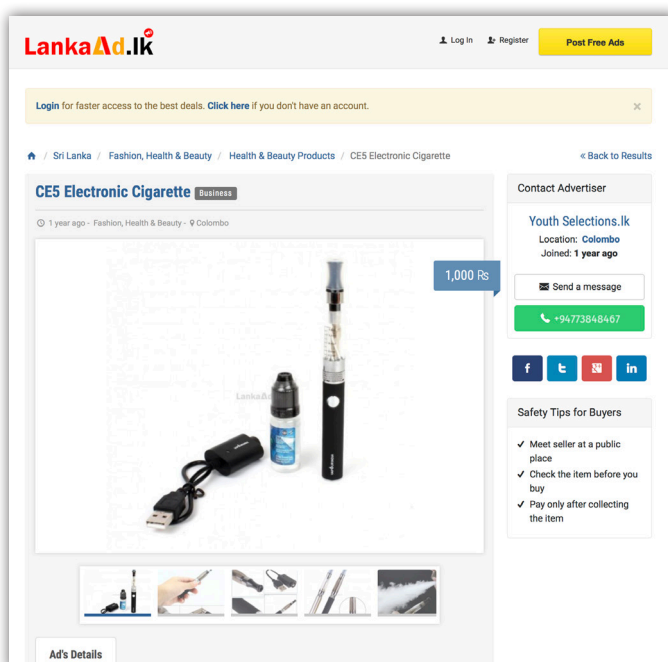
9. <https://www.facebook.com/thekurumbavapeshop/>



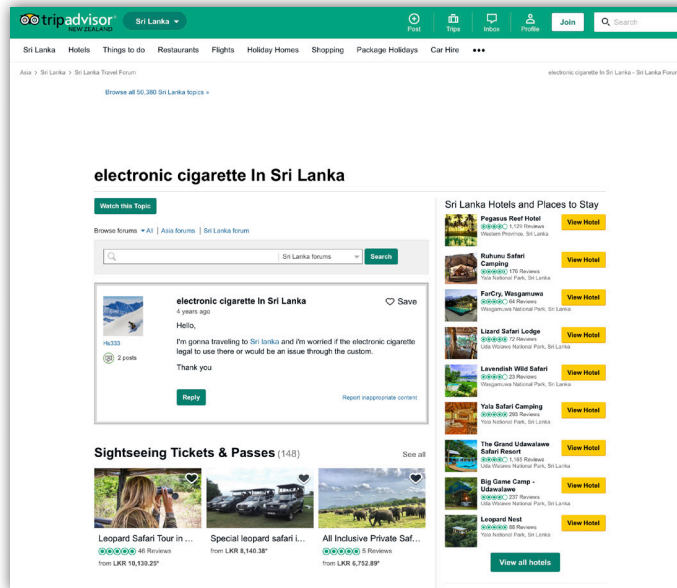
10. <https://the-vaporized-juice-colombo.business.site/>



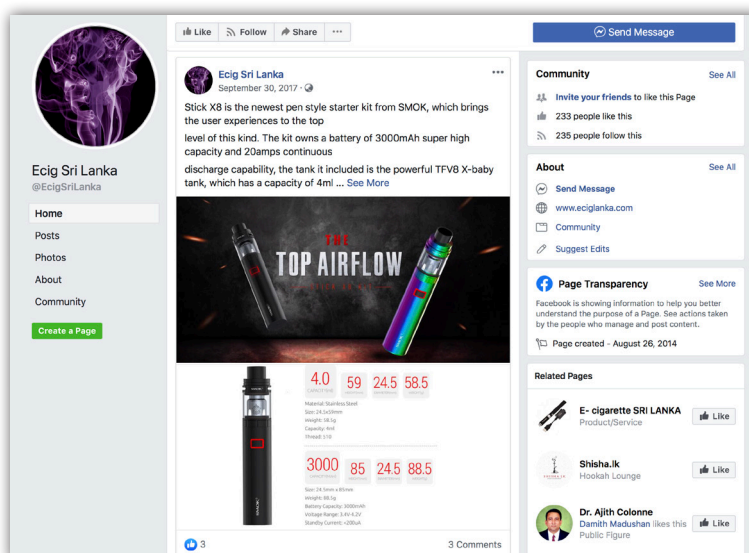
11. <https://www.lankaad.lk/ce5-electronic-cigarette/779.html>



12. https://www.tripadvisor.co.nz/ShowTopic-g293961-i8983-k8645720-o10-Electronic_cigarette_In_Sri_Lanka-Sri_Lanka.html



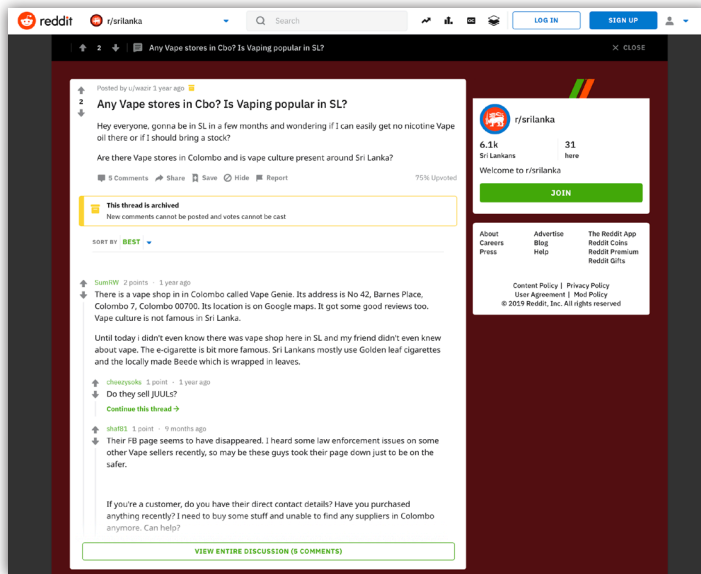
13. <https://www.facebook.com/EcigSriLanka/>



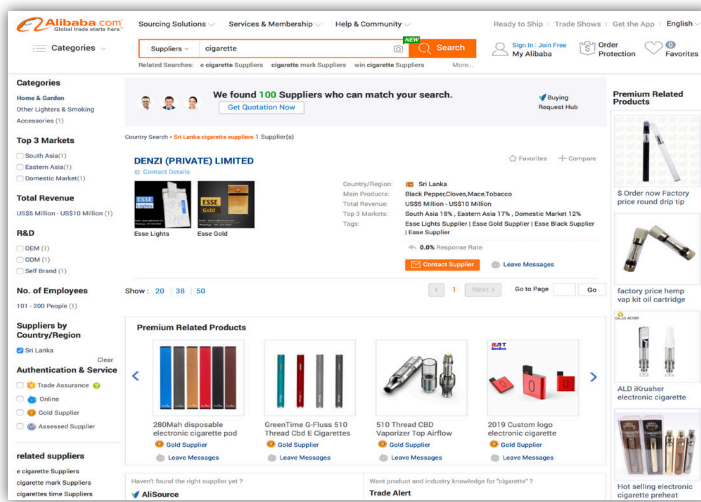
14. <https://ufogs.com/en/pages/e-juice-in-sri-lanka/>



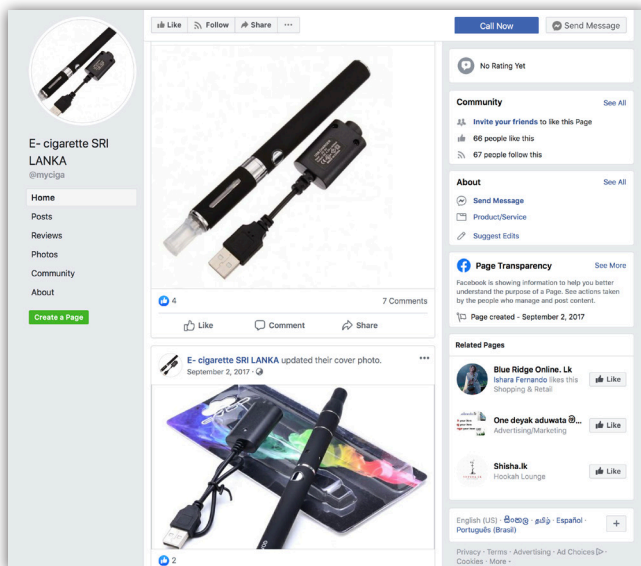
15. https://www.reddit.com/r/srilanka/comments/8psdbl/any_vape_stores_in_cbo_is_vaping_popular_in_sl/



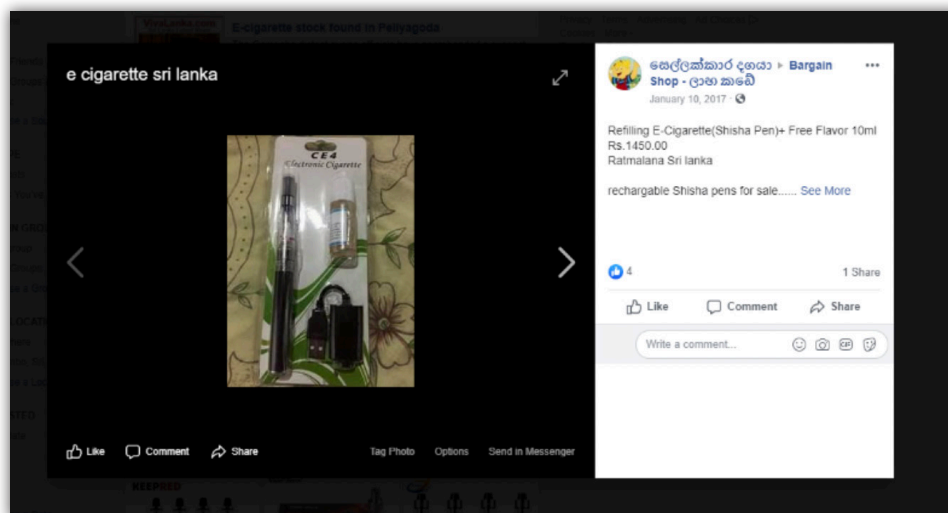
16. <https://www.alibaba.com/countryssearch/LK/wholesale-e-cigarette-distributors-supplier.html>



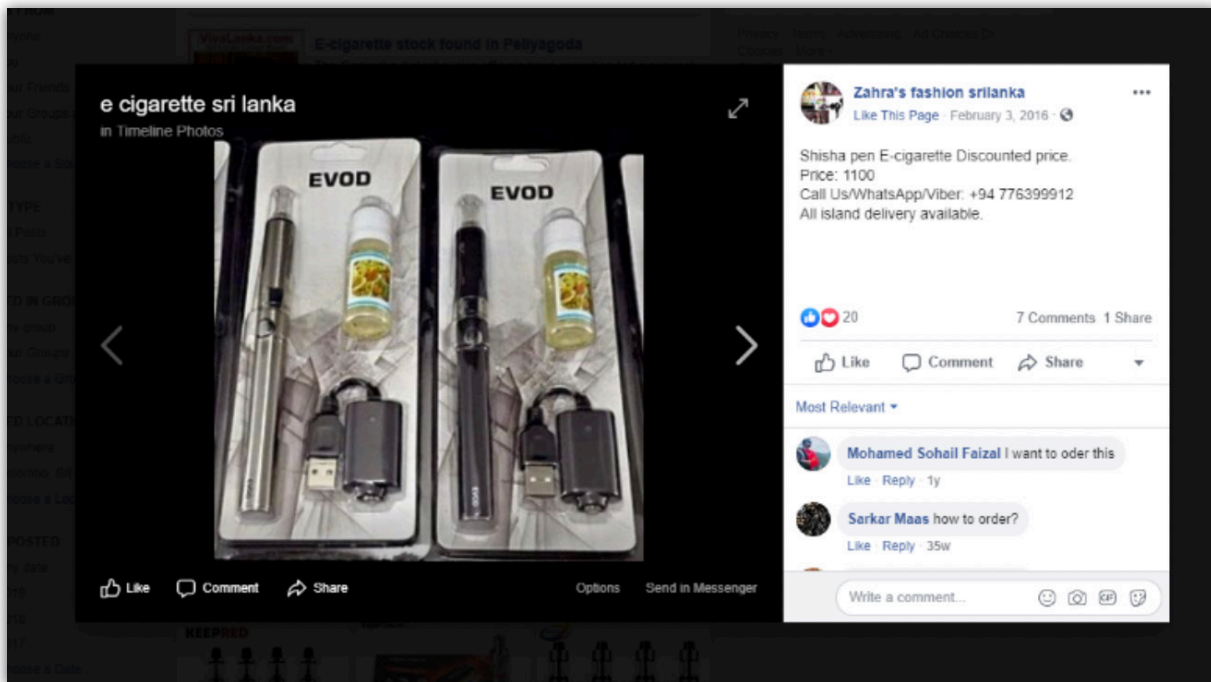
17. <https://www.facebook.com/myciga/>



18. https://www.facebook.com/photo.php?fbid=110891159417772&set=basw.AbpD6wcczTcprboERmGHKF_tew30tDI4Cx-uOCtSxjumaHSsYTiU0Bp2Lum78KTfikfCsiHQ0Ru_np84lu9PUQLHFXzIDM0G0yNGHlscLs_Q_EDPI5F9fzLXhp9ImZcFQmQ6itT4fAIFYrnKxfP2tAoA.110891159417772.484405362044268.222589751416733.484405408710930.485014665316671.484405435377594&type=1&opaqueCursor=AbqklnPbTdjKfBCgjuCqXP0pb-pSk6WQs9F1blxbty155HAoXyRtzgsnsQVlhJqi3ZVIS0GvCiFTWo8UPEfIZBgzhjmExzvR_riO_Mc h0gueQY1y9G7fK1zSi3VqwpYXNssJRsrUv9QTnAGYZHmlm4LGh2eqTLYFIAosVIOh3rCMHZpVugc6Ym2HE5y3-CkO972IPi_b0kxp0tBcDdC1WML_jSNkbT6NGveF3jzcJzF6XeAz8LYbv-pDf4KjappG8vp5e-5nNbJxGR0IMI4PAMk2Uhd2pgYyfw0z4BB57KO_HtqG6UTBdl9IPuvZr1ciWDGp1-tmON6KA0hm0m485nenv3RF8i6_ze1k32CgbOfroA6LGHFwZD58dSfcmHwiMucWhIzlgHlxRiY8PgnXGGBfEqcuZntsPX3g1dqtG5h9dM78ZSPleAF8bns-M9oltPHWXRiUylhfoc06VhN14nqxfV67MTUL9UrSke20ZmDBUyf0TfdZmL3XJZnfeMBaZdP9fh72ewsvu9aESyHaqO6oWo5F4wnn2U4miTleWX700hB8rlxIOVvaOX2oYa3Bh3MhPauRNAHWuXv8l0db7CNkDyl2AeyOvyREXJ7msdJfjucgLyXbCoMtnyvBjctSo_PHLIZ8goK3h_zOlbkK-5s3QoeDc0QI57ft6gCsU_2v7OuvBVD08jojVvexMkHuBHx_-1m5MH37gkex37E2o3_n0vlaTSrvn_StF9VjC7vOjvw8D7u9qmgL6e5gsduQAoqy0ZqsKlIXsHba7k0a_myHksBfvp_Znnw7iBdLXpJxLCGYQ1S9RqW6qNKdSSLbPzvnNXJ-DIS3q99m44U3rhliiv48zkWnV0eK4n8x4g&theater

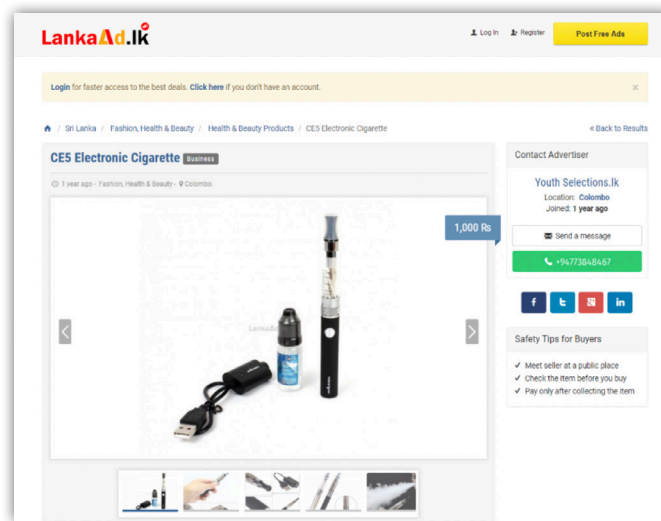


19. https://www.facebook.com/175432312799144/photos/basw.Abq3aAxsVWBnV8XjCDqJJHlv1NRLH4obpkjlaMMbNZw8Ya-71fkz5Nv-laBwFTkk5198FqzCCidr9KgEin_16mFn7qARXZAacqA8yggeDtEOXfdjqbNb8qc-eelz90utvYYfPRHlnHAZdV9XhU3WMAOM.110891159417772.484405362044268.222589751416733.484405408710930.485014665316671.484405435377594/222589751416733/?type=1&opaqueCursor=Abrs_w30pAa0v6CU3_3gOpljXwQHnzKLG6axHcXM8aFZQDG4Qx3q5Mz__AKTbocvb77-sCsNZwzO2db_hhPpIXSDy8RYOo53fYlcHhDnlyQjpHZPfA2jzVcYo3_3QVjG0hSVgqEJa5XILhe-hr7vI43VGe3B8nkKov7VQAGicvoVOtJPTCLzCCGH0XoLdMOAs3aebXNtP4WG62CwX6WMLftV2PvQAJLczsh-l8G6gSBCrH22q6p31efurSOJtNCH-Vx-s1ZpHrR-jdp9KlrbizewouWPvfC4HR3aUTDaOLk01_KThpO-7NzifEPEKBWj0z_LyNblyk8OKmDhg-8yZ44vPCaA-eVftO7VAc217upeH9jfeVEsgDf0W03bfLJSg2KwGRV2kJGVdqVi1W9sn44x2qf2XZB4TZPurJalWTEw9GmZpszLBiLe2vK3JleY5eqpAqjN_HDvjLW-4cR7e6K_kWkInpsCxNaD0vNON_zzQzx3TIm5CqwzRB28WqKWWd4-Eomus0yvEJOWRPWb7UFCvIUy7x1MQSSifQRuOvpqKVp5H0LnEBUiawbDw2u7-YskdmsX51xEUC0g1zsL3N_V1_eXkRdCH2ZO-NOGkwot1Pna_3dsCtdDp8rKiUg9RghCycMVRiHNwsx8dm7GmDQQAPc9oKdCXhaz_MG3qPNtmvjMhpokEyBukIfDhIjWJbEUUwGkZtSrXpm-FFaB8y_OCezZBaWNNCn99VUby9cXvHhrCfcu6ntXIH9nveg6JA67MS8N79gRQQOChzmH349rQ6LI3XKAu6ib340RzNlgDFx80bf3f_3zOoXVx5lvYbV70TntOMHHgXAubTmm9_&theater

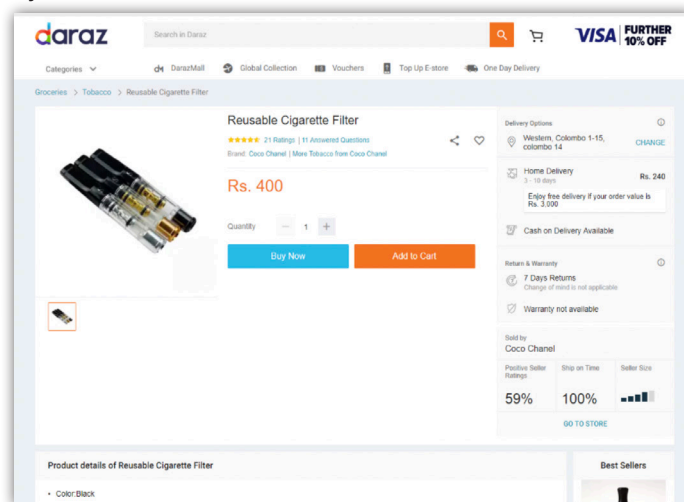


Home delivery

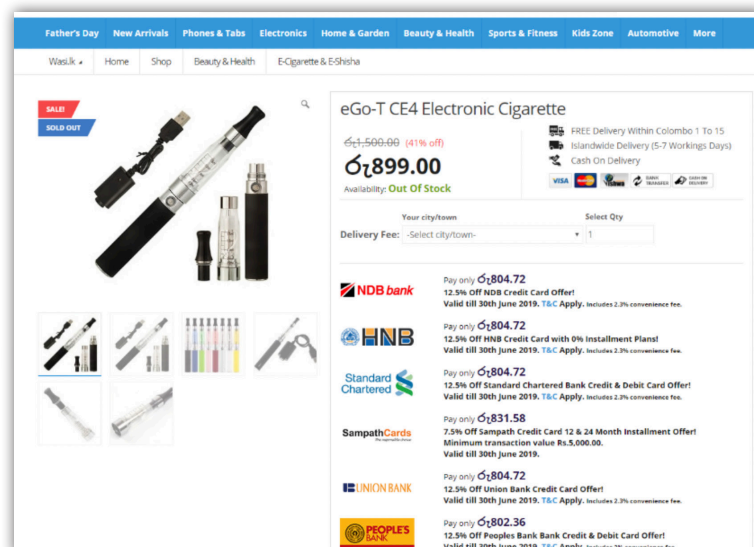
1. <https://www.lankaad.lk/ce5-electronic-cigarette/779.html>



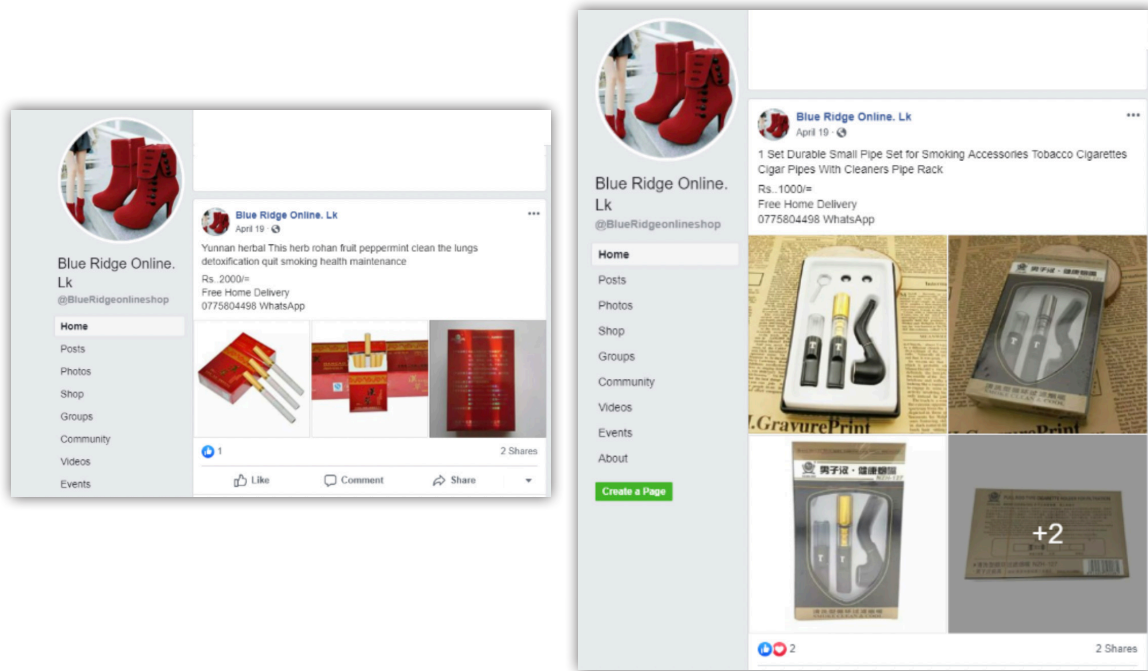
2. <https://www.daraz.lk/products/reusable-cigarette-filter-i906013-s2751600.html?spm=a2a0e.searchlistcategory.list.3.6072547avrA5de&search=1>



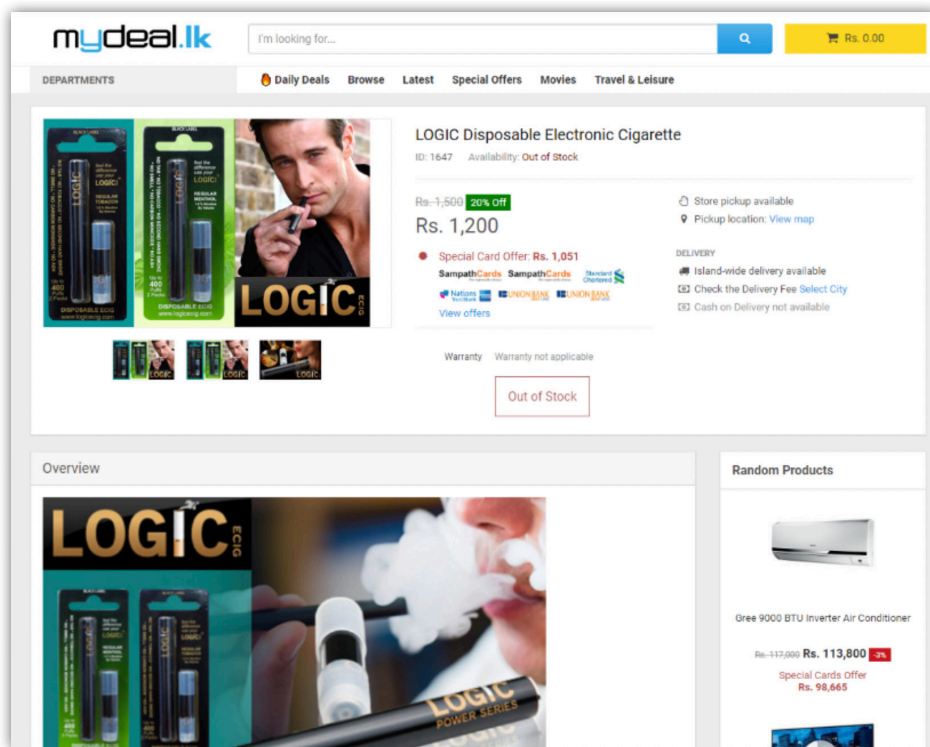
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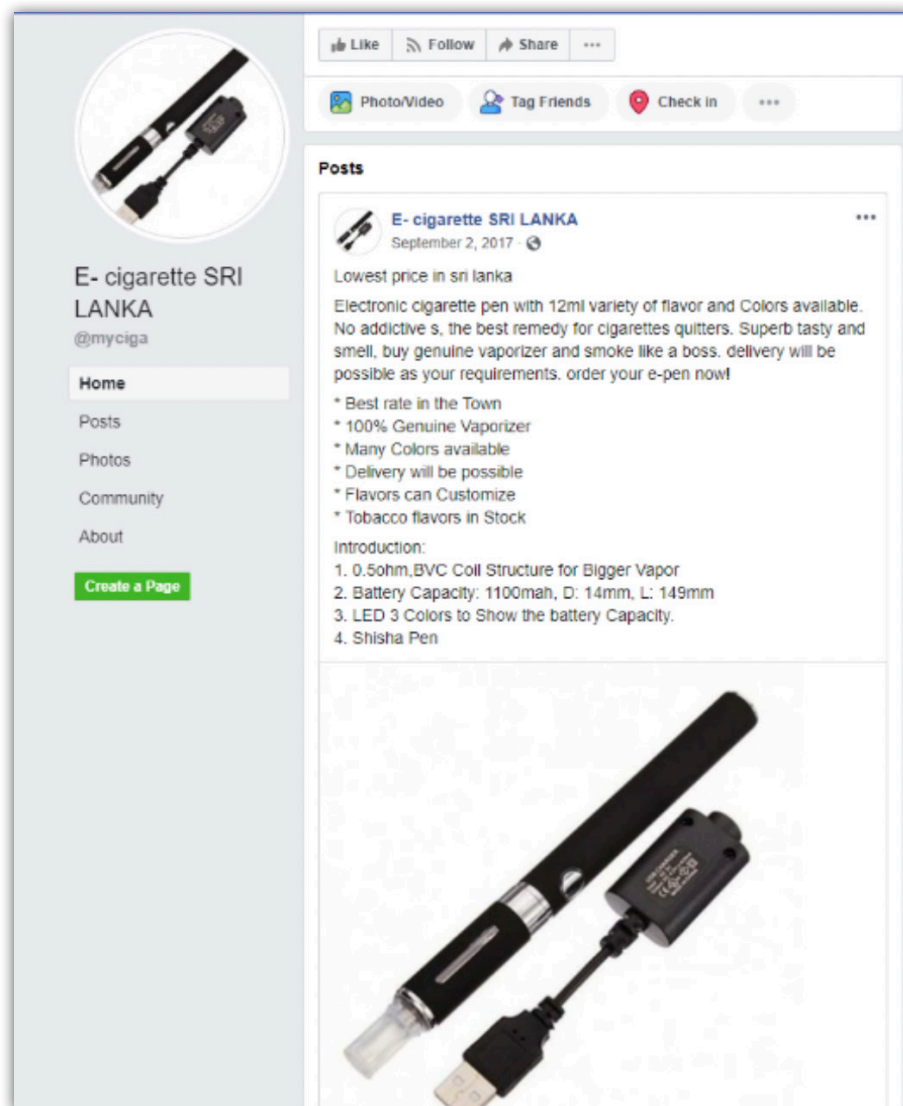
4. https://www.facebook.com/BlueRidgeonlineshop/?tn-str=k*F



5. <https://www.mydeal.lk/deals/view/1647>



6. <https://www.facebook.com/myciga/>



The image shows a screenshot of a Facebook page for 'E-cigarette SRI LANKA'. The page features a profile picture of an e-cigarette and a USB charging cable. The page name is 'E-cigarette SRI LANKA' with the handle '@myciga'. The navigation menu includes 'Home', 'Posts', 'Photos', 'Community', and 'About', along with a 'Create a Page' button. The main content area displays a post from September 2, 2017, titled 'E-cigarette SRI LANKA'. The post text describes the product as an electronic cigarette pen with 12ml of flavor and color options, highlighting its low price and quality. It lists several features: best rate in town, 100% genuine vaporizer, many colors available, delivery possible, customizable flavors, and tobacco flavors in stock. An introduction section lists technical specifications: 0.5ohm BVC coil structure, 1100mah battery capacity, LED indicators, and a shisha pen design. Below the text is a photograph of the e-cigarette and its USB charging cable.

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Posts

E-cigarette SRI LANKA
September 2, 2017 · 🌐


Lowest price in sri lanka

Electronic cigarette pen with 12ml variety of flavor and Colors available. No addictive s, the best remedy for cigarettes quitters. Superb tasty and smell. buy genuine vaporizer and smoke like a boss. delivery will be possible as your requirements. order your e-pen now!

- * Best rate in the Town
- * 100% Genuine Vaporizer
- * Many Colors available
- * Delivery will be possible
- * Flavors can Customize
- * Tobacco flavors in Stock

Introduction:

1. 0.5ohm,BVC Coil Structure for Bigger Vapor
2. Battery Capacity: 1100mah, D: 14mm, L: 149mm
3. LED 3 Colors to Show the battery Capacity.
4. Shisha Pen



- https://www.facebook.com/BlueRidgeonlineshop/photos/basw.Abo_aeWsn7J6T76mX6BMUM0g-rlLcS9wnUpT62BVcMVqbcJyI2QHJqU9PZGp7RNpV-j7EFZYV7Q3fWC8zpcw3d-YKb0FOw5u0-uLUll4QmzniwLKibDEPswtVqduVcD-cnHgzUU3sPEWCQVr6sVidYSCOSvRMeXjkv9wRFE4eFYkw.484405322044272.484405362044268.484405472044257.484405435377594.484405408710930.485014625316675/484405322044272/?type=1&opaqueCursor=AboG95XhWZ2QdOXX-J9U2nkSjbc8_6hHkNnP-zm-JaPlzW4Eur7zUAi6_OI_V1MVxOqfTFyVvsqT_Hq9OcoQxLDvK-kCgLBs0tPyCcp7IWBbLSxsv2iPpTREK4CuGYP1keueHUin1t52H9rF0Ap49bTN8tWcHAuBUT8lbYrqs8x1zuyj6Xsgy66nk-4qLorNkt1lcxWlddeYwrCm8hF5VfD5XXsyXWYJlZCa-k6sFb7higDvN4t-F3SkVT25G3EZe2suhzmqvVcmSfe3Le-9o-CWQ4QMQ-2AGH19MIFbUcD64WvZKEWpifdBTuzWGyanaUj3_ZISbLtgpyepkCGQbyto0AsEZdSI5cfC6cmQLAk4wO_w6Suy5w5kokTQAPIE_NpPII_w4HN5DWEqRyYrZ8cWyxcM4_BMwax5fLg3EYwWZ_JP5Qy1BZyuuOSR2JJWnYvKcjsHdHSNuHZuiFRauL_8xG7Rm7DZkpl7f9MPYDymk3qcRHosjaqKY5NYfGW0zHubMnXfFM179jn-94a7uaznlhAORjodLgys8-RlsVhJXj5a0j5LTZGEhuNM_CGIwYfzNYrbp7m9SHF1yilTzZATSbtPnOf_C3Kcz_4HmnKVzdc7sGToesilTfUcctnlQTWHM0yF-MgKzHjt22TfJPjKArHVigppq8Ho6kuCbu36JDbJhQnGDFfuuy4PT4wexHD4bk_uqd9-deCUL56yj29MiMXrit3E0lo3t6DBJLbn-h_Sc_x1xIOHoOx0djjelEVESZ7Z_Adapc6Sp8UJTW_7MONzaxRV1mtvevWnZig&theater

