

Tobacco industry activities in Pakistan 1992–2002



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Abbreviations

AMESCA	Africa, Middle East, South and Central Asia Region
ASU30	Adult Smoker Under 30
B&H	Benson & Hedges
BAT	British American Tobacco
BATUKE	British American Tobacco United Kingdom and Export
ETS	Environmental Tobacco Smoke
HORECA	Hotel, Restaurant and Café industry
ITC	Indian Tobacco Company
JPGL	John Player Gold Leaf
LTC	Lakson Tobacco Company
PM	Philip Morris
PTC	Pakistan Tobacco Company
PTI	Premier Tobacco Industries
SUTL	Singapura United Tobacco Limited

Introduction

Transnational tobacco companies have had a presence in Pakistan for over 50 years. British American Tobacco (BAT) established Pakistan Tobacco Co. (PTC) in 1947, making it one of the first foreign companies in the newly established country (1); PTC “inherited the business previously conducted by Imperial Tobacco Co., Tobacco Manufacturers India and ILTD [Indian Leaf Tobacco Development]” (1). Philip Morris (PM) entered the Pakistani market in August 1967, obtaining interests in Premier Tobacco Industries Ltd (PTI) through its purchase of the British holding company Godfrey Phillips Ltd (2). There is no shortage of domestic tobacco companies in Pakistan, including Sarhad Cigarette Industries Ltd and Souvenir Tobacco Co. Ltd (3). However, transnational tobacco companies, which included Rothmans International until 1998, have been the dominant force in the manufacture, marketing and sale of tobacco products in Pakistan. In practice, as one BAT document suggests, “there are only two global tobacco competitors, PM and BAT” (4). This report describes the activities of transnational tobacco companies in Pakistan from 1992 to 2002 in five key areas: (a) the economics of tobacco; (b) smuggling of cigarettes into Pakistan; (c) the influence of the tobacco industry on science; (d) sports sponsorship by the tobacco industry; and (e) the effect of tobacco industry activities on health equity.

Methodology

The research methodology employed in this analysis is an iterative examination of previously secret internal tobacco industry documents. From October to December 2008, a full text search was conducted on the Legacy Tobacco Document Library for documents related to the tobacco industry's activities in Pakistan in the following areas: (a) the economics of tobacco; (b) smuggling of cigarettes into Pakistan; (c) the influence of the tobacco industry on science; (d) sports sponsorship by the tobacco industry; and (e) the effect of tobacco industry activities on health equity.

Using a snowball sampling approach, initial searches were conducted with broad search terms such as "Pakistan Tobacco Company" and "Pakistan marketing" and used to retrieve documents to identify more specific search terms such as "Pakistan Tobacco Company transit" and "Mardanwallahs". Over 5000 documents were found using this method, with approximately 200 documents used in the final analysis.

A significant majority of the documents used in the analysis are from the BAT collection in the Legacy Tobacco Documents Library. This can be attributed to two factors: the direct ownership of PTC by BAT and the approach that BAT adopted in releasing company documents during litigation. BAT owned PTC as a subsidiary, and thus communication between the two companies occurred far more than it did between PM and PTI, to whom PM licensed the manufacture of its brands. While PM was primarily concerned with collecting royalties from sales of its licensed brands, BAT had interest in the operations of PTC as its subsidiary. Thus, brand development, pricing and marketing strategies that were communicated from PTC to BAT and kept by BAT staff were subject to review during lawsuits. Second, BAT released far more documents than it was required to during lawsuits in an effort to overwhelm prosecuting attorneys with paperwork. These two factors combined provide a glimpse into tobacco industry activities in Pakistan, primarily through BAT documents; this is otherwise undocumented in other tobacco industry document collections.

Economics of tobacco in Pakistan

Transnational tobacco companies

The two major transnational tobacco companies in Pakistan are BAT and PM. BAT owns PTC, a BAT subsidiary. PM holds a majority stake in Lakson Tobacco Co. (LTC). Prior to its merger with BAT in 1998, Rothmans held an ownership stake in LTC and significant market share, especially through smuggling of its international brand of cigarettes, Dunhill.

British American Tobacco (BAT) and the establishment of Pakistan Tobacco Co. (PTC)

PTC was established by BAT in 1947, taking over business from Imperial Tobacco, Tobacco Manufacturers India and Indian Leaf Tobacco Development after the modern state of Pakistan was created in 1947 from the former British India (1). The profitability of PTC has waxed and waned over its history, with 1988–1994 being a period of particularly low profitability. However, the company has continued because Pakistan is viewed as an emerging market with large growth potential (5).

Philip Morris (PM)

PM obtained ownership interest in PTI in 1967 through its purchase of Godfrey Phillips Ltd (2). Its brands were sold in Pakistan through a licensing agreement with PTI (6). However, the company was not able to recoup earnings from its licensed brands until the 1990s, owing to government constraints on royalty repatriation. Until 1994, Rothmans held 40% ownership stake in LTC, which was owned and operated by the Lakani family, the same family that owned and operated PTI (7). In 1995, PTI and LTC were joined in a merger, and both PM and Rothmans “equalized their shareholdings via a share swap” (8). Both PM and Rothmans had 19% shares of the new entity, Lakson Premier Group. BAT purchased Rothmans and its ownership stake in Lakson Premier Group in 1998; PM purchased a majority stake in LTC in 2007.

Major brands

Both BAT and PM have a portfolio of brands that are sold in Pakistan. At the end of 1991, PTC had six brands selling in four price segments (9):

Premium: John Player Gold Leaf (JPGL).

High-price: Capstan.

Mid-price: Gold Flake, Wills Kings, Player's No. 6.

Economy: Embassy.

JPGL was the premium offering from PTC and had a "virtual monopoly" in the "legitimate sector" (i.e. non-smuggled cigarettes) for premium cigarettes (9). Its main competition came from United States of America/United Kingdom of Great Britain and Northern Ireland brands smuggled into Pakistan, especially Dunhill, then a Rothmans brand. Capstan, the high-price-segment brand, was the "sole brand" (9) in the legitimate sector, its main competition coming from transit brands (i.e. smuggled cigarettes; see 'Smuggling' section below for further discussion of transit), especially the Japanese brand Mild Seven. The Capstan brand was facing decline owing to PTC exports of Capstan to Afghanistan that were being smuggled back to Pakistan and sold at a lower price. In the medium-price segment, PTC's brands faced competition from transit brands, LTC (Morven Gold) and PTI (Red & White and K-2). At the low-price segment, Embassy was the market leader, but its market share was eroding owing to domestically produced brands.

By 1995, a decline in profitability led BAT to direct PTC to develop a company plan that refocused its brand offerings and implemented strategies to revitalize declining brands. In particular, BAT felt that "JPGL, Wills Kings, Gold Flake and Embassy" were PTC's "drive brands" (10). In its response, PTC suggested a focus on improving the quality of JPGL to compete against smuggled international brands at the premium-price point, putting greater support behind Wills Kings to improve market share in the middle segment, and lowering the price on Embassy to compete with domestically produced cigarettes that evaded excise taxes. By 1996, PTC was "now clearly focused on three brands: JPGL, Wills Kings and Embassy Kings" (11). In 1996, Benson & Hedges (B&H) was launched in Pakistan (12) to counter the introduction of imported international brands, especially Marlboro, and the rising market share of Red & White.

Red & White and K-2, two PM brand cigarettes, were produced by PTI through a licensing agreement (6). Red & White was priced between JPGL and Wills Kings as a high-price offering, while K-2 was priced to compete more directly with Wills Kings in the medium-price category. When the government considered lifting import bans in Pakistan, PM moved forward with plans to import Marlboro (13) and later license production to LTC. PM delayed its launch of Marlboro Red until October 1995 and considered importing L&M in January 1996. After the merger of LTC and PTI, PM was assigned trademarks for secondary domestic brands, including Belmont, Monterey, Shelton and Visa.

Morven Gold, now a leading brand in Pakistan, was manufactured by LTC. It was positioned in the medium-price category in 1992 (9) but has now become a high-profit brand for PM.

Company strategies: British American Tobacco (BAT)

By 1992, PTC was having losses in profitability because other brands were the price leaders. In the premium segment, international transit brands prevented raising prices of JPGL, while tax-evaded domestic brands kept prices low at the high-volume economy segment. In response, BAT requested that PTC, in its company plan for 1994–1998, address improving the quality of JPGL, revitalizing Capstan and Wills Kings, countering the growth of Red & White (which had become a market leader by 1994), and reducing the market share of Mardanwallahs, domestic manufacturers who lobbied the government for lower excise tax on their cigarettes.

PTC proposed maintaining a price differential between JPGL and Red & White to maximize “upgrading” to JPGL, scaling-up efforts behind Wills Kings to counter Red & White, holding down the price of Embassy while lobbying for increased taxes on Mardanwallahs brands, and launching a BATUKE (British American Tobacco United Kingdom and Export) international brand above JPGL to “drive up trading even further from Red & White and to establish a pricing point above JPGL should Camel, Dunhill or Marlboro be launched” (14).

By 1996, PTC volume was increasing on all drive brands. Percentage increases from 1994 to 1995 were 25% for JPGL, 15% for Wills Kings and 40% for Embassy Kings. The increase in growth for Embassy Kings was attributed to greater control of tax evasion by Mardanwallahs (15).

The PTC company plan for 1997–1999 (developed in 1996) was a comprehensive strategy to become “the best fast moving consumer goods company in Pakistan before the year 2000” (11).

Brand portfolio

The brand portfolio consisted of three drive brands: JPGL, Wills Kings and Embassy Kings. B&H, a BATUKE international import, launched in 1996 (12). B&H was offered as an international offering at the highest price segment in Pakistan. It was imported into Pakistan in limited numbers, but concerns over possible changes in import legislation led to planning for domestic production when the quality of international production could be achieved. Imported B&H would be “priced alongside transit Benson & Hedges” (11) as would any locally manufactured B&H products.

JPGL had been growing steadily in volume since 1994, with an additional 7% growth expected in 1997. It underwent two price increases in 1996 and withstood challenges from the entry of R.J. Reynolds brands, B&H, Marlboro and Dunhill. It was to be priced “at a Rs10 premium to Red & White... and at a discount to transit Dunhill/Marlboro” (11). Wills Kings packaging underwent a design change, and a new advertising campaign projected Wills Kings as “a national brand with international standards” (11). The relaunch of the brand in its new packaging was “scheduled to tie up with Pakistan’s Golden Jubilee

Celebrations” (11). Wills Kings was priced to compete directly with Red & White. Embassy’s role was to “control growth of the tax evaded segment” (11) and to take volume away from K-2, a PM brand produced by the Lakson Premier Group. Embassy, advertised along the themes of friendship and adventure, was the price leader in the economy segment and priced “at a maximum of Rs1 above the main tax evaded brands” (11).

Product quality

The quality of PTC brands, especially JPGL, was a major concern in PTC’s desire to obtain price leadership. To improve quality, PTC planned to improve packaging material (i.e. paper, wrappings, package printing), introduce new tobacco plants to improve leaf quality, and invest in manufacturing machines.

Marketing and distribution

PTC sought to be the “preferred suppliers” to the retail trade (11). The company estimated that the retail universe consisted of 215 500 outlets with a market of 56 billion sticks. To service retail outlets effectively, PTC increased the number of its retail outlet trade representatives and focused them on high-volume outlets that sold more than 3000 cigarettes per day. The sales promotion teams were divided into three groups to provide greater coverage of key markets: (a) a metro task force, consisting of nine teams, executed promotional plans in three major metropolitan areas (Karachi, Lahore, Rawalpindi/Islamabad); (b) an urban task force, with 24 teams, carried out promotional activities in large urban areas; and (c) a rural task force, made up of 24 teams, covered 159 medium-sized urban markets and villages.

Consumer and regulatory affairs

A new consumer and regulatory affairs department was created in PTC in 1996 (11). “Improving our lobbying with Government and broadening our sphere of influence to include Provincial Governments and legislative bodies is a key objective” for the new PTC consumer and regulatory affairs department (11). It also covered issues of “corporate communication, corporate image, manufacturers’ rights to advertise, smoking and health and smoking restrictions” (11). PTC felt that consumer and regulatory affairs issues had been dealt with on a reactive basis and that it needed to “pro-actively manage the entire Company environment to ensure that we can influence Government policy to our competitive advantage” (11).

With regards to smoking and health, PTC felt that it needed to manage the media “reacting to uninformed and misleading articles” (11). It wanted to promote a “rational, science based debate on ETS [environmental tobacco smoke]”, and “pro-actively support the consumer’s freedom of choice to smoke” (11). It also looked to “build farmers and suppliers as groups willing and able to lobby for us” (11).

Other areas covered in the company plan included controlling supply chain costs, manufacturing, information and control systems, human resource management, and finance.

The economic strategy of BAT for the Africa, Middle East, and South and Central Asia (AMESCA) region, which included Pakistan, for 1999–2001 echoed the strategy laid out by PTC in 1996. BAT's vision for the region was to "deliver consistent profit growth in excess of 10% per annum over the long term" (16). One of the key economic strategies it proposed to achieve this was to continue to "grow segment shares in Premium, Light and ASU30 [Adult Smoker Under 30]" (16). These were focus segments because premium-brand cigarettes provided higher profit and lights-brand extensions were a growth market, as were ASU30. The premium segment was considered "the key source of profitable growth", while lights were "projected to grow significantly" (17). The ASU30 segment was important not only because it accounted for significant profit, but also because it was a key source of "brand inflow to international and premium price brands and as such is the main long term source of growth" (17). PTC was lauded by BAT for having a differentiated and segmented brand portfolio, but its inability to enact price increases (due to lack of government approval) and increase profits was considered a failure on the part of PTC that needed greater attention.

In the regulatory arena, key BAT objectives were to:

- Build strong relations with governments and regulators
- Achieve optimum excise structure and rates
- Progress towards consumer and regulatory affairs self-sufficiency
- Promote a positive corporate image, corporate conduct and reputation.

In particular, United States litigation, public smoking, marketing freedoms and prevention of under-age smoking were key consumer and regulatory affairs issues for the AMESCA region. BAT was concerned that United States litigation would cause governments in the region to "seek to embark on a 'let's catch up' approach with the objective of introducing all forms of tobacco control measures" (16). BAT's strategy to combat this potential upsurge in government tobacco control efforts was to communicate points in BAT "position papers on smoking and health" within the company as well as to "educate our allies, government and regulators on our stances" (16). AMESCA region companies would work with BAT's central consumer and regulatory affairs department to communicate messages "on the uniqueness of the US situation and why it should not be carbon copied by governments in AMESCA", and "put science into the debate on smoking and health" (16).

BAT was concerned that United States litigation might lead to demands for bans and restrictions against smoking "inspired by Governments' beliefs that the tobacco industry targets young people in its marketing". It would resist restrictions based on concerns over youth smoking by launching "Prevention of Under Age Smoking Campaigns... in

collaboration with industry and other third parties or on our own to demonstrate our policy and commitment against youth smoking” (16).

BAT suggested that “public smoking or consumer freedoms represents one of the company’s best opportunities to contribute to constructive and informed debate” (16), while also recognizing that marketing freedom was essential to business goals in the AMESCA market. BAT suggested that companies should “work with HORECA [hotels, restaurants and cafes] to provide opportunities for the accommodation of smokers and non-smokers” (16) while lobbying governments with voluntary marketing codes.

Company strategies: Philip Morris (PM)

In the mid-1990s, PM was looking to international markets to maintain its growth. The PM 1996–2000 5-year plan stated that “to maintain growth beyond the year 2000, PMI is developing or investigating new markets with high growth potential... this list includes... Pakistan” (18). In 1995, the then-PM chief executive officer Geoff Bible said that “our international tobacco business is firing on all cylinders... but there is still a plethora of countries with large cigarette markets yet to develop like... Pakistan” (19).

Though PM had a presence in Pakistan since 1967 through its ownership stake in PTI, it was considered an “early development market” (20). Early development markets were considered large and/or growing markets with limited or no branded PM presence; local brands were dominant in early development markets. Early development markets were expected to have “favourable demographics and a rising disposable income” (21). However, capitalizing on opportunities to enter new markets was considered a key challenge facing PM (20).

In 1992, PM’s opportunity to gain entry for its lead international brand, Marlboro, presented itself. Until that time, PM’s primary concern was extracting royalties on brands licensed to PTI for production and sale. In February 1992, a PM official wrote that “royalties on consumer goods manufactured for sale in the domestic market are still not permitted, thereby depriving foreign companies of income from their licensed brands” (6). This led PM to consider getting “royalties out of Pakistan” (6) its primary near-term objective. However, the company also wanted to “achieve greater market access for imported products” (6) to import Marlboro for sale in the Pakistani market. This objective was raised as a priority because “imports of cigarettes are reportedly being allowed for the first time this year [1992]” (6). However, in general PM’s assessment was that the company’s “immediate alternatives depend on its willingness to take risk in face of a moderate market potential”, and that the company “may simply maintain the status quo until the business climate improves” (6).

PM proceeded with plans to import Marlboro, its international premium brand, after it projected the reduction of import restrictions in 1992. However, imported Marlboro did not enter the market until after 1995 and had reached a 1.28% retail market share by 1998,

less than the 1.98% for B&H and 2.10% for Dunhill (22). As PM struggled to import Marlboro (PTC lobbied to restrict imports (23) while planning to launch a BATUKE international brand (14) once imports were allowed), its strategy continued to focus on improving returns by receiving royalties for Red & White, which had reached a market share of 20.7% by 1996 (23).

Tax-evaded cigarettes

Tax-evaded cigarettes were one of two primary market challenges that shaped PTC strategy (the second, smuggling of foreign brands, is discussed below). Domestic cigarette companies in the Mardan region, referred to as Mardanwallahs, were producing cigarettes that directly challenged PTC's Embassy brand in the lowest-price economy segment. In 1992, Embassy was PTC's largest selling brand by volume, accounting for 43% of all sales (24). However, Mardanwallahs lobbied for a tax structure in which they paid excise at 15% of retail selling prices, compared with the official rate of 73% that PTC had to budget for in its pricing strategy (25). In 1992, the Mardanwallahs effectively lobbied the government to cease the implementation of the tax structure that PTC and BAT had lobbied for.

PTC was concerned that the Mardanwallahs would launch new brands in higher market segments, eroding market share of other PTC brands. They also felt that the Mardanwallahs would make speculative tobacco leaf purchases, driving up costs for PTC (24).

PTC lobbied the government to change to a tax structure that would minimize tax evasion, arguing that tax-evaded cigarettes led to significant losses in government revenue (14). The Pakistani Finance Minister and Secretary General Finance encouraged PTC to "expand its operations into other agri-based activities such as edible oils" in order for its request for a change in cigarette excise structure to be considered. PTC felt investment in edible oils was worth the potential gains in profit that might result from a more favourable excise structure on cigarettes (26) and proceeded to diversify its operations into edible oils in 1993. In 1996, the edible oils project was "expected to break... the objective being a self-financing corporate affairs programme with minimum capital investment" (11).

Increases in excise collections from Mardanwallahs began in 1994. After losses in market share in 1992, Embassy grew 40% in the economy segment from 1994 to 1995 as "the drop in evasion by Mardanwallahs has reduced their volume dramatically" (15). Tax evasion continued in the economy segment, but changes in excise collection allowed PTC to gain price leadership with Embassy, allowing the positioning of Embassy to "control growth of the tax evaded segment" and "take volume from... tax evaded brands" by building "Embassy brand equity" (11). This would "force the tax evaders... to take price increases, further strengthening our position" (11).

Marketing

Company documents reveal detailed marketing plans for PTC brands but not PM brands. PTC marketing efforts included “above-the-line” and “below-the-line” activities. Above-the-line marketing includes “traditional media advertising” (27), including television commercials, billboards and print advertising. Below-the-line marketing includes merchandising and promotions (27). In addition to marketing products, PTC began to “build the company image” (11).

John Player Gold Leaf (JPGL)

Cigarette brand marketing is best understood by examining brand plans available for PTC’s two premium-brand cigarettes: JPGL and B&H. JPGL was considered the “main drive brand in [the] PTC portfolio” (28). In 1998, 43% of JPGL smokers were age 18–29 years, and all JPGL smokers were men. Image ratings for the brand showed that it scored high on attributes such as “formal”, “American”, “prestigious”, “youthful” and “international” (28). It scored lower on attributes such as “masculine”, high quality” and “smooth”.

Above-the-line marketing channels included television commercials, sponsorship of radio programming and print advertising. Below-the-line marketing included setting up stalls at HORECA outlets to “take the brand closer to the consumers” (28). Point-of-sale material was also used, with posters considered the most effective form of marketing.

PTC’s promotion “Explore the World” demonstrates how above-the-line and below-the-line mixed media worked together. Explore the World allowed JPGL smokers to enter a contest for international round-trip airline tickets and other instant prizes by sending in four coupons contained in every pack of JPGL during the promotion. Two television commercials were developed for the promotion, one airing in prime time and the other in late prime time. Press advertising was also used to promote “Explore the World”. Promotional booths were set up at selected HORECA outlets to allow consumers to participate in games and win prizes. Sampling teams were also present at HORECA booths to pass out free packs. Live radio shows were held at promotional booths and broadcast over radio. The promotion concluded with a grand draw to pick five winners for the “Free World Trip Return Tickets” grand prize. The event, attended by “celebrities from the entertainment industry, and a large number of social notables”, (29) was given media attention that was “key for making this promotion credible” (28).

In total, 1.27 million entries were received for the Explore the World contest. Television advertising provided 90% of awareness to JPGL smokers and 38% of non-JPGL smokers. JPGL trial by Red & White smokers, JPGL’s main competitor, was 21% compared with 12% among international transit brand smokers (28). Overall, image attributes of “modernity”, “quality”, and “internationality” improved during the promotion.

JPGL brand extension into the lights market occurred in 1996 (30) with a similar mixed-media marketing plan. JPGL Lights were targeted primarily at young adult urban smokers, young professionals, and businessmen/industrialists who were males, age 18–24 years, with medium to high incomes and a college education (31). The brand character of JPGL Lights highlighted “the world of maritime adventure” and an “active and adventurous individual, respected as a leader” (31). JPGL Lights were differentiated as the “best masculine satisfying taste in a low tar cigarette” (31). The media plan to communicate the message included a 30-second television commercial in English, an introductory press campaign (also in English), and a series of point-of-sale materials, including posters, outdoor billboards, leaflets, giveaways and a merchandising line.

Benson & Hedges (B&H)

B&H was introduced in Pakistan in 1996 as a super-premium international brand (12). Its introduction was designed to compete with other international brands such as Marlboro and allowed for up-trading from JPGL into a higher-price segment. As a BATUKE international brand, it was subject to both international brand guidelines as well as an end-market PTC brand plan.

The B&H brand vision in the international brand guidelines was “to become the leading premium international brand that appeals to adult smokers who are attracted to the dynamic and confident imagery of Benson & Hedges” (32). B&H is considered a destination brand that appeals to the urban ASU30 smoker, positioned as a premium cigarette for men offering “independence/freedom and action” (32). Similar to JPGL in Pakistan, B&H is targeted towards male ASU30 in high social classes. Key marketing strategies included an association of the brand with music and B&H Golden Tones music events, focusing on HORECA, and engaging in a diverse media communication mix.

BAT had a pool of television commercials, print advertising and outdoor promotional schemes available for use and/or adaptation in regional markets. Radio was considered a “tactical medium to address specific issues on the brand’s status” (32) in end-markets. Cinema was considered an “ideal opportunity” to reach target consumers because it “generates considerably greater re-call than TC [television commercial] advertising” (32).

Below-the-line marketing had three objectives: to stimulate trial of B&H, communicate with the consumer in the desired environment, and develop trade relations. Consumer promotions were designed to “generate trial by adult smokers and stimulate incremental sales” (32). To enforce the brand link with music, promotionals should “ideally be centred around music”. HORECA was a major component of below-the-line marketing. Regional markets were encouraged to “develop collaborations with selected ... HORECA outlets in key cities in order to position Benson & Hedges as the ‘right brand to be seen with’” (32). HORECA promotions also provided the opportunity to develop relationships with retail outlets and build support for BAT companies.

In Pakistan, the brand guidelines were manifest in two planned marketing campaigns in 1998. The first was around the launch of B&H Lights and the second was a rebranding of B&H under the marketing campaign “&”. The B&H Lights launch included above-the-line marketing such as television commercials, print advertising, direct mail and outdoor advertising. A “launch dinner” for B&H Lights with “key journalists who write for ASU30 in popular music, fashion and lifestyle publications, or in entertainment sections of prestigious mainstream publications” was planned to “build brand image by favourable and positive mention in press, radio, and consumer word of mouth” (22). Sampling in key HORECA outlets was also planned for the B&H Lights launch.

The “&” campaign also included plans for television advertising (especially during the Cricket World Cup 1999), radio, newspaper and magazine advertising, direct mail and outdoor advertising. Below-the-line marketing included plans for hosting and promoting a music concert in Karachi (or Dubai if “local law and order situation does not permit it”) and holding pre- and post-concert events for journalists and the press. In addition, below-the-line marketing included continued sponsorship of a radio music programme and a music page in a popular English newspaper, implementing the “new look B&H” (32) in each of the channels, and designing and airing “a music show for PTV’s satellite channel” (32). All merchandising in HORECA and retail outlets would be replaced with “&” campaign-branded merchandise.

Improving corporate image

BAT’s regional strategy for “guiding the positive management of the company’s reputation” (16) included:

- Building relationships with authorities, regulators and communities.
- Demonstrating corporate citizenship.
- Promoting the new corporate brand image of BAT as ethical, successful and a winning corporation.
- Demonstrating added value to its end-markets.
- Adhering to official laws and codes of ethical business conduct.

PTC embarked in three programmes to improve its corporate image. The first was the production and sale of edible oils, an effort focused specifically on securing favourable standing with government officials. The other two, an afforestation and mobile health van project, worked towards improving the general public’s view of the company.

Edible oils

PTC diversified its operations to include the manufacture and sale of edible oils as a means of gaining political favour in its cigarette business. The edible oils project was seen as “a self-financing corporate affairs program with minimum capital investment” (11).

Afforestation

Afforestation programmes are responses by tobacco companies to concerns over the environmental impacts of tobacco production. Tobacco production, especially curing tobacco leaves, requires deforestation and the use of firewood as an energy source (33). PTC's web site claims that its afforestation programme began in 1981. Documents show that the programme did not receive a dedicated budget until 1995, and though "significant headway" had been made by the mid-1990s, the company still had "a long way to go... we had to catch up on the past" (11). In 1994, 500 000 trees were planted on 540 hectares of land, with planned expansion to over 7 million trees over 1838 hectares of land in 1999 (11). PTC pursued alternative fuels for curing, including coal and rice husk, but felt that it would plant enough trees to meet the company's energy needs in tobacco production and be self-sufficient by 2004. However, by 1996 it was felt that "we are spending a lot of money on our Edible Oils and Afforestation programmes, but we do not get the maximum 'bang for our buck' because we spend our time running the projects and not exploiting them" (34).

Mobile health vans

PTC began delivering medical services through mobile vans in 1989 (35). The mobile vans provide free treatment, first aid and medicines for "common diseases and ailments which do not require hospitalization and surgery" (35). Three vans, two based at a PTC factory in Akora Khattak and one at a factory in Jhelum, serve factory workers, make visits to communities within a 30-kilometre radius of the factories, and provide services in emergencies and natural disasters (36). From 1989 to 1994, they had reportedly served 17 000 patients (37). The mobile vans have been highlighted in PTC advertisements extolling the benefits the company brings to Pakistan (38), a stark contrast to the message of tobacco control advocates on the negative health impacts of smoking in Pakistan (39).

Summary

Transnational tobacco companies view Pakistan as a large and emerging market where potential profits justify a long-term investment and short-term profit losses. Companies occupy the market with a brand portfolio, segmenting the potential customers into specific price points. PTC, for example, had brands at four price points in 1991: premium, high, medium and economy. With the introduction of B&H in 1996, it created the international super-premium segment. Segmentation of the market and brand-specific marketing allow the company to attract new smokers at multiple price points. As improvements in the overall economy occur and individual per capita income and purchasing power increase, brand marketing is used to motivate smokers to "trade up" and move smokers closer to the more profitable premium segment.

Price leadership and marketing are two critical aspects of growth for tobacco companies. Price leadership, or the ability to set prices in each market segment, is important because it

helps to dictate market share. Transnational tobacco companies engage in price wars, lowering or raising prices as conditions allow. Price leadership also drives transnational tobacco company lobbying efforts with the government to minimize the tax burden and create more flexibility on prices leadership. Marketing takes on many forms and is used to create brand identities that convey particular qualities; for example JPGL has been associated with qualities such as “American”, “prestigious” and “youthful” while B&H is intended to convey “independence/freedom and action”. Brand identities are created and used to move smokers from economy and medium-priced brands to premium and international brands.

In addition to marketing brands, transnational tobacco companies are also engaged in marketing the company and managing its corporate image. The move into the edible oils area by PTC was specifically designed to improve the tax environment for the cigarette business. The afforestation programme deflects attention from the environmental damage that results from tobacco growing and manufacturing, while the mobile vans programme neglects the disease consequences of continued growth of the tobacco industry.

Smuggling of cigarettes into Pakistan

Smuggling cigarettes into a country is a way for transnational tobacco companies to enter otherwise closed markets, create pressure to open markets to imports, undermine regulation, create a desire for smuggled brands, and earn a substantial profit (40). The situation in Pakistan is no different. Cigarettes have been smuggled into Pakistan as a means of creating brand awareness of, and loyalty to, international brands when import restrictions or high import taxes and customs fees preclude the introduction of legally imported cigarettes.

Market share of smuggled brands

In the early and mid-1990s, smuggled brands were a major concern for PTC. (Smuggled cigarettes have been referred to under a variety of terms by BAT such as “general trade”, “transit” and “duty not paid”. For more detail on smuggling terminology by BAT, see Collin et al. 2004 (40)). Smuggling of cigarettes presented the same challenge to JPGL in the premium-price segment that tax-evaded cigarettes posed to Embassy Kings’ market share and price leadership in the economy segment.

Brands smuggled into Pakistan fell into two types: international brands (such as Dunhill and Marlboro) and return cigarettes, typically from Afghanistan, which were first exported from Pakistan then smuggled back into Pakistan (41). PTC was focused on the effects on international brands because of the challenge to JPGL and profitability in the premium segment.

At the end of 1991, PTC estimated that transit brands accounted for 24% of the premium market (9), a market share that continued into 1996 (15). During this period, PTC considered an inability to increase prices a key factor in its declining profitability. In the lower segment, tax-evaded brands prevented price increases for Embassy Kings. Similarly, transit international brands were the price leaders in the premium section, and the low quality of JPGL relative to transit brands limited PTC’s ability to raise prices on JPGL to match transit brands.

The main transit brand was Dunhill, then a Rothmans International brand, with Marlboro also making up a component of the transit market. One BAT official wrote of Dunhill during a visit to Pakistan in 1994 that:

“Dunhill is the leading smuggled brand. The Commerce Minister was openly smoking Dunhill, which he admitted to being smuggled, during the meeting with the UK Trade Delegation” (42).

PTC responded to its concern over Dunhill transit brands by embarking on quality-improvement measures for JPGL and introducing imported B&H in 1996 (12). Documents show that Dunhill and Marlboro were not the only brands smuggled into Pakistan. A BAT employee noted in her 1994 visit to Pakistan “wide distribution of International Transit Brands (Dunhill, SE [State Express] 555, B&H, Marlboro)” (43).

Smuggling routes

Cigarettes were smuggled into Pakistan through Afghanistan, a fact known by BATUKE since the mid-1980s (44, 45). In 1984, two documents by BATUKE and one by Singapura United Tobacco Limited (SUTL), a Singaporean manufacturer that supplied smuggled BAT brands throughout Asia (40), assessed the status of smuggled brands into Pakistan. The summary of the visit found that smuggled brands, including State Express, B&H, Dunhill, Marlboro and Kent, were being smuggled into Pakistan over the Afghani border (45). BATUKE brands accounted for an estimated 40% to 50% of total smuggled brands. The report suspected that unmarked brands arriving in Afghanistan from SUTL were being passed into the Pakistani market. The three main entry points were Torkham along the Khyber Pass, Baiur/Suat/Mingora and Parachinar. Business was conducted “almost entirely by tribesman... more on an individual basis than on an organized large scale”. However, PTC felt at this time that distribution out of tribal areas was becoming wider and more organized and an emerging threat.

The 1984 memo recommended that, if international transit brands threatened JPGL’s status as the premium brand in Pakistan, then “BATUKE must, therefore, with its brands, retain for the Group as much volume as possible” with State Express and B&H, “the brands to be pushed at this stage”. It was also “recognized that PTC do not wish any direct involvement in these activities and BATUKE will operate through a third party”.

However, in a later meeting, it was noted that “BATUKE had been hesitating about seeking and supplying transit opportunities, in other than a reactive manner” in Pakistan (46). The company instead supplied transit brands to Afghanistan (44) and allowed for local smuggling of cigarettes from Afghanistan into Pakistan (45), noting that “it was believed that much of what was destined for Afghanistan ended up in Pakistan” (46).

In Afghanistan, BATUKE arranged for SUTL to make shipments directly to companies in Afghanistan. Abdul Jalil Rashidzada, for example, was a company that BATUKE identified as a partner to directly receive transit shipments from SUTL (47). The general trade into Afghanistan from SUTL in December 1989 doubled from 64 million cigarettes to 112 million cigarettes compared with December 1988 (48).

The cigarette smuggling route into Pakistan from Afghanistan was outlined in a graphic that identified two suppliers to the Afghani and Pakistani markets. Along with SUTL, a supplier named Sarwar Bros shipped BAT brands into Torghundi and Hairatan in Afghanistan (49). From Torghundi, cigarettes were transported to Quetta in Pakistan for distribution to Karachi and Hyderabad. From Hairatan, cigarettes were transported to Peshawar in Pakistan for distribution in Islamabad and Lahore.

Coordination of smuggling

In the 1991 BATUKE company plan, it was noted that the “Far East Area teams are developing domestic, duty free and general trade opportunities in Pakistan.... Both SE555 and BHSF enjoy existing franchises [in Pakistan] through general trade with an estimated 20% share of imports” (50). In a 1992 assessment of new market opportunities in Pakistan, it was stated that “the current transit from SUTL into Pakistan is estimated to be 255 million” but with increased import liberalization and BATUKE local entry, that transit will “stabilize around 100 million” (51).

Beginning in 1992, BATUKE began a shift from simply knowing about smuggling from Afghanistan to Pakistan to actively managing it. A BAT and a SUTL representative went to Pakistan to better understand the general trade market. In February 1992 they reported on their tour of four major general trade markets: Karachi, Quetta, Lahore and Rawalpindi (52). At each site, wholesale prices for smuggled cigarettes were recorded, along with the popularity of BAT cigarettes relative to competitors. In Quetta, where cigarettes arrived from Torghundi, Afghanistan via Kandahar and Chaman, BAT and SUTL representatives met with major buyers and began negotiating with one in particular, identified as Hayatullah, to become the sole agent of transit brands into Afghanistan and Pakistan.

Hayatullah guaranteed BAT a set annual sales volume, but would only accept shipments from SUTL and not Wesimex, a Dutch exporting company that also supplied the Afghan market (53). The BAT and SUTL representatives felt that having a sole supplier and agent for Afghanistan and Pakistan would allow for greater control of prices for transit brands and introduction of line extensions. By June 1993, SUTL established an exclusive distribution agreement with Hayatullah, with the possibility of BAT discontinuing its relationship with Wesimex if Hayatullah proved “reliable and effective” (54). Through his company Hayatullah Bros, he was identified as the agent “who handles our business in Pakistan and Afghanistan” (55).

SUTL shipping records show that, by 1996, shipments to Pakistan were destined for duty-free markets and not transit, suggesting that direct shipments of transit cigarettes from SUTL into Pakistan were not made. However, BAT sales records show that in 1995 Afghanistan was still receiving general trade shipments (56). It is unclear how many of these cigarettes were making their way into Pakistan. A reference to “transit Benson & Hedges” (11) in PTC’s 1997–1999 company plan would suggest that BAT transit brands

continued to enter Pakistan, but the presence of other forms and sources of counterfeiting (57, 58) may also be responsible for non-BAT coordinated transit of international brands.

Summary

Cigarettes were smuggled into Pakistan across the Afghanistan border. BAT has coordinated a smuggling operation into Afghanistan since at least 1984. It shipped smuggled cigarettes to Afghanistan through two overseas manufacturers, SUTL and Wesimex, and possibly others. BAT was aware of, but did not coordinate or manage, transit trade from Afghanistan into Pakistan until 1992. BAT began to explore opportunities to work directly with an importer in Afghanistan and Pakistan in 1992, consolidating a relationship between SUTL and Hayatullah Bros as the sole supplier of smuggled cigarettes for Pakistan by 1993.

Marlboro was also smuggled into Pakistan, but no information on its mode of entry was identified.

Influence of the tobacco industry on science

Litigation in the United States over the health effects of tobacco smoke led BAT to develop “position paper[s] on smoking and health” for internal use and to “educate allies, governments and regulators on our stances” (16). Position papers covered topics such as “environmental tobacco smoke” (59), “safer” cigarettes (60), smoking and lung cancer (61) and smoking and addiction (62). Position papers were developed under the direction of BAT management to be disseminated and used in all end-markets. Position papers allowed the company to have a common stance on key issues in all of its operating companies and subsidiaries. In its position papers and position papers training (63), the subversion of scientific evidence used to support tobacco control was a key strategy used by BAT and its subsidiaries to fend off tobacco control measures. Two issues demonstrate how science was undermined to support company positions on issues of concern to PTC and the AMESCA market: environmental tobacco smoke (ETS) and light cigarettes.

Environmental tobacco smoke (ETS)

In its 1997–1999 company plan, PTC felt the need for its consumer and regulatory affairs department to better manage concerns over smoking and health. The company needed to “manage the media better, reacting to uninformed and misleading articles” and be able to “professionally provide the necessary inputs to deal with media and government functionaries” (11). Importantly, PTC sought to “promote a rational, science based debate on ETS”, following BAT’s desire “to put science into the debate on smoking and health as appropriate for each market” (16) in the AMESCA region.

The thrust of the BAT position paper on ETS was that it was an annoyance, but no evidence supported it as a health hazard and thus it should not be regulated by the government (59). BAT argued that though “many people have been led to believe that environmental tobacco smoke (ETS)... is a cause” of disease, “in our view, not only has it not been proven that ETS causes disease, but ETS has not even been established to be a risk factor for diseases such as lung cancer and heart disease” (50). The company also asserted that “this view is shared by many scientists” (50). The position paper continues that ETS does not change the substances found in indoor air; asserts that ETS is difficult to measure; and challenges studies on the effects of ETS on lung cancer, childhood disorders, adult respiratory disease and heart disease. It takes particular aim at the United States Environmental Protection Agency’s 1992 ruling that second-hand smoke causes lung cancer in adults and disease in children. The company’s interpretation of the science on

ETS and health led it to conclude that the “common sense” way of dealing with it is accommodation of smokers and non-smokers.

In a BAT position paper training module, communication points are emphasized beyond the scientific arguments put forth in the position paper. The first is the emphasis on ETS as a potential annoyance. It should be acknowledged that “many people find other people’s smoke annoying” and that “non-smokers should not be forced to live or work in very smoky environments” (63). However, it must be stressed that an “‘annoyance’ is not the same as ‘hazard’” (54). The second communication point is that ETS is not a health issue but a social issue. This point reinforces BAT’s position that no sound science supports ETS as a “risk factor, much less a cause of disease in non-smokers” (54). The training points out that it is “political correctness and annoyance” (54) that are behind the enactment of smoking bans. The final communication point is that solutions to concerns over ETS should be dealt with at the “grassroots” level and that “smokers and non-smokers should be allowed to work out accommodation measures between themselves” (63). Solutions should be oriented around “courtesy, tolerance, good humor, respect” (54) and that there is no place for government intervention on the issue of ETS.

Light cigarettes

Along with the premium segment, light cigarettes were considered a priority segment for BAT. It was expected that the lights segment would “grow significantly from 20.7% to 30% of global sales by 2005” and “account for 44% of contestable volume with much of it within the premium price segment” (17). In other words, the lights segment was considered a high-growth, high-profit segment that not only had been untapped, but was not as strongly dominated by PM as the full-flavour segment.

However, a limit to uptake of light cigarettes in the AMESCA market was “product awareness” and “understanding of lights” compared with full-flavour cigarettes. BAT’s 1998–2000 company plan for AMESCA concluded that “consumers have low understanding of light products” but that “the widespread availability of imported IBs [international brands] across the region is an opportunity – consumers are increasingly gaining a preference for these, usually lower delivery products” (64).

What BAT wanted consumers to “understand” about light cigarettes is detailed in the company’s position paper entitled “British American Tobacco Research & the ‘Safer’ Cigarette” (60). With “many health authorities, scientists, and doctors” concluding that “smoking is a cause of lung cancer in smokers”, BAT has responded to “consumer demands for lower tar cigarettes, which some scientists, government and public health authorities have considered to be ‘safer’ or ‘preferable’” (60). BAT does not “make any health claims about” its products (51), but only because the exact microbiological mechanisms that underlie the genesis of cancer were unknown.

The position paper discusses BAT's internal research programme to identify "safer" cigarettes, as well as its support and funding of "independent research into the questions of causation and mechanism of diseases associated with smoking" (60). Lower-tar cigarettes, lower-biological-activity cigarettes, reduction and removal of specific constituents, and innovative and alternative products are all discussed as attempts to make cigarettes safer. However, of all these areas, "the only product modification that has met with encouragement from governments or medical bodies is lowering tar deliveries". BAT arrives at this conclusion, citing a 1966 statement by the United States Public Health Service that "scientific evidence strongly suggests that the lower the tar *and nicotine* of cigarette smoke, the less harmful would be the effect" [emphasis added] and a 1996 report from the United Kingdom's Tobacco Products Research Trust that states:

"research has clearly demonstrated that the tar yield of cigarettes is positively and independently associated with the incidence of many smoking-related conditions.... As a result of this research, efforts have been made by the tobacco companies to reduce tar yield of cigarettes; although, it is clear, as this volume points out, that other components of tobacco smoke which cause or contribute to smoking-related diseases and their mechanisms of action remain largely unresolved" (51).

Neither statement indicates support for "light" or "low-tar" cigarettes as an alternative to full-flavour cigarettes, yet they are used to argue that some governments and official bodies "encourage" them as a form of a potentially "safer" cigarette.

Communication points covered in the position paper training module are: (a) the good faith effort of the company to make cigarettes safer; (b) deference to referent authority; (c) identifying "cherry picking" of data by opponents; and (d) making clear that the company makes no health claims of light cigarettes. The first point emphasizes that "nobody is more interested than [BAT] in cigarette design" (54) and that the company has made substantial efforts to designing safer cigarettes. The second is that the company has a history of working with governments, and that they often come to a similar conclusion: "the search for a less hazardous cigarette has not yielded a product which can be considered as 'safe'" (54). The third point is that "apparently incriminating phrases" have to be put into context, and that the company's positions are based on an understanding of the "body of science" (54). Finally, the training module emphasizes communication of the point that "some public health authorities have considered lights to be 'safer' or 'preferable'", though the company makes no health claims about "light" or "low-tar" cigarettes (54).

Summary

Environmental tobacco smoke (ETS)

BAT's "practice of science", or the interpretation of scientific data that BAT used to reach its conclusions on the effects of ETS, is highly problematic. Its criticisms ignore the weight of the scientific literature that supports the conclusion that second-hand smoke exposure causes disease and premature death. This includes sudden infant death syndrome, acute respiratory infections, ear problems and more severe asthma in children, and adverse effects on the cardiovascular system and coronary heart disease and lung cancer in adults (65). The conclusion that ETS should be resolved through accommodation has also been refuted, with determinations that there is no risk-free level of exposure to second-hand smoke, and separating smoker and non-smokers, cleaning the air, and ventilation systems cannot eliminate exposure to second-hand smoke (65). PTC's effort to "promote a rational, science-based debate on ETS" in Pakistan was based on faulty science.

Light cigarettes

The interpretation of a dated statement by the United States Public Health Service from 1966 and the Tobacco Products Research Trust that led to the assertion that "some scientists, governments and public health authorities" have considered low-tar cigarettes "to be 'safer' or 'preferable'" is misleading. The United States Public Health Service did not endorse lower-tar cigarettes, instead saying that decreasing levels of tar *and* nicotine would lower the harm level. The Tobacco Products Research Trust also concluded that low-tar cigarettes are not "safer" because smokers of low-tar cigarettes puff more often and more deeply per cigarette, and smoke more often per day and to a shorter butt length (66). BAT misinterpreted scientific statements to assert that there was support from the scientific community for "light" cigarettes as a "safer" alternative to full-flavour cigarettes. It lent credibility to any perception among consumers that "light" cigarettes were safer, while allowing the company to disavow responsibility for findings that there is no health benefit to smoking "light" cigarettes.

Sports sponsorship by the tobacco industry

Sports sponsorship was a major form of advertisement and marketing for BAT and PM before sophisticated above-the-line and below-the-line marketing was introduced in Pakistan in the mid- to late-1990s. In 1991, PTC sponsored cricket matches with its Wills Kings and Gold Flake brands and a golf tournament with JPGL, while LTC and PTI sponsored car racing with Morven Gold and Red & White, snooker with Red & White, water sports with Morven Gold, and television coverage of local sports tournaments (9, 67). Of these, cricket received by far the most sponsorship attention, followed by golf and snooker.

Cricket

PTC began sponsoring cricket in 1977 (68). It sponsored domestic cricket matches and tournaments such as the One-Day International Cricket Tournament, Wills Trophy International, Wills Cup one-day national cricket tournament pool matches, Gold Flake Cricket League, as well as international one-day matches between Pakistan and other countries and World Cup cricket matches (9, 67, 69). At cricket events, PTC committed signage on the ground for all of its brands, including Gold Flake and JPGL. PTC also negotiated rights to advertising space on the scoreboard, sightscreen and boundary runners, branding of cricket bats and other sports' kit components (70). PTC sponsorship of cricket led to an association with "Wills by 62% of smokers, Gold Flake 14% and Gold Leaf 9%" (68).

Beyond creating an association between the sport and a particular brand, sports sponsorship was a form of advertising. As a PTC report states, sponsorship:

"not only impacts on spectators in the domestic stadia, but also on television viewers... and in newspaper reporting. The Wills logo on the kit also benefits us for away tours which are telecast and in action photographs in newspapers/magazines" (68).

Cricket sponsorship was also a way of circumventing potential bans on cigarette advertisement on television. PTC projected that:

"The cricket sponsorships will become invaluable when the broadcast media ban is imposed. Through the cricket kit sponsorship it will be possible to flight our commercials under the ostensible purpose of

promoting cricket bats. When this is also banned the nomenclature and the ground signage will give us continued television presence” (68).

PTC held tightly to cricket sponsorship, having “successfully protected our sports sponsorships despite strong and concerted efforts during the past several years by the anti-smoking lobby who have the active support of Pepsi Cola who want to displace us as the main sponsors of cricket in Pakistan” in 1994 (71). A sponsorship agreement between PTC and the Board of Control for Cricket in Pakistan in 1993 was reported in the news to include several naming and merchandising rights above and beyond “the usual privileges pertaining to display their banners, hoardings at stadia and on television, etc”. (72). They included:

- The creation of the Wills Foundation, a trust fund for “players’ welfare”.
- A logo deal that allowed PTC to have its logo displayed on all cricket gear for the Pakistan cricket team and for all teams taking part in Board of Control for Cricket in Pakistan-organized tournaments from 1993 to 1995.
- First rights to place logos on shirts and sweaters of the Pakistan cricket team after a logo agreement with Pepsi expired in 1995.
- Naming of awards and prizes to players, such as the Wills Man of the Series and Wills Man of the Match awards.
- Right of refusal for sponsorship of the World Cup if held in Pakistan (which it was in 1996).
- All Test matches and one-day internationals played by the Pakistan cricket team in Pakistan to be named the Wills Series.
- All domestic tournaments to be named the Wills Cricket Season.
- All Test series played between Pakistan and India to be played for the Wills Shield.
- All one-day International matches played in Pakistan to be named the Wills Challenge.
- The Asia Cup, when played in Pakistan, to be named the Wills Asia Cup.

In addition, the Board of Control for Cricket in Pakistan agreed to place a nominee of PTC on its Council as an ex officio member.

Wills sponsorship came under fire in Australia when the Pakistan cricket team played a season there. The Wills name and logo on the bats of the Pakistan cricket teams were challenged as a violation of the Australian Tobacco Advertising Prohibition Act, which banned tobacco company sponsorship of sports (73, 74). The Pakistan cricket team agreed to cover the Wills Kings brand name on its bats, but not the brand logo (75, 76).

In 1992, the Cricket World Cup was held in Australia and New Zealand and sponsored by B&H (77, 78). The following Cricket World Cup, held in 1996, was hosted jointly by India, Pakistan and Sri Lanka and presented a large marketing opportunity for BAT and its subsidiaries in each of the three countries. A PTC official wrote to BAT in 1992, before India, Pakistan and Sri Lanka won the hosting rights, that tournament sponsorship would “provide an excellent promotional opportunity” but that “the sponsorship cost would be beyond the means of any single BAT Company, at least in the Sub Continent, and maybe

even beyond the collective resources of all the regional Companies” (79). In response, BAT considered sponsorship of the 1996 World Cup, again with B&H, but ultimately declined to do so (72, 80). India Tobacco Co., a BAT operating company, was ultimately awarded sponsorship rights for the 1996 World Cup (81), though it was suggested by PTC that any single BAT company in the region could not afford the sponsorship. Nevertheless, the 1996 World Cup was sponsored by the India Tobacco Co. with its Wills Kings brand, allowing PTC to also use Wills Kings for sponsorship of events held in Pakistan (69, 82), as stipulated in the 1993 PTC–Board of Control for Cricket in Pakistan sponsorship agreement (72).

Golf

PTC sponsored golf tournaments with JPGL in an effort to “reinforce its elite image” (9). Its main golf sponsorship was for the Matchplay Golf Tournament for Gold Leaf Trophy (9, 83), which began in 1986. PTC garnered media coverage, television highlights of the tournament and aired promotional spots for the tournament on television for the 1992 tournament (9). Both professional and amateur players were invited to participate in the 1993 tournament, with prize money reaching Rs100 000 (83). In 2002, it was reported that PTC not only hosted the tournament, but also a dinner for the players at which prizes would be distributed (84). In 2003, an estimated 150 golfers took part in the tournament, and a ladies putting competition for non-golfers was also held (85). In 1993, PTC was also awarded a sponsorship contract by the Golf Federation for the National Amateur Golf Tournament, which was then called the Gold Leaf Trophy National Amateur Golf Tournament (9).

Snooker

The national snooker championship was sponsored by Red & White (a PM brand) in 1992, a relationship that continued until at least 2003 with the Red & White Sindh Cup (86) and Red & White National Snooker Championship (87). In 1993, PTI was awarded a sponsorship agreement for the World Amateur Snooker Championship (88).

Summary

Sports sponsorship served many functions for transnational tobacco companies. First, it used association with a particular sport to augment the brand image. Using JPGL to sponsor golf, for example, reinforced the brand’s “elite image”. Second, sports sponsorship was another stream of advertising. Through its cricket sponsorship, PTC was able to have its brand advertised throughout cricket stadia, on players’ uniforms, and through trophies and awards given out to players. Advertising through sponsorship was disseminated through television and print media, and reached domestic and international audiences. Third, sports sponsorship provided a means of undermining tobacco control measures

limiting cigarette advertising and marketing. By sponsoring or advertising non-tobacco products, tobacco companies used sports sponsorship as a way of gaining visibility for their brands that circumvented media bans on specific tobacco products.

Effect of tobacco industry activities on health equity

The activities of the tobacco industry have direct and indirect effects on vulnerable populations in Pakistan. Youth and young adults have been identified as a high-growth market in Pakistan, the “main long-term source of growth” for the tobacco industry. Though the tobacco industry states that it does not advertise to youth in Pakistan, young people are caught up in the marketing and advertising activities of the tobacco industry. For women, who smoke far less than men, exposure to second-hand smoke poses a health risk to them and their families. As the tobacco industry works to undermine policies to reduce exposure to second-hand smoke, they are disproportionately harming women.

Marketing to youth

BAT states explicitly in its internal company documents that it markets “cigarettes to adults only” (16). In its brand plans, BAT states that in references to “Adult Smokers Under 30”, a target segment for the industry, “adult” is defined as anyone who is “18 years or over” and that “‘target consumer’, ‘smokers’, ‘target audience’ or similar term shall mean adult smokers aged 18 years or over” (89). However, contrary to this position, tobacco control advocates in Pakistan maintain that industry advertising and marketing activities are targeted towards youth. Tobacco control advocates assert that activities such as musical concerts (90) and other promotional activities, for example the JPGL Voyage of Discovery promotion (39), where cigarettes are given out for free, attract adolescents.

The JPGL Voyage of Discovery was the “first international BTL [below-the-line] initiative for the brand”, developed to “inject internationality and the ‘Big Brand’ image” for JPGL. The promotion centred on the voyage of the “JPGL boat”, leaving from England to major markets in the European and AMESCA regions, including Cyprus, France, Greece, India, Italy, Malta, Oman, Pakistan, Saudi Arabia, Spain and Sri Lanka, from June to November 1999 (91). There were television commercials and limited-edition packs prepared for the campaign, and in each market a coordinated public relations effort, involving in-port events and large consumer promotions in support of the voyage, was arranged (92).

Benson & Hedges (B&H) Golden Tones

Golden Tones, a series of musical events launched under the B&H brand name, was a marketing campaign with youth appeal. Launched in Nigeria in 1993, Golden Tones concerts highlighted local artists in a high-profile setting provided by BAT affiliates. Golden Tones was seen as the “unique promotional event developed for Benson &

Hedges” (93), an event that “provides for high levels of quality branded contact and sampling opportunities with consumers... and animates the brand for the target consumer” (93). Golden Tones grew from live concerts to full marketing campaigns that encompassed HORECA activity, broadcast sponsorship of TV and radio programmes, “Golden Tones News” and the “Golden Tones Roadshow” via a videowall truck (94). The effectiveness of Golden Tones campaigns lay in providing a platform in which consumers could experience the brand, creating a forum for “consistent brand communication and exploitation”, and engaging in “pre and post event publicity... to maximizing brand exploitation of the events”, increasing brand awareness, and making the brand real and relevant to the consumer (94). Golden Tones was used to drive B&H image attributes such as “‘quality’, ‘contemporaneity’, ‘for younger adult smokers’, and ‘international’” in markets where it was rolled out (95).

The release of B&H in Pakistan in 1996 led to the use of Golden Tones as a model for the marketing campaign for the brand. The marketing campaign, named “&”, drew on the association of the brand with music, using radio and print to market B&H. PTC used B&H to sponsor the “B&H Golden Tones” radio programme (96). The company also sponsored a music page in an English language magazine that replicated Golden Tones News, a print instrument “positioned as the ‘provider of international music news’” (97). Information for Golden Tones News was compiled by “a specialized agency in the UK which includes latest releases, latest gossips, feature stories, photographs etc”. and was “presented to the local media and the local radio for their use” (97). Documents describing musical events in Pakistan were not found, but news accounts indicate they were held (39, 90).

Youth smoking prevention

Tobacco companies not only state that they do not market their products to children, but also have developed and implemented youth smoking prevention programmes. However, contrary to public statements, private documents show that industry youth smoking prevention programmes are used to deflect attempts at industry regulation. In 1994, a meeting of BAT, Rothmans and PM representatives was held to discuss growing industry opposition in Pakistan. To counter the opposition, the group concluded that, among other things, it should “look at developing a minors’ programme that would show the industry to be willing to work cooperatively with the authorities in at least one area in which we have a mutual objective” (98).

BAT did in fact develop a company-wide tool, the “Took-kit for Developing Programmes to Prevent/Reduce Under-age Smoking” (99), which was to be used in response to concerns over youth smoking. The tool-kit included a case study on Pakistan that demonstrated the use of research in developing youth smoking prevention programmes. Company research found that youth smoking was considered a “very major problem”, and that there was a high level of hostility and distrust towards the tobacco industry. However, a higher degree of trust was attributed to doctors, teachers, the government and the media, a finding that likely led to BAT’s strategy of “launch[ing] Prevention of Under Age Smoking

Campaigns... in collaboration with industry and third parties or on our own to demonstrate our policy and commitment against youth smoking” in the AMESCA region (16). The case study concluded that, despite distrust of the industry, there was support for the involvement of PTC in youth smoking prevention activities and that a campaign aimed at retailers to bar youth access held potential as a component of a youth smoking prevention campaign (99).

Reflecting the 1994 memo from the PM, BAT and Rothmans meeting and the findings that made up the case study, PTC and LTC jointly organized a ceremony in 1999 to launch an anti-smoking campaign for youth (100). At the ceremony, reportedly opened with complimentary remarks from Finance Minister Ishaq Dar, an LTC representative said the campaign would include an effort to encourage retailers to no longer sell cigarettes to teenagers, while a PTC official added that anti-smoking advertisements would be incorporated into the campaign (100).

Smoking and women

BAT felt that, in Pakistan, “smoking is widespread”, but it was viewed as the “preserve of men” (101). There was growing recognition that although “Pakistan is an Islamic state”, it was transitioning towards “a more liberal outlook” as evidenced by the “increase in working women and the entry of upper class women into universities” (101). Yet, BAT had yet to explicitly incorporate women into its brand development or marketing schemes; for example in brand and advertising plans for B&H and JPGL the target audience was specifically characterized as male (31, 32).

An estimated 6.4% of adolescent females in Karachi have ever smoked, a higher percentage than adolescent females in Indonesia, Myanmar, Nepal and Sri Lanka (102). In a survey of pregnant women, 10.2% of women in Pakistan were ever smokers and 3% were current smokers (103). Yet 91.6% lived in homes where smoking was allowed and 49.9% reported being frequently or always exposed to tobacco smoke indoors. Thus, while fewer women smoke compared with men (community surveys report between 55% and 64% of men smoke (104, 105)), evidence suggests that many are exposed to second-hand smoke. Efforts of the tobacco industry to resist indoor smoking regulations have a disproportionate affect on women than men.

Second-hand smoke was considered both an important issue and an opportunity for BAT in the AMESCA region and for PTC. BAT considered “public smoking” as “one of the company’s best opportunities to contribute to [a] constructive and informed debate” in the AMESCA region (16). PTC felt that “environmental tobacco smoke” was a critical area within the debate on smoking and health that needed to be addressed to support “consumers’ freedom of choice” to smoke (11). Though BAT and PTC adopted a proactive stance to second-hand smoke as an issue it could help resolve, market research showed that “environmental tobacco smoke was thought to be the most powerful smoking issue” among “external opinion movers” (101). Research found that “whilst smoking and health

are, in general, matters of adult responsibility, if others are negatively affected, those who 'had no choice' needed to be protected" (101). Though second-hand smoke was a "live" issue in Pakistan, the health effects were not considered "proved", especially since "pollution levels are so high" (101). Based on market research, BAT consultants suggested that the company engage in a course of action based on two modes of communication. The first was to emphasize that the link between health and second-hand smoke was not proven, and the second was to advocate for "coexistence between smokers and non smokers" (101).

BAT's strategy in the AMESCA region and in Pakistan was to use the ETS position paper (described above) to establish the company's position and argument among government and other officials, launch its Courtesy of Choice campaign to support separate smoking and non-smoking spaces and work with HORECA to "provide opportunities for the accommodation of smokers and non-smokers" (16).

Summary

Transnational tobacco companies deny marketing to young people in Pakistan. However, tobacco control advocates argue that their marketing events appeal to and attract young people. To further its apparent commitment to prevent underage smoking, PTC and LTC publicly announced, with support from the Minister of Finance, a youth smoking prevention programme in Pakistan. The youth-appealing marketing practices of transnational tobacco companies as well as the promotion of company-sponsored youth smoking prevention programmes reflect what occurs in other countries. It has been shown that tobacco industry marketing does appeal to youth (106) and that company-sponsored youth smoking prevention programmes are designed to be counterproductive (107). Unlike tobacco control advocates, for whom youth smoking prevention programmes are geared to preventing youth from ever smoking, the tobacco industry in its programmes is looking only to delay smoking initiation until youth reach the legal age (108).

Similarly, proposals for accommodation and ventilation measures to address concerns over second-hand smoke are a replication of strategies used in other countries (109). The tobacco industry actively seeks to sow seeds of doubt about the scientific findings on the risk of second-hand smoke and promote accommodation and ventilation as alternative solutions to the risks associated with second-hand smoke (110). In Pakistan, this strategy has a disproportionately negative effect on women, who smoke far less than men.

Discussion

The tobacco industry in Pakistan is constantly evolving. Ownership structures change, as evidenced by the merger of PTI and LTC as well as the purchase of Rothmans by BAT. Brand portfolios expanded with the introduction of new brands and line extensions, and some existing brands went through a process of rebranding. Market share and prices fluctuated, and the tax structure for cigarettes was revised. Marketing efforts became more sophisticated and broader in reach, with an increased emphasis being placed on sports sponsorship as a form of marketing. BAT in particular asserted greater control over smuggling.

The changes observed in the tobacco industry and tobacco market from 1992 to 2002 continue to the present; for example PM has purchased a majority stake in LTC since 2007 (111). With respect to changes in brand portfolio, the price increase and resultant decline in sales of Embassy prompted PTC to relaunch Embassy Kings “with rejuvenated communication and packaging” in 2004 (112). PTC added Dunhill in 2005 (113) and Pall Mall in 2006 (114) to its brand portfolio, while creating a brand association between Capstan and Pall Mall in 2007 (115).

Despite these changes in PTC brands, its market dominance since 2000 has eroded to a level of parity with LTC. LTC, which had only 35.6% of market share in 2000, now has 47% of market share compared with 48.4% for PTC (P. Petit, unpublished data, 2008). This increase is due in large part to the growing popularity of Morven Gold, now the leading brand in Pakistan with 37.6% of market share (Petit, unpublished data, 2008). The rise of Morven Gold has not been well documented, though one news report attributes its prominence to improvements in tobacco quality, changes in pack design and use of printed tipping paper (116).

To assure a good business environment, transnational tobacco companies were consistent in two areas over the period of this study: attempting to influence policy-makers and resisting tobacco control efforts. A 1993 BAT public affairs review for the Indian subcontinent provides important information on PTC’s relationship with government. PTC reported its overall government relations as “good”, and that its chairman, deputy managing director and marketing director attended meetings with senior government officials and ministers (117). PTC met with officials of the Central Board of Review and Ministry of Finance on a regular basis to discuss excise taxation issues and, through its lobbying, obtained a three-tier ad valorem excise tax structure in May 1992 (117). PTC officials also met with government officials and ministers socially through dinners and functions hosted by the company and the government, as well as at prize distribution ceremonies and end-of-event dinners for sponsored sports events (117). PTC also reported

that at LTC, the “company no. 1” was a member of the Senate who was “reputed to have bought membership” and spends “a lot of money to ‘entertain’ senior officials” (117).

In addition to winning a favourable excise tax structure, transnational tobacco companies actively lobbied government to reduce competition from domestic tobacco company tax evasion and obtained support from the Minister of Finance for their youth smoking prevention programme. Transnational tobacco companies also responded to government requests for the company to diversify its operations to continue a favourable environment for its tobacco business. These examples, along with information from the 1993 corporate affairs review, show how intertwined transnational tobacco companies are with government officials and the ways in which the tobacco industry works to influence policy-makers.

A second area of consistency among transnational tobacco companies is resistance to tobacco control measures. For example, in 1993 PTC felt that an electronic media ban for tobacco products was possible (117) but that engaging in cricket sponsorship would provide an opportunity not only to increase the visibility of its brands, but also to work around a media ban. Similarly, second-hand smoke and potential smoking bans in Pakistan were of concern to BAT. PTC had received company-prepared “ETS booklets”, “Q’s and A’s on ETS”, and “anti-smoking ETS materials” – likely similar to the “position papers” described above (117). These documents were for PTC to use in developing a strategy paper outlining a plan to deal with potential second-hand smoke issues, which it was pursuing with the national manufacturers association (117). The smuggling of cigarettes into Pakistan is a third way transnational tobacco companies undermined tobacco control efforts. As discussed above, smuggling of cigarettes creates a market for international brands where one would otherwise not exist. BAT, in particular, moved to actively control the smuggling of cigarettes into Pakistan as a way to stabilize its transit business.

Conclusion

The view of transnational tobacco companies in Pakistan that emerges from documents during this period is a cutting-edge industry where individual companies are constantly seeking a competitive advantage through changes in manufacturing, branding, marketing and pricing. A key component to tobacco industry success is to influence government to ensure industry-friendly policies and to resist and undermine tobacco control efforts. As it succeeds in its business objectives – increasing sale and consumption of cigarettes – the public and the government will suffer the disease and mortality consequences that indisputably accompany tobacco use. Though the consequences of increasing smoking in Pakistan have yet to fully impact the country's health system and economic productivity, evidence from other countries such as the United States makes plain that those effects will be felt. Comprehensive tobacco control measures should be implemented in Pakistan to prevent young people from starting smoking, to help existing smokers quit and to protect non-smokers from the proven dangers of second-hand smoke. Short-term sacrifices in excise and agricultural output are likely to result, but the long-term health savings and increase in productivity will have lasting social and economic benefits.

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