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REEP: Research Unit on the Economics of Excisable Products

with the

WHO FCTC Knowledge Hub on Tobacco Taxation

Newsletter #34, November 2024


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Director's Message

Dear Friends,

We are pleased to share this packed last newsletter of 2024. Many things have happened over the past two months. REEP staff attended global meetings and conferences, three papers were published, and REEP was reviewed by the University of Cape Town's Research Committee.

But first: we are delighted to announce that the five-week Tobacco Taxation 101 online course will start on 10 February 2025. Please see [here](#). We received positive feedback from participants who attended the course when it was first offered in May and June 2024. We are currently making some adjustments to improve the course.



Over the past two months, REEP staff have traveled far and wide. Estelle Dauchy and I attended a workshop in Dakar, Senegal, on [health taxes in the ECOWAS region](#). Leoné Walters attended meetings in [Washington DC](#) and in [Tübingen, Germany](#). Mxolisi Zondi attended a meeting focused on domestic resource mobilisation in [Abidjan, Cote d'Ivoire](#). Zunda Chisha attended a meeting in [Nairobi, Kenya](#), on health tax earmarking organised by the African Tobacco Control Alliance. He also attended a conference in [Lusaka, Zambia](#), where he presented some preliminary results on the political economy of health taxes in Zambia. Estelle and Vanessa Darsamo attended the [Second African Conference for Tobacco Control](#) in Accra, Ghana. Closer to home, Nicole Vellios attended the launch of the [Health Tax Alliance](#) in Cape Town. The alliance aims to lobby for higher taxes on tobacco, alcohol, and sugar-

sweetened beverages in South Africa.

On publications, Sam Filby 's research on the tobacco price landscape in Africa featured in Tobacco Control. This paper will be a valuable resource to anyone who wants to conduct a country-specific or continental study on tobacco prices and taxes. Estelle, together with REEP research associate Hana Ross, and other co-authors, published a paper on [track and trace system compliance in Pakistan](#). I was a co-author of a [paper](#) with a previous Masters student, Tim Evans, on the share price performance of nine of the world's largest tobacco companies. A summarized version of the paper was recently published in [The Conversation](#).

We have our usual contributions about the developments at the [Tobacco Control Data Initiative](#), and Leoné's [report](#) on global research outputs in the tobacco control space.

As 2024 draws to a close, we extend our gratitude to our funders whose generous support and commitment makes our work possible. We wish you a happy and productive 2025.

Best regards

Corné van Walbeek

Director: Research Unit on the Economics of Excisable Products

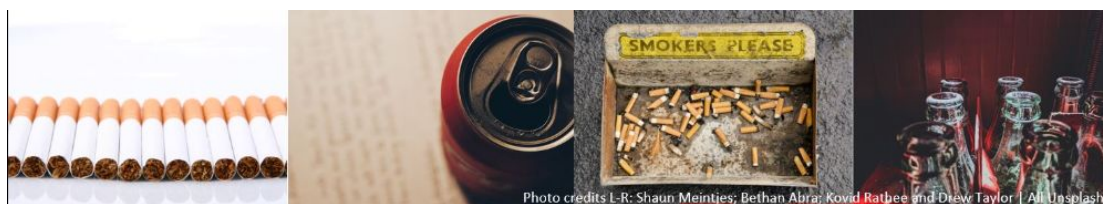


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NEWS: Research Unit on the Economics of Excisable Products

Upcoming Course: Tobacco Taxation - Enhancing Public Health through Effective Taxation

We're excited to announce the launch of the second edition of Tobacco Taxation 101 (TT101), an online course that explores how smart, evidence-based taxation can serve as a powerful tool for reducing tobacco consumption, improving public health outcomes, and generating vital fiscal revenues. This course is ideal for those interested in understanding the intersection of economics, public health, and sustainable development.

Starting on 10 February 2025, this online course is convened by the Research Unit on the Economics of Excisable Products (REEP) at the University of Cape Town, in partnership with Tax Justice Network Africa (TJNA) and Cancer Research UK.

What you will learn

Participants will gain foundational knowledge on:

- Designing effective tobacco tax policies
- Balancing health and fiscal goals
- Leveraging tax revenue for sustainable development

Through this course, you'll explore real-world case studies and gain insights into the practical aspects of implementing excise tax reforms. Whether you're a policymaker, researcher, or public health advocate, TT101 will equip you with the tools and knowledge to advocate for impactful tobacco tax policies.

Enrol today!

For [more information](#) and to [register](#), visit the [REEP website](#).

Online Course

Tobacco Taxation 101



Join us in advancing public health through smarter tax policies.

Nicole presents at the launch of the Tax Health Alliance



On 16 & 17 October 2024, Nicole attended the launch of the Health Tax Alliance in Cape Town. The event, organized by the [Rural Health Advocacy Project](#) (RHAP), was titled 'South Africa's health taxes: collaborating to strengthen the public health arguments'. The alliance is a coalition of public health advocates academics, community members and journalists from various sectors working together to advocate for higher taxes on tobacco, alcohol, and sugar-sweetened beverages.



Dr Yogan Pillay from the Bill & Melinda Gates Foundation gave the keynote address, titled 'Can current interlinked crises stimulate the structural and policy choices required for healthy societies?'. The presentation was based on a 2024 publication [in the BMJ](#).

Nicole presented on tobacco and alcohol taxes. On tobacco, Nicole focused on excise taxes, and how these have changed over time. She also spoke about illicit cigarette trade, drawing on research from [a recent paper](#) that estimated the lost revenue. On alcohol, she presented on [a recent report](#) that reviewed excise taxation on alcohol in South Africa.

Two REEP members attend health taxes workshop in West Africa

Many West African countries have implemented better tax structures on tobacco and alcohol over the past five years, although there is still much room for improvement. That is the main message from a workshop organized by the World Bank's Global Tax Programme and the ECOWAS Secretariat, which was also attended by Corné van Walbeek and Estelle Dauchy from REEP.

The workshop, which was held on 8-9 October 2024 in Dakar, Senegal, brought delegates from most of the 15 members of the Economic Community of West African States (ECOWAS). In December 2017 ECOWAS passed a tax directive that changed the tobacco excise tax from a purely ad valorem tax (levied at between 50% to 150% of the CIF value) to a mixed system of at least a 50% ad valorem tax and a specific tax of at least 0.40 USD per pack of cigarettes. At the same time, the West African Economic and Monetary Union (WAEMU), a group of eight countries that form a subset of ECOWAS, implemented a tax directive that required its members to impose a minimum ad valorem tax of 50%. There was no requirement to implement a specific component.



At the workshop, the country delegates reported on progress on implementing these directives. Some countries, notably Cabo Verde, have implemented tobacco excise tax rates well above the ECOWAS requirements, and reported substantial increases in government revenue and reductions in tobacco consumption. WAEMU countries have generally implemented the (much less demanding) WAEMU directive, but not the specific tax component, as required by the ECOWAS directive. Delegates discussed the possibility of aligning the WAEMU tobacco tax directive with the ECOWAS directive, but this seems to be mired in political controversy. On the positive side, even though the WAEMU alcohol excise tax directive does not prescribe a specific tax component, a number of WAEMU countries have adopted a specific component on the alcohol excise tax.

A substantial number of countries report that illicit trade and smuggling across porous borders is a substantial hindrance to increasing the excise tax. Tax harmonization in the region may reduce some of these incentives for cross-border smuggling.

Most countries in the ECOWAS region have ratified the Protocol to Eliminate Illicit Trade in Tobacco Products, and a number are implementing its provisions, like track and trace systems, etc. It is clear that progress in increasing excise taxes and curbing illicit trade in the ECOWAS region is uneven, but, compared to, say, a decade ago, much progress has been made.

Leoné Walters presents research on women in tobacco agriculture in Germany

At a recent workshop at the Eberhard-Karls-Universität Tübingen, Germany, Leoné Walters presented her work-in-progress entitled "*Tobacco is a man's crop: A historical perspective on women in tobacco cultivation in Malawi*". The objective of this research is to provide historical context to the institutions affecting women in tobacco cultivation in present-day Malawi. This research was motivated by the numerous accounts of the historical and contemporary challenges faced by women in tobacco agriculture. Once this work is published, we will report on it in the REEP Newsletter.



The 'Exploring Gender, Human Capital, and Labour Intersections in Economic History' workshop aimed to bring together researchers in economic history who are interested in human capital and labour from a gendered perspective. The presentations covered a wide range of time periods, regions, and industries. It was insightful to learn how researchers employ economic analysis of historical data to address important contemporary research questions that impact individuals, both women and men, and societies.

ATCA Summit on Innovative Financing for Health Promotion: Insights and Outcomes

The *African Tobacco Control Alliance (ATCA)* held a "Summit on Innovative Financing for Health Promotion," from October 7–9, 2024. The summit aimed to deepen African stakeholders' understanding of sustainable health financing, especially through earmarked tobacco taxes for public health programs.



The summit convened African fellows who had previously visited ThaiHealth to learn from its successful model of health promotion financing. Funded by a 2% surcharge on tobacco and alcohol excise taxes, ThaiHealth exemplifies how independent bodies can enhance health outcomes through dedicated prevention programs. ThaiHealth has become a prominent example of an autonomous health promotion body that effectively uses tobacco tax revenue to advance public health objectives.

The Knowledge Hub Programme Director, Zunda Chisha, contributed a presentation highlighting how tobacco taxes represent a "win-win" for both public health and government finances. He underscored the importance of fiscal policies that align with health objectives, noting that well-implemented tobacco taxes not only reduce consumption but also provide a sustainable fiscal base.

Representatives from Kenya, Côte d'Ivoire, Niger and Senegal shared national experiences and strategies related to health promotion financing. The summit was organised in collaboration with the South East Asian Tobacco Control Alliance (SEATCA) and the Thai Health Promotion Foundation (ThaiHealth).

REEP participates in Washington DC meetings on Tobacco and Alcohol Taxation in Latin America



Credit: Arantxa Cayón (PAHO)

Leoné Walters attended the “Advancing Tobacco Taxes in Latin America” workshop at John Hopkins Bloomberg Centre in Washington DC from 28 to 30 October 2024. This workshop was followed by a one-day meeting on 31 October at the Pan American Health Organization (PAHO) headquarters, focused on alcohol taxation in Brazil, Columbia and Mexico.

The meetings brought together policymakers from ministries of health and finance, public health professionals, academics and technical experts to discuss ongoing economic and health challenges in the Latin American region, and how health taxes can be employed to reduce the burdens of tobacco and alcohol use.

During the four days the importance of tobacco and alcohol taxation as a public health intervention was highlighted, along with its beneficial impact on public finance through the government revenue generated. The presentations on tobacco taxation further emphasised that increased taxation is not the cause of illicit trade, and tax reductions are not its solution. By implementing the Protocol to Eliminate Illicit Trade in Tobacco Products, and strengthening tax administration, countries can achieve substantial increases in taxation.

Although the meetings focused on Latin American countries, parallels can be drawn to African countries. Developing countries face similar challenges in the effective and efficient formulation and implementation of tobacco and alcohol taxation.

These meetings were co-organised by PAHO/WHO, the World Bank, Johns Hopkins University's Institute for Global Tobacco Control and Economics for Health, and the Organization for Economic Co-operation and Development (OECD).

REEP member attends the Zambia Health Research Conference: Advancing Health Taxes for Sustainable Health Systems

The 11th Zambia Health Research Conference, held from October 14-17, 2024 in Lusaka, considered the theme “Sustainable and Resilient Health Systems: Accelerating Progress towards Universal Health Coverage in the Face of Service Delivery Challenges, Emerging Diseases, and Pandemics”.

Zunda Chisha presented preliminary findings from a study on Zambia’s political economy of health taxes. This study explores how health taxes could advance both fiscal and public health goals in Zambia. The study was funded by the WHO Alliance for Health Policy and Systems Research (AHPSR) and conducted with the University of Zambia’s Department of Economics.



Preliminary findings from the study underscored a disconnect between Zambia’s economic and public health objectives, revealing that health taxes were an underutilised tool for balancing these priorities. This policy gap reflects broader issues of coherence found in the country’s national strategies.

Moving forward, the research team plans to publish their findings to contribute to ongoing discussions on enhancing the role of health taxes in Zambia’s journey toward universal health coverage.



Prof. Felix Masiye (University of Zambia) and Zunda Chisha (UCT)

Mxolisi Zondi represents REEP at Africa Think Tank Summit in Cote d’Ivoire



Mxolisi Zondi recently represented REEP at the Africa Think Tank Summit in Abidjan, Côte d'Ivoire. The summit was hosted by the African Capacity Building Foundation.

At a side event that focused on the of tobacco taxation in domestic resource mobilisation, Mxolisi delivered a presentation titled *Tobacco Control and Public Revenue Mobilization: Theoretical Insights*. This presentation highlighted pressing public health challenges that tobacco use poses across Africa and explored how tobacco excise taxes could be a useful tool for domestic revenue mobilization.

The side event brought together stakeholders from across Africa, featuring a diverse panel that included finance ministry officials from Côte d'Ivoire, Kenya and Chad. Country-specific discussions highlighted the potential of earmarking tobacco tax revenues for development projects, the effectiveness of tobacco taxes in influencing tobacco use, and the growing threat of illicit trade.

2nd Africa Conference on Tobacco Control and Development

A number of REEP staff and one PhD student participated in the *Second African Conference for Tobacco Control*, which was held in Accra, Ghana, from 13 - 14 November 2024, with the theme "Breaking Barriers, Building Futures: Advancing the Tobacco Control Ecosystem in Africa".

Estelle Dauchy was part of a panel discussion on taxation, earmarking and sustainability. Among many tobacco control advocates there is an implied understanding that, for excise tax increases to work well, at least some of the earmarked revenues must be earmarked for public health and/or tobacco control purposes. This excessive focus on earmarking is not always justified. An increase in the excise tax increases the retail price, and the higher price discourages tobacco consumption. What happens with the revenue is a second-order question.

Estelle noted that international organizations advise that if there is not a solid administrative structure dedicated to earmarking, earmarks can be misallocated and mis- or under-used, which defeats the objective of increasing funding for dedicated causes. Earmarks introduce rigidity in public budgets, which is why they are unloved in most Ministries of Finance. Nevertheless, when countries face public finance frictions, earmarking could help increase health funding.

Estelle mentioned that soft earmarks provide more flexibility. They are not legislated, but are defined annually during the budgetary process. A well-designed excise tax system can be extremely effective in reducing tobacco consumption, and the associated health burden over time. Most African countries still employ tax systems that do not comply with best practices, and excise taxes in Africa are among the lowest in the world. Estelle stressed that effective, well-designed tax systems are more likely to curb tobacco use, while simultaneously raising tax revenue.

The following oral and poster presentations were made (in-person and remotely):

- **Vanessa Darsamo**: Making cigarette taxes more effective in Mozambique.
- **Retselisitsoe Pokothoane**: The use of electronic cigarettes and nicotine pouches among adolescents in the DRC and Kenya.
- **Estelle Dauchy**: The price elasticity of electronic nicotine delivery systems (ENDS) and cross price elasticity with cigarettes and heated tobacco: Cross Country Evidence.

The conference was organized by the African Capacity Building Foundation (ACBF), and the Center for Tobacco Control in Africa (CTCA), and was attended by more than 160 attendees from across Africa.



From left: Estelle Dauchy (REEP), Patience Yakobe (ACBF), Pape Yona Mane (CRES), Barassou Diawara, Irene Otieno (National Taxpayers Association), John Njenga (TJNA), Labram Musah (Vision for Alternative Development), Oumar Ba, (MoH Senegal).

Paper on performance of tobacco shares published in *Tobacco Control*

Tobacco shares have substantially underperformed the market since 2016, according to a recent paper published in *Tobacco Control*. The paper, entitled “[Investigating the financial case for investing in, or divesting from, tobacco investments](#)” is based on Tim Evans’s Masters thesis, which was supervised by Corné van Walbeek. The third author, Ayesha Sayed, is a senior lecturer in the Department of Finance and Tax at UCT.

In the paper, the authors consider nine of the ten largest multinational tobacco companies and analyse aspects of their stock market and financial performance between 2008 and 2023. They find that tobacco shares greatly outperformed the market between 2008 and 2016, but that this has reversed in the subsequent nine years. Cigarette sale volumes have been decreasing consistently over the 16-year period. In the earlier years the tobacco companies were able to offset the decrease in sales volumes by increasing the average price per stick, but in later years this has become increasingly more difficult.



Many established tobacco companies are diversifying into novel nicotine products (such as heated tobacco products, e-cigarettes and oral nicotine pouches) to offset the revenue lost from combustible cigarettes. Some, notably Philip Morris, have been more successful at this than others. While these new products will most certainly provide a new and growing revenue stream for established tobacco companies, they are likely to cannibalize existing products, especially as competition intensifies with new entrants outside the traditional tobacco industry. At the same time, the external environment for novel products is likely to become more hostile in coming years, as these novel products are increasingly being regulated.

While the moral argument for investors to divest from tobacco investments is obvious, this paper only considers the financial case. The authors conclude that “the tobacco industry’s growth trajectory is uncertain, and as a consequence, the financial rationale for including tobacco stocks in a portfolio is not readily apparent, especially as the ongoing decline in the cigarette business is expected to persist.”

REEP staff co-author a paper about Track and Trace compliance in Pakistan

Although Pakistan has a fully implemented Tracking and Tracing System since July 2020, compliance with the system has been poor. This is the main finding of a recently published paper, "[Evaluating Compliance with Track and Trace and Other Regulations in Pakistan's Cigarette Market](#)" in *Tobacco Control*, co-authored by Estelle Dauchy and Hana Ross.

In Pakistan the excise tax on cigarettes has increased by at least 200% since 2020. Illicit trade in Pakistan is high, although the exact magnitude of the illicit market is unclear. The Federal Bureau of Revenue (FBR) implemented a Tracking and Tracing System (TTS) in July 2022.

The study evaluates the degree of compliance with the tax stamp requirement and the penetration of illicit cigarettes since the implementation of the TTS. The authors collected empty cigarette packs at waste recycle stores covering the ten most populous cities in Pakistan during April 2023. The authors found that 32.4 % of cigarette packs lacked tax stamps. Though non-compliance was present across all brands, it was about 5 to 10 times larger for smaller domestically-produced brands than for international brands.

The study also explored compliance with other regulatory requirements, such as the presence of textual and pictorial health warning labels, underage warnings, and indication of place of production and manufacture. The study found that 23.7% of the packs collected did not comply with these additional requirements, independently from tax stamps. In total, 36% of cigarette packs did not comply with either the tax stamps or the other requirements. The study also evaluated compliance with minimum price laws (MPLs). Minimum prices had been updated shortly prior to the study. The study finds that 62% of the packs collected had been sold below the new minimum price, but that 98% were compliant with prior minimum prices.

Overall the study highlights the need for stronger enforcement and additional regulatory support, such as border controls and licensing to ensure that all manufacturers adhere with the TTS. Though registration of brands does not guarantee compliance with all regulations, registering a brand with the FBR appears to be positively correlated with compliance. The authors encourage the government of Pakistan to implement additional enforcement measures to enhance the performance of the TTS, and to impose severe penalties on non-compliers.

Dr Estelle Dauchy is a recently appointed Principal Research Officer in REEP, and Hana Ross is an Honorary Research Associate in REEP.

The paper is available [here](#) (subscription or institutional access required to read the whole paper).

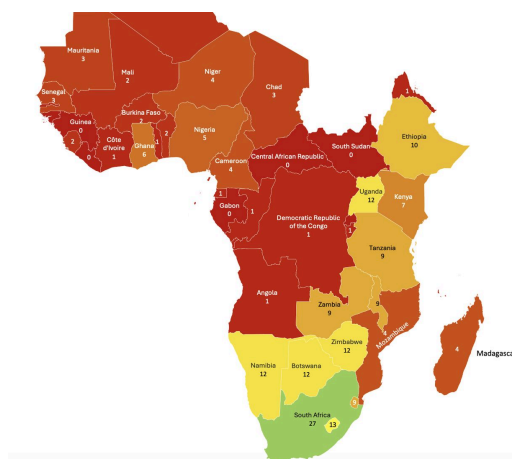
Study on the African cigarette price data landscape is published in Tobacco Control

Sam Filby recently published an article in *Tobacco Control* entitled [The African cigarette price data landscape: An overview of gaps and opportunities](#).

The article locates and describes free datasets that provide information on cigarette prices in African countries, and identifies opportunities for:

improving the frequency and coverage of cigarette price data collection in the region. It was written with the purpose of helping researchers and funders to identify those African countries in which little is known about cigarette prices, and where skills and resources are most necessary to obtain a comprehensive understanding of the cigarette price landscape in the region.

The study also serves as a reference point for researchers seeking a roadmap of the different sources of cigarette price data available for African countries.



Number of times information on cigarette prices has been collected in each WHO-AFRO country

In the article, Sam argues that a broader base of cigarette price information for the African region could be obtained through proactive efforts by the tobacco control community. These efforts should include lobbying governments to leverage existing surveys that already collect information on cigarette smoking behavior across the continent (such as the MICS, DHS and STEPwise surveys), to also collect information on the prices that people pay for the cigarettes that they smoke.

This paper was the fifth of five papers that have been funded by the CDC Foundation. The funding aimed to support REEP in investigating important economic relationships in tobacco control in Africa. When it comes to tobacco control, Africa is often under-researched. This paper is part of a strategy to address this.

Read the full news article on the REEP website [here](#), and access the paper itself, [here](#).

Tobacco Control Data Initiative (TCDI) Update

The TCDI team has conducted a series of capacity building exercises with different stakeholders in the respective countries:

- In DRC, the team shared findings from the illicit trade study with 26 provincial public health inspectors. This training also included capacity building on key FCTC articles. The outcome of this training was for participants to know the difference between licit and illicit products and stipulations of the law.
- In Nigeria, the team conducted an M&E training with Ministry of Health officials. This training included developing comprehensive questionnaires, developing indicators, qualitative and quantitative data collection methods and developing M&E plans.

The TCDI team had an opportunity to showcase their work in two conferences in November 2024. At the Union World Conference on Lung Health, the team showcased three studies: **Factors associated with Shisha Smoking: results from a cross-sectional telephone-based survey among general population adults in Nigeria**, **Tobacco smoking attributable mortality in Kenya, 2012-2021** and "Prevalence Of E-Cigarette Use; Profile Of E-Cigarette Users; and Relationship Between E-Cigarette Use and Cigarette Smoking in South Africa."

In Accra, during the second Africa Tobacco Control Conference and Development, the TCDI presented their recent research on illicit tobacco trade in Zambia, illicit tobacco trade in DRC, **Patterns of tobacco use among patients with tobacco-related illnesses** and **Determinants of non-compliance to tobacco advertising, promotion, and sponsorship ban laws in Ethiopia among sellers at the points of sale**.

New Research on the Economics of Tobacco Control: November 2024

This **Appendix**, compiled by Leoné Walters, aims to keep you updated on the latest research in the field of economics of tobacco control. In this section, introduced in the July 2024 newsletter, we provide summaries and abstracts of the latest research that has been published about the economics of tobacco control, as a service to the research and policy community.

Please reach out to leone.walters@uct.ac.za if you would like to publicise your working papers and new publications.

Read the November Appendix [here](#).

In the Media

- Corné van Walbeek and Tim Evans published an Op-Ed, "**Tobacco isn't a good investment – study shows a decline in stock prices since 2016**" on 20 November 2024, in the Conversation. The piece co-published in the **Econotimes**, in **Modern Ghana**, and the **Tolerance Webzine** and as "**Tobacco has lost its flavour**" in The Citizen on 21 November 2024.
- On 14 November, Corné van Walbeek was interviewed on the Cape Talk 702 early breakfast show, about "**Changes to tax on alcoholic drinks are coming! How to comment...**" and again on the Cape talk radio afternoon drive about "**National Treasury proposes tax measures to curb hazardous alcohol use**".
- 2 Nov 2024: Estelle Dauchy was interviewed by the *Bhekisisa* on novel tobacco products, especially e-cigarettes, in South Africa: "**Will SA's new vaping laws lead to more smokers instead of fewer?**". The article also appeared in **News24** on 4 Nov.
- Additional media coverage includes: "Gov could regulate vaping in SA – what that means for vapers" on 5 Nov in **Head Topics** and in **Hypertext**, and as "**Will vaping laws lead to more smokers?**" in Juta medical brief on 6 Nov.
- .25 Oct 2024: Illicit trade and lost revenue paper cited in this article in the *Business Day*: **New smoking laws for South Africa heat up**.
- 21 Oct 2024: Tamar Kahn, writing for the *Business Day*: **Push for higher taxes on sugary drinks, booze, tobacco** (read full press clipping [here](#)).
- 7 Oct 2024: Covid-19 lockdown surveys and lost revenue paper cited in this article in *Business Tech*: **South Africa's massive tobacco ban fumble**.
- In October 2024, the Rural Health Advocacy Project published: **RHAP launches Health Tax Alliance to help save the public health system**.

BusinessDay

■ NATIONAL / HEALTH

Health activists push for higher taxes on sugary drinks, booze and tobacco

SA Canegrowers pushes back against campaign for increasing and broadening taxes on sugary drinks

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If you have any comments or feedback on this e-newsletter, or suggestions for possible story ideas for our next issue, please get in touch with the REEP team, by emailing us at:

tobaccoecon@gmail.com

And contact the WHO FCTC Knowledge Hub on Tobacco Taxation team at:

tobaccotaxationkh@gmail.com



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