



Cigarette Retail and Wholesale Price Research

Gauteng – Free State – Western Cape

Published:

April 12, 2021

Commissioned by British American Tobacco South Africa

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1. Governance Statement

We herewith confirm the results of the study to be an Ipsos Pty Ltd body of work. Ipsos was commissioned by British American Tobacco South Africa (Pty) Ltd (“BAT”) to carry out research into the cheapest purchase prices in the tobacco cigarette market.

The study is free of interference from the commissioning company. BAT had no role either of oversight or influence in the selection of the sample stores, researchers employed for the study, any part of the quality control process, nor in the analysis of the data. All data, and associated research intellectual property remain the sole property of Ipsos Pty Ltd.

For purposes of preservation of purchased items for any legal challenges or requirements, all samples and proof of purchase invoices have been placed in sealed evidence bags for future use. The samples have been stored in a secure location.

In order to address bias in the study, all results tabled in the executive summary and mini report cover all manufacturers of products found in the market for the study. No specific brand, manufacturer, retailer, or wholesaler was discriminated against, and all were within the scope of the study by virtue of its design. The only limitation applied for the study was that the retailer must be a tobacco retailer in either a form of a branded retail chain or forecourt, or an independent retailer not linked to any organized branded retail chain.

2. Methodology

In order to answer the research question British American Tobacco had posed, having considered other potential approaches to answering the research question, Ipsos Pty Ltd selected the Mystery Shopper methodology as the most appropriate approach.

The mystery shopper approach is a widely used research approach, which has been applied in many scenarios requiring mimicking shopper experience across the globe. The approach is generally used to understand brand metrics such as pricing, promotional items, and consumer experience of product in store or the store experience. Various sectors use the approach for a myriad of market research questions related to consumer experience.

Mystery shopper as a research approach can be utilized to answer the following instances and business questions:



Applying the method, the responsibility of the researcher is as follows:

Mystery shopping approach to price checking studies:

- Shopper poses as an actual consumer at retail location
- Shopper enquires at retailer for brand/s availability and price options
- Shopper requests cheapest pack price

The process of the research explained.

For the study it was important that the process followed be governed Ipsos' strict market research guidelines, as defined within the Ipsos Pty Ltd approach to market research, and subject to quality assurance. The following research process was applied:

- Sample stores, representing the universe for both modern and informal trade across Gauteng, Free State and Western Cape were identified;
- Ipsos field interviewers conducted a mystery shop at the sampled stores and posed as a regular consumer and gathered the information for the research by:
 - Casually enquiring about the cheapest selling cigarette brand available in the store, without specifying any brand preference
 - Purchasing the cheapest cigarette brand available at the time of the visit;
 - Only one pack/carton was purchased per store thus meaning that throughout store = pack/carton
- Once the interviewer left the store, they recorded the price, region and name of the store on a CAPI device. The purchased cigarette product was then labelled and placed in a sealable bag and the bag was labelled with the following details: date, store details, region, product, price, interviewer name and signature;
- These products were then delivered to Ipsos head offices, matched back to the store visited, verified, and kept in a secured room as proof of purchase; and
- Throughout the fieldwork process, Ipsos had the following quality control checks in place:
 - Local & regional supervisors did control checks on prices paid and specific products purchased;
 - The data collected on the platform was run through a scripted quality control check to highlight any omissions, anomalies or inconsistencies'
 - The acceptable pricing parameters formed part of the script checks;
 - Regions and areas were matched backed to the original sample selection to ensure that the sample spread will ensure representation of the total market; and
 - 10% spot checks done on products purchased vs data collected.

3. IPSOS Fieldwork WAVE 2

Total Duration: 17-23 March 2021

Field days: 17-22 March 2021

Quality check and re-shop days: 23 March 2021

(**WAVE 1**- Total Duration: 11-16 February 2021; Field days: 11-14 February 2021; Quality check and re-shop days: 15-16 February 2021)

4. Questions asked by IPSOS field worker

Researchers were briefed to ask the following question:

"I want to buy the cheapest 20 pack available"; and
"I want to buy the cheapest carton available".
No price negotiations were allowed.

5. Research retail price point definitions

Excise rates March:

R18.79 for 20 sticks (1 pack), or R187.90 for 200 sticks (1 carton)

[Sec 37 of the Customs and Excise Act, No. 91 of 1964 – Schedule No 1, Part 2A, Tariff Item 104.30.07]

MCT = Minimum Collectable Tax (Excise rate +15% VAT)*

R21.61 for 20 Sticks (1 pack) or R216.10 for 200 Sticks (1 carton)

**[Sec 7 of the Value-Added Tax Act, No. 89 of 1991]*

Research price points ranges

1. R20.00 and below for a pack of 20 sticks – R200.00 and below for a carton of 200 sticks
Price point is used as reference price point for below MCT sales before excise rate change and used in this report to analyze the price trend after excise increased as to R18.79 as of end February 2021
2. R21.60 and below for a pack of 20 sticks – R216.09 and below for a carton of 200 sticks
Price break down 20 sticks: R21.60 is below the MCT of R21.61
Price break down 200 sticks: R216.09 is below the MCT of R216.10
3. R22.00 and below for a pack of 20 sticks – R220.00 and below for a carton of 200 sticks
Price break down 20 sticks: Excise R18.79; VAT R2.87; Total Net Margin** R0.34
Price break down 200 sticks: Excise R187.90; VAT R28.70; Total Net Margin** R3.40
4. R25.00 and below for a pack of 20 sticks – R250.00 and below for a carton of 200 sticks
Price break down 20 sticks: Excise R18.79; VAT R3.26; Total Net Margin** R2.95
Price break down 200 sticks: Excise R187.90; VAT R32.60; Total Net Margin** R29.50

**Total Net Margin must cover Manufacturer margin and all costs related to production, leaf, material, supply chain, Retail and Wholesale margins.

6. Research Scope

Total defined retail universe comprises 50 257 stores based off hot spot regions selected namely Free State, Gauteng and Western Cape. The sample of the total national universe used for the research (the “Representative Sample”, identified in the tables below under the heading “in scope”) was modeled based on the national retail universe.

Table: Statistical representative sample of study for the three provinces

	Universe	Sample	SE
Defined National	47,849	668	3.5%
REGION/GEOGRAPHY			
Free State/Northern Cape	6,625	150	7.3%
Gauteng	31,325	320	5.0%
Western Cape	9,899	198	6.3%
CHANNEL			
H SHOP / SPAZA	24,127	410	4.4%
In Sup/Corner Cafe	5,415	309	5.0%
Table Top/Hawker	16,416	188	6.5%
Wholesale	4,299	93	9.3%

However, in order to get a better understanding of the selected regions for the study, a boost was applied to the sample, to get a more granular view of the provinces. The reason for the selection of the three hot spot provinces, was to follow up on the Price Research from February 2021 and to understand the prevalence of illicit activity within the province, given the provinces were significantly more impacted by availability of below MCT pricing averaging 69.3% between them vs an average of 41% nationally. This significant disparity in availability of low pricing below or at R20.00 is of particular interest for understanding low pricing trends.

Thus, the review of the three most affected provinces in deep low pricing trends, provides a good proxy to understand the market behavior pre and post the excise rate change initiated by the National Treasury excise rate proposals. The basic understanding being that the most affected provinces would see a price shift driven by tax increases if the manufacturers of the product were compliant with the tax laws. In other words, the cheapest prices in the market on average should be at a higher price point than the previous study WAVE.

Table: Study Sample

Channel	Free State	Gauteng	Western Cape	Channel Total
Modern Trade Grocery	74	220	159	453
Modern Trade Forecourts	65	143	151	359
Non Organized Informal	777	908	780	2465
Wholesale	83	242	108	433
Sample Total	999	1513	1198	3710

Table: Non Organized Sample Sub Channels

Non Organized Informal	Free State	Gauteng	Western Cape	Sub - Channel Total
Corner Café / Convenience	52	125	98	275
Spaza	447	446	377	1270
Table Top / Hawkers	278	337	305	920
Sample Total	777	908	780	2465

Sub-channel definitions:

- Modern Trade Grocery: branded organized trade (Grocery). Referred to as Modern Trade in study
- Modern Trade Forecourts: branded forecourts (Petrol Retail Stores). Referred to as Forecourts in study
- Non organized informal: corner café/ convenience; spaza; tabletops / hawkers
- Wholesale – wholesale; semi wholesale / informal general dealer; cash and carry

Sample process:

- A sample was designed to represent the South African cigarette universe at a provincial level as well as at major channel level.

Sampling approach:

- Universe information available based on an earlier sample census conducted by Ipsos was used to establish a representative sample.
- Standard errors at all reporting levels were below 8%.

Both Non Organized Informal and modern trade stores were covered to ensure a national view of low prices on cigarettes.

7. Analysis model

All price points were allocated to specific price groups based on the segmentation referred to in Section 5 above.

From the data gathered, the price points were arranged from lowest to highest price point recorded. This was done for packs and separately for cartons.

Furthermore, the number of times each price point presented itself in the study was noted.

Each brand was analyzed individually to record the proportion of occurrences at each price point as defined in Section 5.

These occurrences were aggregated at a provincial and channel level to provide a holistic view of the distribution of low(est) price point for different brands of cigarettes across SA.

Due to the shopper behavior in the Tabletop/Hawker channels (where most of the purchases are done per stick), higher than average pack prices were captured.

This was a result of the conversion ratios (by store owners) used to determine a pack price (sticks x 20) on the per stick pricing strategy.

DISCLAIMER: “Brand manufacturer identification was determined by on pack descriptor and where required through online GTIN barcode searching.”

8. Key Research Results – hot spot focus

8.1 Results of purchased products in total sample at defined price points:

In the key hotspot regions of Gauteng, Free State and Western Cape post the price increase of excise in February 2021 shows a trend of increased availability of R20.00 and below pricing, from 69% of the provinces' sample to 73% of sample.

In comparison Gauteng saw an increase in availability of the R20.00 and below prices, moving up by 8% to 70% of outlets recording their cheapest product as R20.00 or lower prices. Free State still leads the country with the highest availability of R20.00 and below pricing at 81% of total provincial sample.

Lowest pack price recorded in the second study was R8.00 in Wholesale for a product called W33D manufactured by an unknown manufacturer in Gauteng. Remington Gold by Gold Leaf Tobacco Zimbabwe had the lowest price in the Free State sample retailing for R10.00 a pack, whilst Golden Flake by Afroberg Tobacco at R12.00 a pack was the cheapest in the Western Cape.

Table: Provincial incidence by price category

Province	Outlets in Scope		Cheapest price		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
Free State	449	996	R9.00	R10.00	76%	81%	77%	81%	78%	82%	87%	86%
Gauteng	709	1,499	R9.00	R8.00	62%	70%	64%	70%	66%	73%	79%	78%
Western Cape	483	1,078	R10.00	R12.00	73%	71%	73%	71%	73%	71%	78%	78%
Grand Total	1,641	3,573	R9.33	R10.00	69%	73%	70%	74%	71%	75%	81%	80%

8.2 Sales channel penetration

Highest incidence of R20.00 and below is observed in Wholesale (87%) and Non Organized Informal (93%) and this has increased since last reading. Modern Trade outlets who sold a pack of cigarettes below R20.00 and below has increased by 3% to 11% of the second study sample. This is higher than the national average of 5% of Modern Trade outlets visited.

Table: Channel availability by price category

Channels	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
FORECOURT	166	359	1%	5%	1%	5%	1%	5%	4%	8%
Non-Organized Informal	1114	2466	88%	93%	89%	94%	90%	95%	96%	98%
Modern Trade	180	457	8%	11%	8%	11%	8%	11%	42%	28%
Wholesaler	181	291	81%	87%	83%	88%	83%	91%	93%	94%
Grand Total	1641	3573	69%	73%	70%	74%	71%	75%	81%	80%

8.3 Manufacturer penetration

Gold Leaf Tobacco Corporation products still showing highest incidence of price recorded below MCT level followed by Carnilinx and Afroberg Tobacco. GLTC increasing to 85% price incidence of their products found selling below MCT level. It must be noted that the brand Remington Gold manufactured by Gold Leaf Zimbabwe is the main driver of the dominance of the Gold Leaf Tobacco Corporation in availability.

Note: it must be noted that when we remove Remington gold from the GLTC roster, 51% of the GLTC portfolio still has the most mentions at R20.00 and below.

Table: Lowest price incidence by Manufacturer

Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
Gold Leaf Tobacco Corporation	763	1,527	72%	84%	75%	85%	77%	85%	92%	94%
BAT	204	521	1%	0%	1%	0%	1%	0%	1%	0%
CARNILINX	283	386	92%	90%	92%	91%	92%	91%	98%	95%
AFROBERG TOBACCO	46	314	100%	100%	100%	100%	100%	100%	100%	100%
MANGO INVESTMENTS	-	133	0%	99%	0%	100%	0%	100%	0%	100%
BEST TOBACCO	46	117	72%	55%	72%	57%	72%	77%	85%	99%
GLOBAL TOBACCO	35	76	97%	99%	97%	99%	97%	99%	100%	100%
PROTOBAC	19	72	100%	99%	100%	99%	100%	99%	100%	100%
BARCO	36	70	100%	100%	100%	100%	100%	100%	100%	100%
FOLHA TOBACCO	41	70	66%	96%	66%	96%	66%	100%	93%	100%
OLOMIDE	48	67	100%	87%	100%	87%	100%	94%	100%	100%
Mastermind TOB	7	55	86%	91%	86%	91%	86%	91%	100%	91%
JTI	20	49	10%	0%	10%	0%	10%	0%	10%	2%
VAWDA AMALGAMATED HOLDINGS	17	44	100%	93%	100%	93%	100%	95%	100%	98%
OTHER	35	38	83%	76%	83%	76%	83%	76%	83%	82%
KTNG	1	12	100%	100%	100%	100%	100%	100%	100%	100%
PMI	14	11	0%	0%	0%	0%	0%	0%	0%	0%
AMALGAMATED TOBACCO	11	8	91%	38%	91%	38%	91%	38%	91%	38%
SAVANNAH ZIMBABWE	15	3	93%	100%	93%	100%	93%	100%	93%	100%
Grand Total	1,641	3,573	69%	73%	70%	74%	71%	75%	81%	80%

8.4 Brand Incidence

Following the national trend from the previous study, Remington Gold manufactured by Gold Leaf Tobacco Zimbabwe leads the brand listing of cheapest available products, accounting for 21% of the lowest prices in the study. At 99% of the products found of the brand selling at R20.00 and below, it is the dominant brand available, frequently mentioned at R15.00 a pack.

Table: Brand incidence by price category – total sample

Brand	Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
REMINGTON GOLD	Gold Leaf Tobacco Zimbabwe	269	632	98%	99%	98%	99%	99%	100%	100%	100%
PALL MALL	BAT	194	511	1%	0%	1%	0%	1%	0%	1%	0%
SAVANNAH	Gold Leaf Tobacco South Africa	231	365	72%	88%	78%	89%	82%	90%	96%	93%
SAHAWI	Gold Leaf Tobacco South Africa	104	297	96%	100%	96%	100%	96%	100%	97%	100%
SHASHA	CARNILINX	73	168	100%	100%	100%	100%	100%	100%	100%	100%
VOYAGER	Gold Leaf Tobacco South Africa	77	141	3%	6%	3%	6%	3%	6%	66%	67%
CAPE	AFROBERG TOBACCO	27	139	100%	100%	100%	100%	100%	100%	100%	100%
SEVILLE	MANGO INVESTMENTS	0	127	0%	99%	0%	100%	0%	100%	0%	100%
Red and Black	AFROBERG TOBACCO	14	125	100%	99%	100%	99%	100%	99%	100%	100%
CAESAR	BEST TOBACCO	46	117	72%	55%	72%	57%	72%	77%	85%	99%
RICHMAN	GLOBAL TOBACCO	35	76	97%	99%	97%	99%	97%	99%	100%	100%
SUPERMATCH	BARCO	6	70	100%	100%	100%	100%	100%	100%	100%	100%
WESTLEIGH	FOLHA TOBACCO	41	70	66%	96%	66%	96%	66%	100%	93%	100%
LEGENDS	Mastermind TOB	6	54	100%	91%	100%	91%	100%	91%	100%	91%
Premium	CARNILINX	14	52	100%	98%	100%	100%	100%	100%	100%	100%
F1	CARNILINX	9	49	100%	98%	100%	98%	100%	100%	100%	100%
KYRO	PROTOBAC	2	49	100%	100%	100%	100%	100%	100%	100%	100%
GOLDEN	AFROBERG TOBACCO	1	44	100%	100%	100%	100%	100%	100%	100%	100%
KINGS	VAWDA AMALGAMATED HOLDINGS	14	44	100%	93%	100%	93%	100%	95%	100%	98%
WINSTON	JTI	15	44	0%	0%	0%	0%	0%	0%	0%	0%
SHARP	Gold Leaf Tobacco South Africa	16	42	50%	26%	50%	26%	56%	36%	94%	79%
ATLANTIC	CARNILINX	22	36	0%	6%	0%	6%	0%	8%	77%	42%
CHELSEA	OLOMIDE	44	35	100%	80%	100%	80%	100%	89%	100%	100%
EXPRESS	OLOMIDE	4	32	100%	94%	100%	94%	100%	100%	100%	100%
DERBY	CARNILINX	26	28	100%	96%	100%	100%	100%	100%	100%	100%
RG	Gold Leaf Tobacco South Africa	57	28	14%	25%	21%	39%	25%	46%	65%	75%
MEGA	CARNILINX	34	24	100%	100%	100%	100%	100%	100%	100%	100%
BASTILLE	PROTOBAC	17	23	100%	96%	100%	96%	100%	96%	100%	100%
JFK	CARNILINX	3	17	100%	100%	100%	100%	100%	100%	100%	100%
Other	OTHER	0	15	0%	100%	0%	100%	0%	100%	0%	100%
CHICAGO	Gold Leaf Tobacco South Africa	9	12	56%	17%	56%	17%	56%	17%	56%	58%
PINE	KTNG	1	12	100%	100%	100%	100%	100%	100%	100%	100%
CHESTERFIELD	PMI	14	10	0%	0%	0%	0%	0%	0%	0%	0%
M23	Gold Leaf Tobacco South Africa	0	10	0%	100%	0%	100%	0%	100%	0%	100%
VIP	CARNILINX	57	10	100%	100%	100%	100%	100%	100%	100%	100%
ROTHMANS	BAT	5	8	0%	0%	0%	0%	0%	0%	0%	0%
OXFORD	OTHER	1	6	100%	100%	100%	100%	100%	100%	100%	100%
WISH	MANGO INVESTMENTS	0	6	0%	100%	0%	100%	0%	100%	0%	100%
OSSUM	AFROBERG TOBACCO	3	5	100%	100%	100%	100%	100%	100%	100%	100%

ATLANTA	OTHER	0	4	0%	0%	0%	0%	0%	0%	0%	50%
LD	JTI	4	4	25%	0%	25%	0%	25%	0%	25%	0%
CK	AMALGAMATED TOBACCO	1	3	0%	0%	0%	0%	0%	0%	0%	0%
MS	AMALGAMATED TOBACCO	1	3	100%	100%	100%	100%	100%	100%	100%	100%
PETERMAN GOLD	OTHER	0	3	0%	100%	0%	100%	0%	100%	0%	100%
PRINCETON	OTHER	7	3	14%	0%	14%	0%	14%	0%	14%	0%
MALIMBO	AMALGAMATED TOBACCO	9	2	100%	0%	100%	0%	100%	0%	100%	0%
PACIFIC	SAVANNAH ZIMBABWE	7	2	86%	100%	86%	100%	86%	100%	86%	100%
SHAG	OTHER	0	2	0%	100%	0%	100%	0%	100%	0%	100%
STIX	CARNILINX	45	2	100%	100%	100%	100%	100%	100%	100%	100%
ABS	OTHER	0	1	0%	0%	0%	0%	0%	0%	0%	0%
CAMEL	JTI	0	1	0%	0%	0%	0%	0%	0%	0%	100%
CASPIAN	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
CASTLE	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
DUNHILL	BAT	0	1	0%	0%	0%	0%	0%	0%	0%	0%
FORUM	Mastermind TOB	1	1	0%	100%	0%	100%	0%	100%	100%	100%
KINGSTON	OTHER	0	1	0%	0%	0%	0%	0%	0%	0%	0%
MARLBORO	PMI	0	1	0%	0%	0%	0%	0%	0%	0%	0%
PEGASUS	SAVANNAH ZIMBABWE	8	1	100%	100%	100%	100%	100%	100%	100%	100%
PETER STUYVESANT	BAT	4	1	25%	0%	25%	0%	25%	0%	25%	0%
RAINBOW	AFROBERG TOBACCO	1	1	100%	100%	100%	100%	100%	100%	100%	100%
ROYALS	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
777	OTHER	11	0	100%	0%	100%	0%	100%	0%	100%	0%
ADMIRAL	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
BENSON & HEDGES	BAT	1	0	0%	0%	0%	0%	0%	0%	0%	0%
CHEEKY	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CHELE CHELE	OTHER	4	0	100%	0%	100%	0%	100%	0%	100%	0%
JPS	VAWDA AMALGAMATED HOLDINGS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
KINGSGATE	VAWDA AMALGAMATED HOLDINGS	2	0	100%	0%	100%	0%	100%	0%	100%	0%
MC	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
RB	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SOBRANIE	JTI	1	0	100%	0%	100%	0%	100%	0%	100%	0%
STYLE	OTHER	7	0	100%	0%	100%	0%	100%	0%	100%	0%
VIVA	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
YES	BARCO	30	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		1641	3573	69%	73%	70%	74%	71%	75%	81%	80%

8.5 Carton purchase incidence

All cheapest cartons available in the market were found to be retailing for R200.00 or lower in the second study. Of note is the prevalence of all local manufacturers having product mentioned at R200.00 albeit at low Outlets in Scope levels for the smaller manufacturers. Carton prices found were as low as R60 in Western Cape which translates into R6 a pack. In Gauteng R70 (R7 a pack) and Free State was R75 (R7.50 a pack).

Table: Carton price incidence by brand and price range grouping.

Brand	Manufacturer	Outlets in Scope		R200.00 and below		R216.09 and below		R220.00 and below		R250.00 and below	
		Feb 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
SUPERMATCH	BARCO	3	25	100%	100%	100%	100%	100%	100%	100%	100%
SHASHA	CARNILINX	13	24	100%	100%	100%	100%	100%	100%	100%	100%
CAPE	AFROBERG TOBACCO	3	17	100%	100%	100%	100%	100%	100%	100%	100%
REMINGTON GOLD	Gold Leaf Tobacco Company Zimbabwe	8	14	100%	100%	100%	100%	100%	100%	100%	100%
PINE	KTNG	4	8	100%	100%	100%	100%	100%	100%	100%	100%
VIP	CARNILINX	1	8	100%	100%	100%	100%	100%	100%	100%	100%
KYRO	PROTOBAC	3	5	100%	100%	100%	100%	100%	100%	100%	100%
Red and Black	AFROBERG TOBACCO	4	5	100%	100%	100%	100%	100%	100%	100%	100%
ATLANTIC	CARNILINX	0	4	0%	25%	0%	25%	0%	50%	0%	50%
KINGS	VAWDA AMALGAMATED HOLDINGS	1	4	100%	100%	100%	100%	100%	100%	100%	100%
DERBY	CARNILINX	0	3	0%	100%	0%	100%	0%	100%	0%	100%
MEGA	CARNILINX	1	3	100%	100%	100%	100%	100%	100%	100%	100%
RICHMAN	GLOBAL TOBACCO	0	3	0%	100%	0%	100%	0%	100%	0%	100%
BASTILLE	PROTOBAC	0	2	0%	100%	0%	100%	0%	100%	0%	100%
GOLDEN	AFROBERG TOBACCO	3	2	100%	100%	100%	100%	100%	100%	100%	100%
JFK	CARNILINX	0	2	0%	100%	0%	100%	0%	100%	0%	100%
PALL MALL	BAT	0	2	0%	0%	0%	0%	0%	0%	0%	0%
WESTLEIGH	FOLHA TOBACCO	2	2	100%	100%	100%	100%	100%	100%	100%	100%
CHELSEA	OLOMIDE	3	1	100%	100%	100%	100%	100%	100%	100%	100%
DS	AMALGAMATED TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
PEGASUS	SAVANNAH ZIMBABWE	0	1	0%	100%	0%	100%	0%	100%	0%	100%
RAINBOW	AFROBERG TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
777	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CAESAR	BEST TOBACCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CASPIAN	Benson Craig	1	0	100%	0%	100%	0%	100%	0%	100%	0%
EXPRESS	OLOMIDE	1	0	100%	0%	100%	0%	100%	0%	100%	0%
LEGENDS	Mastermind TOB	2	0	100%	0%	100%	0%	100%	0%	100%	0%
OSSUM	AFROBERG TOBACCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Premium	CARNILINX	2	0	100%	0%	100%	0%	100%	0%	100%	0%
SAHAWI	Gold Leaf Tobacco Company	9	0	100%	0%	100%	0%	100%	0%	100%	0%
SAVANNAH	Gold Leaf Tobacco Company	12	0	83%	0%	83%	0%	92%	0%	92%	0%
STIX	CARNILINX	1	0	100%	0%	100%	0%	100%	0%	100%	0%
VOYAGER	Gold Leaf Tobacco Company	7	0	14%	0%	14%	0%	29%	0%	86%	0%
YES	BARCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		88	137	91%	96%	91%	96%	93%	97%	98%	97%

9. Key Results - Individual Hot Spot Analysis

9.1. Free State

- 81% of outlets visited, sold a cigarette pack below MCT price level.
- Non Organized Informal has a 95% incidence of prices below MCT found.
- The number of modern trade stores selling a brand at less at R20.00 and below has increased in the second wave compared to the first wave to 18% from a 6%.
- Increase in below MCT price incidence largely driven by GLTC products and this is mostly within pack format.

Table: Free State incidence by channel type:

Free State	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
FORECOURT	32	65	6%	6%	6%	6%	6%	6%	13%	9%
Non-Organized Informal	354	778	89%	94%	90%	95%	92%	95%	96%	96%
Modern Trade	32	88	6%	26%	6%	26%	6%	26%	53%	52%
Wholesaler	31	65	74%	72%	74%	74%	77%	75%	90%	85%
Grand Total	449	996	76%	81%	77%	81%	78%	82%	87%	86%

Table: Free State incidence by manufacturer:

Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
Gold Leaf Tobacco Corporation	300	732	78%	88%	79%	88%	81%	89%	93%	93%
BAT	25	71	0%	0%	0%	0%	0%	0%	0%	0%
AFROBERG TOBACCO	4	67	100%	99%	100%	99%	100%	99%	100%	100%
OLOMIDE	39	33	100%	100%	100%	100%	100%	100%	100%	100%
VAWDA AMALGAMATED HOLDINGS	2	32	100%	94%	100%	94%	100%	94%	100%	97%
OTHER	12	22	92%	77%	92%	77%	92%	77%	92%	86%
CARNILINX	12	18	75%	67%	75%	67%	75%	67%	100%	89%
JTI	7	13	14%	0%	14%	0%	14%	0%	14%	0%
Mastermind TOB	-	2	0%	100%	0%	100%	0%	100%	0%	100%
PMI	6	2	0%	0%	0%	0%	0%	0%	0%	0%
SAVANNAH ZIMBABWE	-	2	0%	100%	0%	100%	0%	100%	0%	100%
FOLHA TOBACCO	1	1	100%	100%	100%	100%	100%	100%	100%	100%
MANGO INVESTMENTS	-	1	0%	100%	0%	100%	0%	100%	0%	100%
BARCO	30	-	100%	0%	100%	0%	100%	0%	100%	0%
BEST TOBACCO	11	-	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total	449	996	76%	81%	77%	81%	78%	82%	87%	86%

Table: Free State incidence by brand pack analysis:

Brands	Manufacturers	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
SAHAWI	Gold Leaf Tobacco Company	85	291	95%	100%	95%	100%	95%	100%	96%	100%
SAVANNAH	Gold Leaf Tobacco Company	113	192	72%	81%	73%	82%	80%	83%	92%	87%
REMINGTON GOLD	Gold Leaf Tobacco Company	71	179	100%	100%	100%	100%	100%	100%	100%	100%
PALL MALL	BAT	25	70	0%	0%	0%	0%	0%	0%	0%	0%
Red and Black	AFROBERG TOBACCO	3	62	100%	98%	100%	98%	100%	98%	100%	100%
VOYAGER	Gold Leaf Tobacco Company	30	53	7%	15%	7%	15%	7%	15%	67%	58%
KINGS	VAWDA AMALGAMATED HOLDINGS	0	32	0%	94%	0%	94%	0%	94%	0%	97%
CHELSEA	OLOMIDE	39	20	100%	100%	100%	100%	100%	100%	100%	100%
EXPRESS	OLOMIDE	0	13	0%	100%	0%	100%	0%	100%	0%	100%
WINSTON	JTI	5	13	0%	0%	0%	0%	0%	0%	0%	0%
M23	Gold Leaf Tobacco Company	0	10	0%	100%	0%	100%	0%	100%	0%	100%
ATLANTIC	CARNILINX	3	8	0%	25%	0%	25%	0%	25%	100%	75%
Other	OTHER	0	8	0%	100%	0%	100%	0%	100%	0%	100%
RG	Gold Leaf Tobacco Company	1	7	0%	29%	0%	29%	0%	43%	100%	71%
OXFORD	OTHER	0	6	0%	100%	0%	100%	0%	100%	0%	100%
F1	CARNILINX	9	5	100%	100%	100%	100%	100%	100%	100%	100%
SHASHA	CARNILINX	0	5	0%	100%	0%	100%	0%	100%	0%	100%
ATLANTA	OTHER	0	4	0%	0%	0%	0%	0%	0%	0%	50%
CAPE	AFROBERG TOBACCO	1	3	100%	100%	100%	100%	100%	100%	100%	100%
CHESTERFIELD	PMI	6	2	0%	0%	0%	0%	0%	0%	0%	0%
LEGENDS	Mastermind TOB	0	2	0%	100%	0%	100%	0%	100%	0%	100%
OSSUM	AFROBERG TOBACCO	0	2	0%	100%	0%	100%	0%	100%	0%	100%
CASPIAN	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
CASTLE	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
DUNHILL	BAT	0	1	0%	0%	0%	0%	0%	0%	0%	0%
KINGSTON	OTHER	0	1	0%	0%	0%	0%	0%	0%	0%	0%
PACIFIC	SAVANNAH ZIMBABWE	0	1	0%	100%	0%	100%	0%	100%	0%	100%
PEGASUS	SAVANNAH ZIMBABWE	0	1	0%	100%	0%	100%	0%	100%	0%	100%
ROYALS	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
SEVILLE	MANGO INVESTMENTS	0	1	0%	100%	0%	100%	0%	100%	0%	100%
WESTLEIGH	FOLHA TOBACCO	1	1	100%	100%	100%	100%	100%	100%	100%	100%
777	OTHER	10	0	100%	0%	100%	0%	100%	0%	100%	0%
CAESAR	BEST TOBACCO	11	0	100%	0%	100%	0%	100%	0%	100%	0%
CHEEKY	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
KINGSGATE	VAWDA AMALGAMATED HOLDINGS	2	0	100%	0%	100%	0%	100%	0%	100%	0%
LD	JTI	2	0	50%	0%	50%	0%	50%	0%	50%	0%
PRINCETON	OTHER	1	0	0%	0%	0%	0%	0%	0%	0%	0%
YES	BARCO	30	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		449	996	76%	81%	77%	81%	78%	82%	87%	86%

Table: Free State incidence by brand carton analysis:

Brands	Manufacturers	Outlets in Scope		R200.00 and below		R216.09 and below		R220.00 and below		R250.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
CHELSEA	OLOMIDE	2	1	100%	100%	100%	100%	100%	100%	100%	100%
PALL MALL	BAT	0	1	0%	0%	0%	0%	0%	0%	0%	0%
Red and Black	AFROBERG TOBACCO	1	1	100%	100%	100%	100%	100%	100%	100%	100%
KINGS	VAWDA AMALGAMATED HOLDINGS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
LEGENDS	Mastermind TOB	1	0	100%	0%	100%	0%	100%	0%	100%	0%
PINE	KTNG	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Premium	CARNILINX	1	0	100%	0%	100%	0%	100%	0%	100%	0%
REMINGTON GOLD	Gold Leaf Tobacco Company	3	0	100%	0%	100%	0%	100%	0%	100%	0%
SAHAWI	Gold Leaf Tobacco Company	8	0	100%	0%	100%	0%	100%	0%	100%	0%
SAVANNAH	Gold Leaf Tobacco Company	11	0	82%	0%	82%	0%	91%	0%	91%	0%
VOYAGER	Gold Leaf Tobacco Company	7	0	14%	0%	14%	0%	29%	0%	86%	0%
YES	BARCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		37	3	78%	67%	78%	67%	84%	67%	95%	67%

9.2 Gauteng

- 70% of outlets sold a cigarette pack at R20.00 or less in the universe visited.
- Within the channel's the Non Organized Informal and Wholesale, typically situated within informal market, had high readings of low pricing with significant increases between the waves.
- Conversely to the Wholesale and Non Organized Informal, Modern Trade showed a decline in at or below R20.00 pricing.
- Incidence of GLTC products, in terms of packs, selling below MCT level has increased however we do note a drop in incidence rates for Carnilinx which is still at a very high incidence level of 90%
- Savannah still shows high incidence into latest wave. Caesar, Chelsea, RG have increased incidence into current wave , these brands could be overall embarking on a price decrease strategy.
- Legends a new brand in the market, still showing high incidence of below MCT price, into latest read.
- From a carton perspective Afroberg brands (Cape, Golden, Rainbow, Red &Black) most prominent in terms of high incidence of below MCT pricing in Gauteng. 100% of all carton products purchased in this region were at below MCT level.

Table: Gauteng incidence by channel type:

Gauteng	Outlets in Scope		R20.0 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Feb 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
	FORECOURT	66	143	0%	1%	0%	1%	0%	1%	3%
Non-Organized Informal	408	908	76%	90%	79%	90%	81%	94%	93%	98%
Modern Trade	86	222	12%	11%	12%	11%	12%	11%	41%	23%
Wholesaler	149	226	83%	91%	85%	92%	85%	96%	93%	98%
Grand Total	709	1499	62%	70%	64%	70%	66%	73%	79%	78%

Table: Gauteng incidence by manufacturer:

Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
	Gold Leaf Tobacco Corporation	413	643	69%	84%	73%	85%	75%	86%	92%
BAT	96	271	2%	0%	2%	0%	2%	0%	3%	0%
MANGO INVESTMENTS	-	132	0%	99%	0%	100%	0%	100%	0%	100%
CARNILINX	54	110	93%	89%	93%	90%	93%	91%	94%	97%
AFROBERG TOBACCO	20	108	100%	100%	100%	100%	100%	100%	100%	100%
FOLHA TOBACCO	40	69	65%	96%	65%	96%	65%	100%	93%	100%
Mastermind TOB	7	53	86%	91%	86%	91%	86%	91%	100%	91%

BEST TOBACCO	15	48	13%	38%	13%	44%	13%	90%	53%	98%
OLOMIDE	9	34	100%	74%	100%	74%	100%	88%	100%	100%
OTHER	22	13	77%	69%	77%	69%	77%	69%	77%	69%
JTI	6	6	17%	0%	17%	0%	17%	0%	17%	17%
AMALGAMATED TOBACCO	9	4	100%	0%	100%	0%	100%	0%	100%	0%
PMI	2	4	0%	0%	0%	0%	0%	0%	0%	0%
VAWDA AMALGAMATED HOLDINGS	3	3	100%	67%	100%	67%	100%	100%	100%	100%
PROTOBAC	-	1	0%	100%	0%	100%	0%	100%	0%	100%
SAVANNAH ZIMBABWE	13	-	92%	0%	92%	0%	92%	0%	92%	0%
Grand Total	709	1,499	62%	70%	64%	70%	66%	73%	79%	78%

Table: Gauteng incidence by brand pack analysis:

Brand	Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
REMINGTON GOLD	Gold Leaf Tobacco Company	170	354	96%	99%	96%	99%	98%	99%	100%	100%
PALL MALL	BAT	92	271	1%	0%	1%	0%	1%	0%	2%	0%
SAVANNAH	Gold Leaf Tobacco Company	118	173	73%	95%	82%	96%	85%	97%	100%	99%
SEVILLE	MANGO INVESTMENTS	0	126	0%	99%	0%	100%	0%	100%	0%	100%
WESTLEIGH	FOLHA TOBACCO	40	69	65%	96%	65%	96%	65%	100%	93%	100%
CAPE	AFROBERG TOBACCO	8	67	100%	100%	100%	100%	100%	100%	100%	100%
LEGENDS	Mastermind TOB	0	52	0%	90%	0%	90%	0%	90%	0%	90%
CAESAR	BEST TOBACCO	15	48	13%	38%	13%	44%	13%	90%	53%	98%
VOYAGER	Gold Leaf Tobacco Company	35	46	0%	2%	0%	2%	0%	2%	63%	52%
F1	CARNILINX	0	44	0%	98%	0%	98%	0%	100%	0%	100%
SHARP	Gold Leaf Tobacco Company	16	42	50%	26%	50%	26%	56%	36%	94%	79%
Red and Black	AFROBERG TOBACCO	8	41	100%	100%	100%	100%	100%	100%	100%	100%
SHASHA	CARNILINX	3	36	100%	100%	100%	100%	100%	100%	100%	100%
RG	Gold Leaf Tobacco Company	55	21	15%	24%	22%	43%	25%	48%	65%	76%
EXPRESS	OLOMIDE	4	19	100%	89%	100%	89%	100%	100%	100%	100%
CHELSEA	OLOMIDE	5	15	100%	53%	100%	53%	100%	73%	100%	100%
DERBY	CARNILINX	1	13	100%	92%	100%	100%	100%	100%	100%	100%
ATLANTIC	CARNILINX	4	10	0%	0%	0%	0%	0%	0%	25%	70%
SAHAWI	Gold Leaf Tobacco Company	19	6	100%	100%	100%	100%	100%	100%	100%	100%
WISH	MANGO INVESTMENTS	0	6	0%	100%	0%	100%	0%	100%	0%	100%
MEGA	CARNILINX	1	5	100%	100%	100%	100%	100%	100%	100%	100%
Other	OTHER	0	5	0%	100%	0%	100%	0%	100%	0%	100%
CHESTERFIELD	PMI	2	4	0%	0%	0%	0%	0%	0%	0%	0%
WINSTON	JTI	4	4	0%	0%	0%	0%	0%	0%	0%	0%
KINGS	VAWDA AMALGAMATED HOLDINGS	3	3	100%	67%	100%	67%	100%	100%	100%	100%
PETERMAN GOLD	OTHER	0	3	0%	100%	0%	100%	0%	100%	0%	100%
PRINCETON	OTHER	6	3	17%	0%	17%	0%	17%	0%	17%	0%

CK	AMALGAMATED TOBACCO	0	2	0%	0%	0%	0%	0%	0%	0%	0%
MALIMBO	AMALGAMATED TOBACCO	9	2	100%	0%	100%	0%	100%	0%	100%	0%
STIX	CARNILINX	45	2	100%	100%	100%	100%	100%	100%	100%	100%
ABS	OTHER	0	1	0%	0%	0%	0%	0%	0%	0%	0%
CAMEL	JTI	0	1	0%	0%	0%	0%	0%	0%	0%	100%
CHICAGO	Gold Leaf Tobacco Company	0	1	0%	100%	0%	100%	0%	100%	0%	100%
FORUM	Mastermind TOB	1	1	0%	100%	0%	100%	0%	100%	100%	100%
KYRO	PROTOBAC	0	1	0%	100%	0%	100%	0%	100%	0%	100%
LD	JTI	1	1	0%	0%	0%	0%	0%	0%	0%	0%
SHAG	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
777	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CHELE CHELE	OTHER	4	0	100%	0%	100%	0%	100%	0%	100%	0%
LEGENDS	Mastermind TOB	6	0	100%	0%	100%	0%	100%	0%	100%	0%
MC	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
OSSUM	AFROBERG TOBACCO	3	0	100%	0%	100%	0%	100%	0%	100%	0%
OXFORD	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
PACIFIC	SAVANNAH ZIMBABWE	5	0	80%	0%	80%	0%	80%	0%	80%	0%
PEGASUS	SAVANNAH ZIMBABWE	8	0	100%	0%	100%	0%	100%	0%	100%	0%
PETER STUYVESANT	BAT	4	0	25%	0%	25%	0%	25%	0%	25%	0%
RAINBOW	AFROBERG TOBACCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
RB	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SOBRANIE	JTI	1	0	100%	0%	100%	0%	100%	0%	100%	0%
STYLE	OTHER	7	0	100%	0%	100%	0%	100%	0%	100%	0%
VIVA	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		709	1499	62%	70%	64%	70%	66%	73%	79%	78%

Table: Gauteng incidence by brand carton analysis:

Brands	Manufacturer	Outlets in Scope		R200.00 and below		R216.09 and below		R220.00 and below		R250.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
REMINGTON GOLD	Gold Leaf Tobacco Company	1	5	100%	100%	100%	100%	100%	100%	100%	100%
SHASHA	CARNILINX	3	4	100%	100%	100%	100%	100%	100%	100%	100%
CAPE	AFROBERG TOBACCO	1	2	100%	100%	100%	100%	100%	100%	100%	100%
WESTLEIGH	FOLHA TOBACCO	2	2	100%	100%	100%	100%	100%	100%	100%	100%
PEGASUS	SAVANNAH ZIMBABWE	0	1	0%	100%	0%	100%	0%	100%	0%	100%
CASPIAN	Benson Craig	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CHELSEA	OLOMIDE	1	0	100%	0%	100%	0%	100%	0%	100%	0%
EXPRESS	OLOMIDE	1	0	100%	0%	100%	0%	100%	0%	100%	0%
LEGENDS	Mastermind TOB	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Red and Black	AFROBERG TOBACCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SAHAWI	Gold Leaf Tobacco Company	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SAVANNAH	Gold Leaf Tobacco Company	1	0	100%	0%	100%	0%	100%	0%	100%	0%
STIX	CARNILINX	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		15	14	100%	100%	100%	100%	100%	100%	100%	100%

9.3 Western Cape

- The number of stores who confirmed selling product below R20.00 and below has decreased to 71% vs 73% from the first WAVE.
- However, continuing the theme of availability of at and below R20.00, Non Organized Informal and Wholesale continue the trend in the Western Cape of high prevalence rates.
- Modern Trade in the Western Cape are not immune to low pricing availability increase with a 2% share increase of cheap pricing below R20.00
- Afroberg and Carnillinx brands have maintained high incidence of price below MCT level.
- From a carton sales perspective, a strong concentration of below MCT pricing incidence with 97% incidence of below MCT pricing found. The cheapest carton price picked up was R60.00

Table: Western Cape incidence by channel type:

Western Cape	Outlets in Scope		Below R20.01		Below R21.61		Below R22.00		Below R25.00	
	Feb 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
	FORECOURT	68	151	0%	8%	0%	9%	0%	9%	0%
Non-Organized Informal	352	780	99%	97%	99%	97%	99%	97%	100%	100%
Modern Trade	62	147	3%	1%	3%	1%	3%	1%	39%	29%
Wholesaler	1	0	100%		100%		100%		100%	
Grand Total	483	1078	73%	71%	73%	71%	73%	71%	78%	78%

Table: Western Cape incidence by manufacturer:

Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
	CARNILINX	217	258	93%	93%	93%	93%	93%	93%	99%
BAT	83	179	0%	0%	0%	0%	0%	0%	0%	0%
Gold Leaf Tobacco Corporation	50	152	66%	66%	66%	66%	66%	66%	84%	95%
AFROBERG TOBACCO	22	139	100%	100%	100%	100%	100%	100%	100%	100%
GLOBAL TOBACCO	35	76	97%	99%	97%	99%	97%	99%	100%	100%
PROTOBAC	19	71	100%	99%	100%	99%	100%	99%	100%	100%
BARCO	6	70	100%	100%	100%	100%	100%	100%	100%	100%
BEST TOBACCO	20	69	100%	67%	100%	67%	100%	68%	100%	100%
JTI	7	30	0%	0%	0%	0%	0%	0%	0%	0%
KTNG	1	12	100%	100%	100%	100%	100%	100%	100%	100%
VAWDA AMALGAMATED HOLDINGS	12	9	100%	100%	100%	100%	100%	100%	100%	100%
PMI	6	5	0%	0%	0%	0%	0%	0%	0%	0%
AMALGAMATED TOBACCO	2	4	50%	75%	50%	75%	50%	75%	50%	75%
OTHER	1	3	100%	100%	100%	100%	100%	100%	100%	100%
SAVANNAH ZIMBABWE	2	1	100%	100%	100%	100%	100%	100%	100%	100%
Grand Total	483	1078	73%	71%	73%	71%	73%	71%	78%	78%

Table: Western Cape incidence by brand pack analysis:

Brand	Manufacturer	Outlets in Scope		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
PALL MALL	BAT	77	170	0%	0%	0%	0%	0%	0%	0%	0%
SHASHA	CARNILINX	70	127	100%	100%	100%	100%	100%	100%	100%	100%
REMINGTON GOLD	Gold Leaf Tobacco Company	28	99	100%	100%	100%	100%	100%	100%	100%	100%
RICHMAN	GLOBAL TOBACCO	35	76	97%	99%	97%	99%	97%	99%	100%	100%
SUPERMATCH	BARCO	6	70	100%	100%	100%	100%	100%	100%	100%	100%
CAESAR	BEST TOBACCO	20	69	100%	67%	100%	67%	100%	68%	100%	100%
CAPE	AFROBERG TOBACCO	18	69	100%	100%	100%	100%	100%	100%	100%	100%
Premium	CARNILINX	14	52	100%	98%	100%	100%	100%	100%	100%	100%
KYRO	PROTOBAC	2	48	100%	100%	100%	100%	100%	100%	100%	100%
GOLDEN	AFROBERG TOBACCO	1	44	100%	100%	100%	100%	100%	100%	100%	100%
VOYAGER	Gold Leaf Tobacco Company	12	42	0%	0%	0%	0%	0%	0%	75%	93%
WINSTON	JTI	6	27	0%	0%	0%	0%	0%	0%	0%	0%
BASTILLE	PROTOBAC	17	23	100%	96%	100%	96%	100%	96%	100%	100%
Red and Black	AFROBERG TOBACCO	3	22	100%	100%	100%	100%	100%	100%	100%	100%
MEGA	CARNILINX	33	19	100%	100%	100%	100%	100%	100%	100%	100%
ATLANTIC	CARNILINX	15	18	0%	0%	0%	0%	0%	6%	87%	11%
JFK	CARNILINX	3	17	100%	100%	100%	100%	100%	100%	100%	100%
DERBY	CARNILINX	25	15	100%	100%	100%	100%	100%	100%	100%	100%
PINE	KTNG	1	12	100%	100%	100%	100%	100%	100%	100%	100%
CHICAGO	Gold Leaf Tobacco Company	9	11	56%	9%	56%	9%	56%	9%	56%	55%
VIP	CARNILINX	57	10	100%	100%	100%	100%	100%	100%	100%	100%
KINGS	VAWDA AMALGAMATED HOLDINGS	11	9	100%	100%	100%	100%	100%	100%	100%	100%
ROTHMANS	BAT	5	8	0%	0%	0%	0%	0%	0%	0%	0%
CHESTERFIELD	PMI	6	4	0%	0%	0%	0%	0%	0%	0%	0%
LD	JTI	1	3	0%	0%	0%	0%	0%	0%	0%	0%
MS	AMALGAMATED TOBACCO	1	3	100%	100%	100%	100%	100%	100%	100%	100%
OSSUM	AFROBERG TOBACCO	0	3	0%	100%	0%	100%	0%	100%	0%	100%
Other	OTHER	0	2	0%	100%	0%	100%	0%	100%	0%	100%
CK	AMALGAMATED TOBACCO	1	1	0%	0%	0%	0%	0%	0%	0%	0%
MARLBORO	PMI	0	1	0%	0%	0%	0%	0%	0%	0%	0%
PACIFIC	SAVANNAH ZIMBABWE	2	1	100%	100%	100%	100%	100%	100%	100%	100%
PETER STUYVESANT	BAT	0	1	0%	0%	0%	0%	0%	0%	0%	0%
RAINBOW	AFROBERG TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
SHAG	OTHER	0	1	0%	100%	0%	100%	0%	100%	0%	100%
ADMIRAL	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
BENSON & HEDGES	BAT	1	0	0%	0%	0%	0%	0%	0%	0%	0%
JPS	VAWDA AMALGAMATED HOLDINGS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
RG	Gold Leaf Tobacco Company	1	0	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total		483	1078	73%	71%	73%	71%	73%	71%	78%	78%

Table: Western Cape incidence by brand carton analysis:

Brand	Manufacturer	Outlets in Scope		R200.00 and below		R216.09 and below		R220.00 and below		R250.00 and below	
		February 2021	March 2021	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
SUPERMATCH	BARCO	3	25	100%	100%	100%	100%	100%	100%	100%	100%
SHASHA	CARNILINX	10	20	100%	100%	100%	100%	100%	100%	100%	100%
CAPE	AFROBERG TOBACCO	2	15	100%	100%	100%	100%	100%	100%	100%	100%
REMINGTON GOLD	Gold Leaf Tobacco Company	4	9	100%	100%	100%	100%	100%	100%	100%	100%
PINE	KTNG	3	8	100%	100%	100%	100%	100%	100%	100%	100%
VIP	CARNILINX	1	8	100%	100%	100%	100%	100%	100%	100%	100%
KYRO	PROTOBAC	3	5	100%	100%	100%	100%	100%	100%	100%	100%
ATLANTIC	CARNILINX	0	4	0%	25%	0%	25%	0%	50%	0%	50%
KINGS	VAWDA AMALGAMATED HOLDINGS	0	4	0%	100%	0%	100%	0%	100%	0%	100%
Red and Black	AFROBERG TOBACCO	2	4	100%	100%	100%	100%	100%	100%	100%	100%
DERBY	CARNILINX	0	3	0%	100%	0%	100%	0%	100%	0%	100%
MEGA	CARNILINX	1	3	100%	100%	100%	100%	100%	100%	100%	100%
RICHMAN	GLOBAL TOBACCO	0	3	0%	100%	0%	100%	0%	100%	0%	100%
BASTILLE	PROTOBAC	0	2	0%	100%	0%	100%	0%	100%	0%	100%
GOLDEN	AFROBERG TOBACCO	3	2	100%	100%	100%	100%	100%	100%	100%	100%
JFK	CARNILINX	0	2	0%	100%	0%	100%	0%	100%	0%	100%
DS	AMALGAMATED TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
PALL MALL	BAT	0	1	0%	0%	0%	0%	0%	0%	0%	0%
RAINBOW	AFROBERG TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
777	OTHER	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CAESAR	BEST TOBACCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
OSSUM	AFROBERG TOBACCO	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Premium	CARNILINX	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total		36	120	100%	97%	100%	97%	100%	98%	100%	98%

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For detail data for advanced modeling, available upon request and on authorization from data owners.