



Cigarette Retail & Wholesale Price Research

Wave 4 - National Study (October 2021)

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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 refer to the trademark owners, exclusive licensees etc. of all brands of tobacco 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 or carton of cigarettes and purchases

The process of the research explained.

For the study it was important that the process followed be governed by 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 South Africa, 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 this report, one store correlates with one pack/carton purchase
- 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 and 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 back 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 4

Total Duration: 8 October - 3 November 2021

Field days: 8-15 October 2021

Quality check and re-shop days: 18-20 October 2021

Analysis of data: 20-29 October 2021

Excel delivery: 2 November 2021

Reporting date to British American Tobacco South Africa: 3 November 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/or
"I want to buy the cheapest carton available".

No price negotiations were allowed.

5. Research retail price point definitions

Excise rates 2021:

R18.78 for 20 sticks (1 pack), or R187.80 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)*

R21.60 for 20 Sticks (1 pack) or R216.00 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 – R216.00 and below for a carton of 200 sticks
Price break down 20 sticks: R21.59 is below the MCT of R21.60
Price break down 200 sticks: R216.59 is below the MCT of R216.00
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 R18.78; VAT R2.87; Total Net Margin** R0.35
Price break down 200 sticks: Excise R187.80; VAT R28.70; Total Net Margin** R3.50
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 R18.78; VAT R3.26; Total Net Margin** R2.96
Price break down 200 sticks: Excise R187.80; VAT R32.60; Total Net Margin** R29.60

**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 national retail universe comprises 151,002 stores. 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.

Wave 4 Sample Structure

Channels	In scope	National	Standard Error
Total	4,521	151,002	1.32%
Non-Organized Informal	3,222	136,968	1.57%
Modern Trade Forecourt	484	3,747	3.82%
Modern Trade – Grocery	422	4,111	4.16%
Wholesale	393	6,176	4.40%

For better understanding of the non-organized informal sector:

Sub-Channels	National	Actual sample	RSE Actual
Non Organized Informal	136,968	3,615	1.48%
Independent Superette/Corner Cafe	25,358	681	3.40%
Spazas	72,648	1,749	2.13%
Tabletop/Hawker	38,962	792	3.17%
Wholesale	6,176	393	4.40%

Sub-channel definitions:

- Modern Trade: branded organized trade (Grocery)
- Forecourts: branded forecourts (Petrol Retail Stores)
- 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 general trade and modern trade stores were covered to ensure a national view of low prices on cigarettes.

Sample Exclusions:

72 sample points were excluded from the dataset where one or more of the below governance criteria was not provided:

- Store name
- Province
- Date of transaction/mystery shop
- Price
- Name and signature of the auditor within pack sample

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.

8. Key Research Results

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

Levels of prevalence of products purchased at R21.60 and below have remained stable over time at 43% of outlets visited.

	R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
% of Retail Stores	37%	38%	41%	43%	45%	43%	58%	55%
Number of Retail Stores	1 586	1 723	1 751	1 908	1 904	1 909	2 454	2 469

8.2 Provincial Split:

The prevalence of purchases at R21.60 and below was most evident (above 50%) within four of the nine South African provinces. These four provinces are key hotspot areas for products purchased at R21.60 and below with Western Cape at 77%, Free State at 76%, Gauteng at 64% and Northern Cape at 63%.

Table: Provincial incidence by price category

	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
Eastern Cape	548	509	28%	1%	42%	19%	51%	19%	65%	49%
Free State	489	487	76%	76%	77%	76%	77%	76%	80%	78%
Gauteng	655	640	60%	64%	62%	64%	63%	64%	69%	67%
KwaZulu-Natal	510	559	31%	12%	44%	25%	49%	25%	53%	50%
Limpopo	448	435	3%	8%	5%	13%	10%	13%	37%	38%
Mpumalanga	529	549	0%	4%	0%	4%	0%	4%	2%	11%
North West	328	455	44%	46%	44%	46%	44%	46%	74%	64%
Northern Cape	292	365	17%	63%	17%	63%	30%	63%	75%	64%
Western Cape	449	487	67%	77%	67%	77%	70%	77%	77%	77%
Grand Total	4,248	4,486	37%	38%	41%	43%	45%	43%	58%	55%

8.3 Sales channel penetration

Considering channel incidence, the Non – Organized informal trade of purchases R21.60 and below pricing indicates a high prevalence, with the Wholesale channel at 46% and General Trade at 52%.

Compared to the previous study, Modern Trade has significantly reduced their mentions of purchases at or below the R21.60 price point, to 1%. On the opposite end, an increase of mentions of product purchased below R21.60 has been observed from the data relating to Forecourts. The most significant increase being with product selling at R25.00 and below, moving from 7% to 16% availability.

Table: Channel availability by price category

	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
FORECOURT	411	484	5%	12%	5%	13%	5%	13%	7%	16%
General Trade	3,071	3,222	44%	47%	49%	52%	54%	52%	70%	67%
Modern Trade	399	422	1%	1%	2%	1%	2%	1%	6%	5%
Wholesale	367	358	57%	37%	60%	46%	62%	46%	68%	62%
Grand Total	4,248	4,486	37%	38%	41%	43%	45%	43%	58%	55%

8.4 Manufacturer penetration

Cheapest pack purchases within the sample stores is most prevalent amongst brands owned or licensed by Gold Leaf Tobacco Corporation (GLTC), evident by 1,761 mentions, albeit at a higher purchase price with a third of their portfolio of brands retailing at R21.60 and below.

Brands owned or licensed by Carnilinx and Afroberg Tobacco shows a high incidence of cheapest purchases falling within the R21.60 and below range at 62% and 59% respectively. Folha brands purchased also demonstrated significant incidence at the R20.00 and below price to the tune of 100% of purchases, although off a smaller limited base. Converse to Carnilinx's portfolio of brands, packs with branding owned or licensed by Protobac have significantly reduced incidence of R21.60 and below purchase prices.

The biggest gainers in availability versus previous study are brands owned or licensed to Gold Leaf Tobacco South Africa and Afroberg Manufacturers, at 301 and 213 new mentions versus previous study.

Product bearing brands owned or licensed to foreign manufacturers in general exhibit a decline in mentions, to even lower bases. This data analysis observation however does not hold true for Gold Leaf Tobacco Zimbabwe portfolio of brands, which have remained steady versus the previous study.

Note: Companies in the Gold Leaf Tobacco Corporation being Gold Leaf Tobacco Zimbabwe and Gold Leaf Tobacco South Africa

Table: Lowest price incidence by Manufacturer (Licensee, Brand owner, Manufacturer, etc.)

	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
Gold Leaf Tobacco South Africa	712	1013	34%	30%	35%	30%	37%	30%	51%	36%
Gold Leaf Tobacco Zimbabwe	885	748	31%	58%	32%	59%	33%	59%	44%	70%
BAT	520	684	0%	0%	0%	0%	0%	0%	1%	0%
Carnillinx Tobacco Company	593	627	56%	54%	65%	62%	72%	62%	82%	80%
Afroberg Tobacco	269	482	49%	52%	62%	59%	68%	59%	73%	86%
Other	311	205	40%	34%	44%	52%	57%	52%	72%	76%
KTNG	155	175	2%	93%	2%	93%	2%	93%	99%	94%
Savannah Zimbabwe	79	128	51%	2%	66%	23%	77%	23%	81%	66%
Protobac	196	126	49%	8%	64%	24%	73%	25%	80%	64%
Best Tobacco	90	86	29%	9%	29%	12%	40%	12%	71%	30%
Folha Tobacco	3	56	100%	100%	100%	100%	100%	100%	100%	100%
PMI	35	39	0%	0%	3%	0%	3%	0%	3%	0%
Mango Investments Zambia	200	36	84%	100%	85%	100%	85%	100%	100%	100%
JTI	33	16	0%	0%	3%	0%	3%	0%	3%	0%
Amalgamated Tobacco Manufacturers	3	15	100%	93%	100%	93%	100%	93%	100%	100%
Copperleaf Tobacco Zambia Company Ltd	0	14	0%	100%	0%	100%	0%	100%	0%	100%
Olomide Zimbabwe	48	13	100%	100%	100%	100%	100%	100%	100%	100%
Mastermind Tobacco Zambia	31	12	87%	33%	87%	67%	87%	67%	94%	92%
BARCO Angola	28	4	100%	0%	100%	0%	100%	0%	100%	75%
Vawda Amalgamated Holdings	34	3	56%	0%	56%	0%	56%	0%	56%	0%
Al Matuco Tobacco Company LLC, UAE	0	2	0%	100%	0%	100%	0%	100%	0%	100%
Global Tobacco (Unknown)	21	2	100%	100%	100%	100%	100%	100%	100%	100%
Absolute (Unknown)	1	0	0%	0%	0%	0%	0%	0%	0%	0%
Shag Tobacco (Unknown)	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Grand Total	4248	4486	37%	38%	41%	43%	45%	43%	58%	55%

8.5 Brand Incidence

The cheapest pack purchased was R8.00 and was purchased in Gauteng Wholesale. This price point was however an outlier, with the lowest frequently mentioned prices for purchased product at R10.00 a pack. The R10.00 price point was prevalent in Western Cape, Free State, and Gauteng Provinces, with the Wholesale, Spaza, Tabletop / Hawker channels where it was most prevalent.

Foreign brands have a high incidence, which is represented by a large number of outlets selling at the lowest price point found in the market. The foreign brand, Remington Gold (owned by or licensed to GLTC Zimbabwe) is the most widely accessible brand at the cheapest price point, at 59% selling below R21.60 and a purchase universe of 441 stores out of 748 stores. Pine (owned by or licensed to KTNG), had a higher incidence of R21.60 and below, although off a lower base, when in comparison to Remington Gold.

Pall Mall (owned by or licensed to BAT) has a high prevalence in sample stores, however the brand is not sold at the cheapest price points.

Shasha (owned by or licensed to Carnillinx), Cape (owned by or licensed to Afroberg) and Savannah (owned by or licensed to GLTC) have a high incidence of purchases at R21.60 and below, with Shasha at 59%, Cape at 59% and Savannah at 51% of brands manufactured in South Africa.

New brands, not purchased in the previous studies in 2021 and new to the cheapest prices purchase list, include Liberty (R18.00), Roxbury (R10.00 and R15.00), Chief (R10.00 to R18.00), Ecco Nano (R18.000), and GMB (R10.00).

Table: Brand incidence by price category – total sample

	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
REMINGTON GOLD	885	748	31%	58%	32%	59%	33%	59%	44%	70%
PALL MALL	484	631	0%	0%	0%	0%	0%	0%	1%	0%
SHASHA	184	414	67%	50%	77%	59%	82%	59%	91%	80%
CAPE	239	319	45%	48%	59%	59%	64%	59%	70%	81%
SAVANNAH	160	315	43%	51%	43%	51%	44%	51%	58%	53%
SAHAWI	218	304	75%	45%	76%	45%	79%	45%	94%	56%
VOYAGER	167	232	0%	0%	0%	0%	0%	0%	2%	8%
PINE	155	175	2%	93%	2%	93%	2%	93%	99%	94%
RG	127	148	1%	3%	5%	3%	9%	3%	25%	5%
PEGASUS	78	128	50%	2%	65%	23%	77%	23%	81%	66%
KYRO	178	126	44%	8%	60%	24%	70%	25%	78%	64%

VIP	179	100	63%	72%	79%	80%	88%	80%	93%	100%
INTERNATIONAL										
Red and Black	7	94	57%	30%	71%	30%	100%	30%	100%	96%
777	59	93	49%	10%	69%	46%	71%	46%	75%	81%
CAESAR	90	86	29%	9%	29%	12%	40%	12%	71%	30%
OSSUM	23	69	91%	100%	91%	100%	96%	100%	100%	100%
WESTLEIGH	3	56	100%	100%	100%	100%	100%	100%	100%	100%
JFK	74	45	28%	56%	36%	58%	46%	58%	76%	58%
PETERMAN										
GOLD	1	45	100%	22%	100%	29%	100%	29%	100%	64%
ROTHMANS	21	44	0%	0%	0%	0%	0%	0%	0%	0%
CHESTERFIELD	33	38	0%	0%	0%	0%	0%	0%	0%	0%
ATLANTIC	69	30	1%	3%	1%	3%	1%	3%	13%	17%
Chief	14	23	100%	100%	100%	100%	100%	100%	100%	100%
F1	10	23	80%	100%	100%	100%	100%	100%	100%	100%
SEVILLE	21	21	86%	100%	95%	100%	100%	100%	100%	100%
MALIMBO	3	15	100%	93%	100%	93%	100%	93%	100%	100%
WISH	179	15	83%	100%	83%	100%	83%	100%	99%	100%
LIBERTY	0	14	0%	100%	0%	100%	0%	100%	0%	100%
WINSTON	30	13	0%	0%	0%	0%	0%	0%	0%	0%
SHARP	18	12	0%	0%	0%	0%	6%	0%	56%	42%
VIVA	0	12	0%	42%	0%	42%	0%	42%	0%	42%
CHELSEA	48	11	100%	100%	100%	100%	100%	100%	100%	100%
EXPRESS	117	11	19%	100%	19%	100%	20%	100%	41%	100%
STIX	0	11	0%	100%	0%	100%	0%	100%	0%	100%
GOLD SEAL	0	10	0%	100%	0%	100%	0%	100%	0%	100%
FORUM	2	9	0%	44%	0%	78%	0%	78%	0%	100%
PRINCETON	0	6	0%	0%	0%	0%	0%	0%	0%	0%
YES	25	4	100%	0%	100%	0%	100%	0%	100%	75%
KINGS	34	3	56%	0%	56%	0%	56%	0%	56%	0%
LEGENDS	29	3	93%	0%	93%	33%	93%	33%	100%	67%
PETER										
STUYVESANT	0	3	0%	0%	0%	0%	0%	0%	0%	0%
Stuyvesant	2	3	0%	0%	0%	0%	0%	0%	0%	0%
ATLANTA	0	2	0%	0%	0%	0%	0%	0%	0%	0%
BENSON & HEDGES	1	2	0%	0%	0%	0%	0%	0%	0%	0%
CHICAGO	22	2	36%	100%	36%	100%	36%	100%	91%	100%
DERBY	35	2	71%	50%	71%	50%	83%	50%	100%	100%
LD	3	2	0%	0%	33%	0%	33%	0%	33%	0%
MEGA	20	2	100%	100%	100%	100%	100%	100%	100%	100%
RICHMAN	21	2	100%	100%	100%	100%	100%	100%	100%	100%
Roxybury	0	2	0%	100%	0%	100%	0%	100%	0%	100%
ASPEN	0	1	0%	0%	0%	0%	0%	0%	0%	0%
CASPIAN	0	1	0%	100%	0%	100%	0%	100%	0%	100%
Ecco Nano	0	1	0%	100%	0%	100%	0%	100%	0%	100%
GMB	0	1	0%	100%	0%	100%	0%	100%	0%	100%
GOLF	0	1	0%	0%	0%	0%	0%	0%	0%	100%
MANCHESTER	0	1	0%	0%	0%	0%	0%	0%	0%	0%

MARLBORO	1	1	0%	0%	0%	0%	0%	0%	0%	0%	0%
RANSOM	3	1	0%	0%	0%	0%	0%	0%	0%	0%	0%
ABS	1	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
BASTILLE	18	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
Black & white	10	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
Black Hill	8	0	88%	0%	88%	0%	88%	0%	100%	0%	0%
BOXER	1	0	0%	0%	100%	0%	100%	0%	100%	0%	0%
BROTHER	1	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
CHEEKY	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
CHELE CHELE	98	0	41%	0%	41%	0%	81%	0%	100%	0%	0%
CK	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
DUNHILL	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
JPS	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
KINGDOM	1	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
KINGSGATE	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
LEXINGTON	3	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
LUCKY STRIKE	3	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
MC	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
MS	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
OXFORD	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
PACIFIC	1	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
PAUL REVERE	2	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
RAINBOW	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
RB	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
SHAG	1	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
SOBRANIE	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
STYLE	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
SUPERMATCH	3	0	100%	0%	100%	0%	100%	0%	100%	0%	0%
WAVE	1	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
WEPSTER	0	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
WINFIELD	1	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
GOLDEN	0		0%	0%	0%	0%	0%	0%	0%	0%	0%
Premium	22		100%	0%	100%	0%	100%	0%	100%	0%	0%
Grand Total	4248	4486	37%	38%	41%	43%	45%	43%	58%	55%	

8.6 Carton purchase incidence

The cheapest carton purchased was R70.00 in Gauteng, within a wholesale trader.

Gold Leaf Tobacco (Zimbabwe and South Africa) and Afroberg Tobacco have the highest incidence of cartons being sold at the lowest price point. Remington Gold (owned by or licensed to GLTC Zimbabwe) has the largest incidence of being sold at the cheapest price point, indicating a higher foreign carton penetration.

Table: Carton price incidence by Manufacturer (as Brand owner, Licensee or Contract Manufacturer, etc.) grouping.

	Outlet count		R200.1 and below		R216.1 and below		R220.00 and below		R250.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
AFROBERG TOBACCO	9	8	100%	100%	100%	100%	100%	100%	100%	100%
AMALGAMATED TOBACCO	4	0	100%	0%	100%	0%	100%	0%	100%	0%
BARCO (Angola)	7	0	100%	0%	100%	0%	100%	0%	100%	0%
BAT	4	2	0%	0%	0%	0%	0%	0%	0%	100%
BEST TOBACCO	0	0	0%	0%	0%	0%	0%	0%	0%	0%
CARNILINX TOBACCO	11	3	100%	100%	100%	100%	100%	100%	100%	100%
FOLHA TOBACCO	0	2	0%	100%	0%	100%	0%	100%	0%	100%
GOLD LEAF TOBACCO ZIMBABWE	5	8	100%	100%	100%	100%	100%	100%	100%	100%
GOLD LEAF TOBACCO SOUTH AFRICA	9	8	33%	100%	44%	100%	56%	100%	56%	100%
KTNG	6	1	0%	100%	83%	100%	83%	100%	100%	100%
MANGO INVESTMENTS (ZAMBIA)	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Mastermind TOBACCO (ZIMBABWE)	0	0	0%	0%	0%	0%	0%	0%	0%	0%
OLOMIDE (ZIMBABWE)	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Other	12	3	58%	100%	58%	100%	67%	100%	100%	100%
PROTOBAC	0	0	0%	0%	0%	0%	0%	0%	0%	0%
SHAG TOBACCO (UNKNOWN)	1	0	100%	0%	100%	0%	100%	0%	100%	0%
VAWDA AMALGAMATED HOLDINGS	0	0	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	70	35	70%	94%	79%	94%	81%	94%	89%	100%

Table: Carton price incidence by brand grouping

	Outlet count		R200.1 and below		R216.1 and below		R220.00 and below		R250.00 and below	
	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4	Wave 3	Wave 4
777	0	0	0%	0%	0%	0%	0%	0%	0%	0%
CAESAR	0	0	0%	0%	0%	0%	0%	0%	0%	0%
CAPE	4	2	100%	100%	100%	100%	100%	100%	100%	100%
CASPIAN	0	0	0%	0%	0%	0%	0%	0%	0%	0%
CHELE CHELE	6	0	100%	0%	100%	0%	100%	0%	100%	0%
CHELSEA	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CHICAGO	2	0	0%	0%	50%	0%	100%	0%	100%	0%
Chief	0	2	0%	100%	0%	100%	0%	100%	0%	100%
DS	4	0	100%	0%	100%	0%	100%	0%	100%	0%
EXPRESS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
GOLDEN	0	0	0%	0%	0%	0%	0%	0%	0%	0%
JFK	1	0	100%	0%	100%	0%	100%	0%	100%	0%
KINGS	0	0	0%	0%	0%	0%	0%	0%	0%	0%
KYRO	0	0	0%	0%	0%	0%	0%	0%	0%	0%
LEGENDS	0	0	0%	0%	0%	0%	0%	0%	0%	0%
Life	5	0	0%	0%	0%	0%	20%	0%	100%	0%
MEGA	1	0	100%	0%	100%	0%	100%	0%	100%	0%
OSSUM	2	1	100%	100%	100%	100%	100%	100%	100%	100%
PALL MALL	1	0	0%	0%	0%	0%	0%	0%	0%	0%
PINE	6	1	0%	100%	83%	100%	83%	100%	100%	100%
Premium	1	0	100%	0%	100%	0%	100%	0%	100%	0%
Red and Black	3	5	100%	100%	100%	100%	100%	100%	100%	100%
REMINGTON GOLD	5	8	100%	100%	100%	100%	100%	100%	100%	100%
RG	2	1	0%	100%	0%	100%	0%	100%	0%	100%
ROTHMANS	3	2	0%	0%	0%	0%	0%	0%	0%	100%
SAHAWI	3	4	100%	100%	100%	100%	100%	100%	100%	100%
SAVANNAH	0	3	0%	100%	0%	100%	0%	100%	0%	100%
SEVILLE	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SHAG	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SHARP	0	0	0%	0%	0%	0%	0%	0%	0%	0%
SHASHA	8	3	100%	100%	100%	100%	100%	100%	100%	100%
STIX	0	0	0%	0%	0%	0%	0%	0%	0%	0%
SUPERMATCH	7	0	100%	0%	100%	0%	100%	0%	100%	0%
VIP INTERNATIONAL	0	0	0%	0%	0%	0%	0%	0%	0%	0%
VIVA	0	1	0%	100%	0%	100%	0%	100%	0%	100%
VOYAGER	2	0	0%	0%	0%	0%	0%	0%	0%	0%
WESTLEIGH	0	2	0%	100%	0%	100%	0%	100%	0%	100%
YES	0	0	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	70	35	70%	94%	79%	94%	81%	94%	89%	100%

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