



Cigarette Retail & Wholesale Price Research

Wave 3 - National Study (June 2021)

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Commissioned by British American Tobacco South Africa

Table of Contents

1. Governance Statement	3
2. Methodology.....	4
3. IPSOS Fieldwork	5
4. Questions asked by IPSOS field worker	6
5. Research retail price point definitions.....	6
6. Research Scope	7
7. Analysis model	9
8. Key Research Results	10
8.1 Results of purchased products in total sample at defined price points:	10
8.2 Provincial Split:.....	10
8.3 Sales channel penetration	11
8.4 Manufacturer penetration.....	11
8.5 Brand Incidence	12
8.6 Carton purchase incidence	15

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 trade mark 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 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 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 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 3

Total Duration: 15-22 June 2021

Field days: 15-18 June 2021

Quality check and re-shop days: 19-22 June 2021

Analysis of data: 25 – 30 June 2021

Reporting date to British American Tobacco South Africa: 30 June 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 15-18 June:

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 1 Sample structure :

Channels	In scope	National	Standard Error
Total	4,586	151,002	1.3%
Non Organized Informal	3,207	136,968	1.6%
Modern Trade Forecourt	421	3,747	4.1%
Modern Trade – Grocery	444	4,111	4.0%
Wholesale	514	6,176	3.8%

Wave 3 – Sample Design :

Channels	In scope	National	Standard Error
Total	4,593	151,002	1.3%
Non Organized Informal	3,163	136,968	1.6%
Modern Trade Forecourt	464	3,747	4.1%
Modern Trade – Grocery	423	4,111	4.0%
Wholesale	543	6,176	3.8%

Wave 3 Sample Structure

Channels	In scope	National	Standard Error
Total	4,318	151,002	1.35%
Non-Organized Informal	3,087	136,968	1.60%
Modern Trade Forecourt	411	3,747	4.19%
Modern Trade – Grocery	399	4,111	4.29%

Wholesale	421	6,176	4.24%
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For better understanding of the non-organized informal sector:

Sub-Channels	National	Actual sample	RSE Actual
Non Organized Informal	136,968	3,087	1.60%
Independent Superette/Corner Cafe	25,358	635	3.53%
Spazas	72,648	1,584	2.24%
Tabletop/Hawker	38,962	868	3.02%
Wholesale	6,176	421	4.24%

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:

Sample points were excluded from the dataset where the below governance criteria were 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.

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

8. Key Research Results

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

- R21.60 and below **41%** or 1,751 Retail stores
- R22.00 and below **45%** or 1,904 Retail stores
- R25.00 and below **58%** or 2,454 Retail stores

8.2 Provincial Split:

In three of the nine provinces in South Africa, purchases at R21.60 and below, occurred at more than 50% of the retail stores sampled. Free State province at 77%, Western Cape at 67%, and Gauteng 62%. The 3 regions remain the key hotspot areas nationally, despite the respective incidence levels having dropped marginally into current read vs Wave 1. Eastern Cape province and KZN province have exhibited a surge of below R21.60 pricing increasing to 42% and 44% respectively, into current wave.

Table: Provincial incidence by price category

Province	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21
Eastern Cape	461	548	19%	28%	20%	42%	31%	51%	72%	65%
Free State	449	489	76%	76%	77%	77%	78%	77%	87%	80%
Gauteng	709	655	62%	60%	64%	62%	66%	63%	79%	69%
KwaZulu-Natal	518	510	29%	31%	32%	44%	33%	49%	56%	53%
Limpopo	451	448	24%	3%	35%	5%	48%	10%	80%	37%
Mpumalanga	537	529	0%	0%	0%	0%	1%	0%	6%	2%
North West	463	328	50%	44%	51%	44%	51%	44%	70%	74%
Northern Cape	359	292	36%	17%	36%	17%	37%	30%	61%	75%
Western Cape	483	449	73%	67%	73%	67%	73%	70%	78%	77%
Grand Total	4430	4248	42%	37%	44%	41%	47%	45%	65%	58%

8.3 Sales channel penetration

Research displays a significant leaning towards the Non – Organized informal trade of R21.60 and below pricing, with channels Wholesale (60%) and General Trade (49%) having high incidence. Prevalence of low pricing within Modern Trade into current read has declined by 4% at R21.60 and below to 2% of total availability. Forecourts, however, have increased into current read with 5% incidence of low-price vs 1% in Wave 1.

Table: Channel availability by price category

Channel incidence	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	June'21	Feb'21	June'21	Feb'21	June'21	Feb'21	June'21	Feb'21	June'21
FORECOURT	413	411	1%	5%	1%	5%	1%	5%	8%	7%
General Trade	3 199	3 071	47%	44%	50%	49%	54%	54%	74%	70%
Modern Trade	392	399	6%	1%	6%	2%	6%	2%	36%	6%
Wholesale	426	367	71%	57%	72%	60%	73%	62%	79%	68%
Grand Total	4 430	4 248	42%	37%	44%	41%	47%	45%	65%	58%

8.4 Manufacturer penetration

Pack purchases of brands owned by or licensed to Gold Leaf Tobacco Corporation had the highest prevalence of the cheapest product in sample stores, with its brands being mentioned 1,597 times.

There was a general increase in the number of sample stores that stock non - South African brands from neighbouring countries, when compared with the previous study, pointing to an influx of foreign brands into the market. Brands from neighbouring countries with the exception of brands owned by or licensed to RoxBury Cigarettes and Savanna Tobacco Company have a high availability of R21.60 and below pricing, with brands owned by or licensed to Mango investments having the widest availability with low prices.

Of the local manufacturers, brands owned by or licensed to GLTC in South Africa, Pro Tobacco and Carnillinx saw increases as the cheapest available in store under the R21.60 and below price points. Brands belonging to Afroberg and Mango Investments, although not as widely available, continued to maintain high levels of R21.60 and below of their products where they were the cheapest available.

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

MANUFACTURER	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21
GLTC ZIM	931	885	57%	31%	60%	32%	64%	33%	77%	44%
GLTC SOUTH AFRICA	1457	712	25%	34%	28%	35%	29%	37%	54%	51%
CARNILINX	733	593	48%	56%	50%	65%	56%	72%	81%	82%
BAT	360	520	1%	0%	1%	0%	1%	0%	1%	1%
AFROBERG TOBACCO	109	269	84%	49%	84%	62%	84%	68%	97%	73%
MANGO INVESTMENTS	180	200	89%	84%	91%	85%	92%	85%	94%	100%
PROTOBAC	186	196	19%	49%	22%	64%	27%	73%	65%	80%
KTNG	1	155	100%	2%	100%	2%	100%	2%	100%	99%
BEST TOBACCO	101	149	55%	37%	56%	45%	58%	52%	77%	72%
OTHER	28	135	71%	55%	71%	55%	71%	84%	75%	99%
ROXBURY CIGARETTES ZIMBABWE	86	117	43%	19%	62%	19%	74%	20%	99%	41%
SAVANNA TOBACCO COMPANY ZIM	17	79	82%	51%	82%	66%	82%	77%	82%	81%
OLOMIDE	44	48	100%	100%	100%	100%	100%	100%	100%	100%
PMI	16	35	0%	0%	0%	3%	0%	3%	0%	3%
VAWDA AMALGAMATED HOLDINGS	15	34	100%	56%	100%	56%	100%	56%	100%	56%
JTI	35	33	6%	0%	6%	3%	6%	3%	9%	3%
MASTERMIND TOB	8	31	75%	87%	75%	87%	75%	87%	100%	94%
BARCO	36	28	100%	100%	100%	100%	100%	100%	100%	100%
GLOBAL TOBACCO	35	21	97%	100%	97%	100%	97%	100%	100%	100%
AMALGAMATED TOBACCO	11	3	91%	100%	91%	100%	91%	100%	91%	100%
FOLHA TOBACCO	41	3	66%	100%	66%	100%	66%	100%	93%	100%
ABSOLUTE	0	1	0%	0%	0%	0%	0%	0%	0%	0%
SHAG TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
GRAND TOTAL	4430	4248	42%	37%	44%	41%	47%	45%	65%	58%

8.5 Brand Incidence

There is a clear penetration of foreign brands, selling at the lowest price point found in the market, represented in a significant number of outlets. Remington Gold (owned by/licensed to GLTC Zim) continues to be the foreign brand most widely available as the cheapest purchase. Pall Mall (owned by/licensed to BAT) and Cape (owned by/licensed to Afroberg) had increases in incidence of cheapest available, though the two brands are markedly different in the percentage of the pricing that is at or below R21.60 a pack, with Pall Mall at 0% and Cape at 59% respectively.

Table: Brand incidence by price category – total sample

Brand	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21
REMINGTON GOLD	931	885	57%	31%	60%	32%	64%	33%	77%	44%
PALL MALL	328	484	0%	0%	0%	0%	0%	0%	1%	1%
CAPE	80	239	91%	45%	91%	59%	91%	64%	96%	70%
SAHAWI	491	218	33%	75%	36%	76%	38%	79%	59%	94%
SHASHA	275	184	36%	67%	39%	77%	46%	82%	83%	91%
VIP										
INTERNATIONAL	274	179	43%	63%	44%	79%	50%	88%	69%	93%
WISH	180	179	89%	83%	91%	83%	92%	83%	94%	99%
KYRO	169	178	11%	44%	14%	60%	20%	70%	61%	78%
VOYAGER	276	167	1%	0%	1%	0%	1%	0%	30%	2%
SAVANNAH	287	160	64%	43%	69%	43%	72%	44%	84%	58%
PINE	1	155	100%	2%	100%	2%	100%	2%	100%	99%
RG	346	127	3%	1%	4%	5%	4%	9%	44%	25%
EXPRESS	86	117	43%	19%	62%	19%	74%	20%	99%	41%
CHELE CHELE	4	98	100%	41%	100%	41%	100%	81%	100%	100%
CAESAR	90	90	50%	29%	51%	29%	53%	40%	74%	71%
PEGASUS	8	78	100%	50%	100%	65%	100%	77%	100%	81%
JFK	24	74	17%	28%	38%	36%	79%	46%	96%	76%
ATLANTIC	31	69	0%	1%	0%	1%	0%	1%	74%	13%
777	11	59	100%	49%	100%	69%	100%	71%	100%	75%
CHELSEA	44	48	100%	100%	100%	100%	100%	100%	100%	100%
DERBY	26	35	100%	71%	100%	71%	100%	83%	100%	100%
KINGS	14	34	100%	56%	100%	56%	100%	56%	100%	56%
CHESTERFIELD	16	33	0%	0%	0%	0%	0%	0%	0%	0%
WINSTON	24	30	0%	0%	0%	0%	0%	0%	0%	0%
LEGENDS	6	29	100%	93%	100%	93%	100%	93%	100%	100%
YES	30	25	100%	100%	100%	100%	100%	100%	100%	100%
OSSUM	3	23	100%	91%	100%	91%	100%	96%	100%	100%
CHICAGO	9	22	56%	36%	56%	36%	56%	36%	56%	91%
PREMIUM	15	22	100%	100%	100%	100%	100%	100%	100%	100%
RICHMAN	35	21	97%	100%	97%	100%	97%	100%	100%	100%
ROTHMANS	5	21	0%	0%	0%	0%	0%	0%	0%	0%
SEVILLE	0	21	0%	86%	0%	95%	0%	100%	0%	100%
MEGA	34	20	100%	100%	100%	100%	100%	100%	100%	100%
BASTILLE	17	18	100%	100%	100%	100%	100%	100%	100%	100%
SHARP	48	18	17%	0%	17%	0%	19%	6%	31%	56%
CHIEF	0	14	0%	100%	0%	100%	0%	100%	0%	100%
BLACK & WHITE	0	10	0%	100%	0%	100%	0%	100%	0%	100%
F1	9	10	100%	80%	100%	100%	100%	100%	100%	100%

Brand	Total Sample		R20.00 and below		R21.60 and below		R22.00 and below		R25.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21
BLACK HILL	0	8	0%	88%	0%	88%	0%	88%	0%	100%
RED & BLACK	14	7	100%	57%	100%	71%	100%	100%	100%	100%
LD	7	3	14%	0%	14%	33%	14%	33%	14%	33%
LEXINGTON	0	3	0%	0%	0%	0%	0%	0%	0%	0%
LUCKY STRIKE	0	3	0%	0%	0%	0%	0%	0%	0%	0%
MALIMBO	9	3	100%	100%	100%	100%	100%	100%	100%	100%
RANSOM	0	3	0%	0%	0%	0%	0%	0%	0%	0%
SUPERMATCH	6	3	100%	100%	100%	100%	100%	100%	100%	100%
WESTLEIGH	41	3	66%	100%	66%	100%	66%	100%	93%	100%
EVOLVE	0	2	0%	0%	0%	0%	0%	0%	0%	0%
FORUM	2	2	0%	0%	0%	0%	0%	0%	100%	0%
PAUL REVERE	0	2	0%	0%	0%	0%	0%	0%	0%	0%
ABS	0	1	0%	0%	0%	0%	0%	0%	0%	0%
BENSON & HEDGES	1	1	0%	0%	0%	0%	0%	0%	0%	0%
BOXER	0	1	0%	0%	0%	100%	0%	100%	0%	100%
BROTHER	0	1	0%	0%	0%	0%	0%	0%	0%	0%
KINGDOM	0	1	0%	100%	0%	100%	0%	100%	0%	100%
MARLBORO	0	1	0%	0%	0%	0%	0%	0%	0%	0%
OTHER	1	1	100%	100%	100%	100%	100%	100%	100%	100%
PACIFIC	9	1	67%	100%	67%	100%	67%	100%	67%	100%
PETERMAN GOLD	0	1	0%	100%	0%	100%	0%	100%	0%	100%
SHAG	0	1	0%	100%	0%	100%	0%	100%	0%	100%
WAVE	0	1	0%	0%	0%	0%	0%	0%	0%	0%
WINFIELD	0	1	0%	0%	0%	0%	0%	0%	0%	0%
ASPEN	3	0	0%	0%	0%	0%	0%	0%	33%	0%
CHEEKY	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CK	1	0	0%	0%	0%	0%	0%	0%	0%	0%
DUNHILL	7	0	0%	0%	0%	0%	0%	0%	0%	0%
GOLDEN	11	0	9%	0%	9%	0%	9%	0%	100%	0%
JPS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
KINGSGATE	2	0	100%	0%	100%	0%	100%	0%	100%	0%
MC	1	0	100%	0%	100%	0%	100%	0%	100%	0%
MS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
OXFORD	1	0	100%	0%	100%	0%	100%	0%	100%	0%
PETER	9	0	11%	0%	11%	0%	11%	0%	11%	0%
STUYVESANT	8	0	13%	0%	13%	0%	13%	0%	13%	0%
PRINCETON	1	0	100%	0%	100%	0%	100%	0%	100%	0%
RAINBOW	1	0	100%	0%	100%	0%	100%	0%	100%	0%
RB	1	0	100%	0%	100%	0%	100%	0%	100%	0%
SOBRANIE	1	0	100%	0%	100%	0%	100%	0%	100%	0%
STIX	45	0	100%	0%	100%	0%	100%	0%	100%	0%
STUYVESANT	10	0	0%	0%	0%	0%	0%	0%	0%	0%
STYLE	7	0	100%	0%	100%	0%	100%	0%	100%	0%
VIVA	1	0	100%	0%	100%	0%	100%	0%	100%	0%
WEPSTER	1	0	0%	0%	0%	0%	0%	0%	100%	0%
GRAND TOTAL	4430	4248	42%	37%	44%	41%	47%	45%	65%	58%

8.6 Carton purchase incidence

Lowest price points for a carton of cigarettes below or equal to R216.00 were widely available within the wholesale channel, at 79% incidence of the total wholesale sample. The lowest price point collected during the study was at R60.00 albeit an outlier, with the most frequently mentioned lowest price being R210, followed closely by R80 for a carton of cigarettes. As a channel, below and equal to R216.00 a carton is a strong price feature across multiple manufacturers both local and foreign.

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

Manufacturer	Total Sample		R200.00 and below		R216.00 and below		R220.00 and below		R250.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21
CARNILINX	19	11	100%	100%	100%	100%	100%	100%	100%	100%
AFROBERG TOBACCO	11	9	100%	100%	100%	100%	100%	100%	100%	100%
GLTC	34	9	71%	33%	74%	44%	82%	56%	94%	56%
BARCO	4	7	100%	100%	100%	100%	100%	100%	100%	100%
KTNG	4	6	100%	0%	100%	83%	100%	83%	100%	100%
OTHER	1	6	100%	100%	100%	100%	100%	100%	100%	100%
GLTC ZIM	13	5	100%	100%	100%	100%	100%	100%	100%	100%
COPPERFIELD ZAMBIA	0	5	0%	0%	0%	0%	0%	20%	0%	100%
AMALGAMATED TOBACCO	0	4	0%	100%	0%	100%	0%	100%	0%	100%
BAT	0	4	0%	0%	0%	0%	0%	0%	0%	0%
MANGO INVESTMENTS	0	1	0%	100%	0%	100%	0%	100%	0%	100%
OLOMIDE	3	1	100%	100%	100%	100%	100%	100%	100%	100%
SHAG TOBACCO	0	1	0%	100%	0%	100%	0%	100%	0%	100%
ROXBURY CIGARETTES ZIMBABWE	1	1	100%	100%	100%	100%	100%	100%	100%	100%
BEST TOBACCO	2	0	100%	0%	100%	0%	100%	0%	100%	0%
FOLHA TOBACCO	2	0	100%	0%	100%	0%	100%	0%	100%	0%
MASTERMIND TOB	2	0	100%	0%	100%	0%	100%	0%	100%	0%
PROTOBAC	3	0	100%	0%	100%	0%	100%	0%	100%	0%
VAWDA AMALGAMATED HOLDINGS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
GRAND TOTAL	100	70	90%	70%	91%	79%	94%	81%	98%	89%

Table: Carton price incidence by brand grouping

Brand	Total Sample		R200.00 and below		R216.00 and below		R220.00 and below		R250.00 and below	
	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3	Wave 1	Wave 3
	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21	Feb'21	Jun'21
SHASHA	14	8	100%	100%	100%	100%	100%	100%	100%	100%
SUPERMATCH	3	7	100%	100%	100%	100%	100%	100%	100%	100%
CHELE CHELE	0	6	0%	100%	0%	100%	0%	100%	0%	100%
PINE	4	6	100%	0%	100%	83%	100%	83%	100%	100%
LIFE	0	5	0%	0%	0%	0%	0%	20%	0%	100%
REMINGTON GOLD	13	5	100%	100%	100%	100%	100%	100%	100%	100%
CAPE	3	4	100%	100%	100%	100%	100%	100%	100%	100%
DS	0	4	0%	100%	0%	100%	0%	100%	0%	100%
RED & BLACK	4	3	100%	100%	100%	100%	100%	100%	100%	100%
ROTHMANS	0	3	0%	0%	0%	0%	0%	0%	0%	0%
SAHAWI	13	3	100%	100%	100%	100%	100%	100%	100%	100%
CHICAGO	0	2	0%	0%	0%	50%	0%	100%	0%	100%
OSSUM	1	2	100%	100%	100%	100%	100%	100%	100%	100%
RG	0	2	0%	0%	0%	0%	0%	0%	0%	0%
VOYAGER	8	2	13%	0%	13%	0%	38%	0%	88%	0%
CHELSEA	3	1	100%	100%	100%	100%	100%	100%	100%	100%
EXPRESS	1	1	100%	100%	100%	100%	100%	100%	100%	100%
JFK	0	1	0%	100%	0%	100%	0%	100%	0%	100%
MEGA	1	1	100%	100%	100%	100%	100%	100%	100%	100%
PALL MALL	0	1	0%	0%	0%	0%	0%	0%	0%	0%
PREMIUM	2	1	100%	100%	100%	100%	100%	100%	100%	100%
SEVILLE	0	1	0%	100%	0%	100%	0%	100%	0%	100%
SHAG	0	1	0%	100%	0%	100%	0%	100%	0%	100%
777	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CAESAR	1	0	100%	0%	100%	0%	100%	0%	100%	0%
CASPIAN	1	0	100%	0%	100%	0%	100%	0%	100%	0%
GOLDEN	3	0	100%	0%	100%	0%	100%	0%	100%	0%
KINGS	1	0	100%	0%	100%	0%	100%	0%	100%	0%
KYRO	3	0	100%	0%	100%	0%	100%	0%	100%	0%
LEGENDS	2	0	100%	0%	100%	0%	100%	0%	100%	0%
SAVANNAH	12	0	83%	0%	83%	0%	92%	0%	92%	0%
SHARP	1	0	0%	0%	100%	0%	100%	0%	100%	0%
STIX	1	0	100%	0%	100%	0%	100%	0%	100%	0%
VIP INTERNATIONAL	1	0	100%	0%	100%	0%	100%	0%	100%	0%
WESTLEIGH	2	0	100%	0%	100%	0%	100%	0%	100%	0%
YES	1	0	100%	0%	100%	0%	100%	0%	100%	0%
GRAND TOTAL	100	70	90%	70%	91%	79%	94%	81%	98%	89%

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